As part of Release 1.0 of Informed Visibility® (IV®), mail tracking visibility from IMb Tracing® and *PostalOne!®* as well as Data Distribution Profiles from the Mailer ID (MID) system will be migrated to IV. This presentation provides information regarding actions that migrating users need to take to ensure there is no interruption in receiving mail tracking data.

Hyperlinks within this document allow you to move to the part of the presentation you would like to review or go to a slide with additional information. There are also hyperlinks for web pages and email addresses.

**Note:** Minor changes may be made to the IV user interface before Release 1.0 National Rollout.

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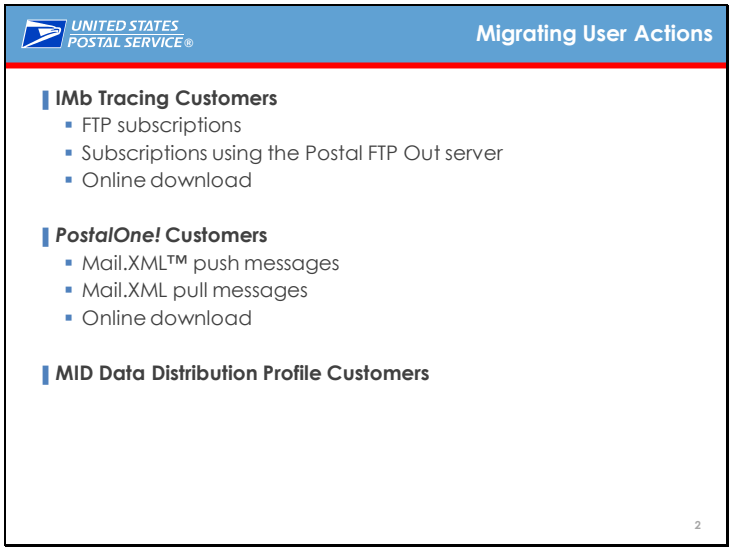
**Slide 2 – Migrating User Actions**



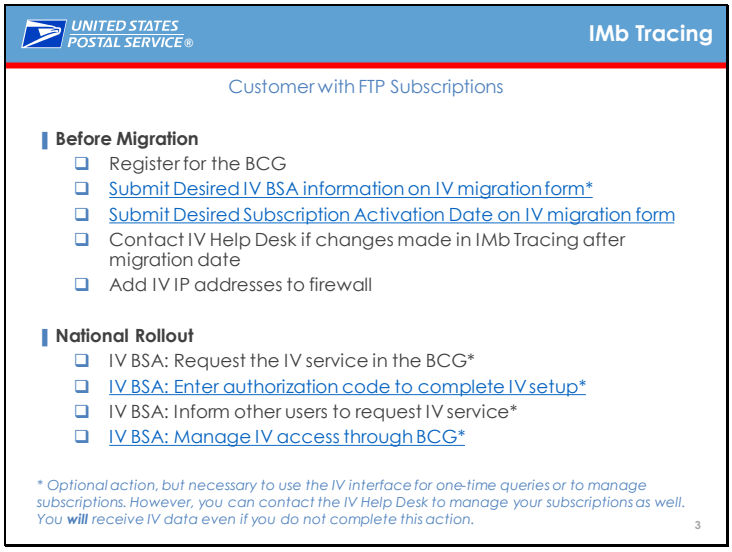

The following customers have actions to complete for the migration to IV:

- IMb Tracing customers who:
  - Have subscriptions sent to an FTP server
  - Have subscriptions sent to the Postal FTP Out server
  - Download data online from the IMb Tracing Mail Tracking & Reporting application
- *PostalOne!* customers who:
  - Use Mail.XML Container Visibility push messages (e.g., ContainerVisibilityDelivery)
  - Use Mail.XML Container Visibility pull messages (e.g., ContainerVisibilityQueryRequest)
  - Download data online from *PostalOne!'s* "Informed Visibility" reports
- Customers who receive data from or provide data to another MID through a MID Data Distribution Profile for Full-Service Start the Clock/Container Visibility or Tray Visibility

Each of the following slides pertains to one of these types of users and lists the actions that type of user must take before the IV migration and once National Rollout begins. Click the link for a particular type of user to be taken to the slide of actions for that user.

When an action is hyperlinked, there is a slide in the Appendix with additional information about that action.

## Slide 3 – IMb Tracing Customer with FTP Subscriptions




Customers with IMb Tracing FTP subscriptions have the following actions:

### Before Migration

- Register for the Business Customer Gateway (BCG), if you do not already have an account:
  - To access the IV migration form, you need an account in the BCG (https://gateway.usps.com/). Instructions for registering will be provided and will be posted on the IV RIBBS® page.
  - You will also need a BCG account if you want to access the IV web application after National Rollout.
  - **Note:** You will not be able to request the IV service until National Rollout.
- Submit contact information for the Desired IV Business Service Administrator (BSA) on the IV migration form*:
  - The IV Team needs to know who the Desired IV BSA is for each CRID. The IV BSA will manage access to the IV service for a CRID and perform other administrative functions in IV.
  - A few weeks before National Rollout, each CRID will receive an email with a link to the IV migration form. Complete this form to submit the contact information for the Desired IV BSA.
  - On the day of National Rollout for Release 1.0, the Desired IV BSA will receive an authorization code via email. He or she will be prompted to enter this code upon accessing IV for the first time. The code is required to properly establish the CRID in IV.
- Submit desired activation dates for migrated subscriptions on the IV migration form:
  - Subscriptions from IMb Tracing and *PostalOne!* are inactive when migrated to IV.
  - A few weeks before National Rollout, each CRID will receive an email with a link to the IV migration form. Complete this form to submit the desired activation dates for migrated subscriptions.
  - The IV Team will activate IV subscriptions based on the information submitted in the IV migration form.

- Contact the IV Help Desk if you make any changes in IMb Tracing after the migration date:
  - A migration date will be announced to all migrating users. After this date, any changes made in IMb Tracing will **not** be migrated to IV.
  - If you make a change in IMb Tracing after the migration date and want that change to be reflected in IV, contact the IV Help Desk. They will assist in making the same change in IV.
- Add the IV IP addresses to your firewall:
  - To ensure your system can receive data from the IV servers, new IP addresses must be added to your firewall before National Rollout.
  - In September, you should have received an email with the IP addresses to be added. If you need this information, please contact the IV Help Desk.

