NOTE: The information contained in this document may not reflect the most current version of the Informed Visibility Mail Tracking & Reporting application. This is a living document that will be updated regularly as enhancements and new functionality are implemented.
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1 Introduction

1.1 Purpose

This guide provides information about the United States Postal Service® (USPS®) Informed Visibility® Mail Tracking & Reporting (IV®-MTR) application, which allows mailers to track letter and flat containers, handling units (trays, tubs, and sacks), bundles, and pieces. IV-MTR does not provide mail tracking data on packages, to include associated containers, handling units, and bundles.

The intended audience for this guide is mailers. This guide describes the prerequisites for receiving mail tracking data through IV-MTR, the data provisioning options available, and how to use the application. This guide also provides information about interpreting scan data.

Additional documentation is available:

- **Mail.XML Guide**: Describes the Mail.XML™ mail tracking messages supported in IV-MTR and how to get started with Mail.XML; intended for mailers and their technical resources
- **External Facing Data Dictionary**: Describes the data attributes available in the external-facing system
- **Sample Data Set**: Provides example records of data attributes available in the application

These documents and other resources are available on the [IV-MTR PostalPro™ page](#).

1.2 Background

Prior to IV-MTR, mail tracking functionality for letters and flats (and their associated containers, handling units, and bundles) was distributed across several applications. IMb Tracing® (formerly CONFIRM®) was the source for automated piece and bundle tracking data, while PostalOne® was the source for container and handling unit tracking data. Furthermore, the availability of tracking data was delayed, limiting usefulness to mailers.

With the legacy systems, mailers did not have full visibility of mail as it moved through the mailstream because they were limited to actual scans of their containers, handling units, bundles, or pieces. As mailpieces are processed, they are nested, de-nested, and re-nested in and out of handling units and containers. There was not a system to capture all nesting relationships between mailpieces, handling units, and containers, which left gaps in end-to-end visibility.

Mail tracking functionality for containers, handling units, bundles, and pieces is consolidated into IV-MTR, which is the new and comprehensive mail data repository for the Postal Service™. The application provides near real-time tracking information for all letters, flats, and mail aggregates, which includes containers, handling units, and bundles.

The application will give mailers visibility into their mailings and service, increasing the value of mail and enabling mailers to plan their mailings, measure success of each mailing campaign, and efficiently staff. The system will provide several key benefits for mailers:

- Enhances visibility to provide end-to-end tracking across the entire mailstream – providing logical handling events and assumed handling events based on nesting associations
- Provides tracking information in near real-time, improving the timeliness for container and handling unit data
- Improved ease of use for mailers through flexible data provisioning (how you get data) and flexible data delegation (how you share data visibility)

1.3 IV-MTR Release Schedule

Mail tracking functionality in the application will be implemented through a phased approach. See the [IV-MTR PostalPro page](#) for the release schedule.
2 Prerequisites for Receiving Tracking Data

This section provides information about the requirements for mail tracking visibility. Section 2.1 explains the requirements that must be met for the Postal Service to provide tracking data. Section 2.2 describes which Customer Registration IDs (CRIDs) and Mailer IDs (MIDs) are able to receive tracking data without data delegation. Section 2.3 describes how roles and permissions can affect an individual's visibility of tracking data.

2.1 Visibility Requirements for Mail Objects

Visibility in IV-MTR is limited to mail objects with Intelligent Mail® barcodes (IMb™), Intelligent Mail® tray barcodes (IMtb), and Intelligent Mail® container barcodes (IMcb). In a future release, bundle visibility will be expanded to include saturation mail and Every Door Direct Mail™ (EDDM), which utilize simplified addressing.

In some cases, visibility requires that a mail object be Full-Service Intelligent Mail® if eligible for Full-Service. Full-Service Intelligent Mail requires unique Intelligent Mail barcodes on mailpieces, handling units, and containers; electronic documentation; and the use of Facility Access and Shipment Tracking (FAST®) to schedule appointments for entry drop-ship mailings and all mailer-transported, origin-entered mail verified at a detached mail unit (DMU). For more information about Full-Service, see the Mailing Services page on PostalPro.

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

<table>
<thead>
<tr>
<th>Term</th>
<th>IV-MTR Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-Service</td>
<td>Mailpiece associated to electronic documentation (eDoc) and paid at the Full-Service rate</td>
</tr>
<tr>
<td>not eligible for Full-Service</td>
<td>Mailpiece associated to an eDoc and has a rate category that is not eligible for Full-Service</td>
</tr>
<tr>
<td>residual mail</td>
<td>Mailpiece eligible for Full-Service but was not paid at the Full-Service rate</td>
</tr>
<tr>
<td>Reply Mail</td>
<td>Mailpiece has an IMb that uses a Reply Mail STID</td>
</tr>
</tbody>
</table>
Visibility also depends on the mail object type, handling event type, and CRID or MID role. The CRID or MID role is defined for a specific mailing or mail object by the eDoc or barcode. For the business rules used to identify each CRID or MID role, see Appendix H: CRID and MID Role Identification. The following table provides the visibility requirements for each mail object type, handling event type, and CRID or MID role.

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

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

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

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>CRID or MID Role</th>
<th>Able to View or Receive Data For</th>
<th>Able to Share Data For</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Container</td>
<td>Handling Unit</td>
</tr>
<tr>
<td>Mail Owner</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Mail Preparer</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>eDoc Submitter</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>FAST Scheduler</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>MID on Piece</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>MID on Tray</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MID on Container</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Delegate*</td>
<td>X*</td>
<td>X*</td>
</tr>
</tbody>
</table>

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

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

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

- If the same CRID or MID has been used to identify more than one role, the permissions are cumulative for that CRID or MID. For example, a user who has visibility of a MID that was used to identify the Mail Owner on a piece can see the container or handling unit that contains that piece. If that MID was also used to identify the MID on Piece, a user who has visibility of that MID can view bundle and piece data as well.

- If a MID is used to define a role, and the CRID that MID belongs to was used to define another role, users with visibility of the CRID will have cumulative permissions. For example, if a MID is identified as the MID on Piece and the CRID that the MID belongs to is identified as the Mail Preparer, users who have permissions for that CRID can view and delegate data for containers, handling units, bundles, and pieces.
2.3 Individual Permissions

In addition, visibility is also determined by an individual’s permissions within IV-MTR. Visibility permissions can be granted to a user at the CRID, MID, or routing code level.

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

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

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

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

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

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

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

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

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

- If a user has CRID-level visibility, the user has visibility of all mail tracking data where that CRID was used to determine the CRID or MID role (e.g., Mail Owner). In addition, that user has visibility of all mail tracking data where a MID belonging to that CRID was used to determine the CRID or MID role.

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

**Important:** Please note that visibility of mail tracking data depends on several factors, including visibility requirements, default permissions, and individual permissions. See Section 2: Prerequisites for Receiving Tracking Data for additional information.

IV-MTR provides multiple options for provisioning (delivering) data. First, you may select to perform a one-time query or set up a data feed (subscription). Then, you may choose from a variety of delivery methods and file formats. Finally, depending on your previous selections, you may customize a query or feed in multiple ways, such as selecting the data fields to receive. See the following sections for additional information about the data provisioning options.

### 3.1 One-Time Query or Data Feed

A one-time query is an ad hoc report to receive data. In IV-MTR, mail tracking data from the last 45 days is available through a one-time query.

A data feed (subscription) provides data on a recurring basis, which is scheduled by the user. With a data feed, you receive handling events accumulated since the last scheduled file delivery. Please note that a data feed only delivers handling events going forward from the time the feed was activated. To receive historical data, you must use a one-time query.

After selecting whether to receive your data through a one-time query or data feed, select your delivery method and file format. The available options differ between one-time queries and data feeds. Please see the following sections for additional information.

For instructions for performing a one-time query, see Section 7: One-Time. For instructions for setting up a data feed, see Section 8: Data Feeds.
3.2 Delivery Methods

The available delivery methods depend on whether you want to receive data through a one-time query or data feed. The following table describes each delivery method and indicates whether each method is available for a one-time query, data feed, or both.

Table 3.1: IV-MTR Delivery Methods

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Description</th>
<th>One-Time Query</th>
<th>Data Feed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online View</td>
<td>The application displays the query results online in a table, which you can export</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> The mail object navigator is available through this delivery method. This feature allows you to view handling events for containers and drill down to view handling units nested to a specific container.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online Download</td>
<td>The application creates a file or files and displays them in an output history, from which you can then download the file(s)</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Send to SFTP Server</td>
<td>The application creates a file or files and pushes them to your selected server via Secure File Transfer Protocol (Secure FTP or SFTP)</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Send to Web Service</td>
<td>The application pushes data to your web service, or your web service pulls data from the application</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

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

3.3 File Formats

The IV-MTR application provides the following file formats for mail tracking data provisioning:

- Online view with option to export as CSV or PDF
- IMb Tracing legacy PKG
- Delimited (TXT)
- Mail.XML
- JSON

The available file formats depend on whether you want to receive data through a one-time query or data feed as well as your selected delivery method. All of these factors determine the mail object types for which you can receive mail tracking data.
The following table indicates the file formats and mail object types available for a one-time query.

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

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>File Format</th>
<th>Mail Object Types</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Container</td>
</tr>
<tr>
<td>Online View</td>
<td>Displays online with option to export as CSV or PDF</td>
<td>X</td>
</tr>
<tr>
<td>Online Download</td>
<td>IMb Tracing Legacy PKG file†</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Delimited (TXT) file</td>
<td>X</td>
</tr>
<tr>
<td>Send to SFTP Server</td>
<td>IMb Tracing Legacy PKG file†</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Delimited (TXT) file</td>
<td>X</td>
</tr>
<tr>
<td>Send to Web Service</td>
<td>Mail.XML message <em>(PUSH only)</em></td>
<td>X</td>
</tr>
</tbody>
</table>

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

** Piece-level one-time queries for Online Download and Send to Address are only available through the IV-MTR Help Desk at this time.

The following table indicates the file formats and mail object types available for a data feed.

**Table 3.3: Data Feed File Formats by Delivery Method**

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>File Format</th>
<th>Mail Object Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Container</td>
</tr>
<tr>
<td>Online Download</td>
<td>IMb Tracing Legacy PKG file</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Delimited (TXT) file</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Mail.XML message <em>(PUSH only)</em></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>JSON file <em>(PUSH only)</em></td>
<td>X</td>
</tr>
<tr>
<td>Send to SFTP Server</td>
<td>IMb Tracing Legacy PKG file</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Delimited (TXT) file</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>JSON file <em>(PUSH only)</em></td>
<td>X</td>
</tr>
<tr>
<td>Send to Web Service</td>
<td>Mail.XML message <em>(PUSH only)</em></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>JSON file <em>(PUSH only)</em></td>
<td>X</td>
</tr>
</tbody>
</table>

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

**Note:**
- A description of each file format is provided in the following sub-sections.
- The legacy *PostalOne!* Informed Visibility Download File Format is not available in IV-MTR. However, the delimited format can be used to create a similar file for download. See Appendix G: *Legacy PostalOne!* Informed Visibility Download File Format for additional information.
### Table 3.4: File Format Characteristics

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>File Format</th>
<th>Mail Object Types Available</th>
<th>Compression</th>
<th>File Naming Convention</th>
<th>Example File Name</th>
<th>Column Headers Included</th>
<th>End of Line Character</th>
<th>Escape Character</th>
<th>Delimiter Character</th>
<th>Handling of Large Number of Records</th>
<th>Success/Failure Email Available</th>
<th>In-App Notification of Readiness Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Push or Pull</td>
<td>Online View</td>
<td>Push</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>Yes</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>Limited to 10,000 most recent records as determined by Scan Date/Time</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>PDF</td>
<td>Push</td>
<td>PDF</td>
<td>n/a</td>
<td>download.pdf</td>
<td>20161207112 728_CS_2XY 4_0001.txt</td>
<td>Yes</td>
<td>Line feed (LF) &quot;n&quot;</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>CSV Export</td>
<td>Push</td>
<td>CSV</td>
<td>n/a</td>
<td>download.csv</td>
<td>20161207112 728_CS_2XY 4_0001.txt</td>
<td>Yes</td>
<td>Line feed (LF) &quot;n&quot;</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Delimited</td>
<td>Push</td>
<td>TXT</td>
<td>n/a</td>
<td>fssbda0113.png</td>
<td>20161207112 728_CS_2XY 4_0001.txt</td>
<td>No</td>
<td>Line feed (LF) &quot;n&quot;</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>PKG</td>
<td>Push</td>
<td>PKG</td>
<td>n/a</td>
<td>fssbda0113.png</td>
<td>20161207112 728_CS_2XY 4_0001.txt</td>
<td>No</td>
<td>Line feed (LF) &quot;n&quot;</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Mail.XML</td>
<td>Push</td>
<td>XML</td>
<td>n/a</td>
<td>fssbda0113.png</td>
<td>20161207112 728_CS_2XY 4_0001.txt</td>
<td>No</td>
<td>Line feed (LF) &quot;n&quot;</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>JSON</td>
<td>Push</td>
<td>JSON</td>
<td>n/a</td>
<td>fssbda0113.png</td>
<td>20161207112 728_CS_2XY 4_0001.txt</td>
<td>No</td>
<td>Line feed (LF) &quot;n&quot;</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
<td>No</td>
</tr>
</tbody>
</table>

**Notes:**
- n/a: Not applicable
- Yes: Available
- No: Not available
- "n": Line feed (LF) "n"
<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>ONE-TIME QUERY</th>
<th>Data Feed</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Format</td>
<td>Online View</td>
<td>Download</td>
</tr>
<tr>
<td>Displays in File or Output History (if Records Available)</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Behavior if No Records</td>
<td>Displays &quot;No Data Found&quot; and export option not available</td>
<td>Displays &quot;No Data Found&quot; and export option not available</td>
</tr>
</tbody>
</table>

* Bundle- and piece-level data are not available through Online View for a one-time query at this time.  
** Piece-level one-time queries for Online Download and Send to Address are only available through the IV-MTR Help Desk at this time.  
† For additional information, see Appendix J: Delimited, Mail.XML, and JSON File Naming Convention.  
‡ For additional information, see Appendix I: Legacy PKG File Naming Convention.
3.3.1 Online View

Online View provides the ability to view the results of a one-time query in a table format within the IV-MTR application. You can export the data as a CSV or PDF file if desired. At this time, only container and handling unit data can be displayed in this format. This format is only available for a one-time query.

**Note:** The mail object navigator is available through this delivery method. This feature allows you to view handling events for containers and drill down to view handling units nested to a specific container.

3.3.2 IMb Tracing Legacy PKG File

IV-MTR supports the legacy PKG file format from IMb Tracing. This file type is limited to pieces. All data is included in a file with a .PKG file extension. The file is fixed-width and comma-delimited.

The PKG file format provides the following attributes for a handling event (scan) record, in this order:

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

You cannot change or rearrange the attributes in this format. The following table provides the position of each attribute in the fixed-width record and a description of the attribute.

<table>
<thead>
<tr>
<th>Position*</th>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-5</td>
<td>Scan Facility ZIP</td>
<td>5-digit ZIP Code™ of the facility where the mail was processed†</td>
</tr>
<tr>
<td>7-9</td>
<td>Scan Event Code</td>
<td>Indicates the type of sort operation at which the mail was processed</td>
</tr>
<tr>
<td>11-29</td>
<td>Scan DateTime</td>
<td>Date (MM/DD/YYYY) and time (hh:mm:ss) the mail was processed</td>
</tr>
<tr>
<td>31-41</td>
<td>Routing Code (IMb Matching Portion)</td>
<td>Destination ZIP Code of the mailpiece (but only the portion that matches the IMb Routing Code); will be 0, 5, 9, or 11 digits \n<strong>Note:</strong> This field is padded to the right with spaces, as needed, to fill positions 31-41.</td>
</tr>
<tr>
<td>43-62</td>
<td>IMb Tracking Code</td>
<td>20-digit tracking code portion of the Intelligent Mail barcode</td>
</tr>
</tbody>
</table>

* Positions 6, 10, 30, and 42 are commas.
† *For a logical delivery event record, the Scan Facility ZIP is the five-digit routing code from the IMb.*

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

**Figure 3.1: Example Scans in Legacy IMb Tracing File Format**

```
11256,918,02/23/2016 16:06:37, 932702011901002535746
11256,918,02/23/2016 16:06:37, 002702011901002535746
10610,919,02/23/2016 16:55:46,109942306 , 002702011901002841081
10199,095,02/23/2016 17:03:31,11222500713,002702011901002844657
29423,919,02/23/2016 17:08:42,29926172902,002702011901004190352
95101,919,02/23/2016 14:38:30,93901 , 002702011901004186070
01546,091,02/23/2016 16:59:06,02081374105,002702011901004190743
01546,091,02/23/2016 16:59:10,02081435323,002702011901004190744
```
3.3.3 Delimited File
The delimited file format allows you to customize the attributes in the data file, rearrange the order of the attributes, and set the delimiter character. This format is available for pieces, bundles, handling units, and containers. The file has the .TXT file extension.

The [IV-MTR External Facing Data Dictionary](#) provides information about the data attributes available in the delimited format.

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

3.3.4 Mail.XML Messaging
IV-MTR supports data provisioning for container and handling unit visibility using Mail.XML. You can obtain data using Mail.XML **pull** messages through a one-time query or using Mail.XML **push** messages through a data feed. For additional information about Mail.XML, see the [IV-MTR Mail.XML Guide](#).

3.3.4.1 Pull Messages
Mailers can choose to retrieve (“pull”) XML messaging for container and handling unit visibility on an ad hoc basis. For this method, mailers send a web service-based Mail.XML request message invoking the Postal Service web service to pull data in an XML format. The Postal Service then sends an XML response message in return with the handling event data that matches the request parameters.

The Mail.XML pull request and response messages currently supported in IV-MTR are as follows:

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

For additional information about these messages, see the [IV-MTR Mail.XML Guide](#).

**Note:** To use Mail.XML pull messages to retrieve IV-MTR data, you do not need to use the IV-MTR web application.

3.3.4.2 Push Messages
Mailers can choose to have IV-MTR automatically send (“push”) eXtensible Markup Language (XML) messaging for container and handling unit visibility – either the information itself (Delivery message) or a notification when such data is available for retrieval (Notification message). For a push subscription, mailers receive handling events accumulated since the last scheduled file delivery.
The Mail.XML push subscription messages currently supported in the application are as follows:

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

For additional information about these messages, see the *IV-MTR Mail.XML Guide*. For instructions to set up a Mail.XML push subscription, see Section 8.1: *Create New Feed*.

### 3.3.5 JSON File

JavaScript Object Notation (JSON) is a lightweight, text-based standard designed for data interchange. In IV-MTR, the JSON format is available for data feeds to receive mail tracking data for pieces, bundles, handling units, and containers. At this time, this format is only available for a data feed. The file has the .JSON file extension.

The *IV-MTR External Facing Data Dictionary* provides information about the data attributes available in the JSON format.

### 3.4 Scan Enrichment

When the IV-MTR application receives a handling event record, the application tries to match the record to an existing eDoc. This enables the IV-MTR application to do the following:

- Enrich the handling event with additional data attributes only available in eDoc
- Determine the Mail Owner, Mail Preparer, etc., which is used to determine which MIDs and/or CRIDs should have visibility of the handling event record (See Section 2.1: *Visibility Requirements for Mail Objects* for additional information.)
- Determine nesting associations, which are required to generate assumed handling events
- Determine Full-Service eligibility, which is used to determine if visibility requirements for the mail object have been met (See Section 2.1: *Visibility Requirements for Mail Objects* for additional information.)

For containers, handling units, and bundles, the IV-MTR application only provisions “enriched” handling event records—those that have been combined with information from eDoc. For pieces, “raw” and enriched handling event records are available, depending on the file format. Raw handling event records only contain information about the processing event and have not been enriched with eDoc information. The following table indicates whether raw or enriched handling events are available for each mail object type based on delivery method and file format.
Table 3.6: Raw and Enriched Handling Events by Delivery Method and File Format

<table>
<thead>
<tr>
<th>Delivery Method and File Format</th>
<th>Container</th>
<th>Handling Unit</th>
<th>Bundle</th>
<th>Piece</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online View</td>
<td>Enriched</td>
<td>Enriched</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Download – PKG</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>Raw*</td>
</tr>
<tr>
<td>Download – Delimited</td>
<td>Enriched</td>
<td>Enriched</td>
<td>Enriched</td>
<td>Raw Enriched*</td>
</tr>
<tr>
<td>Send to Address – PKG</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>Raw*</td>
</tr>
<tr>
<td>Send to Address – Delimited</td>
<td>Enriched</td>
<td>Enriched</td>
<td>Enriched</td>
<td>Raw Enriched*</td>
</tr>
<tr>
<td>Mail.XML Pull</td>
<td>Enriched</td>
<td>Enriched</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Data Feed

<table>
<thead>
<tr>
<th></th>
<th>Container</th>
<th>Handling Unit</th>
<th>Bundle</th>
<th>Piece</th>
</tr>
</thead>
<tbody>
<tr>
<td>PKG</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>Raw</td>
</tr>
<tr>
<td>Delimited</td>
<td>Enriched</td>
<td>Enriched</td>
<td>Enriched</td>
<td>Raw Enriched</td>
</tr>
<tr>
<td>Mail.XML Push</td>
<td>Enriched</td>
<td>Enriched</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>JSON Push</td>
<td>Enriched</td>
<td>Enriched</td>
<td>Enriched</td>
<td>Raw Enriched</td>
</tr>
</tbody>
</table>

* Piece-level one-time queries are currently only available through the IV-MTR Help Desk.

For enriched piece handling events, additional data attributes are available that are not available for raw handling events. See the [IV-MTR External-Facing Data Dictionary](#) for information about which fields are only available for enriched handling events.

For containers, handling units, and bundles, IV-MTR automatically provides enriched handling events. For pieces, you are able to select whether you want raw handling events, enriched handling events, or both when performing a one-time query or creating a data feed. The instructions for making this selection are available in Sections 7: One-Time Queries and 8: Data Feeds.

There are pros and cons to receiving only raw, only enriched, or both raw and enriched handling events. Consider the information in the table below when choosing which to receive in your piece-level one-time query or data feed.

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

<table>
<thead>
<tr>
<th></th>
<th>Raw Only</th>
<th>Enriched Only</th>
<th>Raw and Enriched</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pros</strong></td>
<td>Scan data is provisioned as quickly as possible in near real-time</td>
<td>Additional insight into mailings that scans were part of, based on eDoc information</td>
<td>Get the benefits of receiving both raw and enriched data</td>
</tr>
<tr>
<td><strong>Cons</strong></td>
<td>Loss of visibility into eDoc-related data attributes</td>
<td>May take longer for scans to be provisioned if the eDoc is received late</td>
<td>Each IMb and Scan Date Time will appear twice, once for the raw handling event and once for the enriched handling event. You are responsible for deduplication of this data.</td>
</tr>
</tbody>
</table>
4 Access the IV-MTR Web Application

There are three steps for a user to get access to the IV-MTR application:

1. **All users**: Register for a Business Customer Gateway (BCG) account
2. **All users**: Add the IV-MTR service in the BCG
3. **IV-MTR BSA for each CRID**: Receive and enter the authorization code for the CRID

**Important**: All users for a CRID must have a BCG account and the IV-MTR service to access the application. **However, the person who should be a CRID’s IV-MTR BSA should be the first to complete these three steps.** See below for additional information.

Once the CRID’s IV-MTR BSA user has completed these steps, other users for the CRID may register for the BCG and add the IV-MTR service.

Please note the following regarding the steps for getting access:

- The IV-MTR BSA will manage access to the service for the CRID in the BCG and perform administrative functions in IV-MTR. The person who should have these capabilities for a CRID should become that CRID’s IV-MTR BSA.
  - In most cases, the first BCG user to request the IV-MTR service for a particular CRID automatically becomes the IV-MTR BSA for that CRID. **Therefore, the user who should be the IV-MTR BSA for a CRID should be the first to request the IV-MTR service for a particular CRID.**
  - Other users may request the IV-MTR service once the IV-MTR BSA has done so.
- To complete CRID setup within the application, the IV-MTR BSA must receive and enter the authorization code. Other users for the CRID will **not** have access to the CRID in the application until the IV-MTR BSA enters the code for that CRID.
- For information about IV-MTR BSA permissions, see Section 5.2: *Functionality by Access Level and User Role.*

This guide provides instructions for completing the three steps for getting access to the IV-MTR application. If you:

- **Do not have a BCG account**: Begin with the instructions in Section 4.1: *Register as a New User.*
- **Have a BCG account but not the IV-MTR service**: Begin with the instructions in Section 4.2: *Add the IV-MTR Service.*
- **Have a BCG account and the IV-MTR service**: The IV-MTR BSA for the CRID must complete step 3. The IV-MTR BSA for the CRID should begin with the instructions in Section 4.3: *Enter the Authorization Code.*
4.1 Register as a New User

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

The steps to register for a BCG account are as follows. See the following sections for additional information about these steps:

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

Once you have created your BCG account, you need to request the IV-MTR service. See Section 4.2: Add the IV-MTR Service for instructions.

4.1.1 Pick Username

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

Important: Your BCG username is case-sensitive when logging into the BCG or the IV-MTR application.
After entering a username, check if it is available by clicking **Check This Name**. If the username is already in use, suggestions are provided to choose from, or you may enter another username of your choice.

![Username Check](image)

When finished, continue to enter your security information.

### 4.1.2 Enter Security Information

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

![Security Information](image)

**Important:** Your BCG password is case-sensitive.

The password must contain at least 8 characters and must include an uppercase letter, a lowercase letter, a number, and a special character. The password cannot include your username or more than two consecutive identical characters.

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

When finished, continue to enter your contact information.
4.1.3 Enter Contact Information

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

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

4.1.4 Find Address

There are three options for looking up your address. You may select to enter your address, ZIP Code, or company identifier (i.e., CRID). See the following sections for information about each option.

**Note:** If you know the CRID for your business location, select Company Identifier (i.e., CRID). This option is the quickest and will help ensure you are properly associated to your business location.
4.1.4.1 By Address

If you selected Address, an additional area appears. Complete the required fields, and click Verify Address.

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

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

![Business Verification](image)

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

![Existing Company](image)
Once you have verified your address, read the privacy policy, and click **Create Account**.

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

After a few seconds, you are directed to the BCG landing page. Continue to Section 4.2: *Add the IV-MTR Service* to request the IV-MTR service.

### 4.1.4.2 By ZIP Code

If you selected **ZIP Code**, an additional area appears. Enter your business location ZIP Code, and click **Search**.
If prompted, select your city/state, and click **Continue**.

![Find by ZIP Code](image1)

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

![Find by ZIP Code](image2)

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

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

![Find by ZIP Code](image3)
- If the address entered matches a business address already in the USPS system, you are prompted to verify the business. Select the correct business, and then click Continue. If the business is not listed, select None of the above, and then click Continue.

![](Image)

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

![](Image)

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

![](Image)
A confirmation screen appears. You also receive an email with details on your new account.

After a few seconds, you are directed to the BCG landing page. Continue to Section 4.2: *Add the IV-MTR Service* to request the IV-MTR service.

### 4.1.4.3 By Customer Identifier (CRID)

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

Once you have verified your address, read the privacy policy, and click **Create Account**.
A confirmation screen appears. You also receive an email with details on your new account.

After a few seconds, you are directed to the BCG landing page. Continue to Section 4.2: Add the IV-MTR Service to request the IV-MTR service.

### 4.2 Add the IV-MTR Service

**Important:** The IV-MTR BSA will manage access to the service for the CRID in the BCG and perform administrative functions in IV-MTR. The person who should have these capabilities for a CRID should become that CRID’s IV-MTR BSA.

In most cases, the first BCG user to request the IV-MTR service for a particular CRID automatically becomes the IV-MTR BSA for that CRID. **Therefore, the user who should be the IV-MTR BSA for a CRID should be the first to request the IV-MTR service for a particular CRID.**

Other users may request the IV-MTR service once the IV-MTR BSA has done so.

Once you have a BCG user account, you must request the IV-MTR service through the BCG before you can access the IV-MTR web application. The CRID’s IV-MTR BSA must then approve your request.

**Note:**

- Users have mail tracking visibility in IV-MTR by 1) having the IV-MTR service for a particular CRID and 2) through data delegation rules. For information about the visibility provided through each method and which method you should use to get visibility, see Section 4.2.1: Request IV-MTR Service or Data Delegation?.

- If your company has more than one CRID, users must request the IV-MTR service for each of the company’s CRIDs for which visibility is needed. Alternatively, the IV-MTR BSAs or BSA Delegates for the company’s CRIDs could delegate visibility of those CRIDs to a central CRID. The company’s users would then only need to request the IV-MTR service for the central CRID.

- To complete CRID setup within the IV-MTR application, the IV-MTR BSA must enter the authorization code the first time he or she accesses the application. Other users for the CRID will not have mail tracking data visibility of the CRID in the IV-MTR application until the BSA enters the code for that CRID.

- If you become the IV-MTR BSA unintentionally or no longer wish to be the BSA, contact the IV-MTR Help Desk for assistance.
The steps for requesting the IV-MTR service depend on 1) whether you are a new or existing BCG user and 2) whether your business location (i.e., CRID) is new to the BCG or not. Use the table below to help you determine your scenario and go to the instructions applicable to you.

Table 4.1: Scenarios for Adding the IV-MTR Service

<table>
<thead>
<tr>
<th>New Location</th>
<th>Existing Location</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Location</strong></td>
<td><strong>Existing Location</strong></td>
</tr>
<tr>
<td>Your business location (i.e., CRID) is newly established in the BCG, and you are the first BCG user associated with the location</td>
<td>Your business location (i.e., CRID) was previously established in the BCG, and other BCG users are associated with the location</td>
</tr>
<tr>
<td>New User</td>
<td>Existing User</td>
</tr>
<tr>
<td>You have a BCG account but do not yet have access to any services</td>
<td>You have a BCG account and already have access to services</td>
</tr>
<tr>
<td>See Section 4.2.2: New User at a New Location</td>
<td>See Section 4.2.4: Existing User at a New Location</td>
</tr>
<tr>
<td>See Section 4.2.3: New User at an Existing Location</td>
<td>See Section 4.2.5: Existing User at an Existing Location</td>
</tr>
</tbody>
</table>

4.2.1  Request IV-MTR Service or Data Delegation?

Users have mail tracking visibility in IV-MTR by 1) having the IV-MTR service and 2) through data delegation rules. The IV-MTR service in the BCG provides access to the IV-MTR web application and visibility of the CRID of which you have the service. Data delegation provides visibility from a Delegating CRID or MID to a Receiving CRID or MID. Follow the recommendations below to choose which method you should use to get visibility:

- **If the CRID or MID for which you need visibility is owned by your company, request the IV-MTR service for that CRID.**

  If your company has more than one CRID, users must request the IV-MTR service for each CRID for which the users require mail tracking visibility.

  Alternatively, the IV-MTR BSAs or BSA Delegates for the other CRIDs could delegate visibility from those CRIDs to a central CRID. Users would then only need to request the IV-MTR service for this central CRID. The IV-MTR BSA or BSA Delegate would need to have the IV-MTR service for all of the company’s CRIDs, and be the IV-MTR BSA or BSA Delegate for all of the company’s CRIDs, to be able to do this.

- **If the CRID or MID for which you need mail tracking visibility is NOT owned by your company, request the IV-MTR service for the CRID that IS owned by your company.**

  Then, within the IV-MTR application, submit a data delegation request to the Delegating CRID to ask that mail tracking visibility be delegated to your company’s CRID or MID. The Delegating CRID will need to review and approve the data delegation request before visibility is provided.

  Alternatively, the IV-MTR BSA or a BSA Delegate for the Delegating CRID could also create a data delegation rule to provide mail tracking visibility of their CRID or MID to your company’s CRID or MID instead of your CRID submitting the request.
4.2.2 New User at a New Location

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

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

From this page:

1. Note your CRID, provided in the top section.

2. Review the business services for which you will be given permission. As a new user at a new business location, you are given the core BCG services.

   Note: IV-MTR is not included in the core BCG services. Follow the remaining steps to continue to the BCG and request the IV-MTR service.

