

Informed Visibility® Mail Tracking & Reporting (IV®-MTR) Business Service Administrator (BSA) Instructions

V4.0, June 2020

This document provides an introduction to the Business Service Administrator (BSA) user level and information on its role in the United States Postal Service® (USPS®) Informed Visibility Mail Tracking & Reporting (IV-MTR) business service. It includes the following:

- [What is a BSA?](#)
- [How are BSAs assigned?](#)
- [How do I know if I am a BSA or BSA Delegate for IV-MTR?](#)
- [What specific tasks am I responsible for as the IV-MTR BSA?](#)
- [What can I do if I want to delegate some of the IV-MTR BSA responsibilities to other users?](#)
- [How do I complete the IV-MTR BSA-Level tasks?](#)
- [Where can I find support resources for further assistance?](#)

If you would like further information on BSA tasks in general or for other business services, please reach out to the [PostalOne! Help Desk](#) or the business service's help resources.

What is a BSA?

The Business Customer Gateway (BCG) allows users to sign up for a number of business services available from USPS, including the Enterprise Payment System (EPS), Informed Delivery®, and IV-MTR. Whenever an organization adds a new business service to a Customer Registration ID (CRID), it is prompted to select a Business Service Administrator, or BSA, for the service. The BSA will be in charge of managing the service for that CRID, including granting access to other users and completing other administrative tasks unavailable to regular users. If desired, the BSA can also designate other users as *BSA Delegates*, allowing them to complete most of the BSA-level tasks.

The tasks a BSA is responsible for vary by business service, but generally they include:

- Creating and managing an access control plan for other users
- Handling sensitive areas of the service, such as an organization's server information or releasing data to other organizations
- Being the main point of contact for the service with the USPS

Organizations are responsible for keeping track of their BSAs and notifying the Postal Service when a BSA needs to be changed (especially when a BSA departs an organization). Additionally, organizations are liable for any losses sustained when the Postal Service is not notified of a change in BSAs. More information on general BSA-related responsibilities can be found in the BCG by accessing your **Manage Account** section and clicking **Terms and Conditions**. For information about how BSAs are assigned, see the next section.

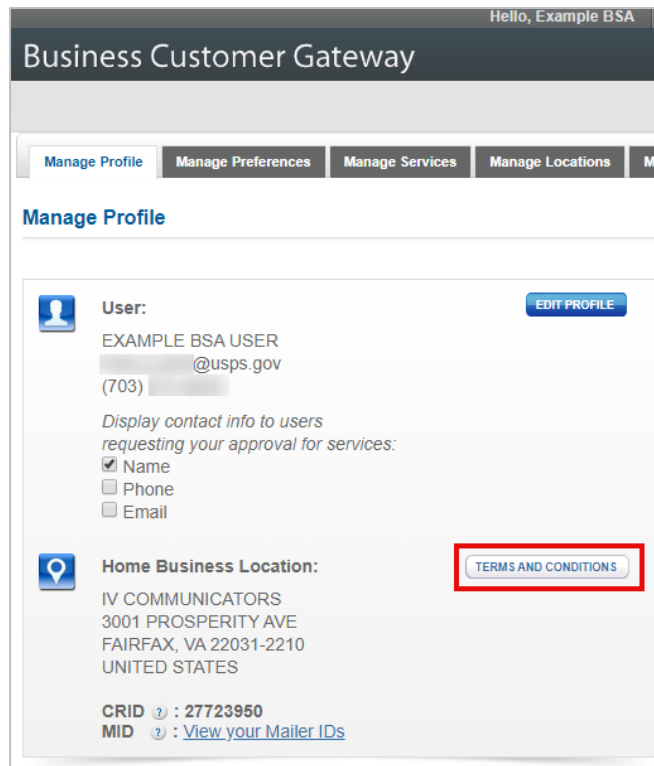


Figure 1. BSA Terms & Conditions Location in the BCG

How are BSAs assigned?


The first user to request access to a new service for a CRID is generally made the BSA for that service. BSA assignment is CRID-specific, so if you have access to multiple CRIDs, you may be the BSA for a business service on one CRID but a regular user for that same service on another CRID.

When first setting up your BCG account, you were asked (with a prompt similar to the one shown below) whether you would like to automatically become the BSA for any service you are the first to request in the future.

- **If you select “Yes”** and you are the first requestor of a new service, you will automatically be made the BSA for the service.
- **If you select “No”** and you are the first requestor of a new service, your request may be marked pending until a BSA for the service is chosen, depending on which service you selected.

Don't remember what you chose during sign up? See the next section for determining who the BSA is for a service.

Did you accidentally become the BSA? See the [Don't want to be the BSA?](#) section for next steps.

 **User Agreement**

If you are the first user to request a service for your location, you can become the **Business Service Administrator (BSA)** of that service; you would be responsible for managing that service for any future users, controlling who can and cannot use it at your business location.

Do you agree to become the BSA for any service that doesn't already have one assigned?

Yes

No

By clicking Continue you agree to the [terms and conditions](#) of the Business Customer Gateway and consent to any future updates.