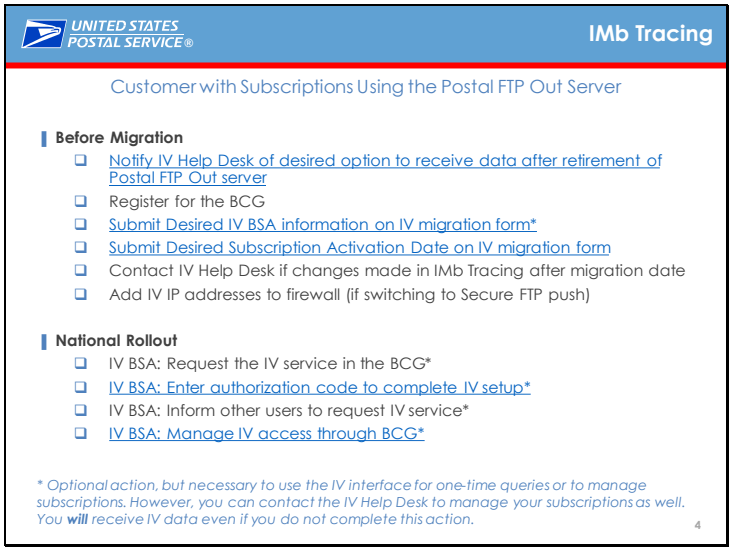
**National Rollout**

- When notified to do so, the Desired IV BSA should request the IV service in the BCG for his or her CRID*:
  - To access the IV web application after National Rollout, users need a BCG account and access to the IV service.
  - The Desired IV BSA will be notified via email when the IV service is available to request in the BCG.
  - **Note:** The Desired IV BSA must be the first person to add the IV service for a particular CRID to be properly set up as the IV BSA for that CRID.
- The IV BSA must enter the authorization code to complete IV setup*:
  - On the day of National Rollout for Release 1.0, the Desired IV BSA will receive an authorization code via email.
  - The IV BSA will be prompted to enter the authorization code upon accessing IV for the first time. The code is required to properly establish the CRID in IV. **Note:** If not prompted, contact the IV Help Desk for assistance.
  - **IMPORTANT:** Other users for the CRID will NOT be able to fully access IV until the IV BSA enters the authorization code.
- Once National Rollout begins, the IV BSA can inform other users for his or her CRID to request the IV service in the BCG*:
  - To access IV, a user must request the IV service in the BCG. The IV BSA must review and approve the request before the user can access IV.
  - Instructions for requesting the IV service will be provided to the IV BSA and will be posted on the IV RIBBS page.
  - **Note:** For Release 1.0, approved IV users will have visibility for all MIDs belonging to the CRID for which the user has the IV service. In a future release, roles and permissions management will be implemented, which will allow the IV BSA or other administrative users to customize roles, permissions, and visibility for individual users.

- The IV BSA manages IV access through the BCG*:
  - The IV BSA or an IV BSA Delegate must review and approve a user's request for access to the IV service in the BCG before the user can access IV.
  - Instructions for approving requests for the IV service are provided in the IV User Guide.

** Optional action, but necessary to use the IV interface for one-time queries or to manage subscriptions. However, you can contact the IV Help Desk to manage your subscriptions as well. You **will** receive IV data even if you do not complete this action.*

## Slide 4 – IMb Tracing Customer with Subscriptions Using Postal FTP Out Server




Customers with IMb Tracing FTP subscriptions using the Postal FTP Out server have the following actions:

### Before Migration

- Notify the IV Help Desk of the option you would like to use to receive data after the Postal FTP Out server is retired:
  - In November, you should have received an email from the IV Help Desk notifying you that the Postal FTP Out server is being retired in early 2017, and USPS is transitioning to Secure FTP by the end of 2017.
  - You must select one of the following two options to continue receiving data: 1) Switch to receiving push data using Secure FTP or 2) continue to pull data from USPS [requires coordination with the USPS Data Transfer Services (DTS) team].
  - If you have not yet done so, contact the IV Help Desk immediately to inform them of the option you have selected.
- Register for the BCG, if you do not already have an account:
  - To access the IV migration form, you need an account in the BCG (https://gateway.usps.com/). Instructions for registering will be provided and will be posted on the IV RIBBS page.
  - You will also need a BCG account if you want to access the IV web application after National Rollout.
  - **Note:** You will not be able to request the IV service until National Rollout.

- Submit contact information for the Desired IV BSA on the IV migration form*:
  - The IV Team needs to know who the Desired IV BSA is for each CRID. The IV BSA will manage access to the IV service for a CRID and perform other administrative functions in IV.
  - A few weeks before National Rollout, each CRID will receive an email with a link to the IV migration form. Complete this form to submit the contact information for the Desired IV BSA.
  - On the day of National Rollout for Release 1.0, the Desired IV BSA will receive an authorization code via email. He or she will be prompted to enter this code upon accessing IV for the first time. The code is required to properly establish the CRID in IV.
- Submit desired activation dates for migrated subscriptions on the IV migration form:
  - Subscriptions from IMb Tracing and *PostalOne!* are inactive when migrated to IV.
  - A few weeks before National Rollout, each CRID will receive an email with a link to the IV migration form. Complete this form to submit the desired activation dates for migrated subscriptions.
  - The IV Team will activate IV subscriptions based on the information submitted in the IV migration form.
- Contact the IV Help Desk if you make any changes in IMb Tracing after the migration date:
  - A migration date will be announced to all migrating users. After this date, any changes made in IMb Tracing will **not** be migrated to IV.
  - If you make a change in IMb Tracing after the migration date and want that change to be reflected in IV, contact the IV Help Desk. They will assist in making the same change in IV.
- Add the IV IP addresses to your firewall (if you select the option to switch to Secure FTP push):
  - To ensure your system can receive data from the IV servers, new IP addresses must be added to your firewall before National Rollout.
  - In September, you should have received an email with the IP addresses to be added. If you need this information, please contact the IV Help Desk.