3. Read the terms and conditions.

   Note: As the first user to register for your location, you are assigned as the BSA for the core services. In addition, you will automatically become the BSA for any additional services (e.g., IV-MTR) for which you are the first user to request the service for your location. For information about IV-MTR BSA permissions, see Section 5.2: Functionality by Access Level and User Role.
4. Click **Continue**. You receive an email containing your CRID and MID and confirming the services you have been granted.

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

![Register Your Account Getting Started You're signed up!](image)

5. If you are a **Mail Service Provider (MSP)**, check the appropriate box.

6. Click **Continue**. You are taken to the BCG welcome page.

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

Now that you have a BCG account and the IV-MTR service, the IV-MTR BSA must enter the authorization code. For instructions, see Section 4.3: Enter the Authorization Code. Once the code is entered, see Section 4.4: Access the Application for instructions to access the IV-MTR application.

4.2.3 New User at an Existing Location

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

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

From this page:

1. Note your CRID, provided in the top section.
2. Under Add Services for your Business Location, select I'd Like to custom select services for my Business Location. The list of business services displays from which you may choose.
3. **Under Additional Mailing Services, select Informed Visibility.**
   
   **Note:** You may also select any additional services you want to request.

4. **Click Continue With Selection.**

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

   **Note:**
   
   - For information about IV-MTR BSA permissions, see Section 5.2: *Functionality by Access Level and User Role.*
   - If you select No, you may continue. However, for any requested service without a BSA assigned, your access to that service will be pending until a BSA is assigned and he or she has approved your request.

6. Review the terms and conditions, and then click **Continue.** You receive an email containing your CRID, the list of services you have been granted, and the list of services for which your access is pending approval from the BSA.
On the BCG site, you are taken to a page that displays your MID, the list of services you have been granted, and the list of services for which your access is pending approval from the BSA. You have become the BSA for the services with an asterisk (*).

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

If you are not the IV-MTR BSA, you must wait for the IV-MTR BSA to approve your request for the service. When your request is approved, you receive an email notification. Once you have the service, see Section 4.4: Access the Application for instructions to access the IV-MTR application.

If you are the IV-MTR BSA, see Section 4.3: Enter the Authorization Code for instructions to enter the authorization code.

4.2.4 Existing User at a New Location

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

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

4. Click **Add Location**.

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

6. Follow the on-screen steps to confirm the address and verify the business name, if needed.
7. When you reach the page below, review the information, and then click **Confirm Add Location**.

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

9. Under **Additional Mailing Services**, select **Informed Visibility**.
   **Note:** You may also select any additional services you want to request.

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

**Note:**
- For information about IV-MTR BSA permissions, see Section 5.2: *Functionality by Access Level and User Role*.
- If you select No, you may continue. However, for any requested service without a BSA assigned, your access to that service will be pending until a BSA is assigned and he or she has approved your request.

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

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

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

If you are not the IV-MTR BSA, you must wait for the BSA to approve your request for the service. When your request is approved, you receive an email notification. Once you have the service, see Section 4.4: *Access the Application* for instructions to access the IV-MTR application.

If you are the IV-MTR BSA, see Section 4.3: *Enter the Authorization Code* for instructions to enter the authorization code.
4.2.5 Existing User at an Existing Location

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

1. Log into the BCG.
2. Click Mailing Services.

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

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

- If you were the first user to request the IV-MTR service for this CRID, and when you initially registered for the BCG you were the first user for your location or you selected to become the BSA for any service that does not already have a BSA, you become the IV-MTR BSA for this CRID. You receive an email confirming the addition of the service. Now that you have a BCG account and the IV-MTR service, see Section 4.3: Enter the Authorization Code for instructions to enter the authorization code.

- If an IV-MTR BSA already exists for this CRID, you receive an email stating that your request is pending approval by the BSA. When your request is approved, you receive an additional email. Once you have the service, see Section 4.4: Access the Application for instructions to access the IV-MTR application.
• If an IV-MTR BSA has not been assigned for this CRID and when you initially registered for the BCG you were not the first user for your location or you did not select to become the BSA for any service that does not already have a BSA, your request for the IV-MTR service will remain pending until a BSA is assigned and he or she approves your request. When your request is approved, you receive an additional email. Once you have the service, see Section 4.4: Access the Application for instructions to access the IV-MTR application.

4.3 Enter the Authorization Code

To complete CRID setup within the IV-MTR application, the IV-MTR BSA must enter a one-time authorization code. Other users for the CRID will not have mail tracking data visibility of the CRID in the application until the IV-MTR BSA enters the code for that CRID.

The IV-MTR BSA should follow these steps to receive and enter the authorization code:

1. Ensure you have a BCG account and the IV-MTR service for each CRID for which you should be the IV-MTR BSA.
2. Contact the IV-MTR Help Desk to obtain an authorization code. The Help Desk will ask for contact information and provide the authorization code for the CRID. There is a separate authorization code for each CRID.
3. Access the IV-MTR application. You are prompted to enter the authorization code for each CRID.
4. Enter the code for each CRID and click Submit. If the code was entered correctly, the CRID is successfully set up within the application.

Important: Contact the IV-MTR Help Desk for any of the following issues:

• You are the IV-MTR BSA and are not prompted to enter the authorization code upon accessing the application. This means you were not properly established as the IV-MTR BSA in the BCG.
• The code does not work.
• You want to make someone else the BSA.
4.4  Access the Application

You may access the IV-MTR web application directly or from within the BCG.

To access the web application directly:

2. On the IV-MTR page, click Log In.
3. At the login page, enter your BCG username and password.
4. Click Sign In. The IV-MTR application opens.

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

2. In the Sign In box, enter your BCG username and password.
3. Click Sign in.
4. In the left-hand navigation area, click **Mailing Services**.

5. In the list of services, find “Informed Visibility,” and click **Go to Service**. The IV-MTR application opens.
5 Application Areas and User Functionality

The following sections describe the main areas within the IV-MTR application as well as application functionality by user role.

5.1 Application Areas

After logging in, the application opens by default to the View Data tab of the Queries & Feeds area. This is where you can perform a one-time query.

There are four main areas available within IV-MTR. The following table describes the functionality within each area and where to go in this guide for additional information.

**Note:** The ability to perform certain functions is based on the user’s role. See Section 5.2: Functionality by Access Level and User Role for additional information.

### Table 5.1: Application Functionality by Area

<table>
<thead>
<tr>
<th>Application Area</th>
<th>Functionality*</th>
<th>User Guide Section(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Queries &amp; Feeds</td>
<td>Perform a one-time query or create and modify data feeds</td>
<td>7: One-Time</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8: Data Feeds</td>
</tr>
<tr>
<td>Data Delegation</td>
<td>Request visibility of data, approve data delegation requests, delegate visibility to others, or view rules for data delegated to your CRID/MID</td>
<td>9: Data Delegation</td>
</tr>
<tr>
<td>Address Book</td>
<td>Add to or modify the address book</td>
<td>10: Address Book</td>
</tr>
<tr>
<td>Roles &amp; Permissions</td>
<td>Manage roles (functionality) and permissions (visibility) for a CRID or user</td>
<td>11: Roles and Permissions</td>
</tr>
</tbody>
</table>

* Some functionality is only available to the IV-MTR BSA, BSA Delegates, and users with administrative roles.*
Navigate between these areas using the navigation bar at the top of the page.

To return to the main page at any time, click **Informed Visibility** at the top-left of the page.

Additional areas of the application are accessible using the widgets at the top left of the screen.

Clicking a widget takes you to an additional application area. The following table describes the functionality of each area and where to go in this guide for additional information.

<table>
<thead>
<tr>
<th>Widget</th>
<th>Application Area</th>
<th>Functionality</th>
<th>User Guide Section(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bell</td>
<td>Notifications</td>
<td>View and manage items in your notification inbox</td>
<td>12: Notifications</td>
</tr>
<tr>
<td>Gear</td>
<td>Settings</td>
<td>Manage email preferences for notifications</td>
<td>12: Notifications</td>
</tr>
<tr>
<td>Question mark</td>
<td>Mail Tracking Help</td>
<td>Access user documentation and videos to help you with the IV-MTR application</td>
<td>14: Mail Tracking Help</td>
</tr>
<tr>
<td>Phone</td>
<td>Contact Us</td>
<td>Get contact information for the IV-MTR Help Desk</td>
<td>18: Customer Support</td>
</tr>
</tbody>
</table>

### 5.2 Functionality by Access Level and User Role

The ability to perform certain functions within the BCG and IV-MTR web application is based on your BCG access level for the IV-MTR service as well as your application role(s). All users have a BCG access level for the service and may have a role or roles in the application.

#### 5.2.1 BCG Access Level

Your BCG access level for the IV-MTR service determines what functionality you can perform in the BCG for the service for a particular CRID. For example, your BCG access level for the IV-MTR service determines whether you can control access to the service for a particular CRID’s users.
There are three BCG access levels. You have one access level for a particular service for a particular CRID. The following table provides a description of each access level.

**Table 5.3: BCG Access Levels for the IV-MTR Service**

<table>
<thead>
<tr>
<th>Access Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BSA</td>
<td>Controls user access in the BCG to the IV-MTR service for a particular CRID. <em>Note:</em> In most cases, the first BCG user to request the IV-MTR service for a particular CRID automatically becomes the IV-MTR BSA for that CRID.</td>
</tr>
<tr>
<td>BSA Delegate</td>
<td>Can perform the same functions in the BCG as the BSA for the IV-MTR service for a particular CRID. <em>Note:</em> The IV-MTR BSA or a BSA Delegate for a particular CRID can assign the BSA Delegate access level for the service to other users of the CRID.</td>
</tr>
<tr>
<td>Access (General User)</td>
<td>Has access to the IV-MTR service in the BCG but cannot control user access to the service for a particular CRID. <em>Note:</em> A user with this BCG access level for the IV-MTR service is referred to as a “General User” throughout this document.</td>
</tr>
</tbody>
</table>

Your BCG access level for the IV-MTR service is specific for each CRID associated to your BCG account. If you are associated with multiple CRIDs in the BCG and have the IV-MTR service for all of them, you could have different BCG access levels for the service for each CRID. For example, you could be the IV-MTR BSA for one CRID and a General User for another. The IV-MTR BSA and BSA Delegates for a CRID manage your BCG access level for the IV-MTR service for that CRID.

Your BCG access level for the IV-MTR service also determines what functionality is available to you in the IV-MTR application. The IV-MTR BSA and BSA Delegates for a CRID can perform administrative and advanced functions for that CRID in the IV-MTR application. General Users do not have access to such functionality. For a complete list of application functionality by BCG access level, see Table 5.5: *Functionality by Access Level and User Role.*

Additional information about the BCG is available on the BCG support page. The BCG Navigation Guide may be particularly helpful. The Guide provides an overview of the BCG as well as instructions for navigating the site, managing your account, and performing BSA and BSA Delegate functions. The Guide is available in the upper-right corner of the Support page:
5.2.2 IV-MTR Application User Role

In addition to your BCG access level, you may have a role or roles in the IV-MTR application itself that determines what functionality is available to you in the application. Having a role in the application enables you to perform certain administrative functions. There are five application user roles. See the following table for a description of each role.

Table 5.4: IV-MTR Application User Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>CRID or MID Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Book Manager</td>
<td>Manages a CRID’s address book</td>
<td>CRID only*</td>
</tr>
<tr>
<td>Data Delegation Manager</td>
<td>Manages data delegation for a CRID or MID</td>
<td>MID or CRID</td>
</tr>
<tr>
<td>Report Manager</td>
<td>Creates and manages a CRID’s public saved reports and portions of reports</td>
<td>CRID only*</td>
</tr>
<tr>
<td>Roles and Permissions Manager</td>
<td>Assigns roles and permissions for a CRID or MID</td>
<td>MID or CRID</td>
</tr>
<tr>
<td>Subscription Manager</td>
<td>Creates and manages a CRID’s data feeds (subscriptions)</td>
<td>CRID only*</td>
</tr>
</tbody>
</table>

* The Address Book Manager, Report Manager, and Subscription Manager roles can only be assigned at the CRID level.

The application user roles can be assigned at the MID or CRID level:

- When a role is assigned at the MID level, the user can perform the role’s functions only for a specific MID. For example, a user with the Data Delegation Manager role for MID A1 could manage data delegation in the application for MID A1 but not for other MIDs belonging to CRID A (the CRID to which MID A1 belongs).
- When a role is assigned at the CRID level, the user can perform the role’s functions for an entire CRID, including all MIDs that belong, or will belong, to that CRID. For example, a user with the Data Delegation Manager role for CRID A could manage data delegation in the application for CRID A and all MIDs that belong, or will belong, to that CRID.
- The table above indicates whether each role can be assigned at the MID or CRID level, or only at the CRID level. Please note that three of the user roles can only be assigned at the CRID level.

The IV-MTR BSA, BSA Delegates, and users with the Roles and Permissions Manager role for a CRID manage your application user roles for that CRID or MIDs belonging to that CRID. You may have zero, one, or multiple user roles.

Your roles are specific to a CRID, or to a MID belonging to a CRID, for which you have the IV-MTR service. If you have the service for multiple CRIDs, you could have different application user roles for each CRID. For example, you could be assigned as an Address Book Manager for one CRID, a Data Delegation Manager for another CRID, and not be assigned a role for a third CRID. The IV-MTR BSA and BSA Delegates for a particular CRID are “super users” for that CRID, meaning they have all five application user roles.

If you have a role or roles in the application, additional functionality is available to you in the application. For information about the functionality available for each user role, see Table 5.5: Functionality by Access Level and User Role.
5.2.3 Functionality by Access Level and User Role

The ability to perform certain functions within the BCG and IV-MTR web application is based on your BCG access level for the IV-MTR service as well as your IV-MTR application role(s). All users have a BCG access level for the IV-MTR service and may have a role or roles in the application.

The table on the next page indicates what functions a user can perform based on his or her BCG access level and any assigned application user roles. There is also a column identifying the applicable section in this User Guide where you can find instructions for performing that function.
### Table 5.5: Functionality by Access Level and User Role

<table>
<thead>
<tr>
<th>Application Area</th>
<th>Function</th>
<th>User Guide Section</th>
<th>BCG Access Level</th>
<th>IV-MTR Application User Role&lt;sup&gt;1&lt;/sup&gt;</th>
<th>IV-MTR BSA&lt;sup&gt;2&lt;/sup&gt;</th>
<th>IV-MTR BSA Delegate&lt;sup&gt;2&lt;/sup&gt;</th>
<th>Address Book Manager</th>
<th>Data Delegation Manager</th>
<th>Report Manager</th>
<th>Roles and Permissions Manager</th>
<th>Subscription Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>BCG</td>
<td>Approve/deny a request for the IV-MTR service</td>
<td>6.1.1</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Designate an IV-MTR BSA Delegate</td>
<td>6.1.2</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General IV-MTR</td>
<td>Enter the IV-MTR BSA authorization code</td>
<td>6.2.1</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Queries &amp; Feeds</td>
<td>Perform a one-time query for Online View or Data Download</td>
<td>7</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Perform a one-time query for Send to Address</td>
<td>7</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>View the one-time query File History and download/resend files</td>
<td>7.4</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create/modify/activate/delete a data feed</td>
<td>8</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>View the data feed Output History and download/resend files</td>
<td>8.2.1</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>View the settings for a data feed</td>
<td>8.2.2</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Load/create/modify/delete a private saved entity, report, filter, or view</td>
<td>12</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create a public saved entity, report, filter, or view</td>
<td>12</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Modify/delete a public saved entity, report, filter, or view</td>
<td>12</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Associate/disassociate a public saved entity to/from a data feed</td>
<td>13.1</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data Delegation</td>
<td>Request to receive visibility from another CRID/MID</td>
<td>9.1.1</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>View the history of requests to receive visibility from another CRID/MID</td>
<td>9.1.2</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cancel a pending request to receive visibility from another CRID/MID</td>
<td>9.1.2</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>View/approve/deny a request to provide visibility to another CRID/MID</td>
<td>9.2.1</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>View the history of requests to provide visibility to another CRID/MID</td>
<td>9.2.2</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Modify/delete an existing rule to provide visibility to another CRID/MID</td>
<td>9.2.2</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create a rule to provide visibility to another CRID/MID</td>
<td>9.3</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>View existing rules to receive visibility from another CRID/MID</td>
<td>9.4</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Delete an existing rule to receive visibility from another CRID/MID</td>
<td>9.4</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address Book</td>
<td>View address book entries</td>
<td>10</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create an address book entry</td>
<td>10</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Modify/delete an address book entry</td>
<td>10</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roles &amp; Permissions</td>
<td>Assign and modify roles and permissions</td>
<td>11</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<sup>1</sup> The IV-MTR BSA is the user designated as the BSA for the IV-MTR service for a particular CRID. An IV-MTR BSA Delegate is a user designated as a BSA Delegate for the IV-MTR service for a particular CRID.

<sup>2</sup> In the user role columns, an X indicates the function is available because the user has the particular role assigned. A ● denotes a function that is available because it is available to ALL users, regardless of access level or user role.
6  IV-MTR BSA Functions

The IV-MTR BSA and BSA Delegate(s) have administrative permissions in the BCG and IV-MTR application for a CRID. The IV-MTR BSA and BSA Delegate(s) are the only users who can perform the following functions for a CRID:

- **BCG:**
  - Approve a user’s request for the IV-MTR service
  - Designate an IV-MTR BSA Delegate

- **IV-MTR application:**
  - Enter the BSA authorization code (*IV-MTR BSA only*)

See the following sections for instructions to perform these functions.

The IV-MTR BSA, BSA Delegate(s), and any users who have been assigned administrative roles for a CRID can perform additional functions for that CRID in the IV-MTR application. For information about which functions are available for each user role, see Section 5.2: *Functionality by Access Level and User Role*.

6.1  BCG

Within the BCG, the IV-MTR BSA and BSA Delegate(s) can perform the following functions for their CRID. See the following sections for additional information:

- Approve a user’s request for the IV-MTR service
- Designate an IV-MTR BSA Delegate

Additional information about the BCG is available on the [BCG support page](#). The *BCG Navigation Guide* may be particularly helpful. The Guide provides an overview of the BCG as well as instructions for navigating the site, managing your account, and performing BSA and BSA Delegate functions. The Guide is available in the upper-right corner of the Support page:
6.1.1 Approve a Request for the IV-MTR Service

When a user requests the IV-MTR service for your CRID, the IV-MTR BSA and BSA Delegate(s) receive a notification email.

To approve or deny the user’s request:

1. Log into the BCG.
2. On the landing page, the Messages section contains a message saying you have access requests awaiting your approval. Click approval.
3. On the Pending Requests page, find the request, and click **Review**.

4. In the Pending Requests window, select the services to be denied or approved.

5. Click **Deny** or **Approve**. The user receives an email notification stating whether the request was approved or denied.

6.1.2 **Designate an IV-MTR BSA Delegate**

An IV-MTR BSA Delegate can perform the same functions as the IV-MTR BSA with the exception of entering the authorization code to complete CRID setup in the IV-MTR application.

The IV-MTR BSA or a BSA Delegate can designate an IV-MTR BSA Delegate by doing the following:

1. Log into [the BCG](#).
2. Click **Manage Account**.

3. Click **Manage Users**.
4. By default, the Manage Users page displays all users belonging to your CRID, with a separate listing for each BCG service the user has. Use the filters near the top of the page to filter by location, service, user, or access level.

**Note:** To see only those users with the IV-MTR service, select **Informed Visibility** from the **Filter by Service** drop-down menu.

5. Find the user who you wish to designate as an IV-MTR BSA Delegate, and then find that user’s row for the Informed Visibility service.

6. In the **Access Level** column of that row, select **BSA Delegate** from the drop-down menu.

After making this selection, a notification appears that the action was successful. The new IV-MTR BSA Delegate also receives an email notification that he or she has been designated as a BSA Delegate for that CRID.
6.2 IV-MTR Web Application

The IV-MTR BSA is the only user who can enter the BSA authorization code for his or her CRID. See the following section for additional information.

6.2.1 Enter BSA Authorization Code (IV-MTR BSA Only)

The BSA for the IV-MTR service for a CRID must enter the authorization code in the IV-MTR application to complete the CRID’s setup within IV-MTR. For instructions, see Section 4.3: Enter the Authorization Code.
7 One-Time Queries

Within the application, you can perform a one-time data query to receive ad hoc data. For a one-time data query, you define the CRID(s), MID(s), or routing code(s) for which you want data, select a delivery method, define filters and the data fields to receive, and then retrieve the results. To access these functions, click Queries & Feeds in the top navigation bar. Then, click the View Data tab.

The general steps for performing a one-time data query are as follows:

1. On the Select Entity(s) screen, select the CRID(s), MID(s), or routing code(s) for which you want data.
2. When finished, click Next Step.
3. On the Select Delivery Method screen, choose a delivery method and set available options.
4. When finished, click Use This Method for the desired delivery method.
5. On the Define Filters & Fields screen, select the mail object type and handling event type(s) to receive, set filters, and select data fields and their display order (if applicable).
6. When finished, click Finish.
7. Based on the selected delivery method, retrieve the results of your data query.

See the following sections for additional information about the steps for performing a one-time query. For information about using a saved entity, filter, view, or report to perform a one-time query, see Section 12: Notifications.
7.1 Select Entity(s)

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

- **Option 1**: Select CRID(s) and then select MID(s) belonging to the CRID(s)
- **Option 2**: Search for and add MID(s) directly
- **Option 3**: Add routing code(s)

Note: You may choose option 3 instead of, or in addition to, option 1 or 2.

![Select Entity(s) Screen]

**Note:**

- You are able to select those entities for which you have the IV-MTR service, or have been delegated visibility, **and** for which you have visibility permissions.
- To export a list of the selectable entities, click the export icon to the top right of the Add MID(s) section.
- For information about using a saved entity to perform a one-time query, see Section 13.1: Saved Entity.
7.1.1 Option 1: Select CRID(s), then MID(s)

By default, the Select CRID(s) section displays the CRIDs for which you have the IV-MTR service or have been delegated visibility.

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

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

To select *all* CRIDs, click **Add All CRIDs**.
The selected CRID(s) and the MID(s) belonging to the CRID(s) appear in the Add MID(s) section.

**Note:** To export a list of the selectable entities, click the export icon to the top right of the Add MID(s) section.

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

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

**Important:** Selecting a single MID creates a MID-level query, while selecting **Add All** creates a CRID-level query. A CRID-level query provides data for all MIDs belonging to the CRID.
To add all of the MIDs for all of the CRIDs, click **Add All MIDs** at the top of the list.

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

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

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

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

To add a routing code, go to Section 7.1.3: **Option 3: Add Routing Code(s)**. If you are finished, click **Next Step**.
7.1.2 Option 2: Directly Add MID(s)

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

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

Note:

- The CRID number appears above the MID number(s), to the right of the company name.
- To export a list of the selectable entities, click the export icon to the top right of the Add MID(s) section.

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

**Important:** Selecting a single MID creates a MID-level query, while selecting **Add All** creates a CRID-level query. A CRID-level query provides data for all MIDs belonging to the CRID.

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

**Important:** This creates a CRID-level query for each CRID. A CRID-level query provides data for all MIDs belonging to the CRID.
The selected MID or MIDs appear in the **Your selected MIDs** section.

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

Repeat the steps above to add additional MIDs as desired.

To add a routing code, go to Section 7.1.3: **Option 3: Add Routing Code(s)**. If you are finished, click **Next Step**.

**7.1.3 Option 3: Add Routing Code(s)**

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

The **Select Routing Code(s)** section appears to the right of **Add MID(s)**.
By default, the Select Routing Code(s) section displays the routing codes mapped to the CRIDs or MIDs for which you have the IV-MTR service. **Note:** To export a list of the selectable entities, including routing codes, click the export icon to the top right of the Add MID(s) section.

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

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

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

Repeat the steps above to add additional routing codes as desired. When you are finished, click **Next Step**.
7.1.4 Remove Selected Entity(s)

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

There are three delivery methods available for a one-time query:

- **Prepare for Online View**: The application displays the query results directly in your web browser, and then you can export the data if desired.
  
  **Note**:
  
  - Only container and handling unit data is available through this delivery method.
  - The mail object navigator is available through this delivery method. This feature allows you to view handling events for containers and drill down to view handling units nested to a specific container.

- **Prepare for Data Download**: The application prepares a file of the query results in your selected format for you to download. *(Note: Piece-level one-time queries for Online Download are only available through the IV-MTR Help Desk at this time.)*

- **Send to Address**: The application prepares a file of the query results in your selected format and sends the file to an SFTP server.
  
  **Note**:
  
  - Piece-level one-time queries for Send to Address are only available through the IV-MTR Help Desk at this time.
  - Only an IV-MTR BSA, BSA Delegate, or Subscription Manager can select this delivery method.

For additional information about what data is available through each delivery method, see Section 3: Data Provisioning Options.

For additional instructions for selecting a delivery method, see the following sections.
7.2.1 Prepare for Online View

**Important:** Only container and handling unit data is available through this delivery method.

To view the query results directly in your web browser, click **Use This Method** under the **Prepare for Online View** section.

![Prepare for Online View](image)

**Note:** The mail object navigator is available through this delivery method. This feature allows you to view handling events for containers and drill down to view handling units nested to a specific container.

7.2.2 Prepare for Data Download

**Important:** Piece-level one-time queries for Online Download are only available through the IV-MTR Help Desk at this time.

To download the query results, make a selection from the **File Format** drop-down menu under the **Prepare for Data Download** section. Two file formats are available:

- **Delimited File:** Customizable format in which you select the data fields, order of fields, and delimiter character
- **IMb Tracing Legacy File Format:** Legacy IMb Tracing format with pre-defined data fields

![File Format](image)

If you select the delimited format, the **Delimiter** drop-down menu appears. From this menu, select the delimiter character you would like for the file. The options are comma, tab, or other.

![Delimiter](image)
If you select Other for the delimiter, a field appears for you to specify the character you would like to use.

When you have finished selecting options for this delivery method, click Use this Method.

### 7.2.3 Send to Address

**Important:**
- Piece-level one-time queries for Online Download are only available through the IV-MTR Help Desk at this time.
- Only an IV-MTR BSA, BSA Delegate, or Subscription Manager can select this delivery method.

If you want the application to prepare a file of the query results and send the file to an SFTP server, go to the Send to Address section of the screen.

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

- **Delimited File:** Customizable format in which you select the data fields, order of fields, and delimiter character
- **IMb Tracing Legacy File Format:** Legacy IMb Tracing format with pre-defined data fields

Based on your selection, additional drop-down menus appear for you to define how to receive the query results. The following sections provide additional information about each drop-down menu.
7.2.3.1 Delimited File

If you select this format, the Delimiter, Define Target, Email Notification, and File Transfer Format sections appear.

First, under Delimiter, select the delimiter character you would like for the file. The options are comma, tab, or other.

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

Second, under Define Target, select the target location(s) of where to send the query results file.

- If the SFTP server is already in your address book, select the server from the Define Target drop-down menu.
  
  **Note:** You may select multiple servers.
If the SFTP server is not yet in your address book, click **Add a server** to open a window where you can add the server without leaving the page OR click **Go to address book** to leave the page to manage your address book.

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

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

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

Third, under **Email Notification**, if you would like to designate one or more contacts to receive an email notification on transfer success and/or failure, check the appropriate box(es). Then, select one or more contacts from the **Select Email Address** drop-down menu.

- If the contact is already in your address book, select the email address from the **Select Email Address** drop-down menu.

  **Note:** You may select multiple email addresses.
If the contact is not yet in your address book, click **Add a contact** to open a window where you can add the contact without leaving the page OR click **Go to address book** to leave the page to manage your address book.

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

If you click **Add a contact**, a window appears. Complete the fields. When you are finished, click **Add to Address Book**. The contact is added to your address book and is now available from the **Select Email Address** drop-down menu.

**Fourth,** under **File Transfer Format**, select whether to receive an un-zipped or zipped file.

**Note:** The query results will be sent to the target location(s) un-zipped or zipped, according to your selection. However, if you download the files from the File History, the files will be zipped, regardless of your selection from this menu.

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

- If the test is successful, a message displays confirming the test was successful.
If the test is not successful, a warning message appears. Go to your address book to modify the settings for the server or contact the IV-MTR Help Desk for additional assistance.

When you have finished selecting options for this delivery method, click **Use this Method**.

### 7.2.3.2 IMb Tracing Legacy File Format

If you select this format, the **Define Target**, **Email Notification**, and **File Transfer Format** sections appear.

First, under **Define Target**, select the target location(s) of where to send the query results file:

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

  **Note:** You may select multiple servers.

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

  **Note:** Only an IV-MTR BSA, BSA Delegate, Address Book Manager, or Subscription Manager can add a new entry to the address book.
If you click **Add a server**, a window appears. Select the **Protocol Type** and complete the remaining fields. When you are finished, click **Add to Address Book**. The server is added to your address book and is now available from the **Define Target** drop-down menu.

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

---

Second, under **Email Notification**, if you would like to designate one or more contacts to receive an email notification on transfer success and/or failure, check the appropriate box(es). Then, select one or more contacts from the **Select Email Address** drop-down menu.

- If the contact is already in your address book, select the email address from the **Select Email Address** drop-down menu.
  
  **Note:** You may select multiple email addresses.

- If the contact is not yet in your address book, click **Add a contact** to open a window where you can add the contact without leaving the page OR click **Go to address book** to leave the page to manage your address book.

  **Note:** Only an IV-MTR BSA, BSA Delegate, Address Book Manager, or Subscription Manager can add a new entry to the address book.
If you click **Add a contact**, a window appears. Complete the fields. When you are finished, click **Add to Address Book**. The contact is added to your address book and is now available from the **Select Email Address** drop-down menu.

![Contact details](image)

Third, under **File Transfer Format**, select whether to receive an un-zipped or zipped file.

**Note:** The query results will be sent to the target location(s) un-zipped or zipped, according to your selection. However, if you download the files from the File History, the files will be zipped, regardless of your selection from this menu.

![File Transfer Format](image)

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

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

  ![TEST SERVER CONNECTION](image)

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

  ![TEST SERVER CONNECTION](image)

When you have finished selecting options for this delivery method, click **Use this Method**.
7.3 Define Filters & Fields

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

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

For additional information about the options on this screen, see the following sections. For information about using a saved filter, view, or report to perform a one-time query, see Section 12: Notifications.

7.3.1 View Selected Entity(s)

This area displays the CRID(s), MID(s), and routing code(s) you selected for the query.
7.3.2 Select Mail Object and Handling Event Type(s)

**Important:** At this time, only one mail object type can be selected for a one-time query. You must perform a separate one-time query if you want data for an additional mail object type.

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

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

![Mail Object Type dropdown](image)

**Important:**
- If you chose the Online View delivery method, data is only available for handling units and containers.
- Piece-level one-time queries for Online Download or Send to Address are only available through the IV-MTR Help Desk at this time.

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

![Handling Event Type checkboxes](image)

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

If you selected piece as the mail object type, two additional options appear.

- Choose whether to include Tracing STIDs, non-Triming STIDs, or both. Check the selected option(s).

**Note:** For the list of Tracing (IV) and non-Tracing (non-IV) STIDs, see the [STID Table on PostalPro](#). In the table, the columns labeled "with IMb IV" are the Tracing (IV) STIDs.
• Select whether to receive raw and enriched data, only raw data, or only enriched data. Click the selected option.

![Mail Object Type and Which would you like to see? options](image)

7.3.3 Add Filter(s)

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

1. Click **Add Filter**. The filter section appears.
2. From the first drop-down menu, select the field on which to filter.
   
   **Note:** The fields available depend on the mail object type selected.
3. From the second drop-down menu, select a filter operator (e.g., equal to) to define when the filter is applied.
   
   **Note:**
   
   - The available filter operators depend on the field selected to filter on.
   - To do a partial search, use the **Contains**, **Begins With**, **Ends With**, or **Does Not Contain** operators.
   - The **Between** operator is inclusive. For example, if you select this operator for **Scan DateTime** and enter 03/01/2018 and 04/01/2018 as your field values, the search will include results where the **Scan DateTime** is 03/01/2018 or 04/01/2018.
4. In the **Field Value** field, enter the filter criteria value.
   
   **Note:** The **One of** and **Not One of** operators allow multiple field values. Separate values by commas without a space (e.g., 123456,123457,123458).