[Continue](#)

Figure 2. Example BCG Screen for Accepting a BSA Role

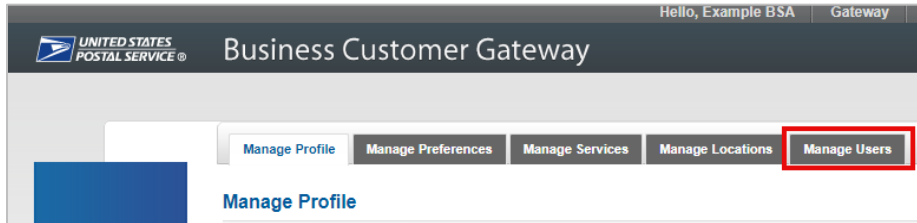
How do I know if I am a BSA or BSA Delegate for IV-MTR?

To find out if you are a BSA or BSA Delegate for a service in the BCG, you can contact the [PostalOne! Help Desk](#) or complete the following steps:

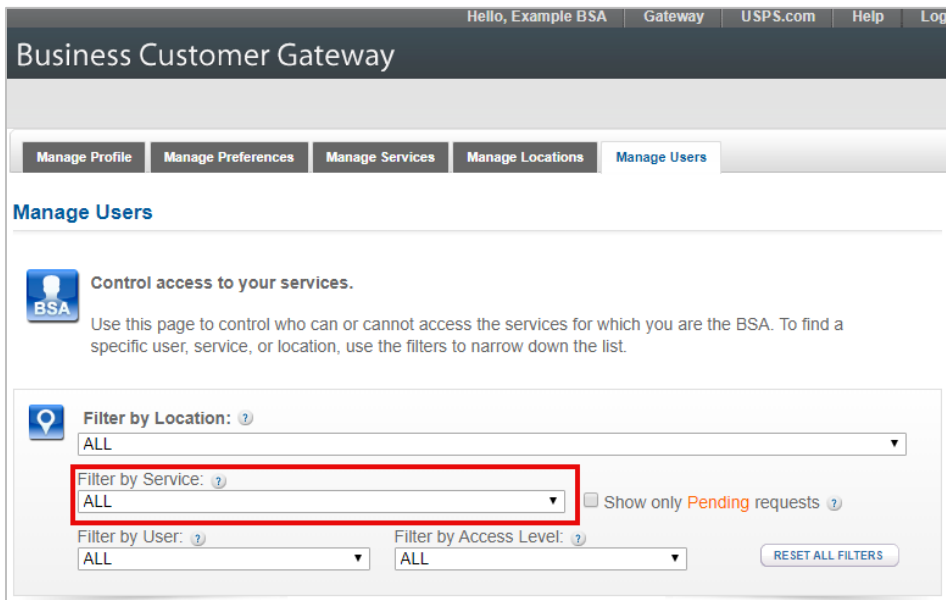
1. Log into your BCG account at gateway.usps.com.
2. Click the **Manage Account** tab on the left navigation bar.



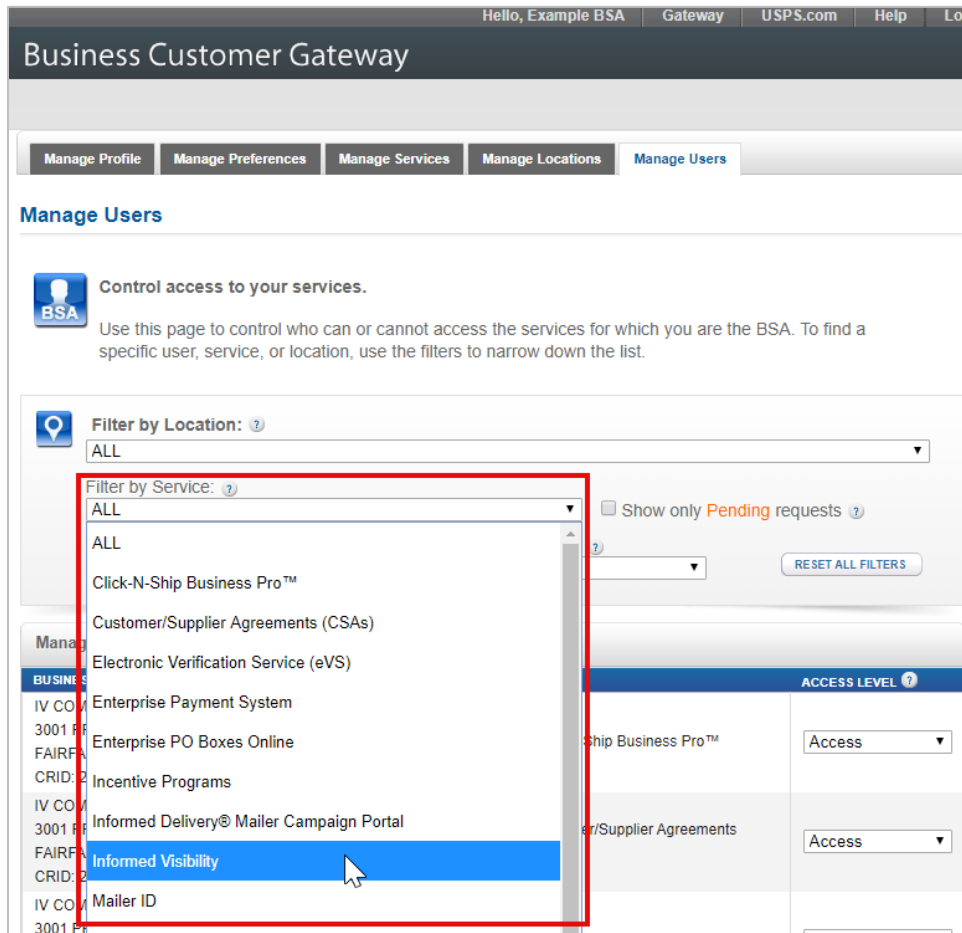
3. Review the tabs at the top of your Account section.
 - a. If the **Manage Users tab is present**, you are the BSA or BSA Delegate for one or more services. Click the **Manage Users** tab.
 - b. If the **Manage Users tab is not present**, you are not the BSA or BSA Delegate for any services. See the [I'm not the BSA. Who is?](#) section for instructions on figuring out who the BSA is.