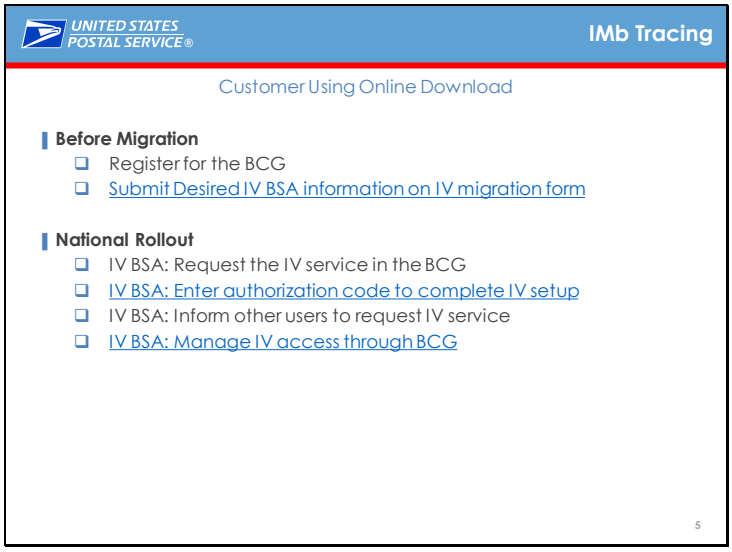
**National Rollout**

- When notified to do so, the Desired IV BSA should request the IV service in the BCG for his or her CRID*:
  - To access the IV web application after National Rollout, users need a BCG account and access to the IV service.
  - The Desired IV BSA will be notified via email when the IV service is available to request in the BCG.
  - **Note:** The Desired IV BSA must be the first person to add the IV service for a particular CRID to be properly set up as the IV BSA for that CRID.

- The IV BSA must enter the authorization code to complete IV setup*:
  - On the day of National Rollout for Release 1.0, the Desired IV BSA will receive an authorization code via email.
  - The IV BSA will be prompted to enter the authorization code upon accessing IV for the first time. The code is required to properly establish the CRID in IV. **Note:** If not prompted, contact the IV Help Desk for assistance.
  - **IMPORTANT:** Other users for the CRID will NOT be able to fully access IV until the IV BSA enters the authorization code.
- Once National Rollout begins, the IV BSA can inform other users for his or her CRID to request the IV service in the BCG*:
  - To access IV, a user must request the IV service in the BCG. The IV BSA must review and approve the request before the user can access IV.
  - Instructions for requesting the IV service will be provided to the IV BSA and will be posted on the IV RIBBS page.
  - **Note:** For Release 1.0, approved IV users will have visibility for all MIDs belonging to the CRID for which the user has the IV service. In a future release, roles and permissions management will be implemented, which will allow the IV BSA or other administrative users to customize roles, permissions, and visibility for individual users.
- The IV BSA manages IV access through the BCG*:
  - The IV BSA or an IV BSA Delegate must review and approve a user's request for access to the IV service in the BCG before the user can access IV.
  - Instructions for approving requests for the IV service are provided in the IV User Guide.

** Optional action, but necessary to use the IV interface for one-time queries or to manage subscriptions. However, you can contact the IV Help Desk to manage your subscriptions as well. You **will** receive IV data even if you do not complete this action.*

**Slide 5 – IMb Tracing Customer Using Online Download**




Customers who download mail tracking data from the IMb Tracing Mail Tracking & Reporting application have the following actions:

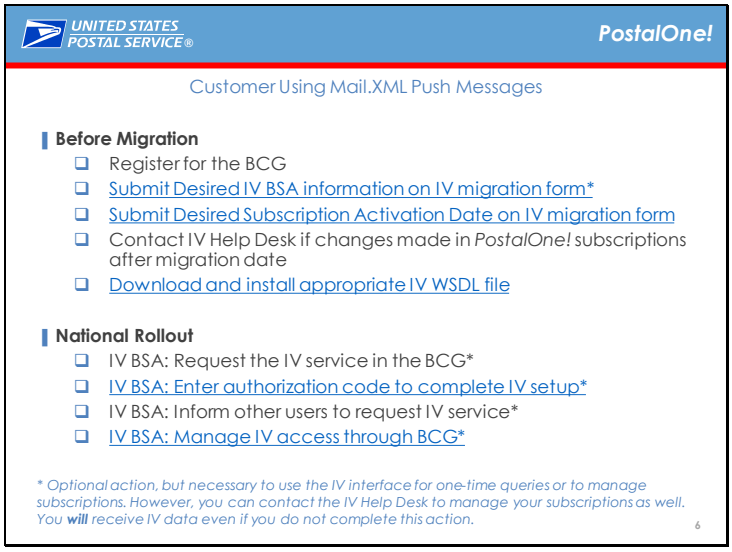
**Before Migration**

- Register for the BCG, if you do not already have an account:
  - You will need a BCG (https://gateway.usps.com/) account to access the IV web application to download mail tracking data after National Rollout. Instructions for registering will be provided and will be posted on the IV RIBBS page.
  - To access the IV migration form, you will also need a BCG account.
  - **Note:** You will not be able to request the IV service until National Rollout.
- Submit contact information for the Desired IV BSA on the IV migration form:
  - The IV Team needs to know who the Desired IV BSA is for each CRID. The IV BSA will manage access to the IV service for a CRID and perform other administrative functions in IV.
  - A few weeks before National Rollout, each CRID will receive an email with a link to the IV migration form. Complete this form to submit the contact information for the Desired IV BSA.
  - On the day of National Rollout for Release 1.0, the Desired IV BSA will receive an authorization code via email. He or she will be prompted to enter this code upon accessing IV for the first time. The code is required to properly establish the CRID in IV.

**National Rollout**

- When notified to do so, the Desired IV BSA should request the IV service in the BCG for his or her CRID:
  - To access the IV web application after National Rollout, users need a BCG account and access to the IV service.
  - The Desired IV BSA will be notified via email when the IV service is available to request in the BCG.
  - **Note:** The Desired IV BSA must be the first person to add the IV service for a particular CRID to be properly set up as the IV BSA for that CRID.
- The IV BSA must enter the authorization code to complete IV setup:
  - On the day of National Rollout for Release 1.0, the Desired IV BSA will receive an authorization code via email.
  - The IV BSA will be prompted to enter the authorization code upon accessing IV for the first time. The code is required to properly establish the CRID in IV. **Note:** If not prompted, contact the IV Help Desk for assistance.
  - **IMPORTANT:** Other users for the CRID will NOT be able to fully access IV until the IV BSA enters the authorization code.
- Once National Rollout begins, the IV BSA can inform other users for his or her CRID to request the IV service in the BCG:
  - To access IV, a user must request the IV service in the BCG. The IV BSA must review and approve the request before the user can access IV.
  - Instructions for requesting the IV service will be provided to the IV BSA and will be posted on the IV RIBBS page.
  - **Note:** For Release 1.0, approved IV users will have visibility for all MIDs belonging to the CRID for which the user has the IV service. In a future release, roles and permissions management will be implemented, which will allow the IV BSA or other administrative users to customize roles, permissions, and visibility for individual users.
- The IV BSA manages IV access through the BCG:
  - The IV BSA or an IV BSA Delegate must review and approve a user's request for access to the IV service in the BCG before the user can access IV.
  - Instructions for approving requests for the IV service are provided in the IV User Guide.