To add an additional filter, click **Add Condition**. A second filter section appears. Follow steps 2-4 above to select the filter options.
To remove all filters, click **Delete** in the upper-right corner of the filter section. To remove one filter, click **Remove** to the right of the filter you wish to remove.

![Filter Section](image)

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

### 7.3.4 Select and Arrange Data Fields

**Important:**
- For the legacy package file format, you can view the data fields that are included, but you cannot add/remove fields or rearrange the order in which they will appear.
- For the JSON file format, although you can rearrange the order of data fields here, this will not affect the order of the data fields in the resulting file.

**Note:**
- For detailed information about the data fields available, see the *IV-MTR External Facing Data Dictionary*.
- When a handling event record contains multiple instances of the same data attribute, only the main data attribute is available for selection (e.g., IMb). When viewing data online, multiple instances for an attribute are grouped in the same field under the name of the main data attribute (e.g., IMb). When creating a delimited file for download, each instance would be reported in a separate field (e.g., IMb, IMb_1, IMb_2, and so on).

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

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

![Data Fields Section](image)
To remove a data field, drag it from the right side to the left side OR double-click the field name on the right side. To remove all of the data fields, click **Remove All** at the top of the list.

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

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

### 7.3.5 Finish

When you are finished on this screen, click **Finish** to perform the query.

### 7.4 Retrieve Query Results

How you retrieve the query results depends on the delivery method selected. For additional information, see the following sections.

#### 7.4.1 Online View

**Important:** The application displays up to 10,000 records in this view. Any records over this limit are not displayed. The most recent scan records, as determined by **Scan DateTime**, are displayed.

If you selected this delivery method, the query results display on the screen.

**Note:** If no results are available, the screen displays “No Data Found”.
Use the scroll bars to view additional records or fields. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.

See the following sections for information about exporting data from this view and using the mail object navigator to view nested mail objects.

### 7.4.1.1 Export Data

To export the data from this view:

1. Click **Export As** in the upper-right corner. A window appears.
2. Select the file format (CSV or PDF).
3. Click **Export**. The file downloads according to your browser settings.

**Note:** For information about importing a CSV file into Microsoft Excel, see Appendix F: *Import CSV or TXT File into Microsoft Excel.*

### 7.4.1.2 Mail Object Navigator

The mail object navigator—a feature for one-time queries—allows you to view handling events for containers and drill down to view handling units nested to a specific container. You can then view handling events for the nested handling units. The handling information displays on the screen with the ability to export.

To use the mail object navigator, follow these steps:

1. On the Select Entity(s) screen of the **View Data** tab, select the CRID(s) or MID(s) for which you want data.
2. When finished, click **Next Step**.
3. On the Select Delivery Method screen, click **Use This Method** under **Prepare for Online View**.

4. On the Define Filters & Fields screen:
   a. For **Mail Object Type**, select **Container**.
   b. Under the **Mail Object Type** drop-down menu, check **View All Linked Mail Objects**.
   c. For **Which would you like to see?**, select one or more handling event types.
      
      **Note:** Your selection here determines which handling event types you will be able to see for the containers and their nested mail objects. By default, all handling events are selected.
   d. Add a filter or filters, if desired.
   e. When finished, click **Finish**. The query results display on the screen.

On this screen:
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To return to the Define Filters & Fields screen, click **Go Back**. To start a new one-time query, click **Start Over**.
- To view nested mail objects, click the hyperlink for the IMb of the parent mail object. The nested mail object(s) display.

- To view handling events for a mail object, click the icon to the left of the IMb for the mail object. The handling events display.

  **Note:** To see handling events for the parent mail object, click the icon to the left of the parent mail object’s IMb. When viewing nested mail objects, to see handling events for a nested mail object, click the icon to the left of the nested mail object’s IMb.
To export the data, click **Export As** in the upper-right corner. A window appears. Select the file format (CSV or PDF), and then click **Export**. The file downloads according to your browser settings.

**Note:** The export will only contain the data currently displayed onscreen.

The following table lists the data fields displayed as columns in the mail object navigator.

**Table 7.2: Data Fields Available in Mail Object Navigator**

<table>
<thead>
<tr>
<th>Container</th>
<th>Handling Events for Container</th>
<th>Nested Handling Unit</th>
<th>Handling Events for Nested Handling Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>IMcb</td>
<td>IMcb</td>
<td>IMcb</td>
<td>IMcb</td>
</tr>
<tr>
<td>IMcb MID</td>
<td>IMtb Event Type</td>
<td>IMtb</td>
<td>IMtb</td>
</tr>
<tr>
<td>IMcb Serial Number</td>
<td>Handling Event Type</td>
<td>IMtb CIN</td>
<td>Handling Event Type</td>
</tr>
<tr>
<td>Appointment ID</td>
<td>Scan DateTime</td>
<td>IMtb Destination ZIP</td>
<td>Handling Event Type</td>
</tr>
<tr>
<td>Bundle Count</td>
<td>Scan Facility City</td>
<td>IMtb MID</td>
<td>Scan DateTime</td>
</tr>
<tr>
<td>Mail Class Description</td>
<td>Scan Facility Name</td>
<td>IMtb Processing Code</td>
<td>Scan Facility City</td>
</tr>
<tr>
<td>Mail Shape Description</td>
<td>Scan Facility State</td>
<td>IMtb Serial Number</td>
<td>Scan Facility Name</td>
</tr>
<tr>
<td>Piece Count</td>
<td>Scan Facility ZIP</td>
<td>Appointment ID</td>
<td>Scan Facility State</td>
</tr>
<tr>
<td>Tray Count</td>
<td>Scan Locale Key</td>
<td>Bundle Count</td>
<td>Scan Facility ZIP</td>
</tr>
<tr>
<td>eDoc CSA Agreement ID</td>
<td>Scan State</td>
<td>Mail Class Description</td>
<td>Scan Locale Key</td>
</tr>
<tr>
<td>eDoc Container ID</td>
<td>Scanner Type</td>
<td>Mail Shape Description</td>
<td>Scan State</td>
</tr>
<tr>
<td>eDoc Container ZIP</td>
<td></td>
<td>Piece Count</td>
<td>Scanner Type</td>
</tr>
<tr>
<td>eDoc Customer Group ID</td>
<td></td>
<td>eDoc CSA Agreement ID</td>
<td></td>
</tr>
<tr>
<td>eDoc Job ID</td>
<td></td>
<td>eDoc Container ID</td>
<td></td>
</tr>
<tr>
<td>eDoc Mailing Group ID</td>
<td></td>
<td>eDoc Customer Group ID</td>
<td></td>
</tr>
<tr>
<td>eDoc Parent Container ID</td>
<td></td>
<td>eDoc Job ID</td>
<td></td>
</tr>
<tr>
<td>eDoc Sibling Container ID</td>
<td></td>
<td>eDoc Mailing Group ID</td>
<td></td>
</tr>
<tr>
<td>eDoc Submitter CRID</td>
<td></td>
<td>eDoc Parent Container ID</td>
<td></td>
</tr>
<tr>
<td>eDoc User License Code</td>
<td></td>
<td>eDoc Sibling Container ID</td>
<td></td>
</tr>
<tr>
<td>eDoc User License Code</td>
<td></td>
<td>eDoc Submitter CRID</td>
<td></td>
</tr>
</tbody>
</table>

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7.4.2 Data Download

If you selected this delivery method, a pop-up message appears. The message notifies you to retrieve the file from the file history. To close the message, click Close OR click the X icon.

![Submitted](image)

Important:
- Depending on the parameters selected for the query, it may take several minutes for the file to be available to download. In-app and email notifications are available to let you know when the file is ready. For information about these notifications, see Section 12: Notifications.
- To help improve the performance of the query, especially for piece-level queries, it may be helpful to add a filter for the Scan DateTime field.

To retrieve the file:

1. Click View File History in the upper-right area of the page. The Output History window opens.

![Output History](image)

2. In the window, click Download for the appropriate file. The file downloads according to your browser settings.

In the window:
- By default, files are sorted by their creation date and time, with the most recent files at the top of the list.
- The Total Scans column indicates the number of handling events contained in the file.
• The **Download Time** column is populated once the file has been downloaded.
• Use the scroll bars to view additional records or fields. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
• To close the window, click **Close** OR click the **X** icon.

**Important:**

- Output History files are saved for 1 day (24 hours) from the time they are created.
- Files created for a one-time query **Send to Address** are also available in the File History.
- All files downloaded from the File History are zipped.

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

### 7.4.3 Send to Address

If you selected this delivery method, a pop-up message appears. The message notifies you to retrieve the file(s) from your server. To close the message, click **Close** OR click the **X** icon.

**Important:**

- Depending on the parameters selected for the query, it may take several minutes for the application to create the file and send it to the target location.
- To help improve the performance of the query, it may be helpful to add a filter for the **Scan DateTime** field.

Files created for a one-time query **Send to Address** are also available in the one-time query File History. For additional information, see Section 7.4.2: *Data Download*.
8 Data Feeds

Important:
- A data feed only delivers handling events going forward from the time the feed is activated. To receive historical data, you must use a one-time query.
- Only data for IV (Tracing) STIDs is available through a data feed. To receive data for non-IV STIDs, you must use a one-time query. For the list of IV and non-IV STIDs, see the STID Table on PostalPro. In the table, the columns labeled “with IMb IV” are the IV STIDs.

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

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

- If a user only has the IV-MTR service for CRID A, the user can only see subscriptions belonging to CRID A.
- If CRID B delegated visibility to CRID A, CRID A could create a subscription to receive data for CRID B. The subscription would belong to CRID A—not CRID B. The CRID A user would see this subscription because it belongs to CRID A.
- However, if CRID B created a subscription to receive data, the CRID A user would not see this subscription because it belongs to CRID B.
You can create a new data feed or view and modify an existing data feed. To access these functions, click **Queries & Feeds** in the top navigation bar. Then, click the **Create & Manage Data Feeds** tab. See the following sections for additional information about data feeds.

### 8.1 Create New Feed

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

The general steps for creating a new data feed are as follows:

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

4. When finished, click **Next Step**.

5. On the Define Filters & Fields screen, select the mail object type and handling event type(s) to receive, set filters, and select data fields and their display order (if applicable).

6. When finished, click **Create Feed**. The data feed will begin to deliver data based on your selections.

See the following sections for additional information. For information about using a saved entity, filter, view, or report to create a data feed, see Section 12: *Notifications*.
8.1.1 Select Initial Feed Options

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

![Create a New Feed](image)

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

### 8.1.1.1 Select Subscription Owner CRID

The **Subscription Owner CRID** drop-down menu is populated with those CRIDs for which you have the IV-MTR service and the ability to create a new data feed. *(Note: IV-MTR BSAs, BSA Delegates, and Subscription Managers are able to create new data feeds.)*

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

8.1.1.2 Select Feed Data Type

Under Feed Data Type, select whether to create the feed to receive Scan Data or Mail Quality Data. When you have made a selection, continue to select the file format.

8.1.1.3 Select File Format and Define Target

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

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

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

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

**DELIMITED FILE**

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

First, under **Delimiter** and **Multi-value Delimiter**, select the delimiter character(s) you would like for the file.

- The options are comma, tab, or other.
• If you select **Other**, a field appears for you to specify the character you would like to use.

![Delimiter](image)

• A multi-value delimiter is required for some data fields. The default is "N/A". If you do not select a multi-value delimiter here but later select a data field requiring the multi-value delimiter, you will be prompted to select one at that time.

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

![Delimiter](image)

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

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

**Note:** You may select multiple servers.

![Define Target](image)

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

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

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

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

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

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

Third, under **Email Notification**, if you would like to designate one or more contacts to receive an email notification on transfer success and/or failure, check the appropriate box(es). Then, select one or more email addresses from the **Select Email Address** drop-down menu.

**Important:** If you selected **Online download**, email notifications are not yet available.

- To have notifications sent to a contact who is already in your address book, select the email address from the **Select Email Address** drop-down menu.

  **Note:** You may select multiple email addresses.
To have notifications sent to a contact who is **not** yet in your address book, click **Add a contact** to open a window where you can add the contact without leaving the page OR click **Go to address book** to leave the page to manage your address book.

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

If you click **Add a contact**, a window appears. Complete the fields. When you are finished, click **Add to Address Book**. The contact is added to your address book and is now available from the **Select Email Address** drop-down menu.

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

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

- If the test is successful, a message displays confirming the test was successful.
• If the test is not successful, a warning message appears. Go to your address book to modify the settings for the server or contact the IV-MTR Help Desk for additional assistance.

When you have finished selecting options for this file format, continue to select the frequency.

**IMb Tracing Legacy File Format**

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

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

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

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

- **To use an SFTP server that is not yet in your address book,** click Add a server to open a window where you can add the server without leaving the page OR click Go to address book to leave the page to manage your address book.
  
  **Note:** Only an IV-MTR BSA, BSA Delegate, Address Book Manager, or Subscription Manager can add a new entry to the address book.
If you click **Add a server**, a window appears. Select the **Protocol Type** and complete the remaining fields. When you are finished, click **Add to Address Book**. The server or web service is added to your address book and is now available from the **Define Target** drop-down menu.

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

![Server Details](image)

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

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

![Define Target](image)

Second, under **Email Notification**, if you would like to designate one or more contacts to receive an email notification on transfer success and/or failure, check the appropriate box(es). Then, select one or more contacts from the **Select Email Address** drop-down menu.

**Important:** If you selected **Online download**, email notifications are not yet available.

- To have notifications sent to a contact who is already in your address book, select the email address from the **Select Email Address** drop-down menu.

  **Note:** You may select multiple email addresses.

![Email Notification](image)
To have notifications sent to a contact who is not yet in your address book, click **Add a contact** to open a window where you can add the contact without leaving the page OR click **Go to address book** to leave the page to manage your address book.

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

If you click **Add a contact**, a window appears. Complete the fields. When you are finished, click **Add to Address Book**. The contact is added to your address book and is now available from the **Select Email Address** drop-down menu.

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

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

- If the test is successful, a message displays confirming the test was successful.
• If the test is not successful, a warning message appears. Go to your address book to modify the settings for the server or contact the IV-MTR Help Desk for additional assistance.

When you have finished selecting options for this file format, continue to select the frequency.

**JSON**

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

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

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

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

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

  **Note:** Only an IV-MTR BSA, BSA Delegate, Address Book Manager, or Subscription Manager can add a new entry to the address book.
If you click **Add a server**, a window appears. Select the **Protocol Type** and complete the remaining fields. When you are finished, click **Add to Address Book**. The server or web service is added to your address book and is now available from the **Define Target** drop-down menu.

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

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

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

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

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

- If the test is successful, a message displays confirming the test was successful.
• If the test is not successful, a warning message appears. Go to your address book to modify the settings for the server(s) and/or web service(s) or contact the IV-MTR Help Desk for additional assistance.

When you have finished selecting options for this file format, continue to select the frequency.

**Mail.XML**

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

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

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

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

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

  **Note:** Only an IV-MTR BSA, BSA Delegate, Address Book Manager, or Subscription Manager can add a new entry to the address book.
If you click Add a server, a window appears. Select the Protocol Type and complete the remaining fields. When you are finished, click Add to Address Book. The web service is added to your address book and is now available from the Define Target drop-down menu.

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

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

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

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

- **ContainerVisibilityDelivery:** The application sends detailed handling event data for containers or handling units matching the subscription.
- **ContainerVisibilityNotification:** The application sends notification of available handling event data for containers or handling units.
Third, under **Message Version**, select the Mail.XML version that the application should send the message in.

**Note:** IV-MTR supports Mail.XML versions 12.0A, 12.0B, 14.0A, and 16.0.

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

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

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

When you have finished selecting options for this file format, continue to select the frequency.

### 8.1.1.4 Select Frequency and Start Time

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

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

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

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

For example, there is a data feed with a frequency of 12 hours and a start time of 8:00 AM Eastern. Once activated, this feed would deliver data at the next occurrence of 8:00 AM Eastern and would then deliver data every 12 hours thereafter.
The default is 12:00 AM in the Atlantic (UTC-4) time zone, but you may select any time. The available time zones are as follows:

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

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

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

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

When you have selected the frequency and start time, continue to name the data feed.

### 8.1.1.5 Name the Feed

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

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

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

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

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

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

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

To filter this list for a specific CRID, begin typing the CRID name or number in the search box. As you type, the list displays the CRID names or numbers matching the entered text.
To select a *single* CRID, hover on the CRID number and click **Show MIDs**.

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

The selected CRID(s) and the MID(s) belonging to the CRID(s) appear in the **Add MID(s)** section.
From the Add MID(s) section, to add a *single* MID, hover on the MID number and click Add MID.

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

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

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

**Important:** This creates a CRID-level subscription for each CRID. A CRID-level subscription provides data for any MIDs belonging to the CRID and will include data for any new MIDs added to that CRID in the future.
After clicking **Add MID, Add All, or Add All MIDs**, a window appears. To limit data by STID(s), enter STIDs separated by a comma. Then, click **Add Selected STID(s)**.

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

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

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

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

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

To add a routing code, go to Section 8.1.2.3: **Option 3: Add Routing Code(s)**. If you are finished, click **Next Step**.
8.1.2.2 Option 2: Directly Add MID(s)

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

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

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

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

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

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

**Important:** This creates a CRID-level subscription for each CRID. A CRID-level subscription provides data for any MIDs belonging to the CRID and will include data for any new MIDs added to that CRID in the future.
After clicking **Add MID**, **Add All**, or **Add All MIDs**, a window appears. To limit data by STID(s), enter STIDs separated by a comma. Then, click **Add Selected STID(s)**.

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

![Add STID(s) window](image)

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

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

![Selected MIDs and CRIDs](image)

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

![Selected STID(s) window](image)

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

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

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

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

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

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

To filter this list for a specific routing code, begin typing the number in the search box. As you type, the list displays the routing codes matching the entered text.
To select a routing code, hover on the number and click **Add**.

![](image1)

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

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

![](image2)

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

![](image3)

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

![](image4)

Repeat the steps above to add additional routing codes as desired. When you are finished, click **Next Step**.
8.1.2.4 Remove Selected Entity(s)

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

8.1.2.5 Modify or Remove STID(s)

To remove a STID added to a CRID or MID:

1. Go to the Your selected MIDs section.
2. Hover on the MID, and click Edit in the Selected STID(s) window.
3. Modify the STID(s) as necessary. (Note: Separate STIDs with a comma.)
4. Click Save.

To remove a STID added to a selected routing code:

1. Go to the Your selected routing codes section.
2. Hover on the routing code, and click Edit in the Selected STID(s) window.
3. To add a STID, check the appropriate box. To remove a STID, uncheck the box.
4. Click **Save**.
8.1.3 Define Filters & Fields

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

Table 8.1: Data Feed Define Filters & Fields Screen Functions

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

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

8.1.3.1 View Selected Entity(s)

This area displays the CRID(s), MID(s), and routing code(s) you selected for the data feed.
8.1.3.2 Select Mail Object and Handling Event Type(s)

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

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

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

![Mail Object Type screenshot]

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

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

![Mail Object Type screenshot]

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

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

![Mail Object Type screenshot]

8.1.3.3 Add Filter(s)

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

1. Click **Add Filter**. The filter section appears.
2. From the first drop-down menu, select the field on which to filter.
   
   **Note:** The fields available depend on the mail object type selected.
3. From the second drop-down menu, select a filter operator (e.g., equal to) to define when the filter is applied.

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

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

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

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

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

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

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

For information about using a saved filter, see Section 13.2: **Saved Filter**.
8.1.3.4 Select and Arrange Data Fields

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

**Note:**
- For detailed information about the data fields available, see the [IV-MTR External Facing Data Dictionary](#).
- When a handling event record contains multiple instances of the same data attribute, only the main data attribute is available for selection (e.g., IMb). When viewing data online, multiple instances for an attribute are grouped in the same field under the name of the main data attribute (e.g., IMb). When creating a delimited file for download, each instance would be reported in a separate field (e.g., IMb, IMb_1, IMb_2, and so on).

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

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

To remove a data field, drag it from the right side to the left side OR double-click the field name on the right side. To remove all of the data fields, click **Remove All** at the top of the list.
On the right side of this area, drag and drop the data fields into the order you would like them to appear in the data feed results.

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

8.1.3.5 Finish

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

To close the window, click OK OR click the X icon.
8.2 View or Modify Existing Feed

Your existing data feeds are listed in the Your Feeds table on the left side of the Create & Manage Data Feeds tab. The list provides the following information:

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

In this section:

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

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

**Important:** Data feed files are saved for 7 days (168 hours) from the time they are sent.

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

The list provides the following information:

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

In the Output History window:

- By default, files are sorted by their creation date and time, with the most recent files at the top of the list.
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To resend a data file to the target location(s) specified in the data feed, click **Resend to Host**.
  - **Note:** Some files may not be available to resend.
- To download a data file, click **Download**.
  - **Note:** Some files may not be available to download.
- To print the output list, click **Print**.
- To export the output list, click **Export As**. A pop-up window appears. Select **CSV** or **PDF**, and then click **Export**.

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

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

### 8.2.2 View Details

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

![Image of feed details](image)

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

![Image of Details for Bundles](image)

In the Details window:

- To print the window, click **Print**.

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

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

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

To modify the details for a data feed, click the modify icon in the Details column for that data feed.
The Details window opens and provides the ability to modify or delete the feed.
In the Details window:

- To change the name of the feed, click Rename at the top left. Enter the new name, and click Save. Then, scroll to the bottom of the page and click Update Feed to commit the changes.
- To delete the feed, click Delete Feed at the bottom right. Click Yes when prompted to confirm that you want to delete the feed.
- To modify the data feed, make the desired updates. Then, scroll to the bottom of the page and click Update Feed to commit the changes.
- If the data feed is NOT associated to a saved entity, the area to modify the selected entities for the data feed functions similarly to the Select Entity(s) screen when creating a data feed. For information about the functionality, see Section 8.1.2: Select Entity(s).
- If the data feed is associated to a saved entity, see Section 13.1.6: Update a Saved Entity Associated to a Data Feed for instructions to update the saved entity. To disassociate the saved entity from the data feed, see Section 13.1.7: Disassociate a Saved Entity from a Data Feed.
- To close the window without saving your changes, click the X icon.

8.2.4 Activate/Deactivate a Data Feed

**Important:**

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

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

To activate or deactivate a data feed:

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

![Activate/Deactivate the feed?](image)

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

Important: Data delegation rules only provide mail tracking visibility from the time they are created or go into effect. Delegation rules do not provide visibility of mail tracking handling events that occurred prior to the delegation’s creation or effective date. For example, if a data delegation request was created on 12/1/2017, the Receiving party would not have visibility of the Delegating party’s handling events from 11/15/2017.

Within the application, your CRID can receive mail tracking visibility from another CRID or MID through data delegation. This allows users for your CRID or MID to perform one-time queries or set up data feeds to receive data from the Delegating CRID or MID. In addition, your CRID can provide mail tracking visibility to another CRID or MID through data delegation. To access these functions, click Data Delegation in the top navigation bar.

This section of the application has four tabs, which are described below. Please note whether you can see all four tabs and the functionality available on these tabs depends on your BCG access level and IV-MTR application user role:

- **Request Data Delegation**: Request to receive visibility from another CRID or MID, view the history of such requests, and cancel a pending request
- **Manage Data Delegation**: View, approve, and deny requests to provide visibility to another CRID or MID; view the history of such requests; and modify or delete an existing rule to provide visibility to another CRID or MID
- **Delegate Data to Others**: Create a delegation rule to provide visibility to another CRID or MID
- **Data Delegated to My CRID**: View active data delegation rules to receive visibility from another CRID or MID and delete existing rules to stop receiving visibility from another CRID or MID

See the following sections for additional information about each tab.
9.1 Request Data Delegation

**Important:** Data delegation rules only provide mail tracking visibility from the time they are created or go into effect. Delegation rules do not provide visibility of mail tracking handling events that occurred prior to the delegation’s creation or effective date. For example, if a data delegation request was created on 12/1/2017, the Receiving party would not have visibility of the Delegating party’s handling events from 11/15/2017.

On this tab, you can request to receive visibility from another CRID or MID, view the history of such requests, and cancel a pending request.

9.1.1 Request Data Delegation

**Important:** Only an IV-MTR BSA, BSA Delegate, Data Delegation Manager, or Report Manager can submit a data delegation request for his or her CRID to receive visibility from another CRID or MID.

The general steps for requesting visibility of another CRID or MID’s mail tracking data are as follows:

1. In the Select Entity(s) section of the page, search for and add the CRID(s) or MID(s) for which you want visibility.
2. When finished, click Next Step.
3. On the Define Filters & Fields screen, select the mail object type(s) and handling event type(s) for which you want visibility. You may also set filters and select data fields (if applicable).
4. When finished, click Next Step.
5. On the Select Recipient(s) screen, select the CRID(s) or MID(s) you would like to receive visibility of the other CRID or MID’s data.
6. When finished, click Submit Request.
7. Review your selections, and click Confirm. Your request is sent to the Delegating CRID for approval.

See the following sections for additional information. For information about using a saved filter or view to request data delegation, see Section 12: Notifications.
9.1.1.1 Select Entity(s)

On this screen, search for and add the CRID(s) or MID(s) from which you want to receive visibility. You may do this in two ways. The following sections provide instructions for each option:

- **Option 1:** Search for CRID(s) and then select MID(s) belonging to the CRID(s)
- **Option 2:** Search for and add MID(s) directly

**OPTION 1: SEARCH FOR CRID(s), THEN ADD MID(s)**

To search for a CRID, type three or more characters from the CRID number into the search box and click the search button or press Enter. CRIDs appear based on the search criteria.

To select a single CRID, hover on the CRID number and click Show MIDs.
The selected CRID(s) and the MID(s) belonging to the CRID(s) appear in the Add MID(s) section.

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

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

Important: Selecting a single MID creates a MID-level delegation request, while selecting Add All creates a CRID-level delegation request. A CRID-level delegation request would provide visibility from all MIDs belonging to the CRID now or added to that CRID in the future.
The selected MID or MIDs appear in the **Your selected CRIDs and MIDs** section.

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

Repeat the steps above to add additional CRIDs or MIDs as desired. When you are finished, click **Next Step**.

**OPTION 2: DIRECTLY ADD MID(s)**

To search for a MID, type three or more characters from the MID number into the search box and click the search button or press **Enter**. MIDs appear based on the search criteria.

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

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

**Important:** Selecting a single MID creates a MID-level delegation request, while selecting Add All creates a CRID-level delegation request. A CRID-level delegation request would provide visibility from all MIDs belonging to the CRID now or added to that CRID in the future.

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

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

Repeat the steps above to add additional MIDs as desired. When you are finished, click **Next Step**.
**REMOVE SELECTED ENTITY(s)**

To remove a selected CRID or MID, go to the *Your selected CRIDs and MIDs* section. Click *Remove* for the entity you wish to remove.
### 9.1.1.2 Define Filters & Fields

The Define Filters & Fields screen has additional options for you to customize the delegation request. The following table describes the functions of each area of the screen.

#### Table 9.1: Request Data Delegation Define Filters & Fields Screen Functions

<table>
<thead>
<tr>
<th>Screen Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>View the CRID(s) or MID(s) selected for the delegation request</td>
</tr>
<tr>
<td>B</td>
<td>Select the mail object type and handling event type(s) for which you want visibility</td>
</tr>
</tbody>
</table>
| C           | Add filters to refine the delegation request (optional)  
**Note:** Filters are not available if “All” is selected for **Mail Object Type**. |
| D           | Select the data fields for which you want visibility  
**Note:** If “All” is selected for **Mail Object Type**, all available data fields for all mail object types are included in the delegation request. |
| E           | Choose the date range for the delegation to be active |
| F           | Click **Next Step** to go to the **Select Recipient(s)** screen |

For additional information about the options on this screen, see the following sections.
**View Selected Entity(s)**

This area displays the CRID(s) or MID(s) of which you are requesting visibility.

**Select Mail Object and Handling Event Type(s)**

**Important:** At this time, you can only select one mail object type OR select All to include all four mail object types. If you want visibility of more than one mail object type but not all mail object types, you must submit a separate data delegation request for each additional mail object type.

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

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

**Note:** Selecting **All** includes all four mail object types.

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

**Note:** Some handling event types are not yet available or are only available for a particular mail object type. However, you may request visibility now in anticipation of all handling event types being available in a future release.

**Add Filter(s)**

**Note:** Filters are only available if you selected one mail object type. At this time, you cannot add a filter to a data delegation request if you selected **All** for **Mail Object Type**.

In this area, you may add filters to limit the data to which you want visibility. To add a filter:

1. Click **Add Filter**. The filter section appears.
2. From the first drop-down menu, select the field on which to filter.
   **Note:** The fields available depend on the mail object type selected.
3. From the second drop-down menu, select a filter operator (e.g., equal to) to define when the filter is applied.
   **Note:**
   - The available filter operators depend on the field selected to filter on.
   - To do a partial search, use the **Contains**, **Begins With**, **Ends With**, or **Does Not Contain** operators.
• The **Between** operator is inclusive. For example, if you select this operator for *Scan DateTime* and enter 03/01/2018 and 04/01/2018 as your field values, the search will include results where the *Scan DateTime* is 03/01/2018 or 04/01/2018.

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

![Filter Interface](image)

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

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

![Filter Interface](image)

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

![Filter Interface](image)

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

**SELECT DATA FIELDS**

**Note:**

• You may only select data fields if you selected one mail object type. If you selected **All** for **Mail Object Type**, all available data fields for all mail object types are included in the data delegation request.

• You can drag to reorder data fields in this section; however, the order of data fields in a data delegation request has no impact on your visibility or the way those data fields will display in results for a one-time query or data feed. For a one-time query or data feed, you select the display order of fields when creating the query or feed.

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

• When a handling event record contains multiple instances of the same data attribute, only the main data attribute is available for selection (e.g., IMb). When viewing data online, multiple instances for an attribute are grouped in the same field under the name of the main data attribute (e.g., IMb). When creating a delimited file for download, each instance would be reported in a separate field (e.g., IMb, IMb_1, IMb_2, and so on).
In this area, select the data fields for which you would like visibility. The available data fields vary based on the selected mail object type. By default, all data fields for the selected mail object type are selected.

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

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

**CHOOSE EFFECTIVE DATE RANGE**

Choose the date range by typing in the **From** and **To** fields OR clicking the calendar icons and selecting the dates. This is the date range for the data delegation rule to be active.

**Note:**

- By default, the **From** date is set as today’s date. However, you may select any date in the future.
- If you select today’s date as the **From** date but the delegation request is not approved until a later date, the approval date becomes the **From** date. Data delegation does not provide visibility until it is approved. For example, if you submit the request on 4/19/2017 with that date selected as the **From** date and the request is approved on 4/26/2017, your visibility of the delegated data begins on 4/26/2017.
- You may leave the **To** date blank for no end date.
- The Delegating Company can change the effective date range.

**GO TO NEXT STEP**

When you are finished on this screen, click **Next Step**.
9.1.1.3 Select Recipient(s)

On this screen, select the CRID(s) or MID(s) which you want to receive visibility of the delegated data. You may do this two ways. The following sections provide instructions for each option:

- **Option 1:** Select CRID(s) and then select MID(s) belonging to the CRID(s)
- **Option 2:** Search for and add MID(s) directly

---

**OPTION 1: SELECT CRID(S), THEN MID(S)**

By default, the **Select CRID(s)** section displays the CRIDs for which you have the ability to request data delegation.

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

---

![Select CRID(s) interface](image1)

![Add MID(s) interface](image2)
To select a **single** CRID, hover on the CRID number and click **Show MIDs**.

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

The selected CRID(s) and the MID(s) belonging to the CRID(s) appear in the **Add MID(s)** section.
From the **Add MID(s)** section, to add a *single* MID, hover on the MID number and click **Add MID**.

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

**Important:** Selecting a single MID creates a MID-level delegation request, while selecting **Add All** creates a CRID-level delegation request. A CRID-level delegation request would provide visibility to all MIDs belonging to the CRID now or added to that CRID in the future.

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

**Important:** This creates a CRID-level delegation request for each CRID. A CRID-level delegation request would provide visibility to all MIDs belonging to the CRID now or added to that CRID in the future.
The selected MID or MIDs appear in the **Your selected CRIDs and MIDs** section.

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

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

When you are finished, continue to submit the request.