4. The Manage Users tab will appear. The **Filter by Service** drop down menu lists the services where you are a BSA or BSA Delegate.



5. To determine if you are a BSA or BSA Delegate for a specific service, select the service from the **Filter by Service** drop down menu.
 - a. If the service you are looking for is not present, you are not the BSA or BSA Delegate for that service. See the [I'm not the BSA. Who is?](#) section for instructions on figuring out who the BSA is.



6. The Manage User Access section at the bottom of the screen will update to list all other users who have access to the selected service. Note that the list only includes *other* users – you are unable to see your own access level in the list. Review the **Access Level** column for the other users.
 - a. If another user is listed as a BSA, then you are a BSA Delegate (see Example A).
 - b. If no users are listed as a BSA, then you are the BSA (See Example B).

Example A where user is a BSA delegate:

Business Customer Gateway

Manage Profile Manage Preferences Manage Services Manage Locations **Manage Users**

Manage Users

Filter by Location:

Filter by Service: Show only Pending requests

Filter by User: Filter by Access Level:

Manage User Access

BUSINESS NAME & LOCATION	USER	SERVICE	ACCESS LEVEL
IV COMMUNICATORS 3001 PROSPERITY AVE FAIRFAX, VA 22031-2210 CRID: 27723950	MINION ONE COMMS	Informed Visibility	No Access
IV COMMUNICATORS 3001 PROSPERITY AVE FAIRFAX, VA 22031-2210 CRID: 27723950	EXAMPLE BSA USER	Informed Visibility	BSA

BSA listed = you are a BSA Delegate

Example B where user is the BSA:

Business Customer Gateway

Manage Profile Manage Preferences Manage Services Manage Locations **Manage Users**

Manage Users

Filter by Location:

Filter by Service: Show only Pending requests

Filter by User: Filter by Access Level:

Manage User Access

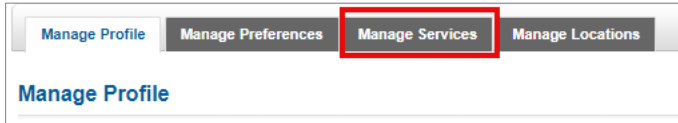
BUSINESS NAME & LOCATION	USER	SERVICE	ACCESS LEVEL
IV COMMUNICATORS 3001 PROSPERITY AVE FAIRFAX, VA 22031-2210 CRID: 27723950	MINION ONE COMMS	Informed Visibility	No Access
IV COMMUNICATORS 3001 PROSPERITY AVE FAIRFAX, VA 22031-2210 CRID: 27723950	MINION TWO	Informed Visibility	BSA Delegate

No BSA listed = you are the BSA

I'm not the BSA. Who is?

To find out who the BSA is, complete these steps:

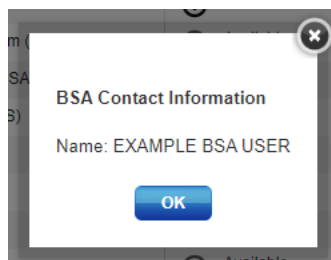
1. In the BCG **Manage Account** area, click the **Manage Services** tab.



2. The Manage Services page will appear, listing all the possible business services available and whether you have been approved for them. Locate the business service you are interested in (such as Informed Visibility). In the BSA column, click the **Not You** link.

SERVICE	STATUS	BSA	ACTION
Audit Mailing Activity (PostalOne!)	Available	Not You	GET ACCESS
Bulk Indemnity Claims	Available	Not You	GET ACCESS
Business Service Network (BSN) eService	Available	Not You	GET ACCESS
Click-N-Ship Business Pro™	Approved	Not You	REMOVE
Customer Label Distribution System (CLDS)	Approved	N/A	REMOVE
Customer/Supplier Agreements (CSAs)	Approved	Not You	REMOVE
Electronic Verification Service (eVS)	Approved	Not You	REMOVE
Enterprise PO Boxes Online	Available	Not You	GET ACCESS
Enterprise Payment System	Available	Not You	GET ACCESS
Every Door Direct Mail	Approved	N/A	REMOVE
Incentive Programs	Approved	Not You	REMOVE
Informed Delivery® Mailer Campaign Portal	Available	Not You	GET ACCESS
Informed Visibility	Available	Not You	GET ACCESS
Intelligent Mail Small Business (IMsb) Tool	Approved	N/A	REMOVE

3. A pop-up will appear, listing either the name of the BSA or stating that no BSA has been assigned for the service.
 - Note that BSA Delegates are not provided in this pop-up.