## Slide 6 – *PostalOne!* Customer Using Mail.XML PUSH Messages




Customers who use *PostalOne!* Mail.XML Container Visibility push messages (e.g., ContainerVisibilityDelivery) have the following actions:

### Before Migration

- Register for the BCG, if you do not already have an account:
  - To access the IV migration form, you need an account in the BCG (https://gateway.usps.com/). Instructions for registering will be provided and will be posted on the IV RIBBS page.
  - You will also need a BCG account if you want to access the IV web application after National Rollout.
  - **Note:** You will not be able to request the IV service until National Rollout.
- Submit contact information for the Desired IV BSA on the IV migration form*:
  - The IV Team needs to know who the Desired IV BSA is for each CRID. The IV BSA will manage access to the IV service for a CRID and perform other administrative functions in IV.
  - A few weeks before National Rollout, each CRID will receive an email with a link to the IV migration form. Complete this form to submit the contact information for the Desired IV BSA.
  - On the day of National Rollout for Release 1.0, the Desired IV BSA will receive an authorization code via email. He or she will be prompted to enter this code upon accessing IV for the first time. The code is required to properly establish the CRID in IV.
- Submit desired activation dates for migrated subscriptions on the IV migration form:
  - Subscriptions from IMb Tracing and *PostalOne!* are inactive when migrated to IV.
  - A few weeks before National Rollout, each CRID will receive an email with a link to the IV migration form. Complete this form to submit the desired activation dates for migrated subscriptions.
  - The IV Team will activate IV subscriptions based on the information submitted in the IV migration form.

- Contact the IV Help Desk if you make any changes in *PostalOne!* after the migration date:
  - A migration date will be announced to all migrating users. After this date, any changes made in *PostalOne!* will **not** be migrated to IV.
  - If you make a change in *PostalOne!* after the migration date and want that change to be reflected in IV, contact the IV Help Desk. They will assist in making the same change in IV.
- Download and install the appropriate IV Web Services Description Language (WSDL) file:
  - A WSDL file automates the details involved in communication between applications for using Mail.XML messages.
  - The IV WSDL files will be posted on the IV RIBBS page prior to National Rollout. The appropriate WSDL file to use depends on whether you are using push or pull messages as well as the version of Mail.XML used. You must install the appropriate IV WSDL file prior to National Rollout.

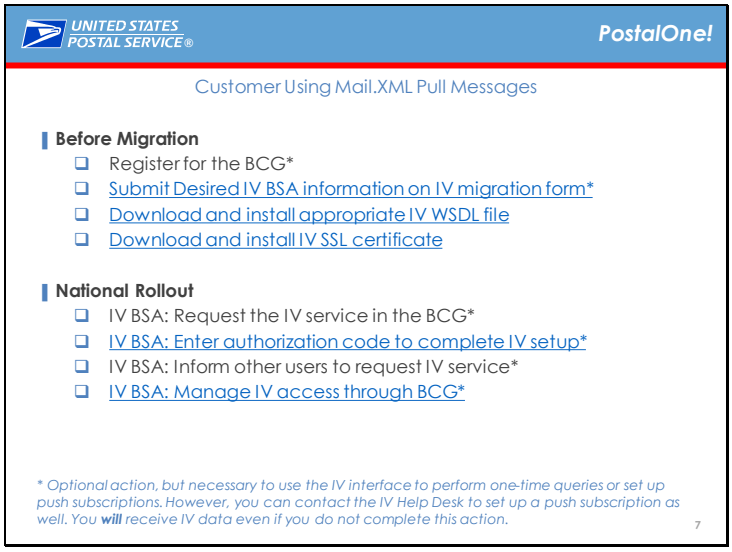
**National Rollout**

- When notified to do so, the Desired IV BSA should request the IV service in the BCG for his or her CRID*:
  - To access the IV web application after National Rollout, users need a BCG account and access to the IV service.
  - The Desired IV BSA will be notified via email when the IV service is available to request in the BCG.
  - **Note:** The Desired IV BSA must be the first person to add the IV service for a particular CRID to be properly set up as the IV BSA for that CRID.
- The IV BSA must enter the authorization code to complete IV setup*:
  - On the day of National Rollout for Release 1.0, the Desired IV BSA will receive an authorization code via email.
  - The IV BSA will be prompted to enter the authorization code upon accessing IV for the first time. The code is required to properly establish the CRID in IV. **Note:** If not prompted, contact the IV Help Desk for assistance.
  - **IMPORTANT:** Other users for the CRID will NOT be able to fully access IV until the IV BSA enters the authorization code.
- Once National Rollout begins, the IV BSA can inform other users for his or her CRID to request the IV service in the BCG*:
  - To access IV, a user must request the IV service in the BCG. The IV BSA must review and approve the request before the user can access IV.
  - Instructions for requesting the IV service will be provided to the IV BSA and will be posted on the IV RIBBS page.
  - **Note:** For Release 1.0, approved IV users will have visibility for all MIDs belonging to the CRID for which the user has the IV service. In a future release, roles and permissions management will be implemented, which will allow the IV BSA or other administrative users to customize roles, permissions, and visibility for individual users.

- The IV BSA manages IV access through the BCG*:
  - The IV BSA or an IV BSA Delegate must review and approve a user's request for access to the IV service in the BCG before the user can access IV.
  - Instructions for approving requests for the IV service are provided in the IV User Guide.

** Optional action, but necessary to use the IV interface for one-time queries or to manage subscriptions. However, you can contact the IV Help Desk to manage your subscriptions as well. You **will** receive IV data even if you do not complete this action.*

**Slide 7 – *PostalOne!* Customer Using Mail.XML PULL Messages**




Customers who use *PostalOne!* Mail.XML Container Visibility pull messages (e.g., ContainerVisibilityQueryRequest) have the following actions:

**Before Migration**

- Register for the BCG, if you do not already have an account*:
  - To access the IV migration form, you need an account in the BCG (https://gateway.usps.com/). Instructions for registering will be provided and will be posted on the IV RIBBS page.
  - You will also need a BCG account if you want to access the IV web application after National Rollout.
  - **Note:** You will not be able to request the IV service until National Rollout.
- Submit contact information for the Desired IV BSA on the IV migration form*:
  - The IV Team needs to know who the Desired IV BSA is for each CRID. The IV BSA will manage access to the IV service for a CRID and perform other administrative functions in IV.
  - A few weeks before National Rollout, each CRID will receive an email with a link to the IV migration form. Complete this form to submit the contact information for the Desired IV BSA.
  - On the day of National Rollout for Release 1.0, the Desired IV BSA will receive an authorization code via email. He or she will be prompted to enter this code upon accessing IV for the first time. The code is required to properly establish the CRID in IV.
- Download and install the appropriate IV WSDL file:
  - The WSDL automates the details involved in communication between applications for using Mail.XML messages.
  - The IV WSDL files will be posted on the IV RIBBS page prior to National Rollout. The appropriate WSDL file to use depends on whether you are using push or pull messages as well as the version of Mail.XML used. You must install the appropriate IV WSDL file prior to National Rollout.