**OPTION 2: DIRECTLY ADD MID(s)**

By default, the **Add MID(s)** section does **not** display all of the MIDs belonging to the CRIDs for which you have the ability to request data delegation.

To search for a MID, type three or more characters from the MID number into the search box and click the search button or press **Enter**. MIDs belonging to a CRID for which you have the ability to request data delegation appear based on the search criteria.

**Note:** The CRID number appears above the MID number(s), to the right of the company name.
To add a *single* MID, hover on the MID number and click **Add MID**.

![Add MID interface](image)

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

**Important:** Selecting a single MID creates a MID-level delegation request, while selecting **Add All** creates a CRID-level delegation request. A CRID-level delegation request would provide visibility to all MIDs belonging to the CRID now or added to that CRID in the future.

![Add All interface](image)

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

**Important:** This creates a CRID-level delegation request for each CRID. A CRID-level delegation request would provide visibility to all MIDs belonging to the CRID now or added to that CRID in the future.

![Add All MIDs interface](image)
The selected MID or MIDs appear in the Your selected CRIDs and MIDs section.

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

Repeat the steps above to add additional MIDs as desired.

When you are finished, continue to submit the request.
9.1.1.4 Submit Request

When you are ready to submit the data delegation request, click **Submit**.

A window appears for you to review your selections. To make any changes, click **Edit** in the appropriate section.

When finished, click **Confirm**. A window appears informing you that the data delegation requested was submitted successfully.

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

For details about viewing or canceling a pending delegation request, see Section 9.1.2: **Request History**.
9.1.2 Request History

**Important:** Only an IV-MTR BSA, BSA Delegate, or Data Delegation Manager can cancel a pending request for his or her CRID to receive visibility from another CRID or MID.

The **Request History** section of this tab displays the requests that have been submitted for your CRID(s) to receive visibility.

<table>
<thead>
<tr>
<th>RECEIVING CRID</th>
<th>RECEIVING COMPANY</th>
<th>RECEIVING MID</th>
<th>MAIL OBJECT TYPE</th>
<th>REQUEST DATE</th>
<th>DELEGATING CRID</th>
<th>DELEGATING COMPANY</th>
<th>DELEGATING MID</th>
<th>REQUEST FOR</th>
<th>EFFECTIVE FOR</th>
<th>STATUS</th>
<th>DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>20769396</td>
<td>XYZ COMPANY</td>
<td>ALL</td>
<td>Container</td>
<td>02/10/2017</td>
<td>20184217</td>
<td>CENTRAL COMPANY</td>
<td>ALL</td>
<td>Request</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20769396</td>
<td>XYZ COMPANY</td>
<td>ALL</td>
<td>Container</td>
<td>02/10/2017</td>
<td>20184217</td>
<td>GO</td>
<td>ALL</td>
<td>Request</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20769396</td>
<td>XYZ COMPANY</td>
<td>ALL</td>
<td>Bundle</td>
<td>02/10/2017</td>
<td>20184217</td>
<td>GO</td>
<td>ALL</td>
<td>Request</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20769396</td>
<td>XYZ COMPANY</td>
<td>ALL</td>
<td>Place</td>
<td>02/10/2017</td>
<td>20184217</td>
<td>XYZ COMPANY</td>
<td>ALL</td>
<td>Request</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20769396</td>
<td>XYZ COMPANY</td>
<td>ALL</td>
<td>Place</td>
<td>02/10/2017</td>
<td>20184217</td>
<td>XYZ COMPANY</td>
<td>ALL</td>
<td>Request</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20769396</td>
<td>XYZ COMPANY</td>
<td>ALL</td>
<td>Handling Unit</td>
<td>02/10/2017</td>
<td>20184217</td>
<td>GO</td>
<td>ALL</td>
<td>Request</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In this section:

- Search within the list by entering a CRID or MID in the search box (as you enter text, the list filters to display those matching your entry).
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To view additional information for a request, click the details icon in the **Details** column for that request. The Details window opens and displays the entities, mail object and handling event type(s), filters, data fields, and effective date range for the request.
In this window:

- To print the window, click **Print**.
- To export the window as a PDF document, click **Export**.
- To close the window, click **Close** OR click the **X** icon.

To cancel a pending delegation request:

**Important:** Only an IV-MTR BSA, BSA Delegate, or Data Delegation Manager can cancel a pending request for his or her CRID to receive visibility from another CRID or MID.

1. Click the delete 🗑️ icon in the **Details** column for that request. A confirmation window appears.

   ![Confirmation Window](image)

2. To delete the data delegation request, click **Delete**.

   ![Delete Confirmation](image)

3. A window appears informing you that the data delegation request has been cancelled. To close the window, click **OK** OR click the **X** icon.

   ![Success Window](image)

**Note:** Users of the Receiving CRID(s) can also cancel a pending request from the **Data Delegation Requests Pending Approval for My CRID** message, which is displayed on the **Queries & Feeds** tab. For more information, see Section 9.1.3: *Data Delegation Requests Pending Approval for My CRID*. 
9.1.3 Data Delegation Requests Pending Approval for My CRID

**Important:** Only an IV-MTR BSA, BSA Delegate, or Data Delegation Manager can cancel a pending request for his or her CRID to receive visibility from another CRID or MID.

While a request for your CRID or MID to receive visibility is pending approval, a message in the upper-right corner of the **Queries & Feeds** tab indicates how many requests are pending approval.

![Data Delegation Requests Pending Approval for My CRID]

**Note:** This message appears to any users who have the IV-MTR service for the Receiving CRID(s) in the delegation request.

For additional information, click the message. A window appears and displays information about pending requests, including the Delegating CRID and MID, mail object type, and request date.

![Data Delegation Requests Pending Approval for My CRID]

In this window:

- For additional information about a request, click **Detail** in the **Details** column.
  - The Details window opens and provides additional details for the request.
  - To close the window, click **Close** OR click the **X** icon in the upper-right corner.
- To cancel a request, click the **X** icon to the left of the Delegating CRID. When the confirmation pop-up appears, click Yes.
- To close this window, click **Close** OR click the **X** icon in the upper-right corner.
9.2 Manage Data Delegation

**Important:**
- Only an IV-MTR BSA, BSA Delegate, or Data Delegation Manager can access this tab.
- Data delegation rules only provide mail tracking visibility from the time they are created or go into effect. Delegation rules do **not** provide visibility of mail tracking handling events that occurred prior to the delegation’s creation or effective date. For example, if a data delegation request was created on 12/1/2017, the Receiving party would not have visibility of the Delegating party’s handling events from 11/15/2017.

On this tab, you can view, approve, and deny requests to provide visibility to another CRID or MID; view the history of such requests; and modify or delete an existing rule to provide visibility to another CRID or MID.

If there are pending requests, the **Manage Data Delegation** tab icon shows the number pending.

9.2.1 Data Delegation Requests Pending Approval

The **Data Delegation Requests Pending Approval** section of the tab displays pending delegation requests, grouped by Receiving CRID.

In this section:
- Search within the list by entering a CRID or MID in the search box (as you enter text, the list filters to display those matching your entry).
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
To see the individual requests for a Receiving CRID and view additional details about the requests, click the + icon to the left of the Receiving CRID number.

The following sections provide instructions for approving or denying a request.

#### 9.2.1.1 Approve Data Delegation Request(s)

If there are multiple requests from one Receiving CRID, you can approve them all at once or approve each individual request.

**Important:**
- If you approve all requests for one Receiving CRID at once, you approve the requests *exactly as submitted*. If you wish to modify a request, you must review and approve it individually.
- If you wish to modify one of the requests but not the others, review and approve the one request individually. Then, you can approve the remaining requests for the Receiving CRID together.

To approve all requests for one Receiving CRID:
1. On the top row of the grouped requests for one Receiving CRID, click the green checkmark icon in the **Action** column. A window appears.
2. Review the warning that approving the requests as a group means you are approving them exactly as submitted.

3. If you wish to approve the requests as a group, click **Approve**. Data delegation rules are created providing visibility to the Receiving CRID as approved.

   If you wish to approve the requests individually, click **Cancel** or click the X icon.

To approve an individual request:

1. On the row for the request you wish to approve, click the green checkmark icon in the **Action** column. A window appears for you to define the data of which the user will have visibility.
2. In the window, make any necessary changes. You can change the mail object type, handling event type(s), add filters, select data fields, and choose the effective date range.

**Note:**
- For detailed information about the data fields available, see the *IV-MTR External Facing Data Dictionary*.
- For information about using a saved filter or view to approve data delegation, see Section 12: *Notifications*.

3. Click **Approve**. A data delegation rule is created providing visibility to the Receiving CRID as approved.
9.2.1.2 Deny Data Delegation Request(s)

If there are multiple requests from one Receiving CRID, you can deny them all at once or deny each individual request.

To deny all requests for one Receiving CRID:

1. On the top row of the grouped requests for one Receiving CRID, click the red X icon in the **Action** column. A window appears.

   ![Data Delegation Requests Pending Approval](image)

2. In the window, select one or more reasons for the denial.

   ![Deny Delegation](image)

3. Click **Submit**. Data delegation rules are not created, and the pending requests are removed from this screen.
To deny an individual request:

1. On the row for the request you wish to deny, click the red X icon in the Action column. A window appears.

2. In the window, select one or more reasons for the denial.

3. Click Submit.

9.2.2 Data Delegation Authorization History

The Data Delegation Authorization History section of this tab displays the status of data delegation rules where visibility for your CRID’s data is provided to another CRID or MID. You can view additional information about a data delegation request or rule, modify an existing data delegation rule, and delete an existing data delegation rule.
In this section:

- Search within the list by entering a CRID or MID in the search box (as you enter text, the list filters to display those matching your entry).

- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.

- To export the authorization history table, click the export icon. A pop-up window appears. Select CSV, XLSX, or XLS, and then click Export.

- To view additional information for an approved request, click the details icon in the Details column for that request or rule. The Details window opens and displays the entities, mail object and handling event type(s), filters, data fields, and effective date range for the request.

In the window:

- To print the window, click Print.

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

- To close the window, click Close OR click the X icon.
9.2.2.1 Modify an Existing Data Delegation Rule

To modify an existing data delegation rule:

1. Click the modify icon in the Details column for the rule. The Modify Delegation window opens.

2. In the window, make any necessary changes. You can change the handling event type(s), add filters, select data fields, and choose the effective date range.
   
   **Note:** For information about using a saved filter or view to modify data delegation, see Section 12: Notifications.

3. When finished, click **Update Delegation**. A window appears informing you that the data delegation rule has been updated.

4. To close the window, click **OK** OR click the **X** icon.
9.2.2.2 Delete an Existing Data Delegation Rule

To delete an existing data delegation rule:

1. Click the modify icon in the Details column for the rule. The Modify Delegation window opens.
2. At the bottom of the window, click Delete Delegation. A window appears.

3. In the window, select one or more reasons for deleting the rule.

4. Click Delete. A window appears confirming the delegation was successfully deleted.

5. To close the window, click OK OR click the X icon.
9.3 Delegate Data to Others

Important:
- Only an IV-MTR BSA, BSA Delegate, or Data Delegation Manager can access this tab.
- Data delegation rules only provide mail tracking visibility from the time they are created or go into effect. Delegation rules do not provide visibility of mail tracking handling events that occurred prior to the delegation’s creation or effective date. For example, if a data delegation request was created on 12/1/2017, the Receiving party would not have visibility of the Delegating party’s handling events from 11/15/2017.

On this tab, you can create a data delegation rule to provide visibility of your CRID to another CRID or MID. (Alternatively, the Receiving CRID could submit a request to receive visibility, as explained in Section 9.1.1: Request Data Delegation. The Delegating CRID would then approve the request, as explained in Section 9.2.1: Data Delegation Requests Pending Approval.)

The general steps for creating a data delegation rule to provide visibility of your CRID or MID to another CRID or MID are as follows:

1. In the Select Entity(s) section of the page, select the CRID(s) or MID(s) to provide visibility of.
2. When finished, click Next Step.
3. On the Define Filters & Fields screen, select the mail object type(s) and handling event type(s) for which to provide visibility. You may also set filters and select data fields (if applicable).
4. When finished, click Next Step.
5. On the Select Recipient(s) screen, search for and add the CRID(s) or MID(s) who should receive visibility.
6. When finished, click Submit Request.
7. Review your selections, and click Confirm. The data delegation rule is created.

See the following sections for additional information. For information about using a saved filter or view to delegate data to others, see Section 12: Notifications.

9.3.1 Select Entity(s)

On this screen, select the CRID(s) or MID(s) whose data you want to provide visibility of. You may do this two ways. The following sections provide instructions for each option:

- **Option 1**: Select CRID(s) and then select MID(s) belonging to the CRID(s)
- **Option 2**: Search for and add MID(s) directly
9.3.1.1 Option 1: Select CRID(s), then MID(s)

By default, the Select CRID(s) section displays the CRIDs for which you have the ability to creation a delegation rule.

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

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

To select all CRIDs, click Add All CRIDs.
The selected CRID(s) and the MID(s) belonging to the CRID(s) appear in the Add MID(s) section.

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

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

**Important:** Selecting a single MID creates a MID-level delegation rule, while selecting Add All creates a CRID-level delegation rule. A CRID-level delegation rule provides visibility from all MIDs belonging to the CRID now or added to that CRID in the future.
To add all of the MIDs for all of the CRIDs, click **Add All MIDs** at the top of the list.

**Important:** This creates a CRID-level delegation rule for each CRID. A CRID-level delegation rule provides visibility from all MIDs belonging to the CRID now or added to that CRID in the future.

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

**Note:**

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

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

When you are finished, click **Next Step**.
9.3.1.2 Option 2: Directly Add MID(s)

By default, the Add MID(s) section does not display all of the MIDs belonging to the CRIDs for which you have the ability to create a delegation rule.

To search for a MID, type three or more characters from the MID number into the search box and click the search button or press Enter. MIDs belonging to a CRID for which you have the ability to create a delegation rule appear based on the search criteria.

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

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

**Important:** Selecting a single MID creates a MID-level delegation rule, while selecting **Add All** creates a CRID-level delegation rule. A CRID-level delegation rule provides visibility of all MIDs belonging to the CRID now or added to that CRID in the future.

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

**Important:** This creates a CRID-level delegation rule for each CRID. A CRID-level delegation rule provides visibility from all MIDs belonging to the CRID now or added to that CRID in the future.
The selected MID or MIDs appear in the **Your selected CRIDs and MIDs** section.

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

Repeat the steps above to add additional MIDs as desired.
When you are finished, click **Next Step**.
9.3.2 Define Filters & Fields

The Define Filters & Fields screen has additional options for you to customize the delegation rule. The following table describes the functions of each area of the screen.

![Define Filters & Fields Screen](image)

<table>
<thead>
<tr>
<th>Screen Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>View the CRID(s) or MID(s) selected for the delegation rule</td>
</tr>
<tr>
<td>B</td>
<td>Select the mail object type and handling event type(s) to provide visibility of</td>
</tr>
</tbody>
</table>
| C           | Add filters to refine the delegation rule (optional)  
**Note:** Filters are not available if "All" is selected for Mail Object Type. |
| D           | Select the data fields to provide visibility of  
**Note:** If "All" is selected for Mail Object Type, all available data fields for all mail object types are included in the delegation rule. |
| E           | Choose the date range for the delegation to be active |
| F           | Click **Next Step** to go to the **Select Recipient(s)** screen |

For additional information about the options on this screen, see the following sections.
9.3.2.1 View Selected Entity(s)
This area displays the CRID(s) or MID(s) of which you are providing visibility.

9.3.2.2 Select Mail Object and Handling Event Type(s)

**Important:** At this time, you can only select one mail object type OR select All to include all four mail object types. To provide visibility of more than one mail object type *but not all mail object types*, you must create a separate data delegation rule for each additional mail object type.

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

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

**Note:** Selecting All includes all four mail object types.

![Mail Object Type dropdown menu](image)

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

**Note:** Logical, assumed actual, and assumed logical handling events may not be available at this time for all mail object types. However, you may provide visibility now in anticipation of all handling event types being available for all mail object types in a future release.

![Handling Event Type selection](image)

9.3.2.3 Add Filter(s)

**Note:** Filters are only available if you selected one mail object type. At this time, you cannot add a filter to a data delegation rule if you selected All for **Mail Object Type**.

In this area, you may add filters to limit the data for which you are providing visibility. To add a filter:

1. Click **Add Filter**. The filter section appears.
2. From the first drop-down menu, select the field on which to filter.
   
   **Note:** The fields available depend on the mail object type selected.
3. From the second drop-down menu, select a filter operator (e.g., equal to) to define when the filter is applied.
   
   **Note:**
   
   - The available filter operators depend on the field selected to filter on.
   - To do a partial search, use the **Contains**, **Begins With**, **Ends With**, or **Does Not Contain** operators.
• The **Between** operator is inclusive. For example, if you select this operator for *Scan DateTime* and enter 03/01/2018 and 04/01/2018 as your field values, the search will include results where the *Scan DateTime* is 03/01/2018 or 04/01/2018.

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

   ![Filter UI](image)

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

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

   ![Add Condition](image)

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

   ![Remove](image)

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

### 9.3.2.4 Select Data Fields

**Note:**

• You may only select data fields if you selected one mail object type. If you selected **All** for *Mail Object Type*, all available data fields for all mail object types are included in the data delegation rule.

• You can drag to reorder data fields in this section; however, the order of data fields in a data delegation rule has no impact on visibility or the way those data fields will display in results for a one-time query or data feed. For a one-time query or data feed, the display order of fields is selected when creating the query or feed.

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

• When a handling event record contains multiple instances of the same data attribute, only the main data attribute is available for selection (e.g., IMb). When viewing data online, multiple instances for an attribute are grouped in the same field under the name of the main data attribute (e.g., IMb). When creating a delimited file for download, each instance would be reported in a separate field (e.g., IMb, IMb_1, IMb_2, and so on).
In this area, select the data fields for which you would like to provide visibility. The available data fields vary based on the selected mail object type. By default, all data fields for the selected mail object type are selected.

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

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

9.3.2.5 Choose Effective Date Range

Choose the date range by typing in the From and To fields OR clicking the calendar icons and selecting the dates. This is the date range for the data delegation rule to be active.

Note:
- By default, the From date is set as today's date. However, you may select any date in the future.
- You may leave the To date blank for no end date.

9.3.2.6 Go to Next Step

When you are finished on this screen, click Next Step.

9.3.3 Select Recipient(s)

On this screen, search for and add the CRID(s) or MID(s) which you want to receive visibility of the delegated data. You may do this two ways. The following sections provide instructions for each option:
- Option 1: Search for CRID(s) and then select MID(s) belonging to the CRID(s)
- Option 2: Search for and add MID(s) directly
9.3.3.1 Option 1: Search for CRID(s), then Add MID(s)

To search for a CRID, type three or more characters from the CRID number into the search box and click the search button or press Enter. CRIDs appear based on the search criteria.

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

The selected CRID(s) and the MID(s) belonging to the CRID(s) appear in the Add MID(s) section.
From the **Add MID(s)** section, to add a *single* MID, hover on the MID number and click **Add MID**.

![Add MID(s) section](image)

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

**Important:** Selecting a single MID creates a MID-level delegation rule, while selecting **Add All** creates a CRID-level delegation rule. A CRID-level delegation rule provides visibility to any MIDs belonging to the CRID now or added to that CRID in the future.

![Add All button](image)

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

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

![Selected CRIDs and MIDs](image)

Repeat the steps above to add additional CRIDs or MIDs as desired.
When you are finished, continue to submit the form to create the delegation rule.

**9.3.3.2 Option 2: Directly Add MID(s)**

To search for a MID, type three or more characters from the MID number into the search box and click the search button or press **Enter**. MIDs appear based on the search criteria.

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

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

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

**Important:** Selecting a single MID creates a MID-level delegation rule, while selecting **Add All** creates a CRID-level delegation rule. A CRID-level delegation rule provides visibility to any MIDs belonging to the CRID now or added to that CRID in the future.
The selected MID or MIDs appear in the **Your selected CRIDs and MIDs** section.

**Note:**

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

Repeat the steps above to add additional MIDs as desired.

When you are finished, continue to submit the form to create the delegation rule.
9.3.4 Submit

When you are ready to create the data delegation rule, click Submit.

A window appears for you to review your selections. To make any changes, click Edit in the appropriate section.

When finished, click Confirm. A window appears informing you that the data delegation rule has been created.

To close the window, click OK OR click the X icon.
9.4 Data Delegated to My CRID

Important:
- Only an IV-MTR BSA, BSA Delegate, or Data Delegation Manager can delete an existing data delegation rule on this tab.
- Data delegation rules only provide mail tracking visibility from the time they are created or go into effect. Delegation rules do not provide visibility of mail tracking handling events that occurred prior to the delegation’s creation or effective date. For example, if a data delegation request was created on 12/1/2017, the Receiving party would not have visibility of the Delegating party’s handling events from 11/15/2017.

On this tab, you are able to see active data delegation rules providing your CRID or MID with visibility of another CRID or MID. If you are an IV-MTR BSA, BSA Delegate, or Data Delegation Manager, you can also delete an existing data delegation rule so your CRID or MID no longer has visibility of a particular Delegated CRID or MID.

On this tab:
- Search within the list by entering a CRID or MID in the search box (as you enter text, the list filters to display those matching your entry).
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To export the delegation table, click the export icon. A pop-up window appears. Select CSV, XLSX, or XLS, and then click Export.
To view additional information for a rule, click the details icon in the Details column for that rule. The Details window opens and displays the entities, mail object and handling event type(s), filters, data fields, and effective date range for the rule.

In the window:
- To print the window, click Print.
- To export the window as a PDF document, click Export.
- To close the window, click Close OR click the X icon.

To delete an existing data delegation rule:

1. Click the delete icon in the Details column for the rule. A window appears informing you that you will not be able to view data for the Delegated CRID or MID after removing the delegation rule.
2. To delete the data delegation rule, click Delete.
3. A window appears informing you that the data delegation rule has been deleted.

4. To close the window, click **OK** OR click the **X** icon.
10 Address Book

In the address book, you can save server locations and people’s contact information for use within the application. To access these functions, click Address Book in the top navigation bar.

![Address Book screenshot]

Address book entries “belong to” a CRID and are shared by that CRID’s users. When an address book entry belongs to a CRID, certain users for that CRID are able to modify or delete the entry. In the application, you can see address book entries belonging to CRIDs for which you have the IV-MTR service. However, you cannot see address book entries belonging to other CRIDs, even if those CRIDs have delegated visibility to your CRID. For example:

- If a user only has the IV-MTR service for CRID A, the user can only see address book entries belonging to CRID A.
- If CRID B delegated visibility to CRID A, the CRID A user would not see any address book entries created by CRID B.

See the following sections for additional information about viewing and managing the address book.

10.1 View and Add Servers

To view and manage server locations, click the Servers tab. The application supports SFTP servers, HTTPS Mail.xml web services, and HTTPS JSON web services.

**Note:** Each address book entry belongs to a CRID and is shared by that CRID’s users. Throughout the application, you see server and contact address book entries belonging to CRIDs for which you have the IV-MTR service.
10.1.1 Your Servers

The Servers table on the right side of the page displays the servers and web services already in your CRID address book(s).

In this table:

- Search by entering text in the search box (as you enter text, the servers filter to display those matching your entry).
- To see additional information for an entry, click the + icon to the left of the server name.
- To modify an entry, click the modify icon. (Note: Only an IV-MTR BSA, BSA Delegate, or Address Book Manager can modify an entry.)
- To delete an entry, click the delete icon. (Note: Only an IV-MTR BSA, BSA Delegate, or Address Book Manager can modify an entry.)
- To view the change history for an entry, click the view change history icon.
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.

Important: If you remove a server that is receiving data for a data feed, that feed will no longer send data to the server. To continue receiving data, modify the data feed to use a different server.

10.1.2 Add New Server

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

To add a new server, complete the Add New Server section on the left side of the page:

1. From the Protocol Type drop-down menu, select SFTP, HTTPS Mail.xml, or HTTPS JSON. The remaining fields change based on this selection. See the following sections for additional information for each protocol type.
2. From the CRIDs drop-down menu, select the CRID(s) whose address book(s) you want to add the server to.
3. Complete the remaining fields.

4. When you are finished, click Add to Address Book. The server or web service is added to the address book(s) for the selected CRID(s) and appears under the Your Addresses section on the right side of the page.

10.1.2.1 Secure FTP (SFTP) Server

**Important:** If you would like to use SFTP to receive data from IV-MTR, you must add the application-specific IP addresses to your server firewall to ensure your system can receive data from the application’s servers. Please contact the IV-MTR Help Desk to receive the IP addresses to be added.

If you chose SFTP as the protocol type, the fields change to reflect this selection. Complete the fields. When you are finished, click Add to Address Book.

**Note:**

- The **Host Address** may be entered as an IP address or URL.
- By default, **Port** is set to 22, which is the application’s standard for SFTP. If you enter a number other than 22, you are prompted to contact the IV-MTR Help Desk to request use of a non-standard port. For additional information, see Section 10.1.3.1: **Non-Standard Port**.
- With the SFTP protocol, you can choose to have the application send files to a USPS-provided server, from which you can then pull the files. To use this method, select **Use USPS Provided Server**. For additional information about using this method, see Section 10.1.3.2: **USPS-Provided Server**.
- The **Primary Contact** field is required so the Application Team has a point of contact if there is a problem communicating with the server. Select a contact from the drop-down list. **Note:** If the selected contact does not have a phone number, you will be prompted to enter one.

To add a contact, click **Add a contact** to open a window where you can add the contact without leaving the page OR click **Go to address book** to leave the page to manage your contacts.

![Add New Server](image)

After completing all of the fields, you can send a test message from the application to the server by doing the following:

1. Click **Test Server Connection**.
2. A message displays confirming if the test was successful or not.

![Test Server Connection](image)

If the test is not successful, you can modify the settings for the server and retest or contact the IV-MTR Help Desk for additional assistance.

![Warning](image)
**10.1.2.2 HTTPS Mail.xml Web Service**

**Important:**
- To use Mail.XML push or pull messages to obtain mail tracking data, you must download and install the appropriate Web Services Description Language (WSDL) file. A WSDL file automates the details involved in communication between applications for using Mail.XML messages.
- The WSDL files are available on the IV-MTR PostalPro page. The appropriate WSDL file to use depends on whether you are using push or pull messages, and for push messages, the version of Mail.XML used. You must install the appropriate WSDL file(s) to be able to receive data from the application.
- To use Mail.XML pull messages to obtain mail tracking data, you must also download and install the IV-MTR Secure Sockets Layer (SSL) certificate. The SSL certificate enables secure communication to the IV-MTR web application. The SSL certificate is available on the IV-MTR PostalPro page. You must install the certificate to be able to receive data from the application.
- For additional information, see the **IV-MTR Mail.XML Guide**.

If you chose HTTPS Mail.xml as the protocol type, the fields change to reflect this selection. Complete the fields. When you are finished, click **Add to Address Book**.

After completing all of the fields, you can send a test message from the application to the web service by doing the following:

1. Click **Test Server Connection**. A window opens.
2. From the **Message Type** drop-down menu, select which message type to use for the test message.
3. From the **Message Version** drop-down menu, select the Mail.XML version that the application should send the test message in.
   - **Note:** IV-MTR supports Mail.XML versions 12.0A, 12.0B, 14.0A, and 16.0.
4. Click **Test Server Connection**.
5. If the test is successful, a message displays confirming the test was successful. To close the window, click OK, click Cancel, OR click the X icon.

If the test is not successful, a warning message appears. To close the window, click OK, click Cancel, OR click the X icon. Modify the settings for the web service and retest or contact the IV-MTR Help Desk for additional assistance.

10.1.2.3 HTTPS JSON Web Service

If you chose HTTPS JSON as the protocol type, the fields change to reflect this selection. Complete the fields. When you are finished, click Add to Address Book.

After completing all of the fields, you can send a test message from the application to the web service by doing the following:

3. Click Test Server Connection.

4. A message displays confirming if the test was successful or not.
If the test is not successful, you can modify the settings for the web service and retest or contact the IV-MTR Help Desk for additional assistance.

10.1.3 Special SFTP Scenarios

**Important:** If you would like to use SFTP to receive data from the application, you must add the application-specific IP addresses to your server firewall to ensure your system can receive data from the application’s servers. Please contact the IV-MTR Help Desk to receive the IP addresses to be added.

Use of a non-standard port for an SFTP server and use of the USPS-provided server are special scenarios. Additional information about these special scenarios is provided in the following sections.

10.1.3.1 Non-Standard Port

The application’s standard port is 22 for SFTP. If you enter a non-standard port number in the Port field, you are prompted to contact the IV-MTR Help Desk to request use of a non-standard port.

When you contact the IV-MTR Help Desk, provide the following information:

- Server host address (if provided as a URL, provide all IP addresses the URL could resolve to)
- Port number requested to be used
- Company name
- Technical POC name (someone who can discuss connectivity, network, and other technical information about the server)
- Technical POC contact information
  - Address, city, state, ZIP
  - Phone number
  - Email address

The IV-MTR Help Desk will collect this information and submit a request for use of a non-standard port. Please allow up to 21 days for the desired port to be opened. The application will not send mail tracking data to the server until the request is approved and the port configured.

While the request is pending approval, a warning icon appears next to that server name throughout the application. Hover on the icon to display the reason for the warning.
The IV-MTR Help Desk will let you know when the request has been approved or rejected.

- If approved, the warning icon no longer displays next to the server name throughout the application.
- If rejected, a red icon displays next to the server name. Hover on the icon to display the reason.

If your request is rejected, you can use the standard port OR enter another non-standard port and contact the IV-MTR Help Desk to submit a request for approval to use that port.

Note:

- If your request is approved, any other existing servers with the same Host Address and Port combination are also approved. Any new servers added with the same Host Address and Port combination are automatically approved.
- If your request is rejected, any other existing servers with the same Host Address and Port combination are also rejected. However, any new servers added with the same Host Address and Port combination are not automatically rejected.

10.1.3.2 USPS-Provided Server

With the SFTP protocol, you can choose to have the application send files to a USPS-provided server, from which you can then pull the files. To use this method, you must 1) work with the IV-MTR Help Desk to receive an account to use this server and 2) add the USPS-provided server to your application address book.

First, contact the IV-MTR Help Desk to request an account for the USPS-provided server. You will need to provide the following information:

- IP addresses that will be used to pull files from the USPS-provided server
- Company name
- Technical POC name (someone who can discuss connectivity, network, and other technical information)
- Technical POC contact information
  - Address, city, state, ZIP
  - Phone number
  - Email address

The IV-MTR Help Desk will collect this information and submit a request for your company to use the USPS-provided server. Please allow up to 21 days for account setup.

When account setup is complete, USPS Data Transfer Services (DTS) Operations will provide the technical POC with the account username via email and the password via phone. Once you have this information, add the server to your address book with the provided account credentials.

To add the USPS-provided server as a new entry in your address book:

1. Go to Address Book > Servers > Add New Server.
2. From the Protocol Type drop-down menu, select SFTP.
3. From the CRIDs drop-down menu, select the CRID(s) to whose address book you want to add the server.
4. Select **Use USPS Provided Server**.

5. In the **Host Description** field, add a name to identify this server in your address book.

6. In the **Host User Name** and **Host Password** fields, enter the server credentials provided by USPS DTS Operations.

7. Select a contact from the **Primary Contact** drop-down menu.
   
   **Note:** This field is required so the Application Team has a point of contact if there is a problem communicating with the server. If the selected contact does not have a phone number, you will be prompted to enter one. To add a contact, click **Add a contact** to open a window where you can add the contact without leaving the page OR click **Go to address book** to leave the page to manage your contacts.

8. When you are finished, click **Add to Address Book**. A pop-up window appears informing you the credentials are being validated.

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

The server is added to the address book(s) for the selected CRID(s) and appears under the **Your Addresses** section on the right side of the page.

A warning icon will appear next to the server name throughout the application until the credentials have been validated. Hovering on the icon displays a message indicating the reason for the warning. Once the credentials are validated, the warning icon is removed.