What specific tasks am I responsible for as the IV-MTR BSA?

In IV-MTR, the BSA is responsible for:

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

Information on completing these tasks is provided in the [How do I complete the IV-MTR BSA-Level tasks?](#) section.

What can I do if I want to delegate some of the IV-MTR BSA responsibilities to other users?

If you would like to allow other users to complete some (or all) of the BSA responsibilities, there are three options available:

1. Assign a BSA Delegate – Allows another user to complete BSA tasks at the BCG-level
2. Assign IV-MTR Roles & Permissions – Specific to the IV-MTR application. Allows you to grant permission for a user to complete a specific admin-level task within IV-MTR
3. Relinquish the BSA role to another user – Allows you to transfer your BSA role to another user

More information about these options is provided below.

BSA Delegates

Assigning another user as a BSA Delegate allows them to do everything a BSA can do (including assigning other BSA Delegates), with these exceptions:*

- In BCG, they cannot change the actual BSA user
- In IV-MTR, they cannot enter the authorization code to set up a CRID in IV-MTR

There are no limits to the number of BSA Delegates a CRID can have.

** Other business services (such as EPS) may also have functionality BSA Delegates cannot complete. Please refer to their support resources for more information.*

IV-MTR Roles & Permissions

If you would like to grant users permission to do admin-level tasks in the IV-MTR application but do not want to give them overall BSA powers, you can use IV-MTR's roles and permissions functionality. Roles and permissions can be granted in two ways:

1. **Enterprise-level:** roles and permissions are granted on a per-CRID basis to all users of that CRID
2. **User-level:** roles and permissions are granted on a per-user basis to all the CRIDs a particular user has access to

Not all IV-MTR admin responsibilities can be granted through roles and permissions. The table below provides information on what responsibilities can be delegated using roles and permissions.

Table 1. Available IV-MTR Roles and Permissions Delegations

Administrative Responsibility	IV-MTR Role Available?
Setting up each CRID in the IV-MTR application with the one-time authorization code	No (must be completed in BCG)
Granting access to other users in BCG	No (must be completed in BCG)
Designating desired BSA Delegates	No (must be completed in BCG)
Managing data feeds	Yes – Subscription Manager
Managing data delegation	Yes – Data Delegation Manager
Managing user roles and permissions	Yes – Roles & Permissions Manager
Managing templates for pulling data	Yes – Report Manager
Managing server set up and contact info	Yes – Address Book Manager
Removing access for users	No (must be completed in BCG)

For details and instructions on how to delegate responsibilities using IV-MTR roles and permissions, see the Roles & Permissions section of the [IV-MTR User Guide](#).

Don't want to be the BSA?

If you accidentally became a BSA, have moved to a new position, or no longer want to be a BSA, please contact the [IV Solutions Center](#) (for the IV-MTR service only) or [PostalOne! Help Desk](#) (for BSA assignments overall) for assistance. Please note that you will need to provide the following:

- CRID(s) and the service(s) where you want to relinquish your BSA role
- Your contact info
- Your username
- An alternate user to designate as the BSA

How do I complete the IV-MTR BSA-Level tasks?

IV-MTR BSA tasks are completed in two systems:

1. BCG
2. IV-MTR application

Instructions for completing the BCG tasks are provided in this document. Instructions for completing the IV-MTR application tasks are provided in the IV-MTR User Guide. See the table below for further information.

Table 2. Instructions for Completing IV-MTR BSA-Level Tasks

Administrative Responsibility	Instructions
Setting up each CRID in the IV-MTR application with the one-time authorization code	Entering the One-Time IV-MTR CRID Authorization Code
Granting access to other users in BCG	Managing Other Users' IV-MTR Access in BCG
Designating desired BSA Delegates	Designating an IV-MTR BSA Delegate
Managing data feeds	See Data Feeds section of IV-MTR User Guide
Managing data delegation	See Data Delegation section of IV-MTR User Guide
Managing user roles and permissions	See Roles & Permissions section of IV-MTR User Guide
Managing templates for pulling data	See Saved Reports section of IV-MTR User Guide
Managing server set up and contact info	See Address Book section of IV-MTR User Guide
Removing access for users	Managing Other Users' IV-MTR Access in BCG

Entering the One-Time IV-MTR CRID Authorization Code

BSAs have to enter a one-time authorization code to complete CRID setup in the IV-MTR application. Each CRID has a unique authorization code. Other users for the CRID will not have mail tracking data visibility in the application until the code has been entered.

The IV-MTR BSA must follow these steps to receive and enter the authorization code (BSA Delegates cannot complete this):

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. Access the IV-MTR application through the BCG or at iv.usps.com.
3. A window prompts you to enter the authorization code for each CRID. Click **Email Code to IV BSA** to receive an email with the authorization code.

BSA Authorization

Please enter Authorization Code for the following CRID(s) to complete setup for that (those) CRID(s). This must be done before you can view visibility data associated with that (those) CRID(s). Please contact the Informed Visibility [Solutions Center](#) for more information.