- Download and install the IV Secure Sockets Layer (SSL) certificate:
  - The IV SSL certificate enables secure communication to the IV web application.
  - The IV SSL certificate is posted on the IV RIBBS page. You must install the certificate prior to National Rollout.

**National Rollout**

- When notified to do so, the Desired IV BSA should request the IV service in the BCG for his or her CRID*:
  - To access the IV web application after National Rollout, users need a BCG account and access to the IV service.
  - The Desired IV BSA will be notified via email when the IV service is available to request in the BCG.
  - **Note:** The Desired IV BSA must be the first person to add the IV service for a particular CRID to be properly set up as the IV BSA for that CRID.
- The IV BSA must enter the authorization code to complete IV setup*:
  - On the day of National Rollout for Release 1.0, the Desired IV BSA will receive an authorization code via email.
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  - **IMPORTANT:** Other users for the CRID will NOT be able to fully access IV until the IV BSA enters the authorization code.
- Once National Rollout begins, the IV BSA can inform other users for his or her CRID to request the IV service in the BCG*:
  - To access IV, a user must request the IV service in the BCG. The IV BSA must review and approve the request before the user can access IV.
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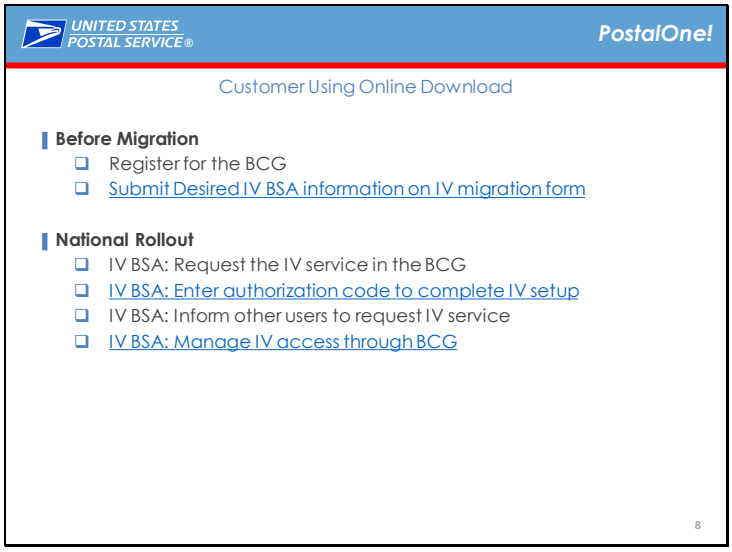
  - **Note:** For Release 1.0, approved IV users will have visibility for all MIDs belonging to the CRID for which the user has the IV service. In a future release, roles and permissions management will be implemented, which will allow the IV BSA or other administrative users to customize roles, permissions, and visibility for individual users.
- The IV BSA manages IV access through the BCG*:
  - The IV BSA or an IV BSA Delegate must review and approve a user's request for access to the IV service in the BCG before the user can access IV.
  - Instructions for approving requests for the IV service are provided in the IV User Guide.

** Optional action, but necessary to use the IV interface to perform one-time queries or set up push subscriptions. However, you can contact the IV Help Desk to set up a push subscription as well. You **will** receive IV data even if you do not complete this action.*

## Slide 8 – *PostalOne!* Customer Using Online Download




Customers who download mail tracking data online from *PostalOne!'s* "Informed Visibility" reports have the following actions:

### Before Migration

- Register for the BCG, if you do not already have an account:
  - You will need a BCG (https://gateway.usps.com/) account to access the IV web application to download mail tracking data after National Rollout. Instructions for registering will be provided and will be posted on the IV RIBBS page.
  - To access the IV migration form, you will also need a BCG account.
  - **Note:** You will not be able to request the IV service until National Rollout.
- Submit contact information for the Desired IV BSA on the IV migration form:
  - The IV Team needs to know who the Desired IV BSA is for each CRID. The IV BSA will manage access to the IV service for a CRID and perform other administrative functions in IV.
  - A few weeks before National Rollout, each CRID will receive an email with a link to the IV migration form. Complete this form to submit the contact information for the Desired IV BSA.
  - On the day of National Rollout for Release 1.0, the Desired IV BSA will receive an authorization code via email. He or she will be prompted to enter this code upon accessing IV for the first time. The code is required to properly establish the CRID in IV.

**National Rollout**

- When notified to do so, the Desired IV BSA should request the IV service in the BCG for his or her CRID:
  - To access the IV web application after National Rollout, users need a BCG account and access to the IV service.
  - The Desired IV BSA will be notified via email when the IV service is available to request in the BCG.
  - **Note:** The Desired IV BSA must be the first person to add the IV service for a particular CRID to be properly set up as the IV BSA for that CRID.
- The IV BSA must enter the authorization code to complete IV setup:
  - On the day of National Rollout for Release 1.0, the Desired IV BSA will receive an authorization code via email.
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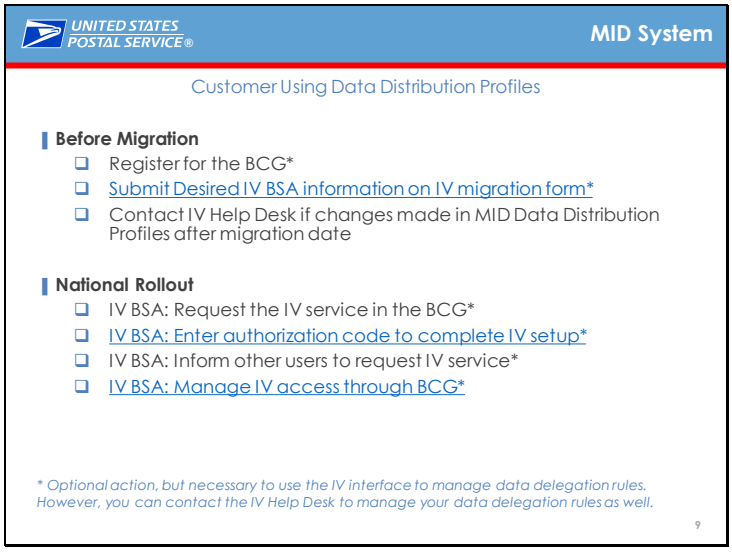
- The IV BSA manages IV access through the BCG:
  - The IV BSA or an IV BSA Delegate must review and approve a user's request for access to the IV service in the BCG before the user can access IV.
  - Instructions for approving requests for the IV service are provided in the IV User Guide.

