UNITED STATES POSTAL SERVICE®

INFORMED VISIBILITY®

Provisioning Mail Quality Data



v7.9, September 1, 2026

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Overview

Welcome to this guide for **Provisioning Mail Quality Data (MQD)** through the **Informed Visibility® Mail Tracking & Reporting (IV®-MTR)** application.

This guide provides information about:

- The IV-MTR application
- Setting up your IV-MTR account to receive MQD
- Modifying and deleting your MQD queries
- MQD file conventions and characteristics
- Troubleshooting resources, including tutorial videos, detailed documentation, and the IV Solutions Center

It also provides high-level guidance for:

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

IV-MTR Overview

IV-MTR is an application that allows mailers to access the following types of Postal data:

- **Mail Tracking (Scan)**
  - Event-based data that allows mailers to see where their mail is in the mailstream
- **Mail Quality Data (MQD)**
  - Detailed error data from the Mailer Scorecard that allows mailers to improve their processes as they relate to the Streamlined Mail Entry program participation for:
    - Full-Service
    - eInduction
    - Seamless Acceptance
    - Move Update
- **Enterprise Payment System (EPS)**
  - Payment data for mailings, PO Boxes, and other Postal products
- **Package Platform Concept (PPC)**
  - Physical and payment data for packages
- **Informed Delivery® Post-Campaign (IDPC) Detailed Data**
  - Processing, opens, and click-throughs for Informed Delivery interactive campaigns

MQD in IV-MTR

- The MQD available in IV-MTR is pass-through data that is not generated by IV-MTR itself
  - Please see the MQD Data Dictionary information about the MQD provided in IV-MTR

- MQD in IV-MTR is available through a data feed*
  - Data feeds are subscriptions that allow you to receive MQD at intervals you select

- MQD Data Feeds:
  - Provide data from the current date forward
    - Historical MQD is currently unavailable in IV-MTR
  - Produce files that can be sent to a server or web service or downloaded online

**MQD is currently unavailable as a One-Time Query in IV-MTR.*

MQD in IV-MTR

- The MQD data feed output files are described in the table below.

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

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

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

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

To receive MQD through IV-MTR, you need:

1. A Business Customer Gateway (BCG) account
2. IV-MTR privileges (requested and granted through the BCG)
3. A Business Service Administrator (BSA) to activate your CRID(s) in IV-MTR

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

Before proceeding, users must verify they have the correct level of access to create data feeds.

- **Only BSAs, BSA Delegates, and users that have been granted Subscription Manager roles can create and manage data feeds.**
  - By default, all users can view existing data feeds.

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

Special Scenarios

The IV-MTR application allows you to access and manage MQD for your organization. There are some special scenarios to consider before setting up your data feed(s).

Want to share visibility of your MQD with another CRID?

- If your organization has several CRIDS of your own that you would like to track through one account, OR if your organization manages IV-MTR data for other organizations, use the IV-MTR feature of Data Delegation.
- See the Data Delegation appendix for more information.

Only want to share your MQD?

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

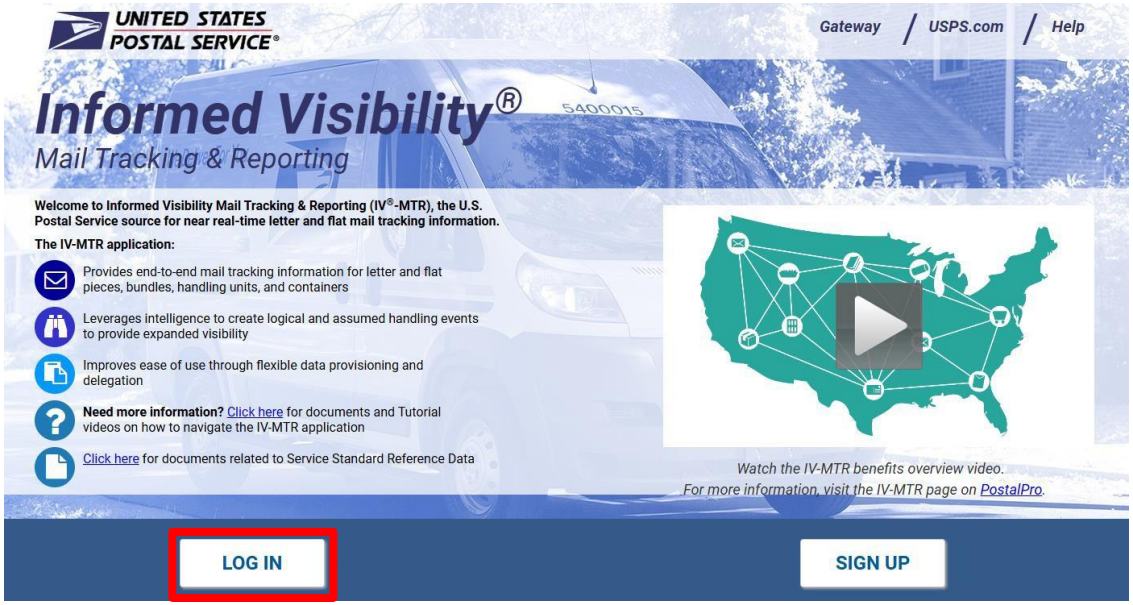
**Note that BCG registration will still be required.*

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Creating an MQD Data Feed

Accessing the IV-MTR Application

- When you are ready to access the IV-MTR application, you have two options:
  - **Option 1: Directly**
    1. Go to https://iv.usps.com.
    2. Click **Log In** and log in with your BCG username and password