**Note:**

- If the warning icon hover-over displays "Invalid username/password combination", verify that the account credentials are correctly entered in the address book. If all appears correct but the message persists, contact the IV-MTR Help Desk for assistance.
- If the warning icon hover-over displays "The server could not be validated", contact the IV-MTR Help Desk for assistance.
- You cannot use the USPS-provided server for data provisioning until 1) your account is created, 2) you have added the server to your address book with the provided account credentials, and 3) the application has validated successful connection to the server.
• You may add the server to your address book before these requirements are satisfied. However, the warning icon will appear next to the server name throughout the application until the credentials have been added and validated.

• USPS does not impose any file size constraints on the USPS-provided server.

• The retention time for files on the USPS-provided server is 30 days.

• USPS-provided server users can read/write/delete/create both files and folders on the server but only under their home directory. If a user drops files on the server, they will not be picked up by USPS. Folder creation is governed by UNIX naming conventions. Special characters and white space (e.g., spaces, tabs, #, &, /, |, $) are not allowed.

10.2 View and Add Contacts

To view and manage contact information for people, click the Contacts tab.

Note: Each address book entry belongs to a CRID and is shared by that CRID’s users. Throughout the application, you see server and contact address book entries belonging to CRIDs for which you have the IV-MTR service.

10.2.1 Contacts

The Contacts table on the right side of the page displays the people already in your CRID address book(s).

![Contacts Table]

In this table:

• Search by entering text in the search box (as you enter text, the contacts filter to display those matching your entry).

• To see additional information for a contact, click the + icon to the left of the contact’s name.

• To modify an entry, click the modify icon. (Note: Only an IV-MTR BSA, BSA Delegate, or Address Book Manager can modify an entry.)

• To delete an entry, click the delete icon. (Note: Only an IV-MTR BSA, BSA Delegate, or Address Book Manager can modify an entry.)

Note: You cannot delete a contact who is designated as the Primary Contact for a server. You must select a new Primary Contact for the server before deleting the contact.
To view the change history for an entry, click the view change history icon.

Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.

10.2.2 Add New Contact

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

To add a new contact, complete the Add New Contact section on the left side of the page:

1. From the CRIDs drop-down menu, select the CRID(s) to whose address book(s) you want to add the contact.
2. Complete the remaining fields.
3. When you are finished, click Add to Address Book. The contact is added to the address book(s) for the selected CRID(s) and appears under the Contacts section on the right side of the page.
11 Roles and Permissions

**Important:** Only an IV-MTR BSA, BSA Delegate, or Roles and Permissions Manager can see and access this area of the application.

Within the IV-MTR application, users can be assigned roles and permissions. Roles provide application functionality to a user, while permissions provide data visibility to particular CRIDs, MIDs, or routing codes.

To access these functions, click **Roles & Permissions** in the top navigation bar. See the following sections for additional information about roles and permissions.

![Roles & Permissions in IV-MTR](image)

**11.1 Roles & Permissions vs. Data Delegation**

IV-MTR also provides data delegation functionality, which is different from roles and permissions management. Data delegation is used to share data between CRIDs—to provide visibility of a CRID or MID’s data to another CRID or MID’s users. Data delegation enables visibility to be shared between a company’s own CRIDs or MIDs or between CRIDs or MIDs belonging to different companies. However, roles and permissions management is used to manage individual user visibility within a particular CRID.

The table below provides example scenarios for when you would use data delegation versus roles and permissions management. For additional information about data delegation, see Section 9: **Data Delegation**.

<table>
<thead>
<tr>
<th><strong>Data Delegation</strong></th>
<th><strong>Roles &amp; Permissions</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer wants to delegate visibility of a MID to a third-party service provider</td>
<td>Company wants to assign a role to a user to allow that user to perform certain functions within the application for the company’s CRID</td>
</tr>
<tr>
<td>Company with more than one CRID wants to delegate visibility of one CRID to another of the company’s CRIDs (enables users to have visibility of multiple CRIDs for the company but only have the IV-MTR service for one CRID)</td>
<td>Company wants to set visibility permissions for a user to allow him/her to see only certain MIDs belonging to the company’s CRID</td>
</tr>
<tr>
<td></td>
<td>Company wants to set default visibility permissions to determine what new users can see when they get the IV-MTR service for the company’s CRID</td>
</tr>
</tbody>
</table>
11.2 User Roles

The ability to perform certain functions within the BCG and IV-MTR web application is based on your BCG access level for the IV-MTR service as well as your application role(s). All users have a BCG access level for the service and may have a role or roles in the application. Application roles are assigned within the Roles & Permissions area.

There are five application user roles:

- Address Book Manager
- Data Delegation Manager
- Report Manager
- Roles and Permissions Manager
- Subscription Manager

For a description of each of these user roles, see Section 5.2.2: IV-MTR Application User Role.

The functions a user can perform within the IV-MTR application depend on the user’s BCG access level and any assigned application user roles. See Table 5.5: Functionality by Access Level and User Role for information about the specific functionality available for each application user role.

11.3 Default and Custom Roles & Permissions

There are two sets of default roles and permissions in IV-MTR: the USPS (system) default and the CRID default. The USPS default is such that non-BSA and non-BSA Delegate users:

- Do not have any application user roles
- Have complete visibility of all mail object and handling event types for the CRID as well as any MIDs belonging to, and routing codes associated with, the CRID

The IV-MTR BSA, BSA Delegate, or Roles and Permissions Manager can create a CRID default that provides users with specific roles and permissions. For example, the CRID default could assign the Address Book Manager role and provide visibility of only one of the MIDs belonging to the CRID. New users granted the IV-MTR service for the CRID inherit the CRID default, if one exists. Otherwise, new users inherit the USPS default roles and permissions.

When a user is inheriting the CRID default, the user’s roles and permissions change as the CRID default changes. For example, if the Data Delegation Manager role were added to the CRID default, any users inheriting the CRID default would receive the Data Delegation Manager role.

The IV-MTR BSA, BSA Delegate, or Roles and Permissions Manager for a CRID can also customize the application roles and visibility permissions for individual users. When a user’s roles and permissions are changed from the CRID default, the user no longer inherits the CRID default. This means the user’s roles and permissions would not change if the CRID default changed. The IV-MTR BSA, BSA Delegate, or Roles and Permissions Manager can reset a user back to the CRID default as needed. In addition, the IV-MTR BSA, BSA Delegate or Roles and Permissions Manager can reset the CRID default back to the USPS default as needed.

For information about creating and managing a CRID default, see Section 11.4.3: Set the CRID Default. For information about resetting a user to the CRID default or resetting the CRID default to the USPS default, see Section 11.4.2.7: Reset to CRID or USPS Default.
11.4 Managing Roles & Permissions

The IV-MTR BSA, BSA Delegate, or Roles and Permissions Manager for a CRID can manage roles and permissions for that CRID’s users. Within the Roles & Permissions area of the application, there are two tabs:

- The **Manage CRIDs** tab allows you to manage roles and permissions at the CRID level, meaning you can assign a role or grant permissions to *multiple* users for *one* CRID at a time.
- The **Manage Users** tab allows management at the user level, meaning you can assign a role or grant permissions to *one* user for *multiple* CRIDs at a time.

The table below can assist you in knowing whether you want to use the **Manage CRIDs** or **Manage Users** tab. For each action listed, the table gives the location where you would perform the action within the Roles & Permissions area of the application and where you can find instructions within this guide.

<table>
<thead>
<tr>
<th>Action</th>
<th>Location</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>View roles assigned to users for a particular CRID</td>
<td>Manage CRIDs &gt; Roles</td>
<td>11.4.1.1: View Assigned Roles</td>
</tr>
<tr>
<td>View roles assigned to a particular user</td>
<td>Manage Users &gt; Roles</td>
<td>11.4.2.1: View Assigned Roles</td>
</tr>
<tr>
<td>View permissions assigned to users for one CRID</td>
<td>Manage CRIDs &gt; Visibility</td>
<td>11.4.1.4: View Assigned Permissions</td>
</tr>
<tr>
<td>View permissions assigned to one user</td>
<td>Manage Users &gt; Visibility</td>
<td>11.4.2.4: View Assigned Permissions</td>
</tr>
<tr>
<td>Assign one or more users a role for one CRID</td>
<td>Manage CRIDs &gt; Roles</td>
<td>11.4.1.2: Assign a Role</td>
</tr>
<tr>
<td>Assign one user a role for multiple CRIDs</td>
<td>Manage Users &gt; Roles</td>
<td>11.4.2.2: Assign a Role</td>
</tr>
<tr>
<td>Assign one or more users permissions for one CRID</td>
<td>Manage CRIDs &gt; Visibility</td>
<td>11.4.1.5: Assign Permissions</td>
</tr>
<tr>
<td>Assign one user permissions for multiple CRIDs</td>
<td>Manage Users &gt; Visibility</td>
<td>11.4.2.5: Assign Permissions</td>
</tr>
<tr>
<td>Reset a user’s roles and permissions to the CRID default or reset the CRID default to the USPS (system) default</td>
<td>Manage Users &gt; Advanced</td>
<td>11.4.2.7: Reset to CRID or USPS Default</td>
</tr>
<tr>
<td>Grant access to delegated data by default</td>
<td>Manage Users &gt; Advanced</td>
<td>11.4.2.8: Grant Delegated Data by Default</td>
</tr>
</tbody>
</table>

See the following sections for additional information about managing roles and permissions.
11.4.1 Manage by CRID

The Manage CRIDs tab allows you to manage roles and permissions at the CRID level, meaning you can manage roles or permissions for *multiple* users for one CRID at a time.

On this tab:

- The **CRID** column lists the CRIDs for which you are the IV-BSA, BSA Delegate, or Roles and Permissions Manager.
  - If one of those CRIDs is receiving visibility of another CRID through data delegation, the Delegating CRID is listed under the Receiving CRID and indented slightly.
  - To see a list of MIDs that belong to or are being delegated to a CRID, hover on the number of MIDs.
To see a list of users with the IV-MTR service for a CRID, hover on the number of total users. **Note:** This capability is not available for listed Delegating CRIDs.

- The **Details** column displays the number of roles and visibility permissions that are available to be assigned and has buttons to manage the roles and visibility for the CRID.
  - To assign or remove a role from CRID users, click **Roles**. For instructions, see Section 11.4.1.2: **Assign a Role** and Section 11.4.1.3: **Remove a Role**.
  - To assign or remove permissions from CRID users, click **Visibility**. For instructions, see Section 11.4.1.5: **Assign Permissions** and Section 11.4.1.6: **Remove Permissions**.
- Search within the list by using the search box (as you enter text, the list filters to display items matching your entry).
- If you need assistance knowing which tab to be on, and which button to click to perform the desired action, click **I Need To...** on the right side of the table. A window opens and displays common actions. Hover on an action for guidance on where to navigate to perform that action.

See the following sections for instructions to view, assign, or remove a role or visibility permissions.

### 11.4.1.1 View Assigned Roles

To view the roles assigned to a CRID’s users, find the CRID on the **Manage CRIDs** tab, and click **Roles** in that CRID’s row.
The **Roles** table on the right side of the page displays the roles assigned to the CRID’s users.

In this table:

- The table is organized by role and lists those users who have a particular role for a particular CRID or MID.
- In the **MID** column, “All MIDs” indicates a CRID-level role is assigned.
- Search within the list by using the search box in the upper-right corner (as you enter text, the list filters to display items matching your entry).
- To remove a role, click the delete icon to the right of the user’s name. Click **Yes** when prompted to confirm that you want to delete the role.

  **Note:**
  - You can only remove one role from one user at a time.
  - IV-MTR BSA and BSA Delegate users have all roles assigned. These role assignments cannot be removed; therefore, the delete icon is not available for these users.

### 11.4.1.2 Assign a Role

Five application user roles can be assigned. For a description of the roles, see Section 5.2.2: *IV-MTR Application User Role*.

To assign a role, follow these steps:

1. On the **Manage CRIDs** tab, find the CRID whose roles you would like to manage, and click **Roles** in that CRID’s row.
2. Select the role to assign.

3. Select the MID(s) to which the role assignment should apply:

   - **Note:** The Address Book Manager, Report Manager, and Subscription Manager roles can only be assigned at the CRID level. If you selected one of these roles, there is no action for you in the Select MID(s) area of the screen.

   - To add a MID, find the MID on the left side of this section. Drag the MID to the right side OR double-click the MID on the left side to move it to the right side.

   - To add all MIDs, click **Add All MIDs**.

     **Note:** This creates a CRID-level role, meaning the user will be able to perform the role’s functions for all of the MIDs belonging to the CRID.
To remove a MID, drag it from the right side to the left side OR double-click the MID on the right side to return it to the left side. To remove all of the MIDs, click **Remove All MIDs**.

- Search within the list by using the search box on the left side (as you enter text, the list filters to display items matching your entry).

4. When finished, click **Next**.

5. Select the user(s) to be assigned the role:
   - To add a user, find the user on the left side of this section. Drag the user to the right side OR double-click the user on the left side to move the user to the right side.
   - To add all users, click **Add All Users**.

6. To add all users, click **Add All Users**.
• To remove a user, drag the user from the right side to the left side OR double-click the user on the right side to return the user to the left side. To remove all of the users, click **Remove All Users**.

![User management interface](image)

• Search within the list by using the search box on the left side (as you enter text, the list filters to display items matching your entry).

• **Note:**
  – Grayed out users displayed on the right side are those users who already have the selected role assigned.

![User management interface](image)

  – Users with an asterisk (*) are partially assigned, meaning the user has been assigned the selected role to one or more—but not all—of the selected MIDs.

6. When finished, click **Finish**. The role is assigned as selected, and the role assignment appears in the table to the right.

**Note:** If a newly assigned user is currently logged into the IV-MTR application, he or she must refresh the browser to see the changes.
11.4.1.3  Remove a Role

To remove a role, click the delete 🗑 icon to the right of the user’s name in the Roles table. Click Yes when prompted to confirm that you want to delete the role.

Note:

- You can only remove one role from one user at a time.
- If you wish to return a user to the CRID default, or return the CRID default to the USPS default, see Section 11.4.2.7: Reset to CRID or USPS Default.
- IV-MTR BSA and BSA Delegate users have all roles assigned. These role assignments cannot be removed; therefore, the delete 🗑 icon is not available for these users.

11.4.1.4  View Assigned Permissions

To view the permissions assigned to a CRID’s users, find the CRID on the Manage CRIDs table, and click Visibility in that CRID’s row.
The **Visibility Permissions** table on the right side of the page displays the permissions assigned to the CRID’s users.

In this table:

- The table is organized by mail object type and handling event type and lists those users who have visibility for a particular CRID, MID, or routing code.
- In the **MID** column, "All MIDs" indicates a CRID-level permission is assigned.
- In the **User** column, “Default User for CRID [Number]” represents the Default User for the CRID. This allows you to see which mail object types, handling event types, CRIDs, MIDs, and/or routing codes are assigned as the CRID default.
- In the **Action** column, a circle icon indicates if a user has a particular permission because he or she is the IV-MTR BSA or BSA Delegate or inheriting the CRID default:
  - The B icon indicates the user is the IV-MTR BSA or a BSA Delegate. Therefore, the user has complete visibility (all mail object and handling unit types for all CRIDs, MIDs, and routing codes).
  - The CD icon indicates the user is inheriting the CRID default permissions. Therefore, the user has visibility of the mail object types, handling event types, CRIDs, MIDs, and/or routing codes that are part of the CRID default. For information about the CRID default, see Section 11.3: Default and Custom Roles & Permissions.

  **Note:** The UD icon can be displayed for the “Default User”. This indicates the CRID default is currently set to the USPS (system) default permissions.

- Search within the list by using the search box in the upper-right corner (as you enter text, the list filters to display items matching your entry).
- To remove a permission, click the delete icon in the **Action** column to the right of the user’s name. Click **Yes** when prompted to confirm that you want to delete the permission.

  **Note:**
  - You can only remove one permission from one user at a time.
IV-MTR BSA and BSA Delegate users have all visibility permissions assigned. These permission assignments cannot be removed; therefore, the delete icon is not available for these users.

11.4.1.5 Assign Permissions

To assign a permission, follow these steps:

1. On the Manage CRIDs tab, find the CRID whose permissions you would like to manage, and click Visibility in that CRID’s row.

2. Select one or more mail object type(s) and one or more handling event type(s).

3. When finished, click Next.

4. Select the MID(s) and/or routing code(s) to provide visibility of:
   - To add a MID or routing code, find the MID or routing code on the left side of this section. Drag the MID or routing code to the right side OR double-click the MID or routing code on the left side to move it to the right side.
To add all MIDs or routing codes, click **Add All MIDs** or **Add All Codes**.

**Note:** If you add all MIDs, a CRID-level permission is created, meaning the user will have visibility of the selected mail object and handling event types for all of the MIDs belonging to the CRID.

To remove a MID or routing code, drag it from the right side to the left side OR double-click the MID or routing code on the right side to return it to the left side. To remove all of the MIDs or routing codes, click **Remove All MIDs** or **Remove All Codes**.

Search within the list by using the search box on the left side (as you enter text, the list filters to display items matching your entry).

5. When finished, click **Next**.
6. Select the user(s) to be assigned the permission:

- To add a user, find the user on the left side of this section. Drag the user to the right side OR double-click the user on the left side to move the user to the right side.

![Unassigned Users and Assigned Users]

- To add all users, click Add All Users.

![Unassigned Users and Assigned Users]

- To remove a user, drag the user from the right side to the left side OR double-click the user on the right side. To remove all of the users, click Remove All Users.
- Search within the list by using the search box on the left side (as you enter text, the list filters to display items matching your entry).

- **Note:**
  - Users displayed on the right side without the select icon are those users who already have the selected permission assigned.
  - Users with an asterisk (*) are partially assigned, meaning the user has been assigned the selected permission to one or more—but not all—of the selected MIDs.

7. When finished, click **Finish**. A window appears confirming the permissions were assigned successfully.

8. To close the window, click **OK** or click the **X** icon. The permission is assigned as selected, and the permission assignment appears in the table to the right.

  **Note:** If a newly assigned user is currently logged into the IV-MTR application, he or she must refresh the browser to see the changes.
11.4.1.6 Remove Permissions

To remove a permission, click the delete icon in the Action column to the right of the user’s name in the Visibility Permissions table. Click Yes when prompted to confirm that you want to delete the permission.

Note:
- You can only remove one permission from one user at a time.
- If you wish to return a user to the CRID default, or return the CRID default to the USPS default, see Section 11.4.2.7: Reset to CRID or USPS Default.
- IV-MTR BSA and BSA Delegate users have all visibility permissions assigned. These permission assignments cannot be removed; therefore, the delete icon is not available for these users.

11.4.2 Manage by User

The Manage Users tab allows you to manage roles and permissions at the user level, meaning you can manage roles or permissions for one user for multiple CRID at a time.
On this tab:

- The **User** column lists the users who have the IV-MTR service for a CRID for which you are the IV-BSA, BSA Delegate, or Roles and Permissions Manager.
  - The Default User(s) for these CRIDs, and for CRIDs delegated to those CRIDs, appear at the top of the table by default.
  - The number of CRIDs to which the user is associated is displayed. To see the CRID numbers, hover on the number of CRIDs.

- The **Details** column has buttons to manage the roles and visibility for the CRID.
  - To assign or remove a role from a user, click **Roles**. For instructions, see Section 11.4.2.2: *Assign a Role* and Section 11.4.2.3: *Remove a Role*.
  - To assign or remove permissions from a user, click **Visibility**. For instructions, see Section 11.4.2.5: *Assign Permissions* and Section 11.4.2.6: *Remove Permissions*.
  - To return a user to the CRID or USPS default or grant a user visibility of delegated data by default, click Advanced. For instructions see Section 11.4.2.7: *Reset to CRID or USPS Default* and Section 11.4.2.8: *Grant Delegated Data by Default*.

  **Note:** A "Default User" can be returned to the USPS default. All other users can be returned to the CRID default.

- The number of MIDs with which the user is associated is displayed. To see the MID numbers, hover on the number of MIDs.

- Search within the list by using the search box (as you enter text, the list filters to display items matching your entry).
- If you need assistance knowing which tab you need to be on, and which button to click to perform the desired action, click **I Need To...** on the right side of the table. A window opens and displays common actions. Hover on an action for guidance on where to navigate to perform that action.

![I Need To...](image)

See the following sections for instructions to assign or remove a role or visibility permissions, return a user to the CRID or USPS default, and grant a user visibility of delegated data by default.

### 11.4.2.1 View Assigned Roles

To view the roles assigned to particular user, find the user on the **Manage Users** tab, and click **Roles** in that user's row.

![Roles Table](image)

The **Roles** table on the right side of the page displays the roles assigned to the user.

In this table:

- The table is organized by role and lists the CRID(s) and MID(s) for which the user has a particular role.
- In the **MID** column, "All MIDs" indicates a CRID-level role is assigned.
- Search within the list by using the search box in the upper-right corner (as you enter text, the list filters to display items matching your entry).
To remove a role, click the delete icon to the right of role. Click Yes when prompted to confirm that you want to delete the role.

**Note:**
- You can only remove one role for one CRID or MID at a time.
- IV-MTR BSA and BSA Delegate users have all roles assigned. These role assignments cannot be removed; therefore, the delete icon is not available for these users.

### 11.4.2.2 Assign a Role

Five application user roles can be assigned. For a description of the roles, see Section 5.2.2: IV-MTR Application User Role.

To assign a role, follow these steps:

1. On the Manage Users tab, find the user you would like to assign a role to, and click Roles in that user’s row.

2. Select the role to assign.

3. Click Next.

4. Select the CRID(s) and/or MID(s) to which the role assignment should apply. The functionality depends on which role you have selected:
   - **Address Book Manager, Report Manager, or Subscription Manager:** These roles can only be assigned at the CRID level.
     - To add a CRID, find the CRID on the left side of this section. Drag the CRID to the right side OR double-click the CRID on the left side to move it to the right side.
– To add all CRIDs, click **Add All**.

– To remove a CRID, drag it from the right side to the left side OR double-click the CRID on the right side to return it to the left side. To remove all of the CRIDs, click **Remove All**.

– Search within the list by using the search box on the left side (as you enter text, the list filters to display items matching your entry).

- **Data Delegation Manager or Roles and Permissions Manager:** These roles can be assigned at the CRID or MID level.

  – To add a CRID-level role, find the CRID on the left side of this section. Drag the CRID to the right side.

  **Note:** If the MID’s are displayed below the CRID when you drag the CRID to the right side, the role will be assigned for the MID’s listed—not a CRID-level role. To create a CRID-level role, first collapse the MID’s list by clicking the CRID number. Then, drag the CRID to the right side.
To add a MID-level role, click the CRID on the left side of this section. The MIDs display below the CRID. Click to deselect any MIDs for which you do not wish to assign the role. Then, drag the CRID, or one of the MIDs, to the right side.

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

**Note:** Selecting **Add All** creates MID-level permissions for the MIDs available for each displayed CRID. To create CRID-level permissions, you must select each CRID individually.

To remove a CRID, drag it from the right side to the left side OR double-click the CRID on the right side to return it to the left side. To remove all of the CRIDs, click **Remove All**.

Search within the list by using the search box on the left side (as you enter text, the list filters to display items matching your entry).

5. When finished, click **Finish**. The role is assigned as selected, and the role assignment appears in the table to the right.

**Note:** If a newly assigned user is currently logged into the IV-MTR application, he or she must refresh the browser to see the changes.
11.4.2.3 Remove a Role

To remove a role, click the delete icon to the right of the role in the Roles table. Click Yes when prompted to confirm that you want to delete the role.

Note:
- You can only remove one role at a time.
- If you wish to return a user to the CRID default, or return the CRID default to the USPS default, see Section 11.4.2.7: Reset to CRID or USPS Default.
- IV-MTR BSA and BSA Delegate users have all roles assigned. These role assignments cannot be removed; therefore, the delete icon is not available for these users.

11.4.2.4 View Assigned Permissions

To view the permissions assigned to a user, find the user on the Manage Users table, and click Visibility in that user’s row.
The **Visibility Permissions** table on the right side of the page displays the permissions assigned to the user.

In this table:

- The table is organized by mail object type and handling event type and lists those CRIDs, MIDs, or routing codes for which the user has visibility.

- In the **MID** column, “All MIDs” indicates a CRID-level permission is assigned.

- In the **Action** column, a circle icon indicates if the user has a particular permission because he or she is the IV-MTR BSA or BSA Delegate, inheriting the USPS default, or inheriting the CRID default:
  - The **B** icon indicates the user is the IV-MTR BSA or a BSA Delegate. Therefore, the user has complete visibility (all mail object and handling unit types for all CRIDs, MIDs, and routing codes).
  - The **CD** icon indicates the user is inheriting the CRID default permissions. Therefore, the user has visibility of the mail object types, handling event types, CRIDs, MIDs, and/or routing codes that are part of the CRID default. For information about the CRID default, see Section 11.3: **Default and Custom Roles & Permissions**.

  **Note:** The **UD** icon can be displayed for the “Default User”. This indicates the CRID default is currently set to the USPS (system) default permissions.

- Search within the list by using the search box in the upper-right corner (as you enter text, the list filters to display items matching your entry).

- To remove a permission, click the delete icon in the **Action** column. Click **Yes** when prompted to confirm that you want to delete the permission.

  **Note:**
  - You can only remove one permission at a time.
  - IV-MTR BSA and BSA Delegate users have all visibility permissions assigned. These permission assignments cannot be removed; therefore, the delete icon is not available for these users.
11.4.2.5 Assign Permissions

To assign a permission, follow these steps:

1. On the Manage Users tab, find the user whose permissions you would like to manage, and click Visibility in that user's row.

2. Select one or more mail object type(s) and one or more handling event type(s).

3. When finished, click Next.

4. Select the CRID(s), MID(s), and/or routing code(s) to provide visibility of:
   - To add a CRID-level permission, find the CRID on the left side of this section. Drag the CRID to the right side.

   **Note:** If the MIDs are displayed below the CRID when you drag the CRID to the right side, MID-level permissions will be created for the MIDs listed—not a CRID-level permission. To create a CRID-level permission, first collapse the MIDs list by clicking the CRID number. Then, drag the CRID to the right side.
To add a MID-level permission, click the CRID on the left side of this section. The MIDs display below the CRID. Click to deselect any MIDs for which you do not wish to create a permission. Then, drag the CRID, or one of the MIDs, to the right side.

To add a routing code permission, find the routing code on the left side of this section. Drag the routing code to the right side OR double-click the routing code on the left side to move it to the right side.

To add all CRIDs or routing codes, click Add All or Add All Codes.

**Note:** Selecting Add All in the Select CRID/MID(s) area creates MID-level permissions for the MIDs available for each displayed CRID. To create CRID-level permissions, you must select each CRID individually.
• To remove a CRID or routing code, drag it from the right side to the left side OR double-click the CRID or routing code on the right side to return it to the left side. To remove all of the CRIDs or routing codes, click Remove All or Remove All Codes.

![Select CRID/MID(s)](image)

* Note: This indicates a partially assigned CRID/MID.

• Search within the list by using the search box on the left side (as you enter text, the list filters to display items matching your entry).

• Note:
  – Users displayed on the right side without the select icon are those users who already have the selected permission assigned.

![Unassigned Users](image)

![Assigned Users](image)

* Names with an asterisk (*) indicate a Partially Assigned User. This User has been assigned the specified Role to some but not all MiDs selected.
– Users with an asterisk (*) are partially assigned, meaning the user has been assigned the selected permission to one or more—but not all—of the selected MIDs.

5. When finished, click **Finish**. A window appears confirming the permissions were assigned successfully.

6. To close the window, click **OK** or click the **X** icon. The permission is assigned as selected, and the permission assignment appears in the table to the right.

**Note:** If a newly assigned user is currently logged into the IV-MTR application, he or she must refresh the browser to see the changes.
11.4.2.6  Remove Permissions

To remove a permission, click the delete icon in the Action column to the right of the user’s name in the Visibility Permissions table. Click Yes when prompted to confirm that you want to delete the permission.

Note:
- You can only remove one permission at a time.
- If you wish to return a user to the CRID default, or return the CRID default to the USPS default, see Section 11.4.2.7: Reset to CRID or USPS Default.
- IV-MTR BSA and BSA Delegate users have all visibility permissions assigned. These permission assignments cannot be removed; therefore, the delete icon is not available for these users.

11.4.2.7  Reset to CRID or USPS Default

Note: You cannot reset an IV-MTR BSA or BSA Delegate user to the CRID or USPS default.

You can reset a user’s roles and permissions to the CRID default and reset the CRID default to the USPS (system) default.

To reset a user to the CRID default, follow these steps:
1. On the Manage Users tab, find the user whose roles and permissions you would like to reset to the CRID default, and click Advanced in that user’s row.
2. Check **Reset Roles & Visibility Permissions to CRID Default.**

![Image of CRID Management](image)

3. Click **Apply Changes.** A window appears confirming the changes were applied successfully.

4. To close the window, click **OK** or click the **X** icon. The CRID default roles and permissions are reset to the USPS default.

![Success Window](image)

To reset the CRID default to the USPS default, follow these steps:

1. On the **Manage Users** tab, find the “Default User” for the CRID whose roles and permissions you would like to reset to the USPS default, and click **Advanced** in that row.

![Advanced Options](image)

2. Check **Reset Roles & Visibility Permissions to USPS Default.**

![Advanced Options](image)

3. Click **Apply Changes.** A window appears confirming the changes were applied successfully.
4. To close the window, click **OK** or click the **X** icon. The CRID default roles and permissions are reset to the USPS default.

![Success](image)

**11.4.2.8 Grant Delegated Data by Default**

If you do not create a CRID default and do not customize an individual user’s roles and permissions, all users for the CRID will inherit the USPS default. The USPS default provides all CRID users with visibility of all mail object and handling event types for the CRID and any CRIDs or MIDs delegated to the CRID.

When you create a CRID default or customize an individual user’s roles and permissions, role functionality and permissions for delegated data are not automatically provided. For example, if you have two users for CRID A and you customize permissions such that the first user has visibility permissions for MID A1 and the second user has visibility permissions for MID A2, the users do not automatically have visibility of data delegated to MID A1 and MID A2. You would need to assign visibility permissions for the delegated data to each user. However, within the Roles & Permissions area, you can grant a user access to delegated data by default.

To grant a user access to delegated data by default, follow these steps:

1. On the **Manage Users** tab, find the user, and click **Advanced** in that user’s row.

![Manage Users Tab](image)

2. Check **Grant default Roles & Visibility Permissions to all Delegated Data**.

![Advanced Options](image)

3. Click **Apply Changes**. A window appears confirming the changes were applied successfully.
4. To close the window, click **OK** or click the **X** icon. The CRID default roles and permissions are reset to the USPS default.

![Success](image)

**11.4.3 Set the CRID Default**

The IV-MTR BSA, BSA Delegate, or Roles and Permissions Manager can create a CRID default that provides users with specific roles and permissions. For example, the CRID default could assign the Address Book Manager role and provide visibility of only one of the MIDs belonging to the CRID. New users granted the IV-MTR service for the CRID inherit the CRID default, if one exists. Otherwise, new users inherit the USPS default roles and permissions.

In IV-MTR, the CRID default is represented by the “Default User”. You can view, assign, and remove roles and permissions to/from the Default User the same way you would any user.

For example, if you want to set the CRID default to include the Address Book Manager role, you would follow the steps in Section 11.4.1.2: **Assign a Role**. When you get to the step where you select the user(s) to receive the role, you would select the Default User.

![Manage CRIDs](image)

The IV-MTR BSA, BSA Delegate or Roles and Permissions Manager can reset the CRID default back to the USPS default as needed. See Section 11.4.2.7: **Reset to CRID or USPS Default** for instructions.
12 Notifications

Notifications are available within the application (in-app notifications) and via email. There are two types of notifications: alerts and actions. Alerts notify you that an event has occurred within the application (e.g., a data delegation rule has been created). Action notifications require that you take action (e.g., a data delegation request has been submitted, and you must approve or deny the request).

See the following sections for additional information about the available notifications, where they appear, and how to manage them.

12.1 Available Notifications

Currently, notifications are available for the following areas of the application: Queries & Feeds, Data Delegation, and Roles & Permissions. The following tables describe the notifications available, indicate whether each notification is an alert or action, and provides information about who receives each notification.

The following table describes the notifications currently available in the Queries & Feeds area of the application, where you perform one-time queries and create and manage data feeds.