## Slide 9 – Customer Using MID Data Distribution Profiles




Customers who receive data from or provide data to another MID through a MID Data Distribution Profile for Container Visibility or Tray Visibility have the following actions:

### Before Migration

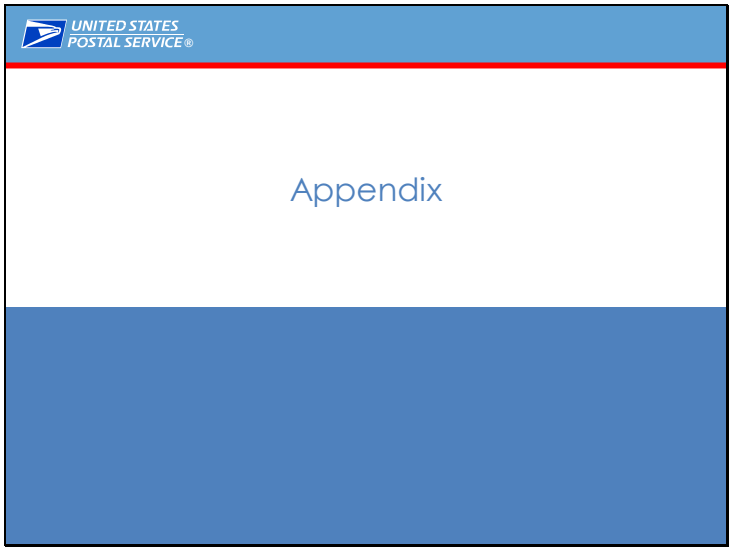
- Register for the BCG, if you do not already have an account*:
  - You will need a BCG (https://gateway.usps.com/) account to access the IV web application to manage data delegation rules for container and handling unit visibility after National Rollout. Instructions for registering will be provided and will be posted on the IV RIBBS page.
  - To access the IV migration form, you will also need a BCG account.
  - **Note:** You will not be able to request the IV service until National Rollout.
- Submit contact information for the Desired IV BSA on the IV migration form*:
  - The IV Team needs to know who the Desired IV BSA is for each CRID. The IV BSA will manage access to the IV service for a CRID and perform other administrative functions in IV.
  - A few weeks before National Rollout, each CRID will receive an email with a link to the IV migration form. Complete this form to submit the contact information for the Desired IV BSA.
  - On the day of National Rollout for Release 1.0, the Desired IV BSA will receive an authorization code via email. He or she will be prompted to enter this code upon accessing IV for the first time. The code is required to properly establish the CRID in IV.
- Contact the IV Help Desk if you make any changes in your MID Data Distribution Profiles after the migration date:
  - A migration date will be announced to all migrating users. After this date, any changes made in MID Data Distribution Profiles will **not** be migrated to IV.
  - If you make a change in your MID Data Distribution Profiles after the migration date and want that change to be reflected in IV, contact the IV Help Desk. They will assist in making the same change in IV.

**National Rollout**

- When notified to do so, the Desired IV BSA should request the IV service in the BCG for his or her CRID*:
  - To access the IV web application after National Rollout, users need a BCG account and access to the IV service.
  - The Desired IV BSA will be notified via email when the IV service is available to request in the BCG.
  - **Note:** The Desired IV BSA must be the first person to add the IV service for a particular CRID to be properly set up as the IV BSA for that CRID.
- The IV BSA must enter the authorization code to complete IV setup*:
  - On the day of National Rollout for Release 1.0, the Desired IV BSA will receive an authorization code via email.
  - The Desired IV BSA will need to log into the BCG and add the IV service for his or her CRID. **Note:** The Desired IV BSA must be the first person to add the IV service for the CRID to be properly set up as the IV BSA.
  - The IV BSA will be prompted to enter the authorization code upon accessing IV for the first time. The code is required to properly establish the CRID in IV. **Note:** If not prompted, contact the IV Help Desk for assistance.
  - **IMPORTANT:** Other users for the CRID will NOT be able to fully access IV until the IV BSA enters the authorization code.
- Once National Rollout begins, the IV BSA can inform other users for his or her CRID to request the IV service in the BCG*:
  - To access IV, a user must request the IV service in the BCG. The IV BSA must review and approve the request before the user can access IV.
  - Instructions for requesting the IV service will be provided to the IV BSA and will be posted on the IV RIBBS page.
  - **Note:** For Release 1.0, approved IV users will have visibility for all MIDs belonging to the CRID for which the user has the IV service. In a future release, roles and permissions management will be implemented, which will allow the IV BSA or other administrative users to customize roles, permissions, and visibility for individual users.
- The IV BSA manages IV access through the BCG*:
  - The IV BSA or an IV BSA Delegate must review and approve a user's request for access to the IV service in the BCG before the user can access IV.
  - Instructions for approving requests for the IV service are provided in the IV User Guide.

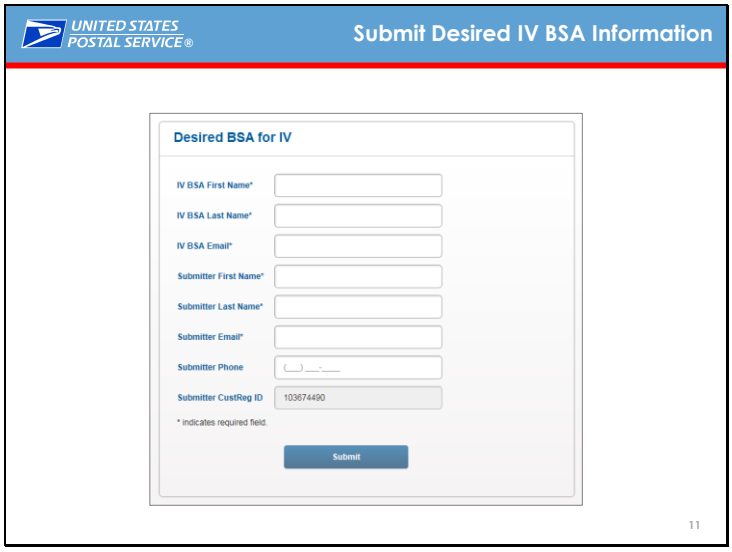
** Optional action, but necessary to use the IV interface to manage data delegation rules. However, you can contact the IV Help Desk to manage your data delegation rules as well.*

**Slide 10 – Appendix**




These slides provide additional information for some of the migration-related actions.