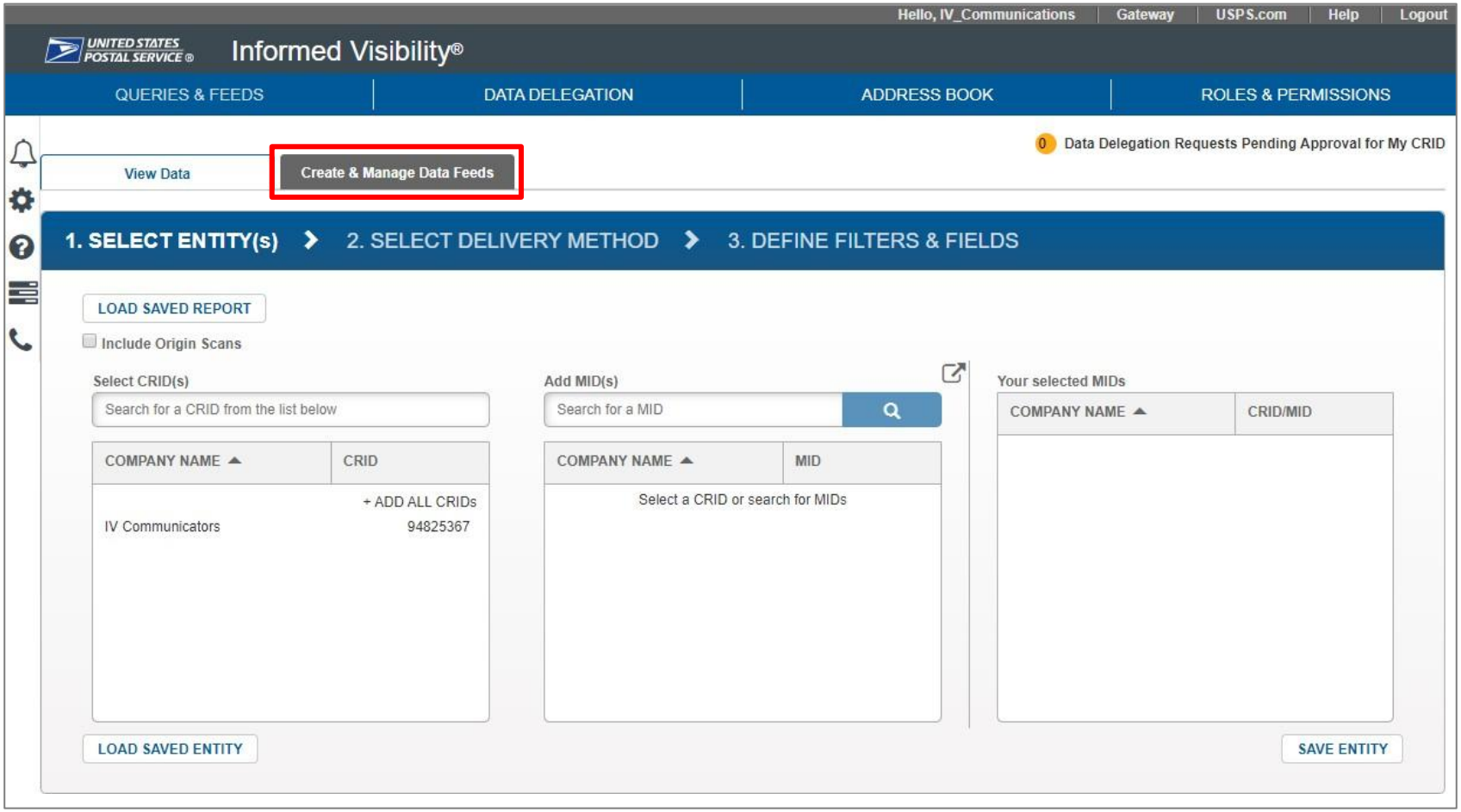


  - **Option 2: Through the BCG**
    1. Log into https://gateway.usps.com.
    2. Go to **Mailing Services** > **Informed Visibility.**
    3. Click **Go to Service**.