CRID 94813198 BSA Authorization Code:

4. Upon receiving the email, return to the IV-MTR application, enter the code for each CRID, and click **Submit**.
 - a. If the BSA entered the code correctly, the CRID is successfully set up within the application and the IV-MTR homepage (Queries & Feeds) will display.
 - b. If the code was entered incorrectly, an error message will appear next to the Submit button. Enter the correct code and click **Submit** again.
 - **Note:** Each CRID has a unique authorization code. If you are entering codes for multiple CRIDs, verify you enter the correct code for each CRID.

Important: Contact the [IV Solutions Center](#) for any of the following issues:

- You are the IV-MTR BSA and a window does **not** prompt you 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.

Managing Other Users' IV-MTR Access in BCG

As a BSA or BSA Delegate, you are responsible for managing other users' access to IV-MTR, including adding new users, changing the access levels for existing users, and removing access for users who should no longer have access to IV-MTR. This section provides information on completing these tasks.

There are two ways to grant access to new users:

1. Add a User – Give a user access to the application without the user needing to do anything. See the [Adding and Updating User Access for IV-MTR](#) section for instructions.
2. Approve a user's request – Review a request submitted by another user who wants access to IV-MTR. See the [Approving a User's Request to Access IV-MTR](#) section for instructions.

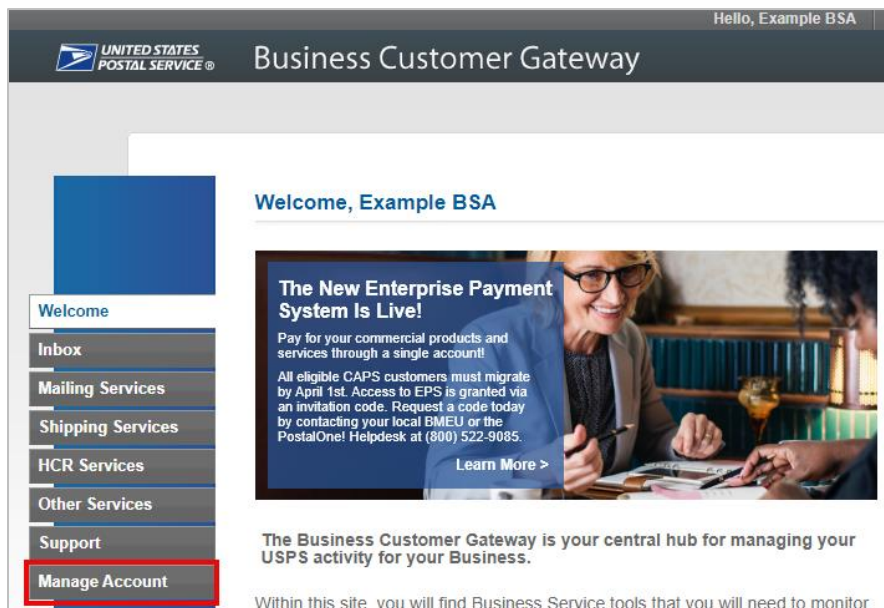
Updating an existing user's access and removing a user's access can only be done by following the instructions in the [Adding and Updating User Access for IV-MTR](#) section.

If you have any questions while completing these instructions, please contact the [PostalOne! Help Desk](#) for assistance.

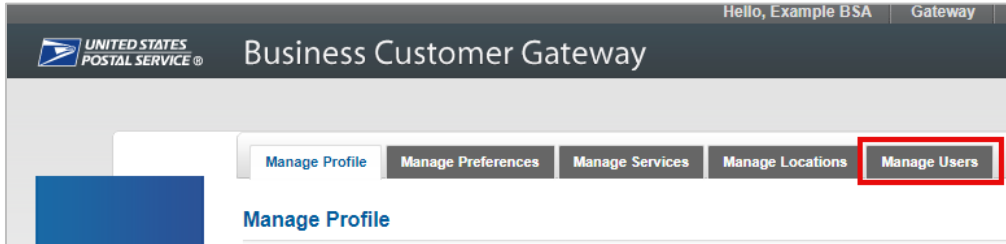
Adding and Updating User Access for IV-MTR

To give, change, or revoke another user's IV-MTR access, follow these steps:

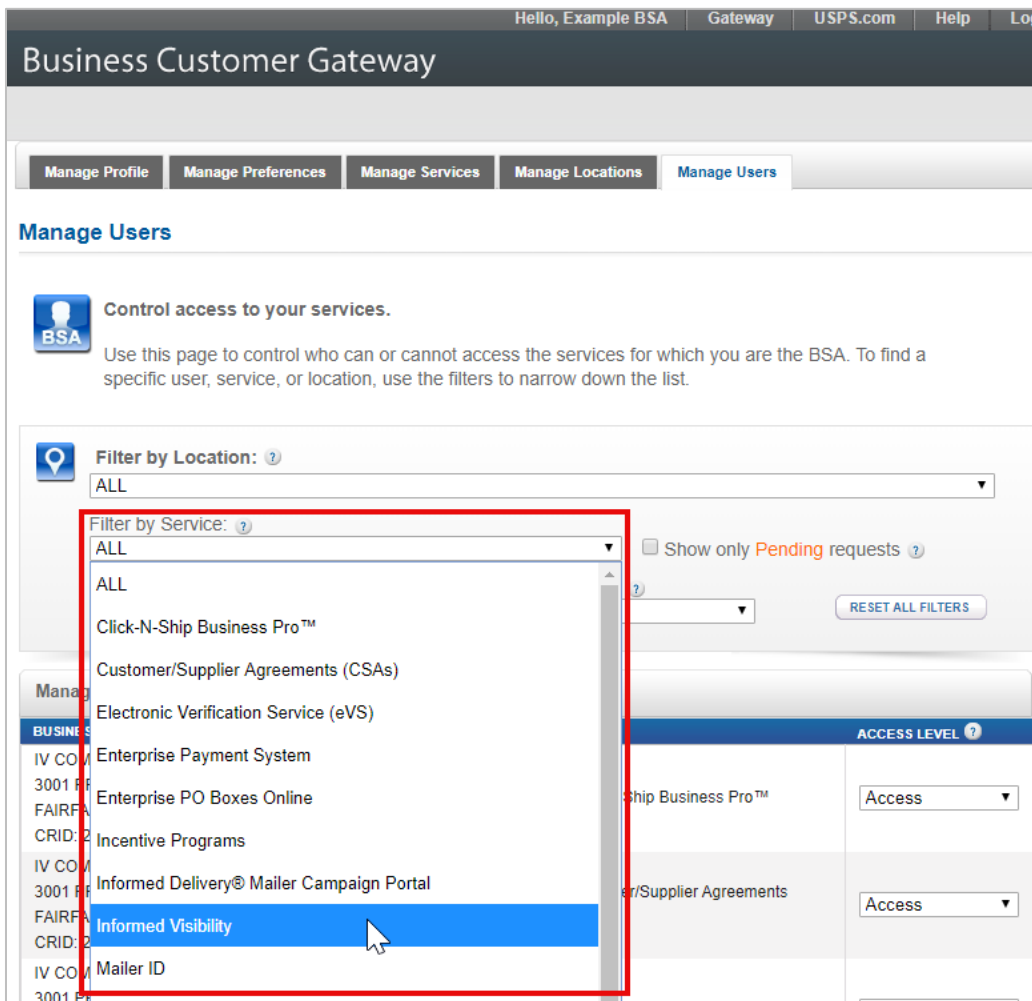
1. Log into [the BCG](#).
2. On the BCG homepage, click **Manage Account**.



3. In the top navigation bar, click **Manage Users**.



4. The Manage Users page appears. In the **Filter by Service** drop down, select **Informed Visibility**. Use the other filters as needed to locate the user whose access you want to change.



- In the **Manage User Access** table at the bottom of the screen, locate the user. Their current access level is displayed in the **Access Level** column.

The screenshot shows the 'Business Customer Gateway' interface. At the top, there are navigation links: 'Hello, Example BSA', 'Gateway', 'USPS.com', 'Help', and 'Log out'. Below this is a header 'Business Customer Gateway' and a set of tabs: 'Manage Profile', 'Manage Preferences', 'Manage Services', 'Manage Locations', and 'Manage Users'. The 'Manage Users' tab is active.

Under 'Manage Users', there are filter options:

- Filter by Location: ALL
- Filter by Service: Informed Visibility
- Filter by User: ALL
- Filter by Access Level: ALL
- Show only Pending requests (checkbox)
- RESET ALL FILTERS button

The 'Manage User Access' table is shown below the filters. It has four columns: BUSINESS NAME & LOCATION, USER, SERVICE, and ACCESS LEVEL. The 'ACCESS LEVEL' column is highlighted with a red box. The table contains two rows of data:

BUSINESS NAME & LOCATION	USER	SERVICE	ACCESS LEVEL
IV COMMUNICATORS 3001 PROSPERITY AVE FAIRFAX, VA 22031-2210 CRID: 27723950	MINION ONE COMMS	Informed Visibility	No Access
IV COMMUNICATORS 3001 PROSPERITY AVE FAIRFAX, VA 22031-2210 CRID: 27723950	MINION TWO	Informed Visibility	BSA Delegate


- Use the **Access Level** drop down menu to give, update, or remove the user's access. Choose an option from the table below for the user.
 - Note that the "BSA" and "Requested" statuses are automatically assigned by BCG and will be greyed out.

Access Level Entry	Description
Access	General user
BSA Delegate	Admin user
No Access	Removes user's IV-MTR access

Business Customer Gateway

Manage Profile Manage Preferences Manage Services Manage Locations Manage Users

Manage Users

 **Filter by Location:** [?](#)
ALL

Filter by Service: [?](#)
Informed Visibility Show only Pending requests [?](#)

Filter by User: [?](#) ALL **Filter by Access Level:** [?](#) ALL [RESET ALL FILTERS](#)

Manage User Access

BUSINESS NAME & LOCATION	USER	SERVICE	ACCESS LEVEL ?
IV COMMUNICATORS 3001 PROSPERITY AVE FAIRFAX, VA 22031-2210 CRID: 27723950	MINION ONE COMMS	Informed Visibility	No Access
IV COMMUNICATORS 3001 PROSPERITY AVE FAIRFAX, VA 22031-2210 CRID: 27723950	MINION TWO	Informed Visibility	Access

7. The BCG will automatically update the user's account and display the status of the update below the Access Level drop down.
 - **If the change was successful**, the user's access has been updated and the user will receive an automated email informing them of the change. Updating the user's access is now complete.
 - **If the change was unsuccessful**, contact the [PostalOne! Help Desk](#) for further assistance.