**Slide 11 – Submit Desired IV BSA Information**



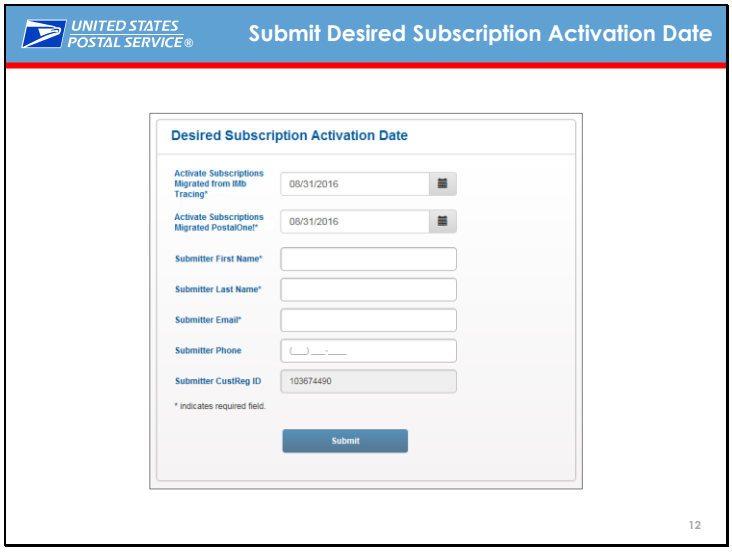

A few weeks before National Rollout, each CRID will receive an email with a link to the IV migration form to submit contact information for the Desired IV BSA. The form will be specific to your CRID. Provide the contact information for the Desired IV BSA and the Submitter.

Please note the following:

- A separate email and link will be issued for each CRID.
- There can only be one IV BSA for each CRID, but others can serve as IV BSA Delegates. An IV BSA must be designated for each CRID. You may identify the same IV BSA for multiple CRIDs.
- You may enter the same person as the Desired IV BSA and the Submitter.
- If you need to make any changes after submitting the form, contact the IV Help Desk.
- After submitting this form, please notify the individual designated as the IV BSA of the IV program and his or her responsibilities.
- On the day of national deployment for IV Release 1.0, the IV BSA will receive an authorization code via email. He or she will be prompted to enter this code upon accessing IV for the first time. The code is required to properly establish the CRID in IV. **IMPORTANT:** Other users for the CRID will NOT be able to fully access IV until the IV BSA enters the authorization code.
- Starting on the day of national deployment, the IV BSA may assign other users as IV BSA Delegates for the CRID. IV BSA Delegates can perform the same functions as the IV BSA except entering the IV authorization code.

- The IV BSA and IV BSA Delegates have administrative privileges in IV for the CRID. For Release 1.0, they are the only users for the CRID who can:
  - Approve a user's request for access to the IV service in the BCG
  - Assign IV BSA Delegates in the BCG
  - Enter the IV authorization code in IV (IV BSA only – not IV BSA Delegates)
  - Create and modify data feeds in IV
  - Approve and modify data delegation requests in IV
  - Delegate data to other users in IV
  - Add and modify address book entries in IV

**Slide 12 – Submit Desired Subscription Activation Date**

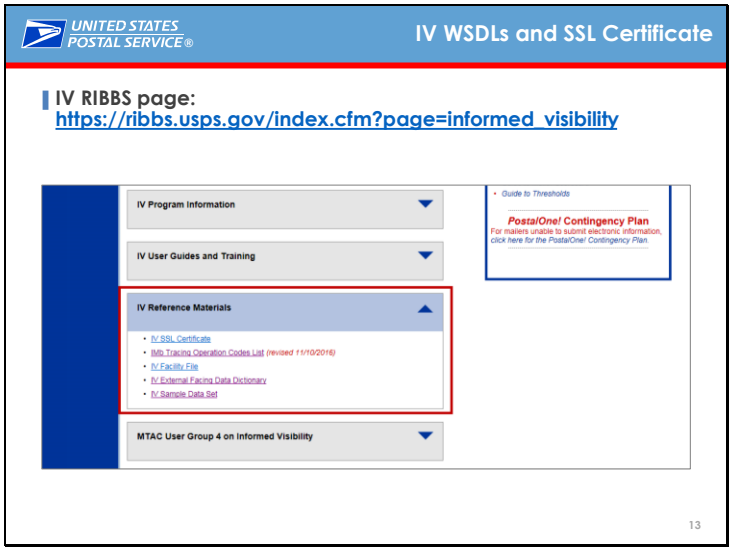



A few weeks before National Rollout, each CRID will receive an email with a link to the IV migration form to submit desired activation dates for your migrated subscriptions. The form will be specific to your CRID. If you need to make any changes after submitting the form, contact the IV Help Desk.

Please note the following:

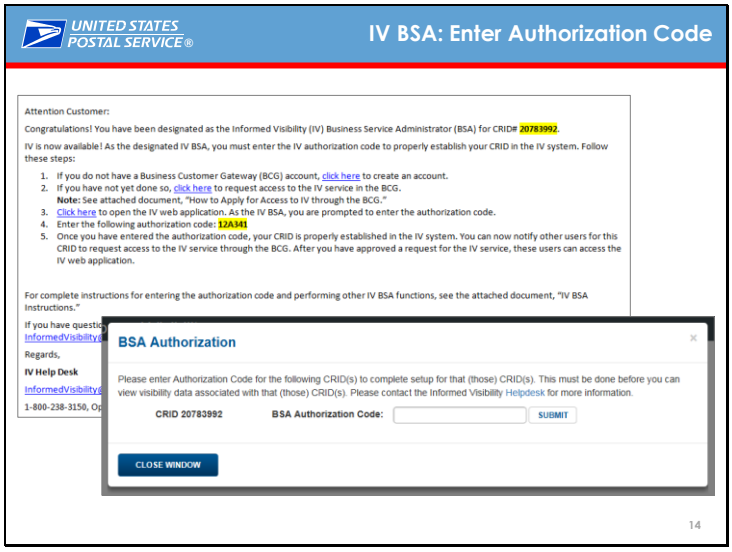
- A separate email and link will be issued for each CRID.
- A subscription activation date must be selected for **each** CRID. You may select the same subscription activation date for multiple CRIDs. You may select the same or different dates for IMb Tracing and container and tray visibility *PostalOne!* subscriptions to be activated.
- Available activation dates are limited to business days, Monday through Friday (excluding holidays).
- We recommend selecting a date when resources for your CRID will be available to observe the subscription activation and ensure that all data is being correctly received and ingested from IV. Subscriptions will run in parallel in the legacy and IV systems for 24 hours, meaning you will receive duplicate data. At the end of this period, your legacy subscriptions will be deactivated.
- When users for your CRID access IV prior to the subscription activation date, the users will see your migrated subscriptions. However, the subscriptions will not yet be activated.
- Prior to the subscription activation date, you may modify your migrated subscriptions in IV. However, the changes will NOT be effective until the subscription activation date. Furthermore, any changes made to your IV subscriptions will NOT be automatically made to your IMb Tracing and *PostalOne!* subscriptions.
- After the migration date, any changes made in the legacy system after that day will need to be manually made in the IV system.