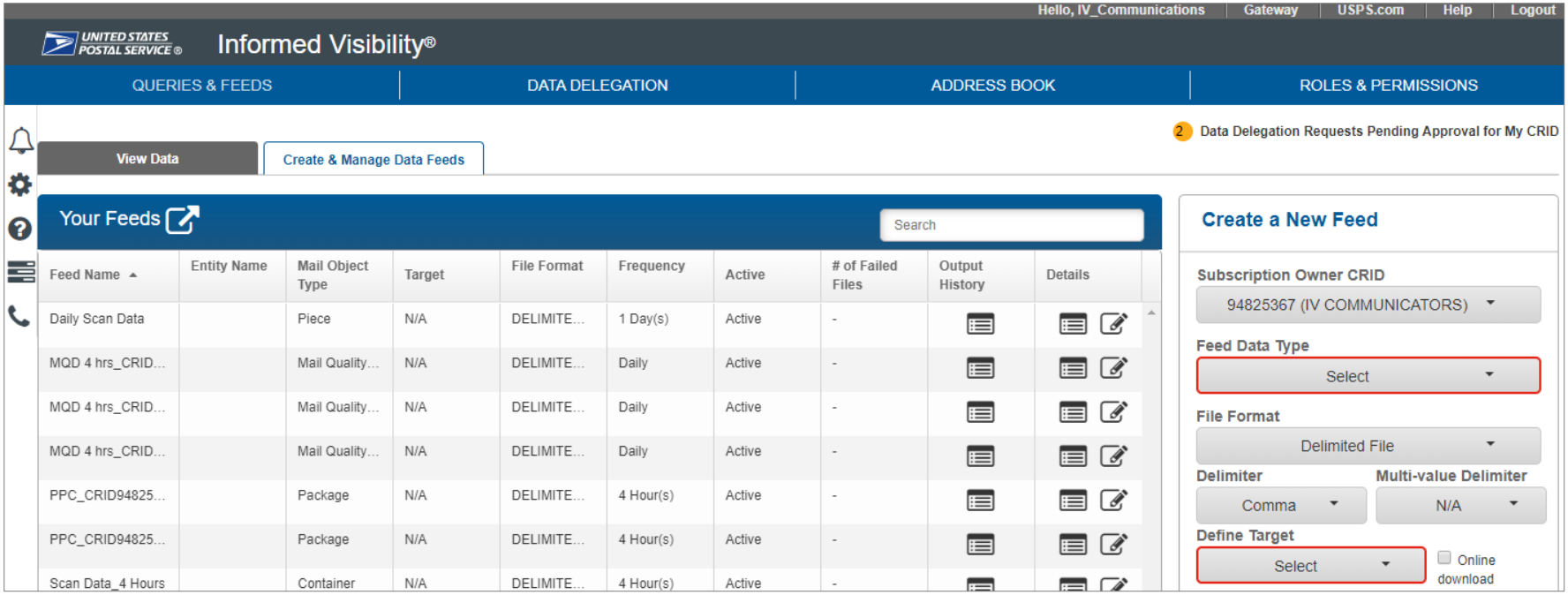
Create a Data Feed

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



Create a Data Feed

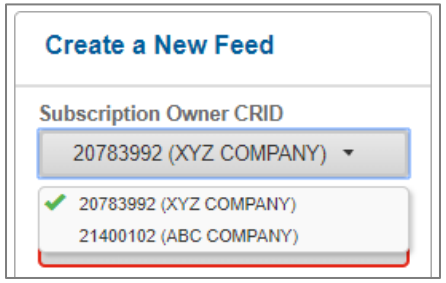
- The **Create & Manage Data Feeds** screen appears.
  - The **Your Feeds** section on the left displays existing data feeds. Here you can view or modify the details of a data feed and view or retrieve a feed's output history.
    - This area is viewable by all users.
  - The **Create a New Feed** section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



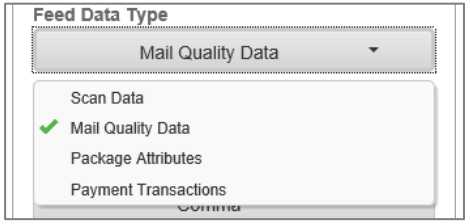
Create a Data Feed – Initial Options

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

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

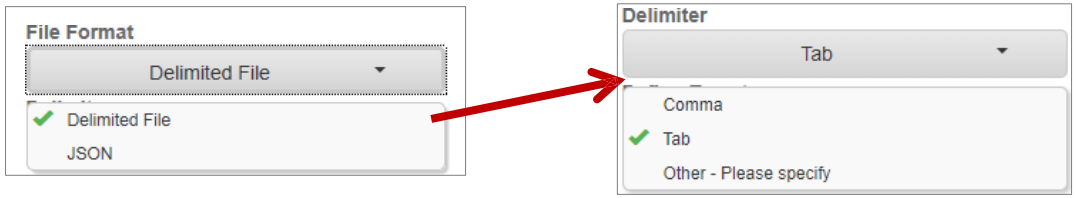


2. In the **Feed Data Type** section, select **Mail Quality Data**.

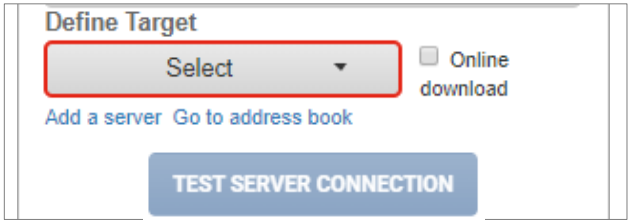


Create a Data Feed – Initial Options

3. In the **File Format** section, select **Delimited File** or **JSON**.
   - If you select the delimited format, make a selection from the **Delimiter** drop-down menu.
     - **Note:** It is recommended you do *not* choose Comma as a delimiter in MQD files since MQD itself contains commas.



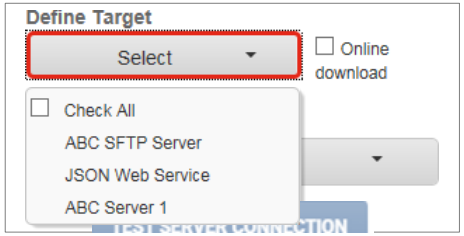
4. In the **Define Target** section, select where to send the files. Available options are:
   - **Server** – IV-MTR will push the output files to an SFTP server you choose (see step 4.a)
   - **Web Service** – IV-MTR will push the output files to a JSON web service (See step 4.a)
   - **Online Download**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

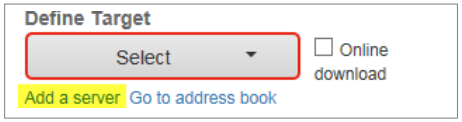


Create a Data Feed – Initial Options

a. **Server download**: In the **Define Target** drop down, select the target server(s) or web service(s)

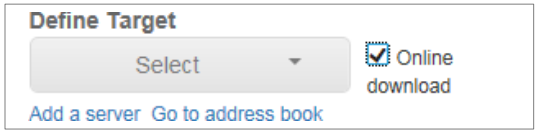
- The Define Target drop down is populated with servers/web services already listed in your IV-MTR Address Book. If you need to add a new server/web service to the list, click the **Add a server** link and follow the instructions in the Adding a Server to the Address Book appendix.





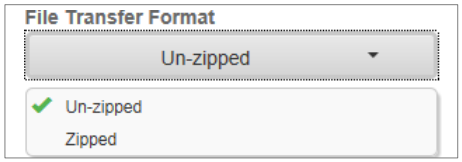
b. **Online download**: Check the box for **Online download**.

- This automatically greys out the Define Target option, as a target server is not needed for this option.



Create a Data Feed – Initial Options

5. In the **File Transfer Format** section, select whether to receive unzipped or zipped files.



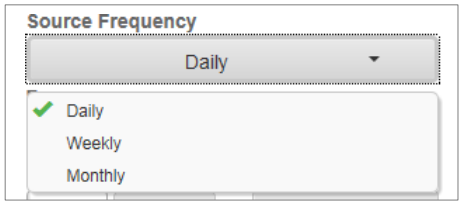
The next sections allow you to choose how and when you would like to receive data:

- **Source Frequency** is for how you would like your data presented – rolled up by day, week, or month
- **Frequency** is for how often you want to receive the rolled-up data – every minute, day, or month
- Some examples are provided in the table below.