<table>
<thead>
<tr>
<th>Table 12.1: Queries &amp; Feeds Notifications</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Notification Text and Description</strong></td>
</tr>
<tr>
<td>File [file name] ready for download</td>
</tr>
<tr>
<td>One-time query for download is ready</td>
</tr>
</tbody>
</table>

The following table describes the notifications currently available in the Data Delegation area of the application, where you can request data delegation, manage data delegation, create data delegation rules, and view existing data delegation rules.

<table>
<thead>
<tr>
<th>Table 12.2: Data Delegation Notifications</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Notification Text and Description</strong></td>
</tr>
<tr>
<td>CRID Data Delegation Access Requested</td>
</tr>
<tr>
<td>A data delegation request has been submitted to your CRID/MID as the Delegating party and is ready for review and approval/denial</td>
</tr>
<tr>
<td>CRID Data Delegation Request Cancellation Notification</td>
</tr>
<tr>
<td>A pending data delegation request submitted to your CRID/MID as the Delegating party has been cancelled and no longer requires action</td>
</tr>
<tr>
<td>CRID Data Delegation Approved/Denied Notification</td>
</tr>
<tr>
<td>A pending data delegation request with your CRID/MID as the Receiving party has been approved/denied by the Delegating party</td>
</tr>
<tr>
<td>Data Delegation Creation Notification</td>
</tr>
<tr>
<td>A data delegation rule for which your CRID/MID is the Receiving or Delegating party has been created</td>
</tr>
</tbody>
</table>
The following table describes the notifications currently available in the Roles & Permissions area of the application, where administrative users can assign roles and visibility permissions to users.

### Table 12.3: Roles & Permissions Notifications

<table>
<thead>
<tr>
<th>Notification Text and Description</th>
<th>Type</th>
<th>Recipient*</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRID Visibility Assignment Created</td>
<td>Alert</td>
<td>• User whose permissions changed</td>
</tr>
<tr>
<td>CRID Visibility Assignment Deleted Notification</td>
<td>Alert</td>
<td>• User whose permissions changed</td>
</tr>
</tbody>
</table>

* IV-MTR BSA and BSA Delegate users have all user roles; therefore, these users receive all notifications.

### 12.2 In-App Notifications

Various in-app notifications are available. These notifications appear in notifications bars near the top of the application and can be managed in your notifications inbox. See the following sections for additional information.
12.2.1 Notifications Bar

**Important:** Alerts and completed actions are deleted after 45 days.

In-app notifications appear in notifications bars near the top of the application. There is an orange-red bar for action notifications and a yellow bar for alert notifications.

When collapsed, the notifications bar displays the number of actions pending or alerts available. For additional information, expand the notifications bar by clicking the arrow on the right side of the bar. When expanded, the notifications bar provides a brief description of the notification.

The action notifications bar appears until the pending action is completed (e.g., the pending data delegation request is approved or denied). To take action, click the description of the notification to be taken to the page where the action should occur. Once the action is completed, the notification is automatically cleared.

The alert notifications bar can be closed. Close the bar by clicking the X icon in the upper-right corner of the bar.

In addition, the items in the yellow notifications bar can be removed. To clear an alert notification, click the red X icon to the right of the notification description. The alert notification for a one-time query file ready to download is automatically cleared when you click **Download**.

For additional information about an alert, click the alert description. Depending on the alert, you are taken to the notifications inbox or to the place in the application to which the alert pertains. For information about the notifications inbox, see the following section.
12.2.2 Notifications Inbox

**Important:** Alerts and completed actions are deleted after 45 days.

The notifications inbox displays all of your actions and alerts, provides additional detail about each notification, and can be filtered and searched.

For some alerts, clicking the alert description in the yellow notifications bar takes you to the notifications inbox. You can also access the inbox by clicking the Notifications (bell) widget at the top left of the screen.

By default, the notifications inbox displays all alert and action notifications that have not been deleted. Unread items appear in bolded text, with read items in non-bolded text.

Within the notifications inbox:

- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- Search within the list by using the search box (as you enter text, the list filters to display items matching your entry).
• Filter for unread vs. read messages as well as actions vs. alerts by clicking the desired option on the left side.

   **Note:** To remove a filter and return to the default view, click the X to the left of the filter.

![Filter Options](image)

• To see details for a notification, click anywhere within the row for that notification. The Notification Details window opens and provides additional information. To close the window, click **OK** OR click the X icon.

![Notification Details](image)

• To mark an item as read or unread, or delete an item, check the box on the left side of the notification row. Then, click **Mark as Read**, **Mark as Unread**, or **Delete** at the top of the inbox. You can perform the action for multiple items at one time by checking the boxes of multiple items.

   **Note:**
   - You cannot mark an open action notification as read or delete it.
   - When you mark an item as read, the notifications bar no longer displays the notification.

![Mark as Read/Unread/Delete](image)

### 12.3 Email Notifications

Email notifications are available for all of the scenarios described in Section 12.1: *Available Notifications*. The application sends email notifications to the recipients specified in the tables within Section 12.1.

### 12.4 Manage Notifications

For email notifications, you can set your preferred email address. You can also opt in and opt out of in-app and email notifications. See the following sections for additional information.
12.4.1 Email Preferences

**Important:** If you change your preferred email address, you must follow the steps to confirm the change to begin receiving notifications at the updated address.

By default, email notifications are sent to the email address associated with your BCG account. To manage your preferred email address to receive email notifications from the IV-MTR application, follow these steps:

1. Click the Settings (gear) widget at the top left of the screen. You are taken to the Email Preferences screen.
2. Enter the new email address under **Email**. Then, click **Update**.

3. Click **Update**. You receive an email at the new address with instructions to confirm the address.

   **Note:** You will receive email notifications at the previous address until you confirm the updated address.

4. Click the link in the email to confirm your new email address. A browser window opens to inform you that your email address was successfully confirmed. You are now ready to receive email notifications from IV-MTR at this new email address.

   **Note:** If you do not receive the email to confirm your new address, resend the confirmation email by clicking **Resend Validation Link** on the Email Preferences screen.
12.4.2 Notification Settings

You are able to opt in and opt out of both in-app and email notifications. To manage these settings, click the Settings (gear) widget at the top left of the screen. Then, click Notification Settings.

On this screen:

- You are opted in to receive those notifications with a check mark.
- To opt out of a notification, clear the checkmark. Then, click Update.
- To opt in or out of all available in-app or email notifications, click the box next to Web or Email until the checkmark appears (opt in) or is cleared (opt out). Then, click Update.
- To reset your selections, click Reset.
- The date and time at the bottom right of the screen indicates when your notification settings were last updated.
- For additional information about each notification, see Section 12.1: Available Notifications.
13 Saved Reports

The IV-MTR application provides the ability to create a saved report. A saved report is a set of entities, mail object type, handling event types, filters, and data fields all together. You can also save portions of a report, such as selected entities or data fields. This allows you to reuse the report or portion of a report throughout the application, so you can perform one-time queries, set up data feeds, and manage data delegation rules more quickly and easily.

The table below describes a saved report and portions of saved reports that can be saved for reuse and where in the IV-MTR application each is available.

Table 13.1: Saved Report Descriptions and Availability

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Where Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saved Entity</td>
<td>Set of CRIDs, MIDs, and/or routing codes*</td>
<td>One-time query</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Data feed</td>
</tr>
<tr>
<td>Saved Filter</td>
<td>Set of data attribute filters</td>
<td>One-time query</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Data feed</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Request data delegation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Approve data delegation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Modify data delegation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Create data delegation</td>
</tr>
<tr>
<td>Saved View</td>
<td>Set of data fields in a specified order</td>
<td>One-time query</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Data feed</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Request data delegation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Approve data delegation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Modify data delegation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Create data delegation</td>
</tr>
<tr>
<td>Saved Report</td>
<td>Set of entities (CRIDs, MIDs, and/or routing codes*), mail object and</td>
<td>One-time query</td>
</tr>
<tr>
<td></td>
<td>handling event types, filters, and data fields</td>
<td>Data feed</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Approve data delegation</td>
</tr>
</tbody>
</table>

* For data feed, may also include STIDs

Saved reports and portions of reports can be public or private. Public means the saved report is available to all users with the IV-MTR service for the CRID that owns the saved report. Private means the saved report is only available to the user who created it. Please note only IV-MTR BSAs, BSA Delegates, or Report Managers can create, modify, or delete a public saved report. For a private saved report, only the user who created it can modify or delete it.

See the following sections for additional information about using a saved entity, filter, view, or report.

13.1 Saved Entity

A saved entity is a set of selected CRIDs, MIDs, routing codes, and/or STIDs for which you want to receive mail tracking data. You may use a saved entity on the Select Entity(s) screen when performing a one-time query or creating a data feed.

See the following sections for information about using a saved entity.
13.1.1 Create a Saved Entity

**Important:** Only an IV-MTR BSA, BSA Delegate, or Report Manager can create a public saved entity. Any user can create a private saved entity.

You can create a saved entity from the Select Entity(s) screen when performing a one-time query or creating a data feed.

To create a saved entity, follow these steps:

1. On the Select Entity(s) screen, select the CRIDs, MIDs, routing codes, and/or STIDs you wish to include in the saved entity. The selected entities appear under the Your selected MIDs and/or **Your selected routing codes** sections on the right side of the screen.

2. In the lower-right corner, click **Save Entity**. A window opens.

3. In the window, enter a name and description for the saved entity.

4. Select whether to make the saved entity private. If selected, the saved entity will only be available for your personal use. If not selected, the saved entity will be available to all users with the IV-MTR service for the CRID(s) selected from the **Owner CRIDs** drop-down menu.

   If you do not select to make a private saved entity, select one or more CRIDs from the **Owner CRIDs** drop-down menu. Users for these CRIDs will be able to use the saved entity, and the IV-MTR BSA, BSA Delegates, and Report Manager for these CRIDs will be able to modify or delete the saved entity.

5. Click **Submit**. The saved entity is created. You may continue to perform the one-time query or create the data feed, if desired. To use the saved entity in the future, see Section 13.1.2: **Load a Saved Entity**.
13.1.2 Load a Saved Entity

**Important:** When you load a saved entity, what is loaded is filtered by your visibility permissions. For example, if a saved entity contains MIDs A and B but you only have visibility permissions assigned for MID A, MID B will not load even though it is part of the saved entity.

You can load a saved entity on the Select Entity(s) screen when performing a one-time query or creating a data feed.

To load a saved entity, follow these steps:

1. On the left side of the Select Entity(s) screen, click **Load Saved Entity**. A window opens.
2. In the window, find the saved entity you wish to load and click the load icon in the **Action** column. The window closes, and the CRIDs, MIDs, routing codes, and/or STIDs that are part of the saved entity populate the **Your selected MIDs** and/or **Your selected routing codes** sections on the right side of the screen.

### Note:

- Toggle between views of private and public saved entities using the buttons at the top-left of the window. A **private** saved entity is only available for your personal use. A **public** saved entity is available to all users with the IV-MTR service for a particular CRID or CRIDs.
- Search within the list by using the search box (as you enter text, the list filters to display items matching your entry).
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To see additional information for a saved entity, click the + icon to the left of the entity name.
- To associate a saved entity to a data feed, see Section 13.1.5: *Associate a Saved Entity to a Data Feed.*
- To delete a saved entity, click the delete icon. Click **Delete** when prompted to confirm that you want to delete the saved entity. **(Note:** Only the creator can delete a **private** saved entity. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a **public** saved entity.)
- To view the change history for a saved entity, click the view log icon.
13.1.3 Modify a Saved Entity

Important:
- Only the creator can modify a private saved entity. Only an IV-MTR BSA, BSA Delegate, or Report Manager can modify a public saved entity.
- For instructions to modify a saved entity that is associated to a data feed, see Section 13.1.6: Update a Saved Entity Associated to a Data Feed.
- If you make updates outside of the data feeds area of the application to a saved entity associated to a data feed, you are not prompted to confirm the changes impact any associated data feeds. However, the changes to the saved entity will be automatically applied to any associated data feeds.

To change the selected entities or other settings for a saved entity, follow these steps:
1. On the Select Entity(s) screen for a one-time query or data feed, follow the instructions in Section 13.1.2: Load a Saved Entity to load a saved entity.
2. Make the desired changes such that the entities you wish to save appear under the Your selected MIDs and/or Your selected routing codes sections on the right side of the screen.
3. In the lower-right corner, click Save Entity. A window opens.
4. In the window, select **Save** to overwrite the existing saved entity OR **Save As** to create a new, separate saved entity.

**Note:** If you select **Save As**, you cannot use the same Entity Name as an existing saved entity. Entity Name is case-sensitive. For example, “Saved Entity A” is different than “saved entity a”.

![Save Entity](image)

5. Make any necessary changes to the saved entity settings.

6. To save the changes, click **Submit**. The changes are saved and ready to use.

### 13.1.4 Delete a Saved Entity

**Important:**
- Only the creator can delete a **private** saved entity. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a **public** saved entity.
- If you delete a saved entity that is associated to a data feed, a “snapshot” of the selected CRIDs, MIDs, and routing codes from the saved entity is applied to the data feed. Once the saved entity is deleted, the association to the data feed no longer exists.

To delete a saved entity, follow these steps:

1. On the left side of the Select Entity(s) screen, click **Load Saved Entity**. A window opens.
2. In the window, find the saved entity you wish to delete and click the delete icon in the Action column.

3. Click Delete when prompted to confirm that you want to delete the saved entity. The saved entity is deleted.

### 13.1.5 Associate a Saved Entity to a Data Feed

**Important:**
- Only a public saved entity can be associated to a data feed.
- Only an IV-MTR BSA, BSA Delegate, or Subscription Manager can associate a saved entity to a data feed.
- If you delete a saved entity that is associated to a data feed, a "snapshot" of the selected CRIDs, MIDs, and routing codes from the saved entity is applied to the data feed. Once the saved entity is deleted, the association to the data feed no longer exists.
- A saved entity can only be associated to a data feed if that saved entity has only one owner CRID AND that CRID is the Subscription Owner CRID for the data feed.

A public saved entity can be associated to one or more data feeds. This allows you to update the saved entity and have the selected entities for the associated data feed(s) automatically updated. You may associate a saved entity to a data feed when creating a new data feed or by modifying an existing one.

When creating a new data feed, follow these steps to associate a saved entity to the data feed:
1. Follow the steps in Section 8.1: *Create New Feed* to select the initial feed options.
2. When you reach the Select Entity(s) screen, if the saved entity does not yet exist, follow the steps in Section 13.1.1: *Create a Saved Entity* to create a new public saved entity.
3. On the left side of the screen, click **Load Saved Entity**. A window opens.

![Load Saved Entity](image)

4. Click **Public**.

5. In the window, find the saved entity you wish to associate to the data feed and click the load and associate icon in the **Action** column. The window closes, and the CRIDs, MIDs, routing codes, and/or STIDs that are part of the saved entity populate the **Your selected MIDs** and/or **Your selected routing codes** sections on the right side of the screen.

**Note:** You cannot modify the saved entity until you finish creating the data feed. Once the data feed is created, see Section 13.1.6: **Update a Saved Entity Associated to a Data Feed** for instructions to modify the saved entity associated to the data feed.

![Load Saved Entity](image)

6. Continue the steps to create the data feed. Once the data feed is created, the **Your Feeds** table displays the new data feed. The associated saved entity displays in the **Entity Name** column.

![Your Feeds](image)
For an existing data feed, follow these steps to associate a saved entity to the data feed:

1. On the **Create & Manage Data Feeds** tab, within the **Your Feeds** table, click the modify icon in the **Details** column for the appropriate data feed. A window opens.

2. If the saved entity does not yet exist, follow the steps in Section 13.1.1: *Create a Saved Entity* to create a new public saved entity.

3. On the left side of the screen, click **Load Saved Entity**. A window opens.

4. Click **Public**.

5. In the window, find the saved entity you wish to associate to the data feed and click the load and associate icon in the **Action** column. The window closes, and the CRIDs, MIDs, routing codes, and/or STIDs that are part of the saved entity populate the **Your selected MIDs** and/or **Your selected routing codes** sections on the right side of the screen.

   **Note:** You cannot modify the saved entity until you finish updating the data feed. Once the data feed is updated, see Section 13.1.6: *Update a Saved Entity Associated to a Data Feed* for instructions to modify the saved entity associated to the data feed.

6. Make any other desired updates. Then, scroll to the bottom of the page and click **Update Feed** to commit the changes.
7. A window appears informing you that the data feed was updated. To close the window, click OK OR click the X icon. The Your Feeds table now displays the associated saved entity in the Entity Name column.

13.1.6 Update a Saved Entity Associated to a Data Feed

Important:
- Only an IV-MTR BSA, BSA Delegate, or Report Manager can modify a saved entity associated to a data feed.
- A Report Manager can only modify an associated saved entity from the Select Entity(s) screen when performing a one-time query.

When you update a saved entity that is associated with one or more data feeds, the selected entities for the data feed(s) are updated automatically. You may update an associated saved entity from the Select Entity(s) screen when performing a one-time query, creating a new data feed, or modifying an existing data feed. Note: A Report Manager can only modify an associated saved entity from the Select Entity(s) screen when performing a one-time query.

To update an associated saved entity when performing a one-time query or creating a new data feed, follow these steps:

Note: A Report Manager can only modify an associated saved entity from the Select Entity(s) screen when performing a one-time query.

1. On the Select Entity(s) screen for a one-time query or data feed, follow the instructions in Section 13.1.2: Load a Saved Entity to load a saved entity.

2. Make the desired changes such that the entities you wish to save appear under the Your selected MIDs and/or Your selected routing codes sections on the right side of the screen.
3. In the lower-right corner, click **Save Entity**. A window opens.

![Save Entity Window](image)

4. In the window, select **Save** to overwrite the existing saved entity OR **Save As** to create a new, separate saved entity.

**Note:** If you select **Save As**, you cannot use the same Entity Name as an existing saved entity. Entity Name is case-sensitive. For example, “Saved Entity A” is different than “saved entity a”.

![Save Entity Options](image)

5. Make any necessary changes to the saved entity settings.

6. To save the changes, click **Submit**.
   a. If you selected **Save**, continue to the next step.
   b. If you selected **Save As**, the changes are saved and ready to use. Do not continue to the next step.
7. If you selected **Save**, a window opens. Review the changes to the selected entities, which will be applied to the listed data feed(s). To apply the changes, click **Confirm**. The changes are applied.

To return to the previous screen, click **Back**. To cancel the changes, click **Cancel**.

To update an associated saved entity when modifying an existing data feed, follow these steps:

1. On the **Create & Manage Data Feeds** tab, within the **Your Feeds** table, click the modify icon in the **Details** column for the appropriate data feed. A window opens.

2. In the **Entities** section, click where it says **Click here to edit “[saved entity name]”**.
3. Make the desired changes such that the entities you wish to save appear under the **Your selected MIDs** and/or **Your selected routing codes** sections on the right side of the screen.

4. In the lower-right corner, click **Review**. A window opens.

5. Review the changes to the selected entities, which will be applied to the listed data feed(s). To apply the changes, click **Confirm**. The changes are applied.

   To return to the previous screen, click **Back**. To cancel the changes, click **Cancel**.
13.1.7 Disassociate a Saved Entity from a Data Feed

**Important:** Only an IV-MTR BSA, BSA Delegate, or Subscription Manager can disassociate a saved entity to a data feed.

If you no longer want a data feed's selected entities to be automatically updated when you update the associated saved entity, you can disassociate the saved entity from the data feed. Follow these steps:

1. On the **Create & Manage Data Feeds** tab, within the **Your Feeds** table, click the modify icon in the **Details** column for the appropriate data feed. A window opens.

2. In the **Entities** section, click where it says **Click here to disassociate [data feed name] from “[saved entity name]”**.

3. A window appears informing you that the data feed was updated. To close the window, click **OK** OR click the **X** icon. The saved entity is disassociated from the data feed.

13.2 Saved Filter

A saved filter is a set of data attribute filters that limit the mail tracking data returned in a one-time query or data feed or available in a data delegation rule. You may use a saved filter on the Define Filters & Fields screen when performing a one-time query, creating a data feed, or requesting/managing/creating data delegation.

See the following sections for information about using a saved filter.

13.2.1 Create a Saved Filter

**Important:** Only an IV-MTR BSA, BSA Delegate, or Report Manager can create a **public** saved filter. Any user can create a **private** saved filter.

You can create a saved filter from the Define Filters & Fields screen when performing a one-time query, creating a data feed, or requesting/managing/creating data delegation.

To create a saved filter, follow these steps:

1. On the Define Filters & Fields screen, add the filter(s) you wish to include in the saved filter.
2. In the upper-right of the filter area, click **Save Filter**. A window opens.

![Save Filter window](image)

3. In the window, enter a name and description for the saved filter.

4. Select whether to make the saved filter private. If selected, the saved filter will only be available for your personal use. If not selected, the saved filter will be available to all users with the IV-MTR service for the CRID(s) selected from the **Owner CRIDs** drop-down menu.

   If you do not select to make a private saved filter, select one or more CRIDs from the **Owner CRIDs** drop-down menu. Users for these CRIDs will be able to use the saved filter, and the IV-MTR BSA, BSA Delegates, and Report Manager for these CRIDs will be able to modify or delete the saved filter.

5. Click **Submit**. The saved filter is created. You may continue to perform the one-time query, create the data feed, or request/manage/create the data delegation rule, if desired. To use the saved filter in the future, see Section 13.2.2: **Load a Saved Filter**.

![Save Filter window](image)

### 13.2.2 Load a Saved Filter

You can load a saved filter on the Define Filters & Fields screen when performing a one-time query, creating a data feed, or requesting/managing/creating data delegation.

To load a saved filter, follow these steps:

1. On the left side of the Define Filters & Fields screen, click **Load Saved Filter**. A window opens.

![Load Saved Filter window](image)
2. In the window, find the saved filter you wish to load and click the load icon in the Action column. The window closes, and the filters that are part of the saved filter populate the filter section on the screen.

![Load Saved Filter](image)

Note:
- Toggle between views of private and public saved filters using the buttons at the top-left of the window. A private saved filter is only available for your personal use. A public saved filter is available to all users with the IV-MTR service for a particular CRID or CRIDs.
- Search within the list by using the search box (as you enter text, the list filters to display items matching your entry).
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To see additional information for a saved filter, click the + icon to the left of the filter name.
- To delete a saved filter, click the delete icon. Click Delete when prompted to confirm that you want to delete the saved filter. (Note: Only the creator can delete a private saved filter. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a public saved filter.)
- To view the change history for a saved filter, click the view log icon.

### 13.2.3 Modify a Saved Filter

**Important:** Only the creator can modify a private saved filter. Only an IV-MTR BSA, BSA Delegate, or Report Manager can modify a public saved filter.

To change the filters or settings for a saved filter, follow these steps:

1. On the Define Filters & Fields screen for a one-time query, data feed, or data delegation rule, follow the instructions in Section 13.2.2: Load a Saved Filter to load a saved filter.
2. Make the desired changes to the filter(s).
3. In the upper-right corner, click **Save Filter**. A window opens.

4. In the window, select **Save** to overwrite the existing saved filter OR **Save As** to create a new, separate saved filter.

   **Note:** If you select **Save As**, you cannot use the same Filter Name as an existing saved filter. Filter Name is case-sensitive. For example, “Saved Filter A” is different than “saved filter a”.

5. Make any necessary changes to the saved filter settings.

6. To save the changes, click **Submit**. The changes are saved and ready to use.

### 13.2.4 Delete a Saved Filter

**Important:** Only the creator can delete a **private** saved filter. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a **public** saved filter.

To delete a saved filter, follow these steps:

1. On the left side of the Define Filters & Fields screen, click **Load Saved Filter**. A window opens.
2. In the window, find the saved filter you wish to delete and click the delete icon in the Action column.

3. Click Delete when prompted to confirm that you want to delete the saved filter. The saved filter is deleted.

13.3 Saved View

A saved view is a set of data fields, in a specified order, that you can receive through a one-time query or data feed. A saved view can also be used to specify the data fields to be shared through a data delegation rule. You may use a saved view on some of the Define Filters & Fields screens throughout IV. See the following sections for information about creating a new saved view and loading an existing one.

13.3.1 Create a Saved View

Important: Only an IV-MTR BSA, BSA Delegate, or Report Manager can create a public saved view. Any user can create a private saved view.

You can create a saved view from the Define Filters & Fields screen when performing a one-time query, creating a data feed, or requesting/managing/creating data delegation.

To create a saved view, follow these steps:

1. On the Define Filters & Fields screen, add the data field(s) you wish to include in the saved view and arrange them in your desired order.

2. In the upper-right of the view area, click Save View. A window opens.

3. In the window, enter a name and description for the saved view.
4. Select whether to make the saved view private. If selected, the saved view will only be available for your personal use. If not selected, the saved view will be available to all users with the IV-MTR service for the CRID(s) selected from the **Owner CRIDs** drop-down menu.

If you do not select to make a private saved view, select one or more CRIDs from the **Owner CRIDs** drop-down menu. Users for these CRIDs will be able to use the saved view, and the IV-MTR BSA, BSA Delegates, and Report Manager for these CRIDs will be able to modify or delete the saved view.

5. Click **Submit**. The saved view is created. You may continue to perform the one-time query, create the data feed, or request/manage/create the data delegation rule, if desired. To use the saved view in the future, see Section 13.3.2: *Load a Saved View*.

13.3.2 Load a Saved View

You can load a saved view on the Define Filters & Fields screen when performing a one-time query, creating a data feed, or requesting/managing/creating data delegation.

To load a saved view, follow these steps:

1. On the left side of the Define Filters & Fields screen, click **Load Saved View**. A window opens.
2. In the window, find the saved view you wish to load and click the load icon in the Action column. The window closes, and the fields that are part of the saved view populate the data fields section on the screen, in the order specified in the saved view.

![Load Saved View](image)

**Note:**
- Toggle between views of private and public saved views using the buttons at the top-left of the window. A private saved view is only available for your personal use. A public saved view is available to all users with the IV-MTR service for a particular CRID or CRIDs.
- Search within the list by using the search box (as you enter text, the list filters to display items matching your entry).
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To see additional information for a saved view, click the + icon to the left of the view name.
- To delete a saved view, click the delete icon. Click Delete when prompted to confirm that you want to delete the saved view. (**Note:** Only the creator can delete a private saved view. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a public saved view.)
- To view the change history for a saved view, click the view log icon.

### 13.3.3 Modify a Saved View

**Important:** Only the creator can modify a private saved view. Only an IV-MTR BSA, BSA Delegate, or Report Manager can modify a public saved view.

To change the fields or settings for a saved view, follow these steps:

1. On the Define Filters & Fields screen for a one-time query, data feed, or data delegation rule, follow the instructions in Section 13.3.2: *Load a Saved View* to load a saved view.
2. Make the desired changes to the fields and their order.

3. In the upper-right corner, click **Save View**. A window opens.

   ![Save View](image)

4. In the window, select **Save** to overwrite the existing saved view OR **Save As** to create a new, separate saved view.

   **Note:** If you select **Save As**, you cannot use the same View Name as an existing saved view. View Name is case-sensitive. For example, “Saved View A” is different than “saved view a”.

5. Make any necessary changes to the saved view settings.

6. To save the changes, click **Submit**. The changes are saved and ready to use.

### 13.3.4 Delete a Saved View

**Important:** Only the creator can delete a **private** saved view. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a **public** saved view.

To delete a saved view, follow these steps:

1. On the left side of the Define Filters & Fields screen, click **Load Saved View**. A window opens.

   ![Load Saved View](image)
2. In the window, find the saved view you wish to delete and click the delete icon in the Action column.

3. Click Delete when prompted to confirm that you want to delete the saved view. The saved view is deleted.

### 13.4 Saved Report

A saved report is a set of entities (CRIDs, MiDs, routing codes, and/or STIDs), mail object and handling event types, filters, and data fields for which to receive data through a one-time query or data feed. See the following sections for information about using a saved report.

#### 13.4.1 Create a Saved Report

**Important:** Only an IV-MTR BSA, BSA Delegate, or Report Manager can create a public saved report. Any user can create a private saved report.

You can create a saved report from the Define Filters & Fields screen when performing a one-time query or creating a data feed.

To create a saved report, follow these steps:

1. Follow the normal process for performing a one-time query or creating a data feed.
2. When you reach the Define Filters & Fields screen, select the mail object type and handling event types, add filters, and select and arrange the data fields to be included in the saved report.
3. In the upper-right corner, click **Save Report**. A window opens.

   ![Save Report Window]

4. In the window, enter a name and description for the saved report.

5. Select whether to make the saved report private. If selected, the saved report will only be available for your personal use. If not selected, the saved report will be available to all users with the IV-MTR service for the CRID(s) selected from the **Owner CRIDs** drop-down menu.
If you do not select to make a private saved report, select one or more CRIDs from the **Owner CRIDs** drop-down menu. Users for these CRIDs will be able to use the saved report, and the IV-MTR BSA, BSA Delegates, and Report Manager for these CRIDs will be able to modify or delete the saved report.

6. Click **Submit**. The saved report is created. You may continue to perform the one-time query or create the data feed, if desired. To use the saved report in the future, see Section 13.4.2: **Load a Saved Report**.

### 13.4.2 Load a Saved Report

**Important:** When you load a saved report, what is loaded is filtered by your visibility permissions. For example, if a saved report contains MIDs A and B but you only have visibility permissions assigned for MID A, MID B will not load even though it is part of the saved report.

You can load a saved report on the Select Entity(s) screen or Define Filters & Fields screen when performing a one-time query or creating a data feed.

To load a saved report, follow these steps:

1. On the left side of the Select Entity(s) screen or Define Filters & Fields screen, click **Load Saved Entity**. A window opens.
2. In the window, find the saved report you wish to load and click the load icon in the Action column. The window closes, and the entities (CRIDs, MIDs, routing codes, and/or STIDs), mail object and handling event types, filters, and data fields that are part of the saved report load on for the query or feed.

![Load Saved Report]

**Note:**
- Toggle between views of private and public saved reports using the buttons at the top-left of the window. A **private** saved report is only available for your personal use. A **public** saved report is available to all users with the IV-MTR service for a particular CRID or CRIDs.
- Search within the list by using the search box (as you enter text, the list filters to display items matching your entry).
- Use the scroll bars to view additional records. Use the controls in the lower-left corner to move to the next page of results and select how many items to show on each page.
- To see additional information for a saved report, click the + icon to the left of the report name.
- To delete a saved report, click the delete icon. Click Delete when prompted to confirm that you want to delete the saved report. *(Note: Only the creator can delete a **private** saved report. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a **public** saved report.)*
- To view the change history for a saved report, click the view log icon.

### 13.4.3 Modify a Saved Report

**Important:** Only the creator can modify a **private** saved report. Only an IV-MTR BSA, BSA Delegate, or Report Manager can modify a **public** saved report.

To change the selected entities, mail object or handling event types, filters, data fields or other settings for a saved report, follow these steps:

1. On the Select Entity(s) screen or Define Filters & Fields screen for a one-time query or data feed, follow the instructions in Section 13.4.2: *Load a Saved Report* to load a saved report.
2. Make the desired changes to the selected entities, mail object or handling event types, filters, or data fields.
3. When you reach the Define Filters & Fields screen, click **Save Report** in the upper-right corner. A window opens.

4. In the window, select **Save** to overwrite the existing saved report OR **Save As** to create a new, separate saved report.

   **Note:** If you select **Save As**, you cannot use the same Report Name as an existing saved report. Report Name is case-sensitive. For example, “Saved Report A” is different than “saved report a”.

![Save Report window](image)

5. Make any necessary changes to the saved report settings.

6. To save the changes, click **Submit**. The changes are saved and ready to use.

### 13.4.4 Delete a Saved Report

**Important:** Only the creator can delete a **private** saved report. Only an IV-MTR BSA, BSA Delegate, or Report Manager can delete a **public** saved report.

To delete a saved report, follow these steps:

1. On the left side of the Select Entity(s) screen or Define Filters & Fields screen, click **Load Saved Entity**. A window opens.
2. In the window, find the saved report you wish to delete and click the delete icon in the **Action** column.

3. Click **Delete** when prompted to confirm that you want to delete the saved report. The saved report is deleted.
14 Mail Tracking Help

Important: The gray bar at the very top of the page provides functionality for the BCG—not the IV-MTR application. The Help link in that bar takes you to a support page for the BCG—not the IV-MTR application.