**Slide 13 – IV WSDLs and SSL Certificate**




The IV WSDL files and IV SSL certificate will be posted on the IV RIBBS page (https://ribbs.usps.gov/index.cfm?page=informed_visibility) in the **IV Reference Materials** section prior to National Rollout.

**Slide 14 – IV BSA: Enter Authorization Code**

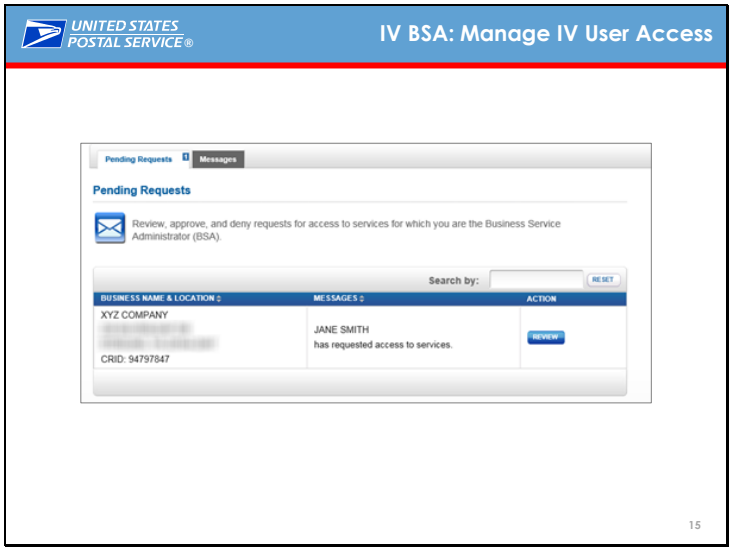



On the day of National Rollout for Release 1.0, the Desired IV BSA will receive an authorization code via email. He or she will be prompted to enter this code upon accessing IV for the first time. The code is required to properly establish the CRID in IV.

**IMPORTANT:** Other users for the CRID will NOT be able to fully access IV until the IV BSA enters the authorization code.

If you do not receive the email with the authorization code or have any problems entering the code, contact the IV Help Desk.

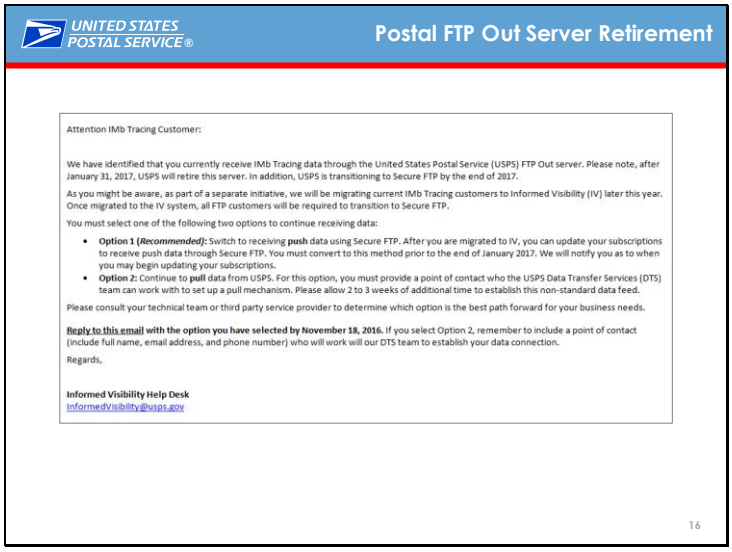
**Slide 15 – IV BSA: Manage IV User Access**




The IV BSA or an IV BSA Delegate must review and approve a user's request for access to the IV service in the BCG before the user can access IV.

Instructions for approving requests for the IV service are provided in the *IV User Guide*.

**Slide 16 – Postal FTP Out Server Retirement**

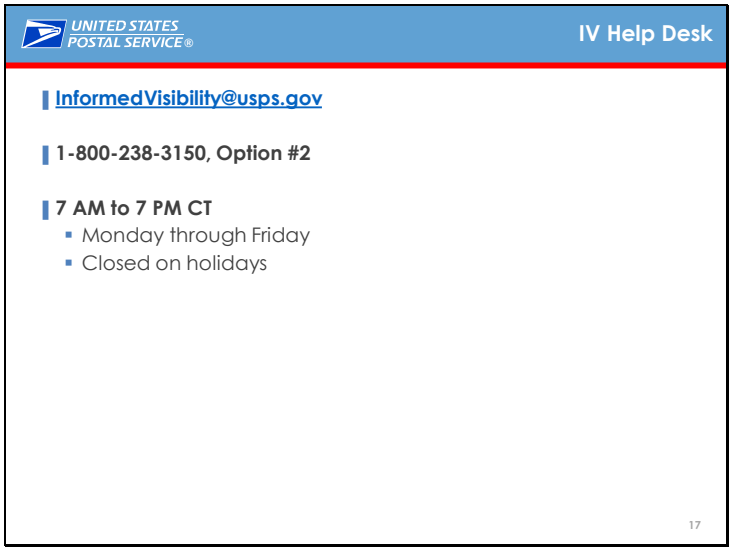



If you currently receive IMb Tracing data through the Postal FTP Out server, you should have received an email in October from the IV Help Desk notifying you that the Postal FTP Out server is being retired in early 2017, and USPS is transitioning to Secure FTP by the end of 2017.

You must select one of the following two options to continue receiving data: 1) Switch to receiving push data using Secure FTP or 2) continue to pull data from USPS [requires coordination with the USPS Data Transfer Services (DTS) team].

If you have not yet done so, contact the IV Help Desk **immediately** to inform them of the option you have selected.

**Slide 17 – IV Help Desk**




Contact the IV Help Desk at the USPS National Customer Support Center (NCSC) for any questions regarding the migration to IV:

- InformedVisibility@usps.gov
- 1-800-238-3150, Option #2

The IV Help Desk is available 7 AM to 7 PM CT, Monday through Friday. The IV Help Desk is closed on holidays.