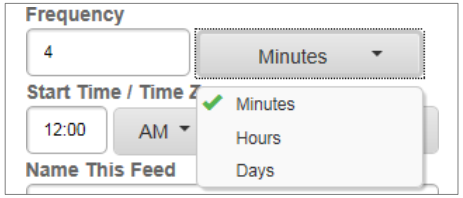
Source Frequency	Frequency	Output
daily	1 day	Every day, a file is received with MQD summarized by day
daily	7 days	Once a week, a file is received with MQD summarized by day
weekly	30 days	Once a month, a file is received with MQD summarized by week
monthly	1 day	Each day, the feed will check for a file with MQD summarized by month

Create a Data Feed – Initial Options

6. In the **Source Frequency** section, select how you would like your data rolled up - Daily, Weekly, or Monthly.

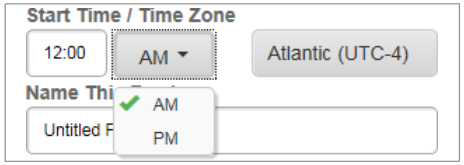


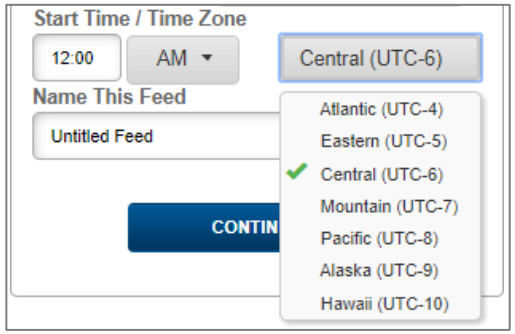
7. The **Frequency** section allows you to choose how often you want to receive data from the feed. In the Frequency field, enter a value and select minutes, hours, or days from the drop down menu.
   - By default, the frequency is set to every 4 hours. However, you can customize this from as often as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



Create a Data Feed – Initial Options

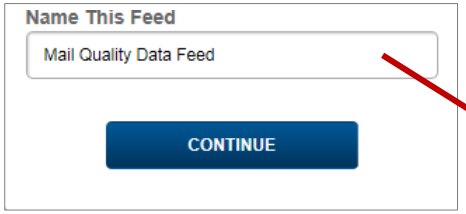
8. In the **Start Time / Time Zone** section, enter a time value, select AM or PM, and select a time zone. The data feed will be active once it is created and will send data according to the selected frequency and start time.

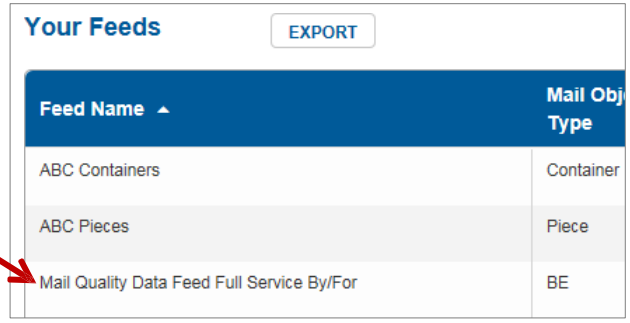




9. In the **Name This Feed** section, enter a name for the data feed. This is how your feed will display in the **Your Feeds** list.

   Note: The program and error type—selected on the next screen—are automatically appended to the feed name.





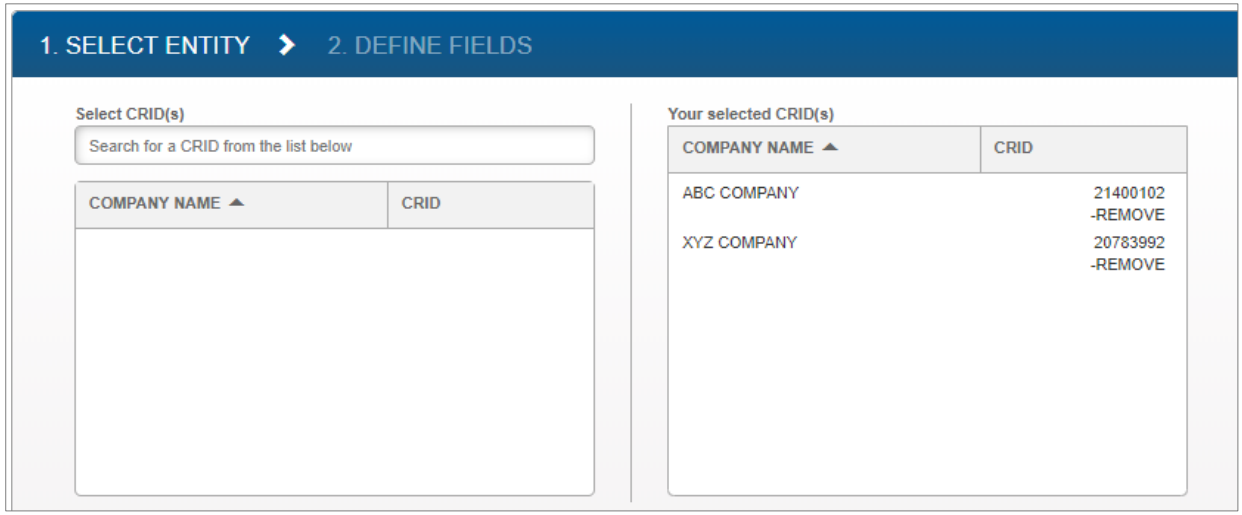
10. Click **Continue**.