A variety of resources are available to assist you with using the IV-MTR application. To access these resources, click the Mail Tracking Help (question mark) widget at the top left of the screen. You are taken to the Mail Tracking Help screen.

On this screen:

- User documentation is available on the left side. Click a document title to open that document in a new tab from the IV-MTR PostalPro page.
- BlueTube™ videos are available on the right side. Click a video title to view a video.
- Search the documents and videos by using the search box (as you enter text, the items filter to display those matching your entry).
- For additional resources, visit the IV-MTR PostalPro page. A link is provided at the top left of the screen.
15 Understand Mail Flow and Interpret Scan Data

When interpreting scan data, it is important to remember that a mail object will most likely receive more than one handling event. Multiple handling events of a mail object make it possible to determine the processing time and location of each mail object. By evaluating handling events, mailers can get an indication of when their mailpieces are near delivery.

15.1 Bundle and Piece Status

For bundle and piece visibility, IV-MTR provides information about where and when a bundle or piece received its last handling event and what type of event it was.

To understand where a bundle or piece received its last handling event, look at the last scan facility. Multiple attributes describe the last scan facility:

- Scan Facility Name
- Scan Locale Key
- Scan Facility ZIP

A reference table of facility information, called the IV-MTR Facility File, is provided on the IV-MTR PostalPro page. This table provides the facility name, locale key, ZIP Code, and address for each Postal Service facility. Mailers can use the data attributes in the list above to look up additional facility information in the IV-MTR Facility File.

To understand when a handling event was received, look at the Scan DateTime.

To understand what type of handling event was received, look at the Scan Event Code. This is the same as the operation code (opcode). See Section 15.3: Scan Event Codes for more information.

15.1.1 Predicted Delivery Date

IV-MTR calculates the Predicted Delivery Date (PDD) for pieces when the first enroute handling event occurs and then recalculates the PDD when subsequent handling events occur. For the business rules around calculating the PDD, see Appendix E.1: Predicted Delivery Date.

The PDD is available in the application as a data attribute for pieces. To view or receive this data attribute, you would need to perform a one-time query or create a data feed with the delimited file format. This format allows you to choose the data attributes you want as well as their display order.

15.1.2 Assumed Handling Events

IV-MTR creates assumed handling events for nested bundles and pieces when a parent mail object (e.g., container) receives a handling event. For information about assumed events, see Appendix E.2: Assumed Handling Events.

15.1.3 Logical Handling Events

IV-MTR provides logical handling events, which are based on business rules, for bundles and pieces. For information about logical events, see Appendix E.3: Logical Handling Events.
15.2 Container and Handling Unit Status

For container and handling unit visibility, IV-MTR provides information about where and when a container or handling unit received its last handling event and what type of event it was.

To understand where a container or handling unit received its last handling event, look at the last scan facility. Multiple attributes describe the last scan facility:

- **Scan Facility Name**
- **Scan Facility Locale Key**
- **Scan Facility ZIP**

A reference table of facility information, called the *IV-MTR Facility File*, is provided on the IV-MTR PostalPro page. This table provides the facility name, locale key, ZIP Code, and address for each Postal Service facility. Mailers can use the data attributes in the list above to look up additional facility information in the *IV-MTR Facility File*.

To understand when a handling event was received, look at the **Scan DateTime**.

To understand what type of handling event was received, look at the **Scan State** attribute. The possible values are:

- **Entered at USPS**: Container or orphan handling unit inducted in Postal Service network (also the scan used for Start-the-Clock)
- **Enroute Arrive**: Container or handling unit arrived at a Postal Service facility or airport
- **Enroute**: Handling unit or bundle was processed at a Postal Service facility on sorting equipment
- **Enroute Depart**: Container or handling unit departed a Postal Service facility or airport

The **Scan Event Code** attribute, or operation code (opcode), also provides information about the type of handling event received. See Section 15.3: **Scan Event Codes** for more information.

15.2.1 Assumed Handling Events

IV-MTR creates assumed handling events for containers and handling units when a parent mail object (e.g., trailer) receives a handling event. For information about assumed events, see Appendix E.2: **Assumed Handling Events**.

15.3 Scan Event Codes

Each handling event has a three-digit **Scan Event Code**, or operation code (opcode), that describes the type of processing operation that generated the event. Each mail object will likely receive multiple handling event records, each of which will contain a different opcode. The number and type of processing operations that take place depend on numerous factors, including mail class, shape, presort level, and originating and destination locations.

Mailers can use opcodes to determine the processing status of mail objects. Understanding these opcodes is critical to the interpretation of handling event data. Each opcode represents a type of sortation and the type of equipment on which the mail was processed. Multiple opcodes can describe a particular type of sort operation because each opcode represents a different piece of equipment or mail type.

The opcodes are listed in the *IV-MTR Operation Codes List*, available on the IV-MTR PostalPro page.
Column M (Mail Phase) in the Operation Codes List can be used to determine what processing phase the mail object is in. The higher the phase number, the closer the mail is to delivery. The phases are:

- **0**: Origin processing (Cancellation)
- **1**: Origin processing (Outgoing Primary or Outgoing Secondary)
- **2**: Destination processing [Incoming Primary, Managed Mail, Incoming section center facility (SCF)]
- **3**: Destination processing* [Incoming Secondary, Box, delivery point sequence (DPS), or Sector/Segment]
- **4**: Delivery Unit events (logical delivery event)

*This phase is when last processing events occur.*

The following are descriptions of the **Mail Level** (column L) in the Operation Codes List:

- **Cancellation**: Process to cancel postage for collection mail. Typically, the first processing operation received for loose collection mail.
- **Outgoing (O/G) Primary**: Processing of originating mail separated by automated area distribution center (AADC), 3-digit ZIP Code separations, and 5-digit ZIP Code separations for overnight, 2-day, and 3-day delivery. Additional processing is expected on automated equipment.
- **Outgoing (O/G) Secondary**: Processing of originating mail not finalized on outgoing primary separated by AADC, 3-digit ZIP Code separations, and 5-digit ZIP Code separations for overnight, 2-day, and 3-day delivery. Additional processing is expected on automated equipment.
- **Managed Mail**: Processing of 3- and 5-digit outgoing primary mail normally sorted from an AADC level down to 3-digit ZIP Code level, with high-volume 5-digit zones and firms also held out. Additional processing is expected on automated equipment for the 3-digit sorted volume and the 5-digit sorted volume for which the plant has incoming secondary, DPS, sector/segment, or box section sorting responsibility.
- **Incoming (I/C) SCF**: Processing of local destinating mail normally separated by the host SCF by 5-digit ZIP Code. Additional processing on automated equipment is expected for the 5-digit ZIP Codes for which the plant has incoming secondary, DPS, sector/segment, or box section sorting responsibility.
- **Incoming (I/C) Primary**: Processing of local mail normally separated by the host SCF by 5-digit ZIP Code for which it has delivery responsibility. Additional processing on automated equipment is expected for mail for which the plant has incoming secondary, DPS, sector/segment, or box section sorting responsibility.
- **Incoming (I/C) Secondary**: Processing of local mail normally separated by carrier route. This mail might be finalized, or additional processing might be expected for letter mail on automated equipment (e.g., carrier sequence barcode sorters). This is the final expected processing for flats that are not processed on the Flats Sequencing System (FSS).
- **Box Section**: Processing of local mail normally separated by Post Office™ (PO) Box section. In most instances, this is the final automated processing for this mail (manual sorting is required to separate mail by individual PO Box). In some instances, mail is separated into individual PO Boxes by repeating this operation on automated equipment. This is the reason why mailers may receive multiple scans with the same operation code for a given piece.
• **Sector/Segment (SEC/SEG or S/S):**
  - *1st Pass (Sec/Seg Sequencing):* Processing to separate mail by ZIP+4® sectors. This mail may require additional processing on automated equipment.
  - *2nd Pass (Sec/Seg Carrier Sort):* Processing to separate mail by ZIP+4 segments. This is the final processing of mail.

• **Delivery Point Sequence (DPS):**
  - *1st Pass (DPS Sequencing):* Processing to separate mail into carrier walk sequence. In most cases, this mail requires additional processing on automated equipment. This is the last processing for some mailpieces (e.g., firm holdouts, box sections, and Postal Service facilities).
  - *2nd Pass (DPS Carrier Sort):* Processing to separate mail into carrier walk sequence. This is the final processing of mail.

• **Logical Out for Delivery Event:** Implied event indicating when the mailpieces should be out for delivery. See Appendix E.3.1: *Logical Out for Delivery Events* for information about how the system creates logical out for delivery events.

• **Logical Delivery Event:** Implied event indicating when the mailpiece should have been delivered. See Appendix E.3.2: *Logical Delivery Events* for information about how the system creates logical delivery events.
16 Data Dictionary and Sample Data Set

The IV-MTR External Facing Data Dictionary and Sample Data Set provide information about the data attributes available in the application for the delimited, legacy IMb Tracing PKG, and JSON file formats.

For information about data attributes in Mail.XML messages, see the IV-MTR Mail.XML Guide.

16.1 Data Dictionary

The IV-MTR External Facing Data Dictionary, on the IV-MTR PostalPro page, describes the data attributes available in the external-facing IV-MTR application.

The data attributes in the Data Dictionary are organized by the mail object to which they apply: container, handling unit, bundle, and piece. The worksheet for a particular mail object lists the data attributes available in the application for that mail object type in the delimited, legacy IMb Tracing PKG, and JSON file formats.

The following information is provided about each data attribute:

- **New Field**: Indication of whether the data attribute is new in IV-MTR or was available in the legacy systems (IMb Tracing and PostalOne)
- **Multiple**: Indication that multiple instances of the data attribute could be received from IV-MTR. When there are multiple values for a data field, the values appear in the same field with a user-selected, multi-value delimiter (e.g., comma, pipe) separating the values.
- **Long Name**: Formal name of the data attribute
- **Display Name**: Name of the data attribute as displayed within the IV-MTR application and in delimited files
- **Description**: Explanation of what information the data attribute provides; includes possible values and their meanings
- **JSON Field Name**: Name of the data attribute as displayed in JSON files
- **Field Size**: Maximum number of characters in the data attribute field
- **Type**: Format of the data attribute field (e.g., alphanumeric, integer)
- **Sample Data**: Example data for the data attribute
- **Release to be Available to Mailers**: IV-MTR release in which this data attribute will be available for users. Allows users to plan for attributes that will be available in a future release.
- **Raw/Enriched Indicator (Piece Only)**: Indication of whether the field is available only in enriched data files or both raw and enriched files

16.2 Sample Data Set

The Sample Data Set workbook, on the IV-MTR PostalPro page, serves as an accompaniment to the Data Dictionary. The Sample Data Set provides sample data in the delimited format for each attribute available in the IV-MTR application for each mail object type. The workbook is not intended as an example of a mail tracking data file you would receive from the application.
17 Additional Notes

17.1 Data Retention

IV-MTR retains transactional scan-level mail tracking data for 45 days.

17.2 Session Timeout

After 30 minutes of inactivity, a user's IV-MTR application session is ended, and a "Session Expired" message appears.

Note: The BCG timeout is 15 minutes. If you have the BCG or another BCG application open in another tab or window while you are using IV-MTR, and the BCG or other BCG application times out due to inactivity, your IV-MTR session will also be timed out, even if you are active in IV-MTR.

17.3 Table Columns

Throughout the IV-MTR application, you can sort a table by a particular column and adjust the width of any table column.

To sort a table by a particular column, click the heading of the column by which you wish to sort. The table sorts in ascending order by the selected column. An icon appears in the column heading indicating the table is sorted by this column.

To sort in descending order, click the selected column again. The table re-sorts, and the icon in the column heading changes.

To adjust the width of a column, hover on the line between two column headings. The mouse icon changes. Drag the icon to adjust the column width.
18 Customer Support

The IV-MTR Help Desk through the Postal Service National Customer Support Center (NCSC):

- Provides full support for initial onboarding
- Provides full support for all IV-MTR needs
  - Questions
  - Account administration
  - Research for visibility issues
  - Barcode testing and certification
- Is able to address most issues on initial call
- Will escalate to necessary functional organizations to address any systemic issues
- Escalates issues to management

<table>
<thead>
<tr>
<th>Hours</th>
<th>7 AM to 7 PM CT, Monday through Friday (Closed on holidays)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone</td>
<td>1-800-238-3150, Option #2</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:InformedVisibility@usps.gov">InformedVisibility@usps.gov</a></td>
</tr>
</tbody>
</table>
| Mail         | USPS National Customer Support Center
ATTN: Informed Visibility
225 N. Humphreys Blvd, Suite 501
Memphis, TN 38188-1001 |

Within the application, access the contact information for the IV-MTR Help Desk by clicking the Contact Us (telephone) widget at the top left of the screen.

General information about IV-MTR is available on the IV-MTR PostalPro page.
## Appendix A  
### Change History

<table>
<thead>
<tr>
<th>Date</th>
<th>Version</th>
<th>Description</th>
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</table>
| 5/11/2018  | 2.6     | - Added Section 3.4: Scan Enrichment.  
- Updated Sections 7.1, 8.1.2, 9.1.1.1, 9.1.1.3, 9.3.1, and 9.3.3 to correct information regarding "Add All" functionality.  
- Updated Section 8.1.1.1: Select Subscription Owner CRID.  
- Added Section 8.1.1.2: Select Feed Data Type.  
- Updated Section 8.1.1.3: Select File Format and Define Target to correct information about which Mail.XML message types are currently available.  
- Updated description of the **Multiple** column in Section 16.1: Data Dictionary. Added description of the **Raw/Enriched Indicator** column. |
| 3/30/2018  | 2.5     | - Reformatted Table 2.3: Default Permissions by CRID or MID Role.  
- Added notes to Section 3: Data Provisioning Options and 7: One-Time Queries that piece-level one-time queries are only available through the IV-MTR Help Desk at this time.  
- Updated Section 4: Access the IV-MTR Web Application to reflect the latest version of the **Applying for Access to IV-MTR** document.  
- Updated Table 5.5: Functionality by Access Level and User Role to indicate who can associate/disassociate a saved entity to/from a data feed.  
- Updated Sections 7.1, 8.1.2, 9.1.1.1, 9.1.1.3, 9.3.1, and 9.3.3 to include option to add all CRIDs and/or MIDs.  
- Updated Sections 7.3.3, 8.1.3.3, 9.1.1.2, and 9.3.2.3 to include information about filter operators and multiple values for Field Value.  
- Updated Section 13.1.5: Associate a Saved Entity to a Data Feed and 13.1.7: Disassociate a Saved Entity from a Data Feed to indicate who can associate/disassociate a saved entity to/from a data feed.  
- Updated Section 13.1.6: Update a Saved Entity Associated to a Data Feed to indicate who can modify an associated saved entity. Added instructions for modifying an associated saved entity outside of modifying a data feed. |
<p>| 2/23/2018  | 2.4     | - Updated Section 10.1.3.1: Non-Standard Port and 10.1.3.2: USPS-Provided Server to change the timeframe for account setup in special scenarios from 14 to 21 days.       |</p>
<table>
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<tr>
<td>2/16/2018</td>
<td>2.3</td>
<td>• Updated Section 2.1: <em>Visibility Requirements for Mail Objects</em> with information about recipient role data fields.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Updated Section 3.3: <em>File Formats</em> to reflect availability of piece-level data through one-time queries.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Updated Section 3.3.4.2: <em>Push Messages</em> to reflect availability of Start-the-Clock Mail.XML push messages.</td>
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<tr>
<td></td>
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<td>• Updated Section 7.2.3.1: <em>Delimited File</em> and 7.2.3.2: <em>IMb Tracing Legacy File Format</em> with test connection functionality.</td>
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<tr>
<td></td>
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<td>• Updated Section 7.3.2: <em>Select Mail Object and Handling Event Type(s)</em> with Tracing/non-Cloning STID filter and raw/enriched data option.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Corrected instructions in Section 7.4.1.2: <em>Mail Object Navigator</em>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Updated Section 8: <em>Data Feeds</em> with note that only data for IV (Tracing) STIDs is available through a data feed.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Updated Section 8.1.1.3: <em>Select File Format and Define Target</em> to include multi-value delimiter option, test connection functionality, and additional message types available for Mail.XML.</td>
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<tr>
<td></td>
<td></td>
<td>• Updated Section 8.2: <em>View or Modify Existing Feed</em> to reflect addition of Entity Name column.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Updated Section 10.1.2.1: <em>Secure FTP (SFTP) Server</em> to include test connection functionality.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Added Section 11: <em>Roles and Permissions</em>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Added Section 13.1.5: <em>Associate a Saved Entity to a Data Feed</em>, 13.1.6: <em>Update a Saved Entity Associated to a Data Feed</em>, and 13.1.7: <em>Disassociate a Saved Entity from a Data Feed</em>.</td>
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<tr>
<td></td>
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<td>• Relocated and renamed Section 15.1.1: <em>IMb Tracing Operation Codes</em> as Section 15.3: <em>Scan Event Codes</em>. Updated Section 15.2: <em>Container and Handling Unit Status</em> to indicate Scan Event Code is now available for these mail object types.</td>
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</table>
| 1/5/2018 | 2.2     | • Throughout the entire document:  
  - Updated “IV” to “IV-MTR”.  
  - Removed references to non-secure FTP.  
  - Updated screenshots to reflect changes making most tables and lists sortable.  
  - Updated screenshots and text to reflect new action icons.  
  - Updated screenshots to reflect changes to the landing page and main navigation bar.  
  - Updated Section 4.4: *Access the Application* to reflect the new IV-MTR login page.  
  - Added description of the **Contact Us** widget to **Table 5.2: Widget Application Areas**.  
  - Updated Section 7.1: *Select Entity(s)* and its subsections with information about exporting a list of the selectable entities.  
  - Added Section 7.4.1.2: *Mail Object Navigator*.  
  - Updated Section 8.2: *View or Modify Existing Feed* with a description of the **# of Failed Files** column and instructions to export the **Your Feeds** table.  
  - Updated Section 8.2.3: *Modify Details* with information about the ability to modify the selected entities for an existing data feed.  
  - Update screenshots in Section 9: *Data Delegation* and its subsections to reflect additional columns added to tables.  
  - Added notes to Section 9: *Data Delegation* and its subsections that data delegation rules only provide visibility from the time they are created or go into effect.  
  - Added subsection to Section 9.1.1.2: *Define Filters & Fields* and added Section 9.3.2.5: *Choose Effective Date Range* about choosing the delegation effective date range.  
  - Updated Sections 9.2.2: *Data Delegation Authorization History* and 9.4: *Data Delegated to My CRID* with instructions to export the tables.  
  - Updated Section 10.1.1: *Your Servers* to reflect updated display of the Servers list.  
  - Updated Section 10.2: *View and Add Contacts* to reflect change of the “People” tab to the “Contacts” tab.  
  - Added Section 12.3: *Email Notifications*.  
  - Added Section 12.4: *Manage Notifications*.  
  - Added Section 13: *Saved Reports*.  
  - Updated Section 14: *Mail Tracking Help* to reflect the new page design and availability of videos.  
  - Updated Section 18: *Customer Support* to include information about the **Contact Us** widget. |
<table>
<thead>
<tr>
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<th>Version</th>
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</tr>
</thead>
</table>
| 11/20/2017 | 2.1     | • Updated definition of residual mail in Table 2.1: *Definitions of Visibility Requirement Terms*. Updated footnote regarding residual mail in Table 2.2: *Visibility Requirements by Mail Object and Handling Event Type*, as the 95% Full-Service requirement is temporarily on hold.  
• Updated Section 3.3: *File Formats* to reflect that bundle-level data is no longer available in the PKG file format, and the PKG file format will be available for one-time queries when piece-level data is available through one-time queries. Added note to Sections 7.2.2, 7.2.3, and 7.2.3.2 regarding the PKG file format for one-time queries.  
• Added Table 3.4: *File Format Characteristics*. Removed file format tables from Section 3.3, as this new table compiles the information into one table. Updated table with information regarding application behavior when no records are available for a query or feed and added information about the escape character used for some file formats.  
• Updated Section 5.1: *Application Areas* to reflect changes to the main navigation bar and include information about the widgets.  
• Updated images and tables in Sections 7.3: *Define Filters & Fields* and 8.1.3: *Define Filters & Fields* to reflect saved report functionality.  
• Added note to Sections 7.3.4: *Select and Arrange Data Fields* and 8.1.3.4: *Select and Arrange Data Fields* that you can rearrange the order of data fields for the JSON file format, but this does not affect the resulting file.  
• Added notes to Section 8.1.1.3: *Select File Format and Define Target* that email notifications are not available when the “Online download” delivery method is selected.  
• Updated Section 8.1.3.2: *Select Mail Object and Handling Event Type(s)* with information about selection to receive raw and/or enriched data for pieces.  
• Added Section 12: *Notifications*.  
• Updated Section 15.1.1: *IMb Tracing Operation Codes* to include definitions of logical out for delivery events and logical delivery events.  
• Added Sections 15.1.2: *Assumed Handling Events*, 15.1.3: *Logical Handling Events*, and 15.2.1: *Assumed Handling Events*.  
• Updated Appendix E.2: *Assumed Handling Events* with correct definitions of assumed actual and assumed logical handling events.  
• Added Appendix E.2.1: *Available Assumed Handling Events*.  
• Added Appendix E.3.1: *Logical Out for Delivery Events*. Added Appendix E.3: *Logical Handling Events* as an introduction to Appendices E.3.1 and E.3.2.  
• Updated Appendix I: *Legacy PKG File Naming Convention* to reflect the new naming convention for PKG files in IV-MTR.
<table>
<thead>
<tr>
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</thead>
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| 9/29/2017  | 2.0     | • Relocated content from previous Appendix I: *Visibility Eligibility* to Section 2.1: *Visibility Requirements for Mail Objects.*  
• Updated Section 2.3: *Individual Permissions* with information about MID-level visibility.  
• Updated Section 3: *Data Provisioning Options* to describe the data provisioning options currently implemented in IV-MTR. Added Appendix I: *Legacy PKG File Naming Convention.* Added Appendix J: *Delimited, Mail.XML, and JSON File Naming Convention.*  
• Updated Section 5.2: *Functionality by Access Level and User Role* to describe about how a user’s BCG access level and IV-MTR application user role(s) determine available functionality. Throughout the document, added and updated notes about functionality limited to users with specific access levels or user roles.  
• Updated Section 8.1.1.3: *Select File Format and Define Target* and its subsections to include the JSON file format and the online download delivery method for data feeds.  
• Updated Section 8.1.1.4: *Select Frequency and Start Time* with information about setting the start time and time zone for a data feed.  
• Added Section 8.2.1: *Output History.*  
• Updated Section 9.1.2: *Request History* with instructions to cancel a pending request to receive visibility.  
• Updated Section 9.1.3: *Data Delegation Requests Pending Approval for My CRID* to describe changes to this notification.  
• Updated Section 9.2.2: *Data Delegation Authorization History* with instructions to delete an existing data delegation rule that is providing visibility to another CRID/MID.  
• Added Section 10.1.2.3: *HTTPS JSON Web Service.*  
• Added Section 10.1.3.2: *USPS-Provided Server.*  
• Updated Appendix D: *References* with references to PostalPro and included additional references.  
• Throughout the entire document:  
  – Replaced references to the IV-MTR RIBBS page with the IV-MTR PostalPro page.  
  – Added notes regarding discontinued support of non-secure FTP for data transfer.  
  – Updated references to FTP to include SFTP. |
| 8/21/2017  | 1.1     | • Updated Section 2.1: *Visibility Requirements for Mail Objects* and Section 2.2: *Default Permissions* to describe the visibility requirements and default permissions currently implemented in IV-MTR.  
• Updated Section 5.1: *Application Areas* to include a description of the Roles & Permissions area of the application.  
• Removed notes about support of non-secure FTP being discontinued by the end of FY2017, as the deadline has been extended. |
| 8/9/2017   | 1.0     | • Initial release. |
## Appendix B  Acronyms and Abbreviations

<table>
<thead>
<tr>
<th>Acronym or Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AADC</td>
<td>automated area distribution center</td>
</tr>
<tr>
<td>BCG</td>
<td>Business Customer Gateway</td>
</tr>
<tr>
<td>BSA</td>
<td>Business Service Administrator</td>
</tr>
<tr>
<td>CRID</td>
<td>Customer Registration ID</td>
</tr>
<tr>
<td>CSA</td>
<td>customer supplier agreement</td>
</tr>
<tr>
<td>DPS</td>
<td>delivery point sequence</td>
</tr>
<tr>
<td>EDDM</td>
<td>Every Door Direct Mail™</td>
</tr>
<tr>
<td>eDoc</td>
<td>electronic documentation</td>
</tr>
<tr>
<td>FAST®</td>
<td>Facility Access and Shipment Tracking</td>
</tr>
<tr>
<td>FSS</td>
<td>Flats Sequencing System</td>
</tr>
<tr>
<td>FTP</td>
<td>file transfer protocol</td>
</tr>
<tr>
<td>IMb™</td>
<td>Intelligent Mail® barcode</td>
</tr>
<tr>
<td>IMcb</td>
<td>Intelligent Mail® container barcode</td>
</tr>
<tr>
<td>IMpb</td>
<td>Intelligent Mail® package barcode</td>
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<td>IMtb</td>
<td>Intelligent Mail® tray barcode</td>
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<td>IV®, MTR</td>
<td>Informed Visibility® Mail Tracking &amp; Reporting</td>
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<tr>
<td>MSP</td>
<td>Mail Service Provider</td>
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<td>NCSC</td>
<td>National Customer Support Center</td>
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<td>operation code</td>
</tr>
<tr>
<td>PDD</td>
<td>Predicted Delivery Date</td>
</tr>
<tr>
<td>PO Box</td>
<td>Post Office™ Box</td>
</tr>
<tr>
<td>SCF</td>
<td>sectional center facility</td>
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<td>secure FTP</td>
</tr>
<tr>
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<td>Service Type ID</td>
</tr>
<tr>
<td>USPS®</td>
<td>United States Postal Service®</td>
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<td>XML</td>
<td>eXtensible Markup Language</td>
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<tr>
<td>XSD</td>
<td>XML Schema Definition</td>
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## Appendix C  Definitions

### C.1  Mail Objects

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
</table>
| mailpiece                     | Letter, flat, or package  
**Note:** IV-MTR only provides mail tracking data for letters and flats.                                                                 |
| mail object                   | Generic term referring to a mailpiece, bundle, handling unit (tray, tub, or sack), container, or transportation                            |
| physical mail object          | One specific mail object (as opposed to a logical mail object)                                                                               |
| logical mail object           | Grouping of physical, composite mail objects that were created together, with the same sort level, and destined for the same location          |
| physical-logical mail object association | Relationship between two or more physical mail objects that are grouped into a logical mail object                                           |

### C.2  Nesting

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>nesting</td>
<td>Insertion of smaller mail objects into a larger mail object. The smaller mail objects are then referred to as nested mail objects, while the larger mail object is then referred to as a composite mail object.</td>
</tr>
<tr>
<td>de-nesting</td>
<td>Removal of nested mail objects from a composite mail object</td>
</tr>
<tr>
<td>composite mail object</td>
<td>Any object that contains other mail objects. Bundles, handling units, containers, and transportation are all composite mail objects. May also be referred to as a mail aggregate or parent mail object.</td>
</tr>
<tr>
<td>mail aggregate</td>
<td>See composite mail object</td>
</tr>
<tr>
<td>parent mail object</td>
<td>See composite mail object</td>
</tr>
<tr>
<td>nested mail object</td>
<td>Any object nested within another mail object. Mailpieces, bundles, handling units, and containers can all be nested mail objects.</td>
</tr>
<tr>
<td>nesting association</td>
<td>Relationship between a nested mail object and the composite mail object the nested mail object is nested into</td>
</tr>
<tr>
<td>physical nesting association</td>
<td>Physical or logical mail object is nested to a physical, composite mail object</td>
</tr>
<tr>
<td>logical nesting association</td>
<td>Physical or logical mail object is nested to a logical, composite mail object</td>
</tr>
<tr>
<td>potential physical parent mail object</td>
<td>Physical parent mail object that is part of a logical mail object and therefore has the potential of being the parent mail object of the mail objects that are nested to the logical mail object</td>
</tr>
</tbody>
</table>
## C.3 Handling Event Types

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>handling event</td>
<td>Any change in the state of a mail object including actions such as assembling, processing, sorting, scanning, staging, and transporting. May also be referred to as a scan event.</td>
</tr>
<tr>
<td>actual handling event</td>
<td>Capture of a scan or other handling of a physical mail object</td>
</tr>
<tr>
<td>assumed actual handling event</td>
<td>System-generated event that is an implied handling of a nested mail object based on an actual handling event associated to the composite mail object. The actual handling event is assumed for the nested mail objects.</td>
</tr>
<tr>
<td>assumed logical handling event</td>
<td>System-generated event that is an implied handling of a nested mail object based on a logical handling event associated to the composite mail object. The logical handling event is assumed for the nested mail objects.</td>
</tr>
<tr>
<td>logical handling event</td>
<td>System-generated event for a mail object based on business rules. For example, the system could create a logical handling event for “Out for Delivery” based on an actual handling event of “Arrived at Unit.”</td>
</tr>
</tbody>
</table>
Appendix D  References

Business Customer Gateway (BCG)
   https://gateway.usps.com

Electronic Documentation (eDoc) page on PostalPro
   https://postalpro.usps.com/mailing/edoc

Full-Service Fact Sheets page on PostalPro
   https://postalpro.usps.com/node/2788

IDEAlliance Mail.XML specifications
   https://www.idealliance.org/mail-xml

IV Mail Tracking & Reporting application
   https://iv.usps.com

IV-MTR page on PostalPro

Mailing Services page on PostalPro
   https://postalpro.usps.com/mailing
Appendix E    Business Rules

See Appendix C: Definitions for definitions of terms used in this section.

E.1    Predicted Delivery Date

The Predicted Delivery Date (PDD) indicates when a mailpiece is most likely to go out for delivery. IV-MTR calculates the PDD when the first enroute handling event occurs and then recalculates the PDD when subsequent enroute or destination handling events occur. The business rules for enroute and destination handling events are provided in the following sections.

Note:
- The PDD is an available data attribute for pieces in the delimited file format.
- The rules for calculating PDD will change in IV-MTR over time. Eventually, the application will factor in historical performance when calculating PDD, which will provide increased accuracy.
- The application does not update the PDD attribute for an earlier handling event record when a new handling event is received for the same mail object.

E.1.1    Enroute Handling Event

For handling events that do not occur at the destination facility, the PDD calculation is based on the following:

- Handling event date/time
- Clearance cutoff time for the handling event
- Service standard of the mail class between the facility where the handling event occurred and the piece’s destination ZIP Code

To calculate the PDD, first IV-MTR compares the handling event date/time to the clearance cutoff time for that handling event operation to determine whether to use the date of the handling event or add one day to that date for the calculation. Then, the application adds the service standard between the facility where the handling event occurred and the piece’s destination ZIP Code. Finally, if necessary, IV-MTR adjusts the PDD to the next Postal Service delivery date. The following table summarizes this calculation:

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Predicted Delivery Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Handling event occurred <strong>at or before</strong> the clearance cutoff time</td>
<td>Date of handling event + Service standard + Adjusted to next Postal Service delivery date, if necessary</td>
</tr>
<tr>
<td>Handling event occurred <strong>after</strong> clearance cutoff time</td>
<td>Date of handling event + 1 day + Service standard + Adjusted to next Postal Service delivery date, if necessary</td>
</tr>
</tbody>
</table>

*Note: Service standard information is available on [PostalPro](https://www. postalpro.com).*
E.1.2 Destination Handling Event

For handling events that occur at the destination facility, IV-MTR calculates the PDD based on whether the handling event was a last processing event or not. See the following sections for the business rules.

E.1.2.1 Non-Last Processing Handling Event

This section of the User Guide is under development.

E.1.2.2 Last Processing Handling Event

For last processing handling events that occur at the destination facility, the PDD calculation is based on the following:

- Handling event date/time
- Clearance cutoff time for the handling event

Certain types of handling events qualify as last processing events. To determine if a handling event is considered a last processing event, follow these steps:

1. Open the IV-MTR Operation Codes List from the IV-MTR PostalPro page.
2. Within the worksheet, find the opcode for the handling event. The handling event is a last processing event if column D (Stop-the-Clock Scan?) for that opcode is “Yes”.