Business Customer Gateway

Manage Profile Manage Preferences Manage Services Manage Locations **Manage Users**

Manage Users

Filter by Location: ?
ALL

Filter by Service: ?
Informed Visibility Show only Pending requests ?

Filter by User: ?
ALL

Filter by Access Level: ?
ALL [RESET ALL FILTERS](#)

Manage User Access

BUSINESS NAME & LOCATION	USER	SERVICE	ACCESS LEVEL ?
IV COMMUNICATORS 3001 PROSPERITY AVE FAIRFAX, VA 22031-2210 CRID: 27723950	MINION ONE COMMS	Informed Visibility	Access Success
IV COMMUNICATORS 3001 PROSPERITY AVE FAIRFAX, VA 22031-2210 CRID: 27723950	MINION TWO	Informed Visibility	BSA Delegate

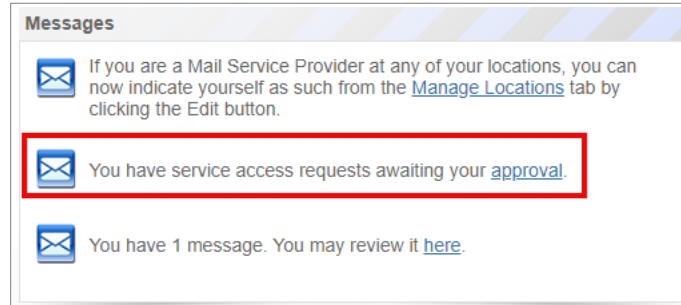
Approving a User's Request to Access IV-MTR

If a user wants to access IV-MTR for a CRID, they can request access through the BCG. This generates an email as well as a message in the BCG for the BSA and all BSA Delegates for that CRID.

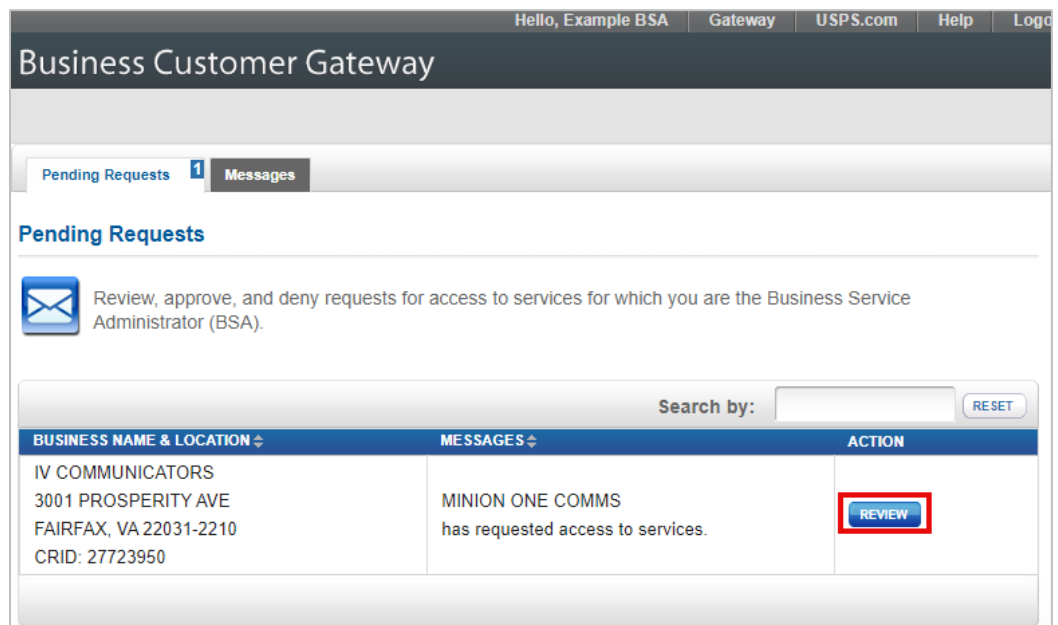
To view the request and approve or deny it, complete the following:

1. Log into [the BCG](#).

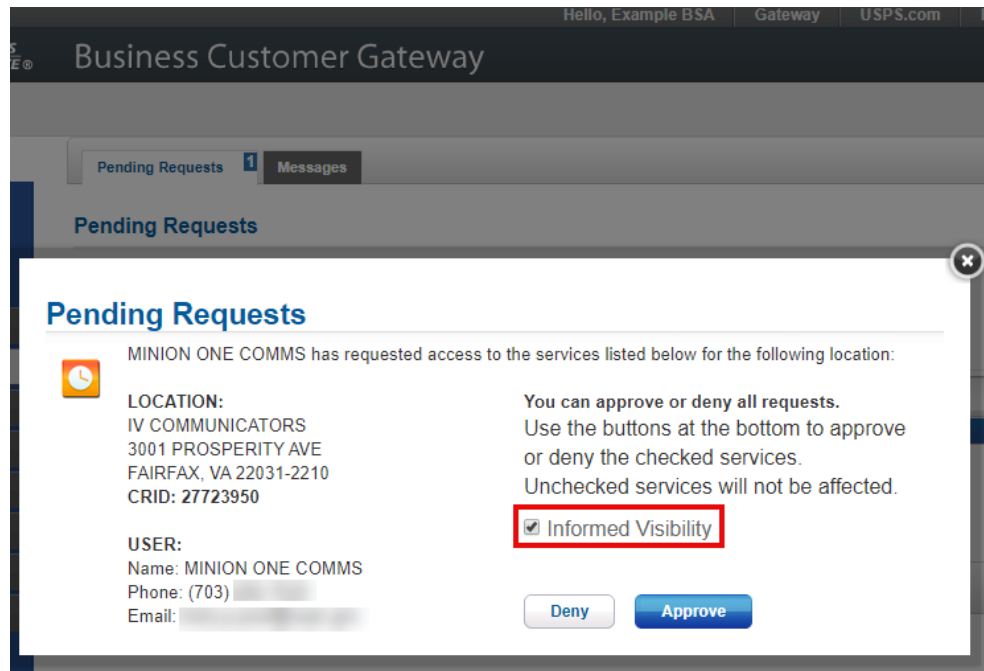
2. On the BCG homepage, locate the Messages section at the bottom of the screen. There will be a notification about pending service access requests. Click the **approval** link.
 - **Note:** If no message about pending requests appears, then another BSA-level user has already reviewed the request and approved or denied it.



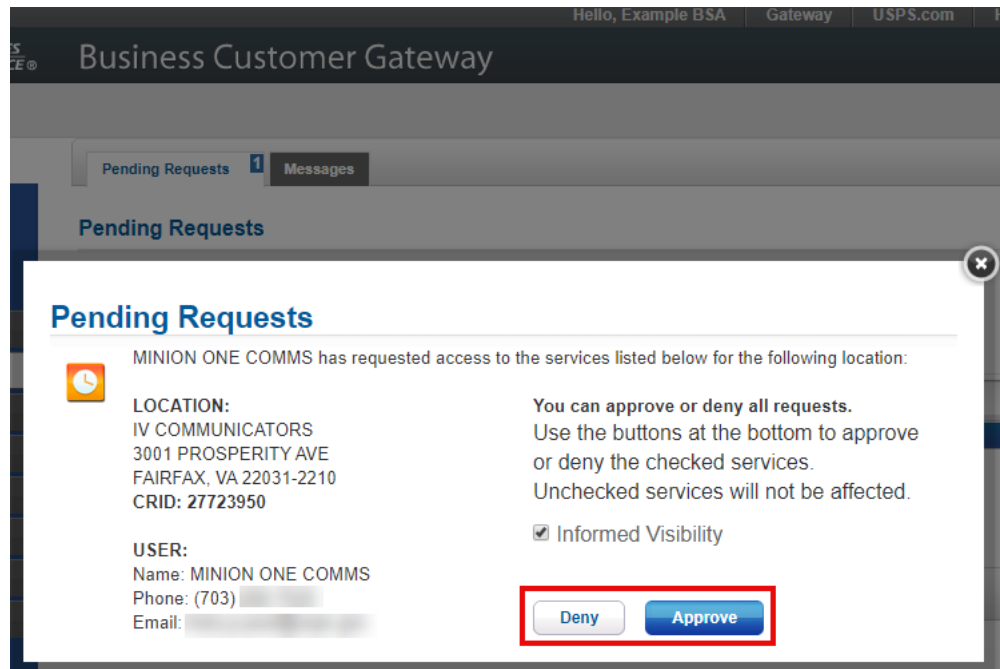
3. On the Pending Requests page, locate the request and click **Review**.
 - **Note:** If the user's request does not appear, then another BSA-level user has already reviewed the request and approved or denied it.



4. In the Pending Requests window, all the services the user has requested access to will be listed, with a check in their checkboxes. If necessary, uncheck any services you do not wish to address at this time.



5. Click **Approve** or **Deny**. The services that are checked will be approved or denied. Approving the user's access is now complete.
 - The user will be notified via automated email of the decision.
 - **Note:** Clicking "Approve" will give the user general access to the application. If you wish to designate the user as a BSA Delegate, please refer to the [Designating an IV-MTR BSA Delegate](#) section for next steps.



Designating an IV-MTR BSA Delegate

To grant BSA powers to another user by making them a BSA Delegate, follow the instructions in the [Adding and Updating User Access for IV-MTR](#) section. When you reach the Access Level drop down in step 6, select **BSA Delegate**.

Where can I find support resources for further assistance?

The USPS PostalPro site provides user guides, trainings, and a variety of other resources for both BCG and IV-MTR:

- BCG page: postalpro.usps.com/BCG
- IV-MTR page: postalpro.usps.com/InformedVisibility

For further assistance, you can contact the IV-MTR Solutions Center or the PostalOne! Help Desk.

IV Solutions Center



InformedVisibility@usps.gov

Phone: 1 (800) 238-3150, Option #2

Hours: 7 AM–5 PM CT,
Monday–Friday
Closed Postal holidays

PostalOne! Help Desk



PostalOne@usps.gov

Phone: 1 (800) 522-9085

Hours: 7 AM – 7 PM CT,
Monday-Friday
Closed Postal holidays