Create a Data Feed – Select Entity(s)

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

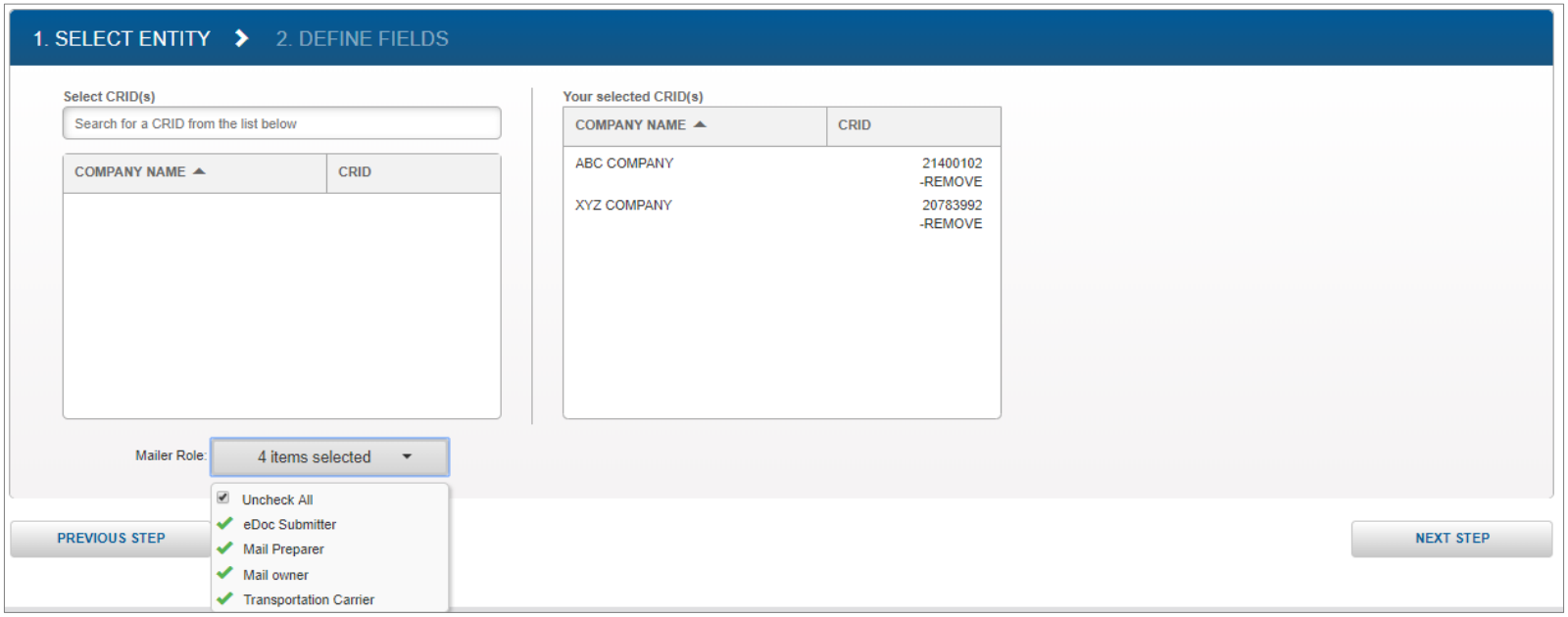
- The **Select CRID(s)** section displays the CRIDs you have the *Manage Mailing Activity* service for in the BCG.
  1. Add CRID(s) using one of the following methods:
     - **To add all CRIDs**: click **+ADD ALL CRIDS**
     - **To add an individual CRID listed in the window**: Click the CRID entry
     - **To add an individual CRID from a long list**: Use the Search dialog to display the CRID, then click the desired CRID entry

  The CRID(s) move(s) to the **Your selected CRIDs** section. Repeat this step as necessary until all desired CRIDs have been added.



Create a Data Feed – Select Entity(s)

2. In the **Mailer Role** drop down, select the role(s) for which to get data.

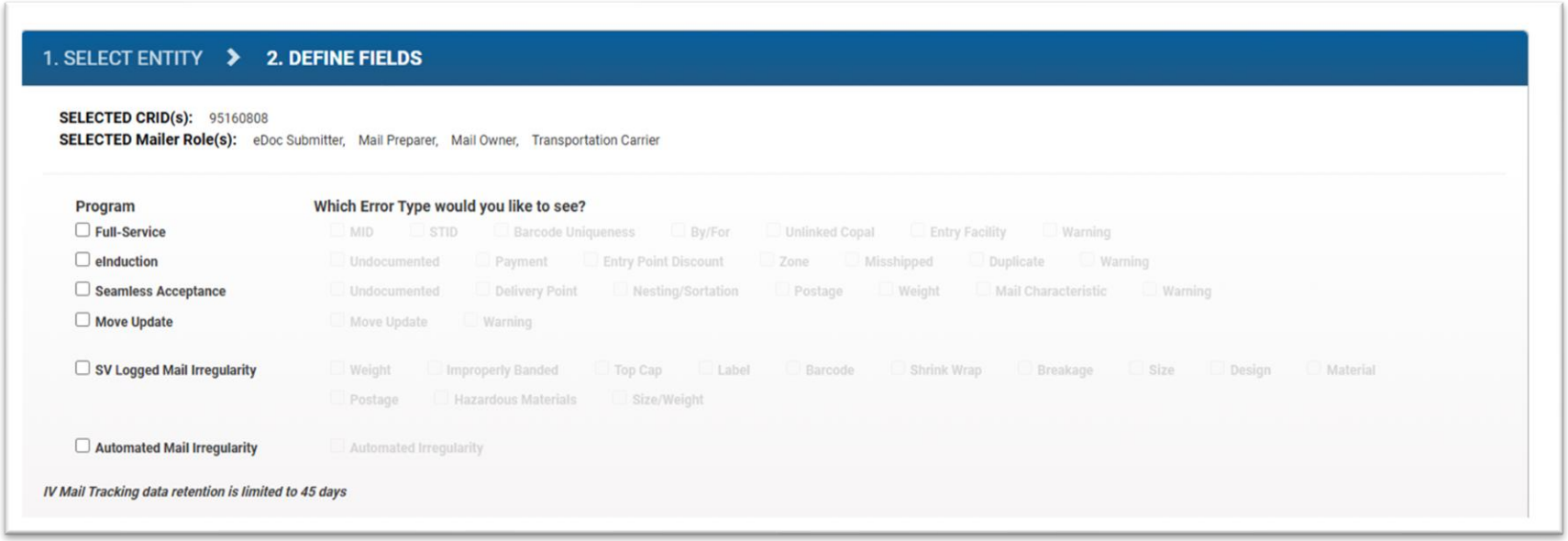


3. Click **Next Step**.

Create a Data Feed – Define Fields

The **Define Fields** area appears. This screen allows you to choose the data types and exact data fields you would like to receive.