If the handling event is a last processing event, IV-MTR calculates the PDD by first comparing the handling event time to the clearance cutoff time for that operation to determine whether to use the date of the handling event or add one day to that date. Then, if necessary, the application adjusts the PDD to the next Postal Service delivery date. The following table summarizes this calculation:

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Predicted Delivery Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Handling event occurred <strong>at or before</strong></td>
<td>Date of handling event&lt;thr&gt; + Adjusted to next Postal Service delivery date, if necessary</td>
</tr>
<tr>
<td>the clearance cutoff time</td>
<td></td>
</tr>
<tr>
<td>Handling event occurred <strong>after</strong> clearance</td>
<td>Date of handling event&lt;thr&gt; + 1 day&lt;thr&gt; + Adjusted to next Postal Service delivery date, if necessary</td>
</tr>
<tr>
<td>cutoff time</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** The clearance cutoff time is found in column E (*Clearance Cut off time*) of the IV-MTR Operation Codes List worksheet.
The following table provides examples of how IV-MTR calculates the PDD for different scenarios:

### Table E.3: Examples of PDD Calculation for Last Processing Events

<table>
<thead>
<tr>
<th>Scenario Description</th>
<th>Handling Event Opcode</th>
<th>Handling Event Date/time</th>
<th>Last Processing Event?</th>
<th>Clearance Cutoff Time</th>
<th>Predicted Delivery Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last processing handling event that occurs <strong>before</strong> cutoff time</td>
<td>919</td>
<td>04/15/2016 06:23:47 (Friday)</td>
<td>Yes</td>
<td>10:00</td>
<td>04/15/2016 (Friday)</td>
</tr>
<tr>
<td>Last processing handling event that occurs <strong>after</strong> cutoff time</td>
<td>538</td>
<td>04/15/2016 08:12:09 (Friday)</td>
<td>Yes</td>
<td>6:00</td>
<td>04/16/2016 (Saturday)</td>
</tr>
<tr>
<td>Last processing handling event that occurs <strong>after</strong> cutoff time, but next calendar day is not a Postal Service delivery day (e.g., Sunday)</td>
<td>918</td>
<td>04/16/2016 11:04:56 (Saturday)</td>
<td>Yes</td>
<td>10:00</td>
<td>04/18/2016 (Monday)</td>
</tr>
<tr>
<td>Last processing handling event that occurs <strong>after</strong> cutoff time, but next calendar day is a Postal Service holiday (e.g., Thanksgiving)</td>
<td>918</td>
<td>11/23/2016 10:17:48 (Wednesday)</td>
<td>Yes</td>
<td>10:00</td>
<td>11/25/2016 (Friday)</td>
</tr>
</tbody>
</table>

### E.1.3 Example of PDD Calculation for a Mailpiece

The following table provides an example of how IV-MTR would calculate the PDD for a particular mailpiece as it travels through the mailstream. In this example, the mailpiece is a periodical with IMb Delivery ZIP Code 602:

### Table E.4: Example of PDD Calculation for a Mailpiece

<table>
<thead>
<tr>
<th>Scan</th>
<th>Handling Event Type</th>
<th>Handling Event Date/time</th>
<th>Before Clearance Time?</th>
<th>Scan ZIP Code</th>
<th>Service Standard to Delivery</th>
<th>Calculation</th>
<th>Predicted Delivery Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Enroute</td>
<td>11/01/2016 09:01:03 (Tuesday)</td>
<td>Yes</td>
<td>221</td>
<td>5 days</td>
<td>Handling event date + 5 days*</td>
<td>11/07/2016 (Monday)</td>
</tr>
<tr>
<td>2</td>
<td>Enroute</td>
<td>11/02/2016 05:11:53 (Wednesday)</td>
<td>Yes</td>
<td>221</td>
<td>5 days</td>
<td>Handling event date + 5 days</td>
<td>11/07/2016 (Monday)</td>
</tr>
<tr>
<td>3</td>
<td>Enroute</td>
<td>11/03/2016 12:55:23 (Thursday)</td>
<td>No</td>
<td>450</td>
<td>4 days</td>
<td>Next day + 4 days</td>
<td>11/08/2016 (Tuesday)</td>
</tr>
<tr>
<td>4</td>
<td>Enroute</td>
<td>11/06/2016 06:01:24 (Sunday)</td>
<td>Yes</td>
<td>602</td>
<td>3 days</td>
<td>Handling event date + 3 days</td>
<td>11/09/2016 (Wednesday)</td>
</tr>
<tr>
<td>5</td>
<td>Last processing</td>
<td>11/06/2016 15:01:55 (Sunday)</td>
<td>No</td>
<td>602</td>
<td>n/a</td>
<td>Handling event date + 1 day</td>
<td>11/07/2016 (Monday)</td>
</tr>
</tbody>
</table>

* Adjusted for Sunday or non-processing day
E.2 Assumed Handling Events

An assumed handling event is a system-generated event that is an implied handling of a nested mail object based on a handling event associated to the composite mail object. In other words, when a composite mail object receives a handling event, IV-MTR assumes the event to the mail objects nested within and creates assumed handling events for those objects. Assumed handling events are dependent upon mailer eDocs (Mail.dat or Mail.XML eDoc) for mailer containers, handling units, and bundles as well as Postal Service nesting information for Postal Service containers and handling units.

In IV-MTR, the Handling Event Type Description for an assumed handling event is “Assumed Actual” or “Assumed Logical”. When the assumed event is created based on an actual handling event of the composite mail object, the assumed event is set as “Assumed Actual”. When the assumed event is created based on a logical handling event of the composite mail object, the assumed event is set as “Assumed Logical”.

The following sections provide information about the assumed handling events currently available in the application as well as how assumed handling events are created based on physical versus logical nesting associations.
### E.2.1 Available Assumed Handling Events

Several assumed handling events are and will be available in IV-MTR. The following table describes the assumed handling events, indicates which mail object types the assumed events are available for, and the Scan State and Scan Event Code for each event.

**Note:** The IV-MTR Operation Codes List provides additional information about these handling events. Additional information about logical out for delivery and logical delivery events is available in Appendix E.3.1: Logical Out for Delivery Events and Appendix E.3.2: Logical Delivery Events.

#### Table E.5: Available Assumed Handling Events

<table>
<thead>
<tr>
<th>Event Description</th>
<th>Mail Object Type</th>
<th>Scan State†</th>
<th>Scan Event Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logical out for delivery event</td>
<td>Container: Logical</td>
<td>Assumed Logical</td>
<td>n/a 516</td>
</tr>
<tr>
<td>Bundle nested to Postal container (SV)</td>
<td>Bundle: Logical</td>
<td>Assumed Logical</td>
<td>n/a 865</td>
</tr>
<tr>
<td>Trailer departed from plant (SV)</td>
<td>Handling Unit: Assumed Actual</td>
<td>Assumed Actual</td>
<td>Enroute Depart 866</td>
</tr>
<tr>
<td>Trailer arrived at Delivery Unit (IMD)</td>
<td>Container: Assumed Actual</td>
<td>Assumed Actual</td>
<td>Enroute Arrive 867</td>
</tr>
<tr>
<td>Container accepted at Delivery Unit (IMD)</td>
<td>Handling Unit: Assumed Actual</td>
<td>Assumed Actual</td>
<td>Enroute Arrive 868</td>
</tr>
<tr>
<td>Container arrived at Delivery Unit (IMD)</td>
<td>Container: Assumed Actual</td>
<td>Assumed Actual</td>
<td>Enroute Arrive 869</td>
</tr>
<tr>
<td>Container scanned as &quot;Distributed&quot; at Delivery Unit (IMD)</td>
<td>Container: Assumed Actual</td>
<td>Assumed Actual</td>
<td>Enroute Arrive 870</td>
</tr>
<tr>
<td>Bundle scanned as &quot;Curtailed&quot; at Delivery Unit (IMD)</td>
<td>Bundle: Assumed Actual</td>
<td>Assumed Actual</td>
<td>n/a 871</td>
</tr>
<tr>
<td>Appointment arrival (FAST)*</td>
<td>Container: Assumed Actual</td>
<td>Assumed Actual</td>
<td>Entered at USPS 873</td>
</tr>
<tr>
<td>Container possession (SV/IMD)*</td>
<td>Container: Assumed Actual</td>
<td>Assumed Actual</td>
<td>Entered at USPS 874</td>
</tr>
<tr>
<td>Bedloaded sack unload (SV)*</td>
<td>Container: Assumed Actual</td>
<td>Assumed Actual</td>
<td>Enroute Arrive 875</td>
</tr>
<tr>
<td>Container unload (SV)*</td>
<td>Container: Assumed Actual</td>
<td>Assumed Actual</td>
<td>Enroute Arrive 876</td>
</tr>
<tr>
<td>Bedloaded sack load (SV)*</td>
<td>Container: Assumed Actual</td>
<td>Assumed Actual</td>
<td>Enroute Depart 877</td>
</tr>
<tr>
<td>Container load (SV)*</td>
<td>Container: Assumed Actual</td>
<td>Assumed Actual</td>
<td>Enroute Depart 878</td>
</tr>
</tbody>
</table>

* These handling events will be released through a phased approach beginning on February 20, 2018.

† Scan State is only available for containers and handling units.
Through assumed handling events, IV-MTR is able to provide enhanced bundle visibility. The following figure depicts the handling events that are especially important for this visibility.

**Figure E.1: Processing Events for Enhanced Bundle Visibility**

![Diagram showing various handling events for enhanced bundle visibility]

### E.2.2 Physical vs. Logical Nesting Associations

Currently, IV-MTR creates assumed handling events based on physical nesting associations. In the future, assumed events based on logical nesting associations will be available. Additional information about how the application creates assumed handling events based on physical and logical nesting associations is provided in the following sections.

#### E.2.2.1 Physical Nesting Associations

When an actual or logical handling event is received for a composite mail object **AND** the composite mail object has a physical nesting association with a nested mail object, IV-MTR creates an assumed handling event for the nested mail object. The date/time, location, and event description for the assumed handling event that is created for the nested mail object remain the same as the actual handling event. The barcode provided in the assumed handling event record is the nested mail object barcode.
E.2.2.2 Logical Nesting Associations

Note: Assumed handling events based on logical nesting associations will be implemented in IV-MTR in a future release. The draft business rules for creating these events are provided below; these rules are subject to change.

In the future, the application will create assumed handling events for mail objects nested to a logical mail object when all of the following are true:

1. The potential physical parent mail objects* have the same handling event type
2. The handling events have the same handling event location
3. The handling event date/times are within two hours of each other
4. The handling events are associated to the same equipment (if applicable)
5. The handling events are associated to the same machine run (if applicable)
6. The handling events have the same disposition (e.g., output bin, staging area) (if applicable)

* A potential physical parent mail object is a physical parent mail object that is part of a logical mail object and therefore has the potential of being the parent mail object of the mail objects that are nested to the logical mail object. The following image depicts potential physical parent mail objects and their relationships to a logical mail object and a nested mail object.

Figure E.2: Potential Physical Parent Mail Object Relationships

The barcode provided in the assumed handling event record will be the nested mail object barcode. The handling event date/time for the record will be the time of the last chronological handling event associated to the logical mail object.

E.3 Logical Handling Events

A logical handling event is a system-generated, implied handling event for a mail object based on business rules. Logical handling events are different from actual handling events (based on physical scans) and assumed handling events (based on nesting associations). In IV-MTR, the Handling Event Type Description for a logical handling event is “Logical”.

Currently, the application creates two logical handling events: 1) logical out for delivery events and 2) logical delivery events. Additional information about these logical handling events is provided in the following sections.

E.3.1 Logical Out for Delivery Events

One of the logical handling events that IV-MTR creates is the logical out for delivery event for bundles. A logical out for delivery event indicates that a bundle has arrived and been distributed at the Delivery Unit and is expected to be out for delivery. The Scan Event Code (opcode) for the handling event is 516.
The application creates a logical out for delivery event as follows:

1. A truck arrives at the Delivery Unit from the plant, and the containers are unloaded.
2. Containers with mail being processed for that day’s delivery are scanned as “Distributed”.
3. Carriers depart the Delivery Unit to make the day’s deliveries. The bundles that did not go out for delivery that day are scanned as “Curtailed”.
4. When the “Inventory Complete” barcode is scanned, IV-MTR creates a logical out for delivery event for any bundle that received a “Distributed” scan but not a “Curtailed” scan.

   **Note:** If the “Inventory Complete” barcode is not scanned, all mail that received a “Distributed” scan for that day reverts to “Curtailed” volume. Therefore, logical out for delivery events would not be generated for that mail for that day.

The following image depicts the logical out for delivery process for bundle visibility.

**Figure E.3: Logical Out for Delivery Process for Bundle Visibility**

When IV-MTR creates a logical out for delivery event for a bundle, the application also creates assumed logical out for delivery events for pieces nested to the bundle (if nesting association information is available). The **Handling Event Type Description** for the resulting handling event for the pieces is “Assumed Logical,” and the **Scan Event Code** (opcode) for the handling event is 516.

Such nested pieces then meet the inventory criteria for IV-MTR to create logical delivery events for those pieces. If the trigger criteria are also met, the application creates logical delivery events for those pieces. For additional information, see Appendix E.3.2: **Logical Delivery Events**.

### E.3.2 Logical Delivery Events

A logical delivery event, which is a type of logical handling event, is an implied delivery. The **Scan Event Code** (opcode) is 517.

The steps for creating a logical delivery event are as follows:

1. When a mailpiece receives its last expected processing operation, the mailpiece is added to inventory for delivery, and the system updates the PDD (see Appendix E.1: **Predicted Delivery Date**).
2. When the logical delivery event trigger criteria are met, the system generates the logical delivery event. The timestamp associated to the logical delivery event is the time the trigger occurred.
The following table describes the criteria the system uses to add a mailpiece to inventory for delivery based on the last expected processing operation as well as the trigger criteria and time used for the logical delivery event. The criteria differ based on the type of delivery:

### Table E.6: Inventory and Trigger Criteria for Logical Delivery Events

<table>
<thead>
<tr>
<th>Delivery Scenario</th>
<th>Inventory Criteria</th>
<th>Trigger Criteria and Time Used for Logical Delivery Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-street</td>
<td>Mailpiece received processing scan with one of the following opcodes: 146, 538, 918, or 919</td>
<td>Carrier device leaves geofence on the PDD for the associated ZIP+4*</td>
</tr>
<tr>
<td></td>
<td><strong>OR</strong></td>
<td>PO Box uptime barcode is scanned on the PDD for the associated Post Office</td>
</tr>
<tr>
<td>PO Box</td>
<td>Bundle that the mailpiece is nested to receive a Logical Out for Delivery Event (opcode 516)</td>
<td>Opening time of Post Office on the PDD</td>
</tr>
<tr>
<td>Caller Service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Delivery Unit)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* If data is not received indicating the carrier device left the geofence for the associated ZIP+4, gaps are filled in when three consecutive (by route sequence) ZIP+4 geofence exits are observed. At that time, any previous ZIP+4s in the route sequence that had not previously received a geofence exit event are then triggered for creation of logical delivery events. For example, there is a set of ZIP+4s labeled by route sequence as A B C D E. The first geofence exited is C, then D, and then E. Because C, D, and E are consecutive ZIP+4s according to the route sequence, and A and B had not yet received a geofence exit event, A and B are then triggered for creation of logical delivery events. The time used for the logical delivery event is the same as for E.*
Appendix F  Import CSV or TXT File into Microsoft Excel

These instructions explain how to import a CSV or TXT file into Microsoft Excel 2010. Importing into other versions of Excel is similar. The links at the end of this section provide additional information.

1. Within Excel, open a blank workbook.
2. On the Data tab, in the Get External Data group, click From Text.
3. Locate and double-click the file you want to open. The Text Import Wizard starts.
4. **Step 1:** Select the file type.
   a. Select Delimited.
   b. Click Next.
5. **Step 2:** Select the delimiter used in the file.
   
a. Select the delimiter that separates values in the file. (For an IV-MTR Legacy IMb Tracing package file, select **Comma**. For an IV-MTR Delimited file, select the appropriate delimiter.)
   
b. Click **Next**.

6. **Step 3:** Select the data format for each column. It is recommended to import all columns as text by doing the following:
   
a. Under **Data preview**, select the first column.
   
b. Scroll all the way to the right of the preview area.
   
c. Hold the **Shift** key and select the last column. All columns in the **Data preview** area should be highlighted.
   
d. Under **Column data format**, select **Text**.
   
e. Click **Finish**.
7. When prompted, choose where to import the data, and click OK.

Note:

- If you do not import numbers to be formatted as text, Excel may drop any leading zeros.
- You may need to convert numbers stored as text to numbers if you intend to use any formulas with the data.
- If you save the file, Excel defaults to save as an Excel workbook (.xlsx).
- For additional information, see the following webpages:
  - Microsoft Office Help: Import or export text (.txt or .csv files)
  - Microsoft Office Help: Text Import Wizard
Customers who previously downloaded container and handling unit visibility reports from the PostalOne! Data Distribution dashboard can create a delimited file in IV-MTR to obtain the same information. The following table shows a mapping of the PostalOne! data attributes to the IV-MTR attributes.

**Note:** Some attributes are no longer available or will not be available until a future release.

For information about creating a delimited file for download, see Section 7: One-Time Queries. For information about creating a data feed to receive delimited files, see Section 8: Data Feeds.

### Table G.1: Mapping of PostalOne! Attributes to IV-MTR Attributes

<table>
<thead>
<tr>
<th>No.</th>
<th>PostalOne! Attribute</th>
<th>IV-MTR Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>CRID</td>
<td>eDoc Submitter CRID</td>
<td>CRID of the eDoc Submitter</td>
</tr>
<tr>
<td>B</td>
<td>UserLicenseCode</td>
<td>eDoc User License Code</td>
<td>4-character code that uniquely identifies the eDoc provider. Combination of eDoc User License Code and eDoc Job ID uniquely identifying a mailing. Provided in Mail.dat and can be used in Mail.XML.</td>
</tr>
<tr>
<td>C</td>
<td>MaildatJobID</td>
<td>eDoc Job ID</td>
<td>Mail.dat Job ID of the eDoc to which the mail object is associated. Provided in Mail.XML eDocs as well. Job IDs are user-managed but must remain unique within one User License Code.</td>
</tr>
<tr>
<td>D</td>
<td>CustomerGroupID</td>
<td>eDoc Customer Group ID</td>
<td>Mail.XML Customer Group ID for the specific mail object</td>
</tr>
<tr>
<td>E</td>
<td>MailingGroupID</td>
<td>eDoc Mailing Group ID</td>
<td>Mail.XML Mailing Group ID for the specific mail object</td>
</tr>
<tr>
<td>F</td>
<td>ConsigneeApptID</td>
<td>Appointment ID</td>
<td>FAST Appointment Number associated to the mail object. Provided in eDoc as the Reservation Number.</td>
</tr>
<tr>
<td>G</td>
<td>LogicalIndicator</td>
<td>Not available at this time</td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>CSADispatchNumber</td>
<td>eDoc CSA Agreement ID</td>
<td>Customer supplier agreement (CSA) number generated by USPS. Provided in eDoc and associated to the mail object.</td>
</tr>
<tr>
<td>I</td>
<td>ContainerID</td>
<td>eDoc Container ID</td>
<td>6-character value that uniquely identifies a container or handling unit within a specific job. This value is used to link Mail.dat files and is unique within Job ID, exclusive of container or handling unit type.</td>
</tr>
<tr>
<td>J</td>
<td>ParentContainerID</td>
<td>eDoc Parent Container ID</td>
<td>eDoc Container ID of the container or handling unit in which this child container or handling unit resided, based upon the eDoc. Parent containers and handling units may have parent containers themselves (e.g., a carton in a sack upon a pallet).</td>
</tr>
<tr>
<td>No.</td>
<td>PostalOne Attribute</td>
<td>IV-MTR Attribute</td>
<td>Description</td>
</tr>
<tr>
<td>-----</td>
<td>-------------------------</td>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>K</td>
<td>SiblingContainerID</td>
<td>eDoc Sibling Container ID</td>
<td>eDoc Container ID of the container or handling unit for which this container or handling unit was created due to an overflow of pieces that could not be included in the original container or handling unit. In the event of a sibling container or handling unit, the eDoc Container ID of the original affected container or handling unit must be populated in this field. This field is blank if a sibling container or handling unit was not created.</td>
</tr>
<tr>
<td>L</td>
<td>ContainerType</td>
<td>Not available at this time</td>
<td></td>
</tr>
<tr>
<td>M</td>
<td>USPSFacilityLocaleKey</td>
<td>Scan Locale Key</td>
<td>USPS Facility Locale Key of the facility where the mail object received its last chronological handling event (may be actual, assumed, or logical handling event)</td>
</tr>
<tr>
<td>N</td>
<td>USPSFacilityName</td>
<td>Scan Facility Name</td>
<td>USPS Facility Name of the facility where the mail object received its last chronological handling event (may be actual, assumed, or logical handling event)</td>
</tr>
<tr>
<td>O</td>
<td>ScanDateTime</td>
<td>Scan DateTime</td>
<td>Date and time when the mail object received its last chronological handling event (may be actual, assumed, or logical handling event)</td>
</tr>
<tr>
<td>P</td>
<td>ScanState</td>
<td>Scan State</td>
<td>State of the mail object based on the last chronological handling event (may be actual, assumed, or logical handling event)</td>
</tr>
<tr>
<td>Q</td>
<td>ScanStatus</td>
<td>Not available in IV-MTR</td>
<td></td>
</tr>
<tr>
<td>R</td>
<td>ScanIssueDescription</td>
<td>Not available in IV-MTR</td>
<td></td>
</tr>
<tr>
<td>S</td>
<td>ScanIssueResolution</td>
<td>Not available in IV-MTR</td>
<td></td>
</tr>
<tr>
<td>T</td>
<td>IMcb</td>
<td>IMcb</td>
<td>IMcb received as part of eDoc or handling event scan record</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Note:</strong> Only available for containers</td>
</tr>
<tr>
<td>U</td>
<td>IMtb</td>
<td>IMtb</td>
<td>IMtb received as part of eDoc or handling event scan record</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Note:</strong> Only available for handling units</td>
</tr>
<tr>
<td>V</td>
<td>IMb</td>
<td>IMb</td>
<td>IMb received as part of eDoc or handling event scan record</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Note:</strong> Only available for bundles and pieces</td>
</tr>
<tr>
<td>W</td>
<td>FullServiceComplianceIndicator</td>
<td>Not available in IV-MTR</td>
<td></td>
</tr>
<tr>
<td>X</td>
<td>FullServiceNonComplianceReasonCode</td>
<td>Not available in IV-MTR</td>
<td></td>
</tr>
<tr>
<td>Y</td>
<td>FullServiceAvailabilityDate</td>
<td>Not available in IV-MTR</td>
<td></td>
</tr>
<tr>
<td>Z</td>
<td>FullServiceIndicator</td>
<td>Not available at this time</td>
<td></td>
</tr>
<tr>
<td>AA</td>
<td>PackageID</td>
<td>Not available at this time</td>
<td></td>
</tr>
<tr>
<td>AB</td>
<td>PackageLevelCode</td>
<td>Not available at this time</td>
<td></td>
</tr>
<tr>
<td>AC</td>
<td>PackageZipCode</td>
<td>Not available at this time</td>
<td></td>
</tr>
<tr>
<td>No.</td>
<td>PostalOne! Attribute</td>
<td>IV-MTR Attribute</td>
<td>Description</td>
</tr>
<tr>
<td>-----</td>
<td>-----------------------</td>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>AD</td>
<td>PackagePieceCount</td>
<td>Bundle Count</td>
<td>Count of bundles associated to container or handling unit, as determined by eDoc</td>
</tr>
<tr>
<td>AE</td>
<td>PackageCopiesCount</td>
<td>Not available at this time</td>
<td></td>
</tr>
<tr>
<td>AF</td>
<td>BundleScanType</td>
<td>Not available at this time</td>
<td></td>
</tr>
</tbody>
</table>
Appendix H  CRID and MID Role Identification

H.1  Mail Owner

Table H.1: Mail.dat Mail Owner Identification Rules

<table>
<thead>
<tr>
<th>Order of Precedence</th>
<th>Mail.dat File Reference</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CPT</td>
<td>MID of mail owner</td>
</tr>
<tr>
<td>2</td>
<td>MPA</td>
<td>MID of mail owner</td>
</tr>
<tr>
<td>3</td>
<td>CPT</td>
<td>CRID of mail owner</td>
</tr>
<tr>
<td>4</td>
<td>MPA</td>
<td>CRID of mail owner</td>
</tr>
</tbody>
</table>

Table H.2: Mail.XML Mail Owner Identification Rules

<table>
<thead>
<tr>
<th>Order of Precedence</th>
<th>Mail.XML Message Reference</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MailPieceCreateRequest message: MailPieceBlockGroup, MailPieceBlock, MailOwner block</td>
<td>MailOwnerMID6 or MailOwnerMID9</td>
</tr>
<tr>
<td>2</td>
<td>MailPieceCreateRequest message: MailPieceBlockGroup, MailPieceBlock, MailOwner block</td>
<td>CRID</td>
</tr>
<tr>
<td>3</td>
<td>QualificationReportCreateRequest message: ContainerInfoData</td>
<td>MailOwnerCRID</td>
</tr>
</tbody>
</table>

Note: IV-MTR will provide mail tracking visibility of EDDM in a future release.

Table H.3: EM-DOC Mail Owner Identification Rules

<table>
<thead>
<tr>
<th>Order of Precedence</th>
<th>EM-DOC File Reference</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EM-DOC</td>
<td>Mail Owner CRID</td>
</tr>
</tbody>
</table>

H.2  Mail Preparer

Table H.4: Mail.dat Mail Preparer Identification Rules

<table>
<thead>
<tr>
<th>Order of Precedence</th>
<th>Mail.dat File Reference</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MPA</td>
<td>MID of mail preparer</td>
</tr>
<tr>
<td>2</td>
<td>MPA</td>
<td>CRID of mail preparer</td>
</tr>
</tbody>
</table>
### Table H.5: Mail.XML Mail Preparer Identification Rules

<table>
<thead>
<tr>
<th>Order of Precedence</th>
<th>Mail.XML Message Reference</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>QualificationReportCreateRequest message: QualificationReportPreparer block</td>
<td>MailerID6 or MailerID9</td>
</tr>
<tr>
<td>2</td>
<td>QualificationReportCreateRequest message: QualificationReportPreparer block</td>
<td>CRID</td>
</tr>
</tbody>
</table>

**Note:** IV-MTR will provide mail tracking visibility of EDDM in a future release.

### Table H.6: EM-DOC Mail Preparer Identification Rules

<table>
<thead>
<tr>
<th>Order of Precedence</th>
<th>EM-DOC File Reference</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EM-DOC</td>
<td>Mail Preparer CRID</td>
</tr>
</tbody>
</table>

### H.3 eDoc Submitter

#### Table H.7: Mail.dat eDoc Submitter Identification Rules

<table>
<thead>
<tr>
<th>Order of Precedence</th>
<th>Mail.dat File Reference</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SEG</td>
<td>eDoc sender CRID</td>
</tr>
</tbody>
</table>

#### Table H.8: Mail.XML eDoc Submitter Identification Rules (Mailpieces)

<table>
<thead>
<tr>
<th>Order of Precedence</th>
<th>Mail.XML Message Reference</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MailPieceCreateRequest message: SubmittingParty</td>
<td>MailerID6 or MailerID9</td>
</tr>
<tr>
<td>2</td>
<td>MailPieceCreateRequest message: SubmittingParty</td>
<td>CRID</td>
</tr>
<tr>
<td>3</td>
<td>QualificationReportCreateRequest message: SubmittingParty</td>
<td>MailerID6 or MailerID9</td>
</tr>
<tr>
<td>4</td>
<td>QualificationReportCreateRequest message: SubmittingParty</td>
<td>CRID</td>
</tr>
<tr>
<td>5</td>
<td>ManifestCreateRequest message: SubmittingParty</td>
<td>MailerID6 or MailerID9</td>
</tr>
<tr>
<td>6</td>
<td>ManifestCreateRequest message: SubmittingParty</td>
<td>CRID</td>
</tr>
</tbody>
</table>

#### Table H.9: Mail.XML eDoc Submitter Identification Rules (Containers and Handling Units)

<table>
<thead>
<tr>
<th>Order of Precedence</th>
<th>Mail.dat File Reference</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>QualificationReportCreateRequest message: SubmittingParty</td>
<td>MailerID6 or MailerID9</td>
</tr>
<tr>
<td>2</td>
<td>QualificationReportCreateRequest message: SubmittingParty</td>
<td>CRID</td>
</tr>
</tbody>
</table>
**Note:** IV-MTR will provide mail tracking visibility of EDDM in a future release.

### Table H.10: EM-DOC eDoc Submitter Identification Rules

<table>
<thead>
<tr>
<th>Order of Precedence</th>
<th>EM-DOC File Reference</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EM-DOC</td>
<td>Mail Submitter CRID</td>
</tr>
</tbody>
</table>

### H.4 FAST Scheduler

#### Table H.11: Mail.dat FAST Scheduler Identification Rules

<table>
<thead>
<tr>
<th>Order of Precedence</th>
<th>Mail.dat File Reference</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CSM</td>
<td>FAST Scheduler ID (CRID)</td>
</tr>
</tbody>
</table>

#### Table H.12: Mail.XML FAST Scheduler Identification Rules (Mailpieces)

<table>
<thead>
<tr>
<th>Order of Precedence</th>
<th>Mail.XML Message Reference</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MailPieceCreateRequest message: SubmittingParty</td>
<td>SchedulerID (CRID)</td>
</tr>
<tr>
<td>2</td>
<td>QualificationReportCreateRequest message: SubmittingParty</td>
<td>SchedulerID (CRID)</td>
</tr>
<tr>
<td>3</td>
<td>ManifestCreateRequest message: SubmittingParty</td>
<td>SchedulerID (CRID)</td>
</tr>
</tbody>
</table>

#### Table H.13: Mail.XML FAST Scheduler Identification Rules (Containers and Handling Units)

<table>
<thead>
<tr>
<th>Order of Precedence</th>
<th>Mail.XML Message Reference</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>QualificationReportCreateRequest message: SubmittingParty</td>
<td>SchedulerID (CRID)</td>
</tr>
</tbody>
</table>

### H.5 MID on Piece

The MID contained in the IMb is used to determine the MID on Piece. For an IMb that uses a Reply Mail by ZIP IMb construct, the routing code contained in the IMb is used to determine who has visibility of data for the piece.

IV-MTR will provide mail tracking visibility of EDDM in a future release. EDDM utilizes an Intelligent Mail® package barcode (IMpb) on EDDM Bundle Facing Slips. The MID from the IMpb is used to identify the MID on Piece for EDDM bundles.

### H.6 MID on Tray

The MID contained in the IMtb is used to determine the MID on Tray.

### H.7 MID on Container

The MID container in the IMcb is used to determine the MID on Container.
Appendix I  Legacy PKG File Naming Convention

The file naming convention for the legacy PKG file format in IV-MTR different from the IMb Tracing Mail Tracking & Reporting application. The file name construct in IV-MTR is as follows:

**File name:**

fsbXXXXXXX.pkg

**Example:**

fsbbda0113.pkg

Where XXXXXXX is a seven-digit, alphanumeric sequence number that is unique across all files generated by IV-MTR.
Appendix J  Delimited, Mail.XML, and JSON File Naming Convention

The file name construct for delimited, Mail.XML, and JSON files in IV-MTR is as follows:

File name:
YYYYMMDDHHmmss_AA_BBBB_CCCC.XXXX

Key:
YYYY = year
MM = month
DD = day

HH = hour
mm = minutes
ss = seconds

AA = two letters for the mail object type, as follows:
CS = container
TS = handling unit
BS = bundle
PS = piece

BBBB = four alphanumeric characters representing the message group (e.g., A2WU)
CCCC = four numbers representing the message number in the group (e.g., 0001)

XXXX = file extension
Delimited file = TXT
Mail.XML message = XML
JSON file = JSON