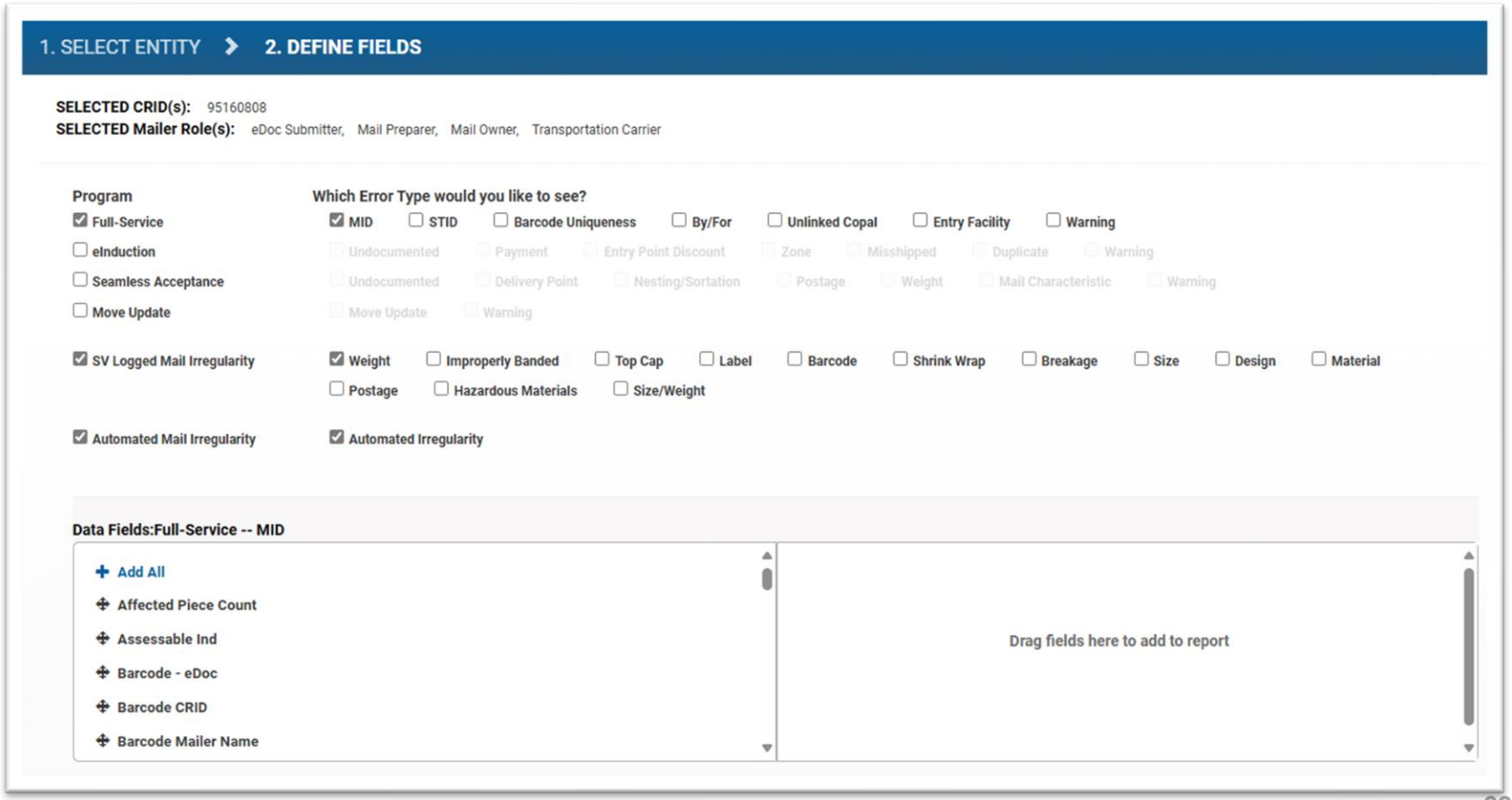
1. In the **Program** section, check the box(es) for the programs you would like to receive. Once a program is selected, its error types will appear to the right.



Create a Data Feed – Define Fields

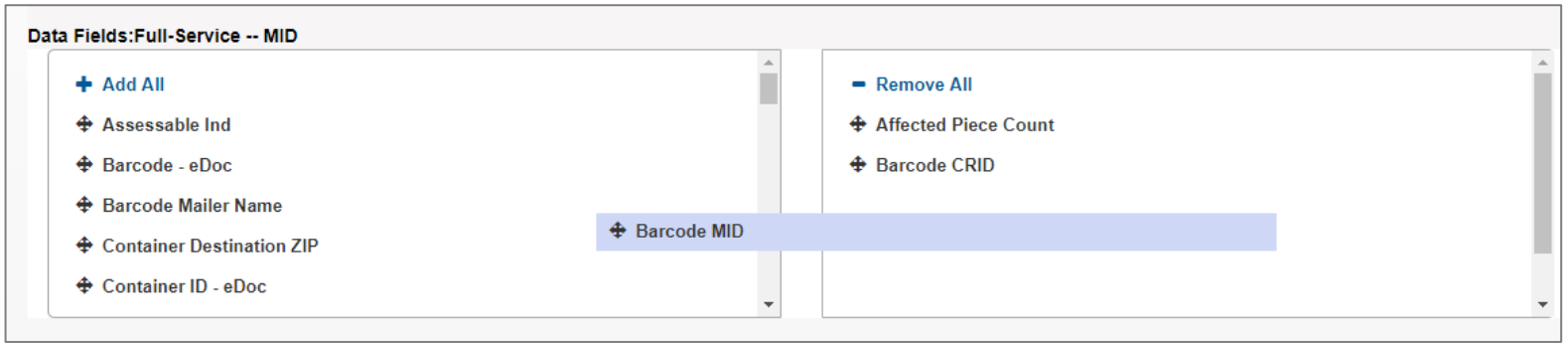
2. In the **Error Type** section, select the error type(s) you want to receive data for. As you make selections, **Data Fields** sections will appear below the Program section. These allow you to specify the data fields to receive for that program and error type.

- **Note:** Each box you check will create a separate data feed. In the example below, three data feeds will be created – a Full-Service MID, a Seamless Acceptance Nesting/Sortation, and a Seamless Acceptance Weight feed.

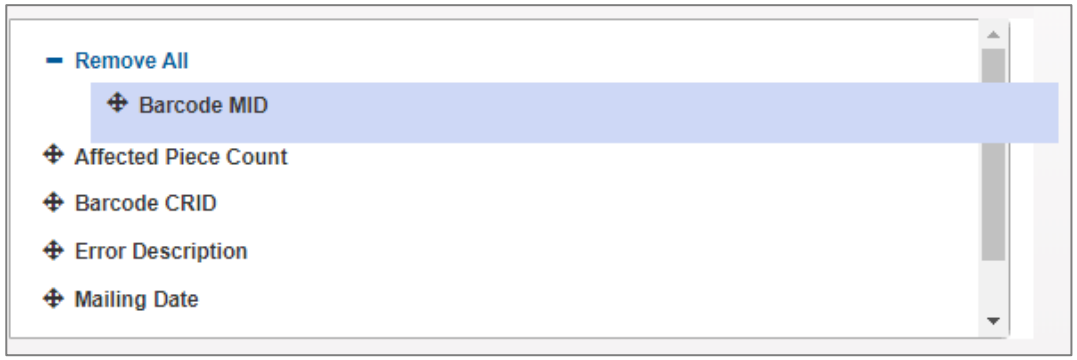


Create a Data Feed – Define Fields

2. In the **Data Fields** section, select the data fields to receive for each program/error type.
   - The fields on the left are available to be added, and the fields on the right are already included in your data feed.
   - **Drag** or **double-click** fields to move them from one side to the other. To add all available data fields, click **+ Add All.**
   - For details about the data fields themselves, please see the MQD Data Dictionary.

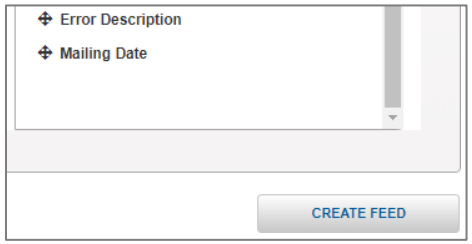


3. Once you have selected the data fields to be included, arrange them in your preferred order by dragging and dropping them on the right side of the **Data Fields** section.

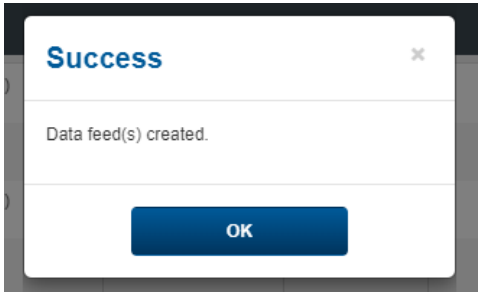


Create a Data Feed – Define Fields

4. Repeat the previous steps for each **Data Fields** section on the page.
5. Once all the Data Fields sections have been set up, click **Create Feed**.



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



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

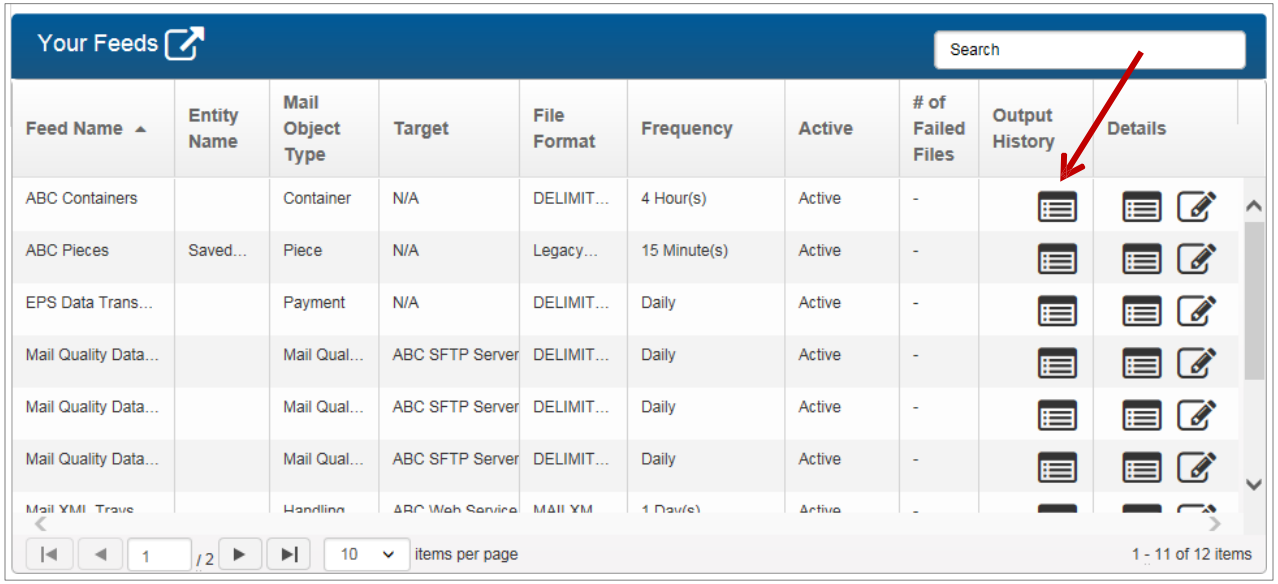
Data feed creation is now complete. The new data feed(s) will appear in the Your Feeds table.

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

Retrieving Data

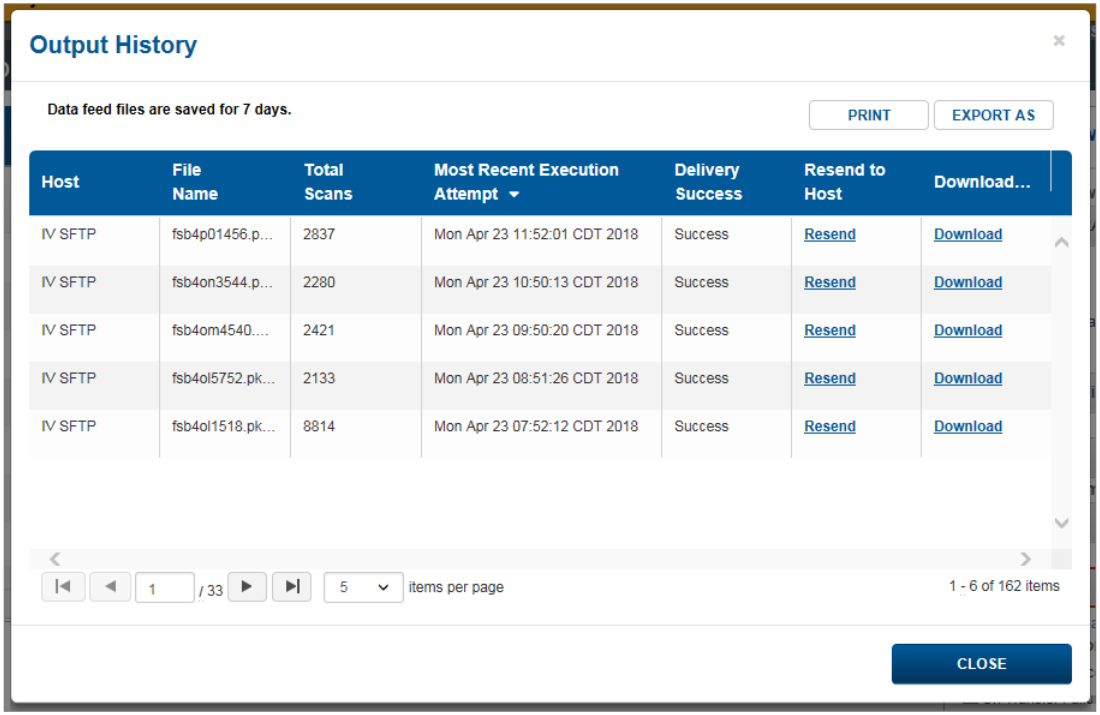
- Data feeds are activated upon creation and begin delivering data according to the selected start time and frequency.

- To retrieve files for a data feed, complete the following:
  - On the **Queries and Feeds** page, click **Create & Manage Data Feeds**.
  - On the **Create & Manage Data Feed** screen, locate the feed in the **Your Feeds** section.
  - Click the **Output History** icon for the feed.



Retrieving Data

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



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Managing Existing Data Feeds

Reviewing, Modifying, Disabling, and Deleting

Managing Data Feeds

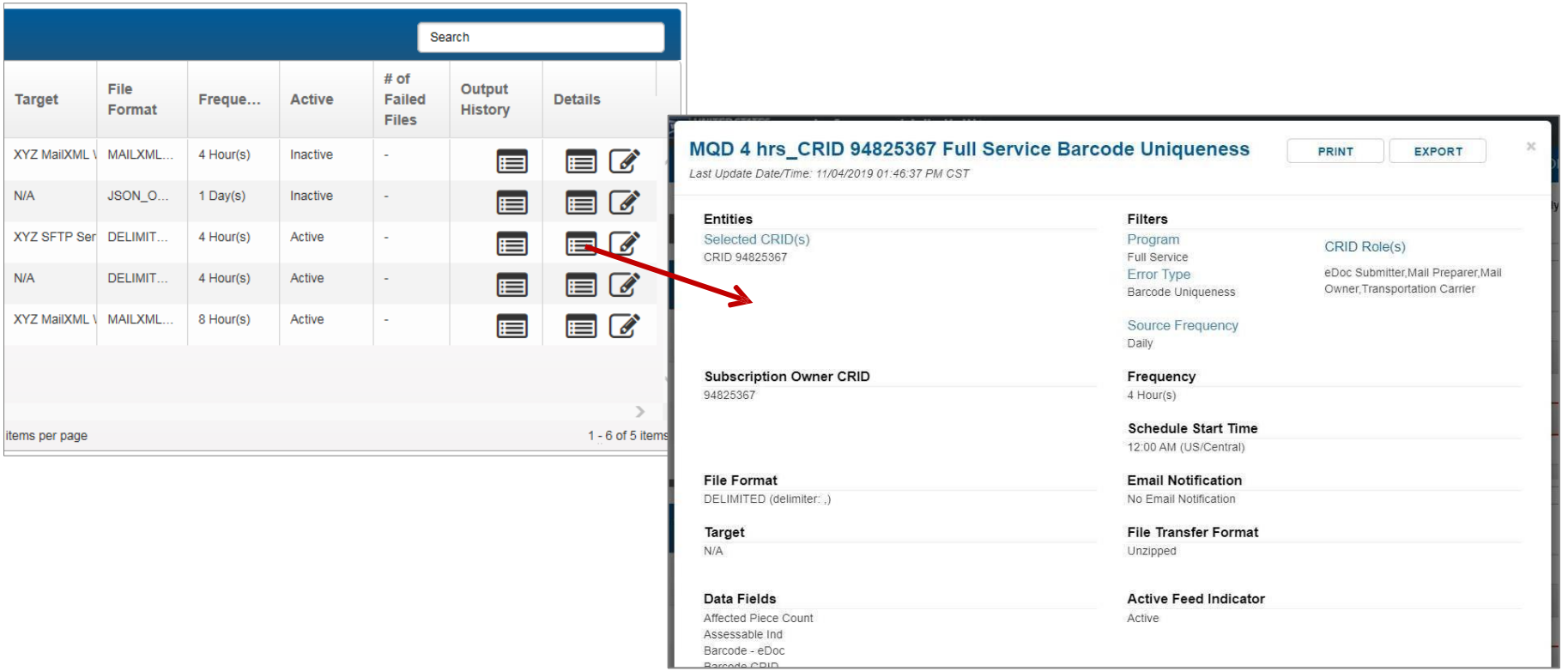
Use the table below to assist in managing existing data feeds.

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

Reviewing a Data Feed

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

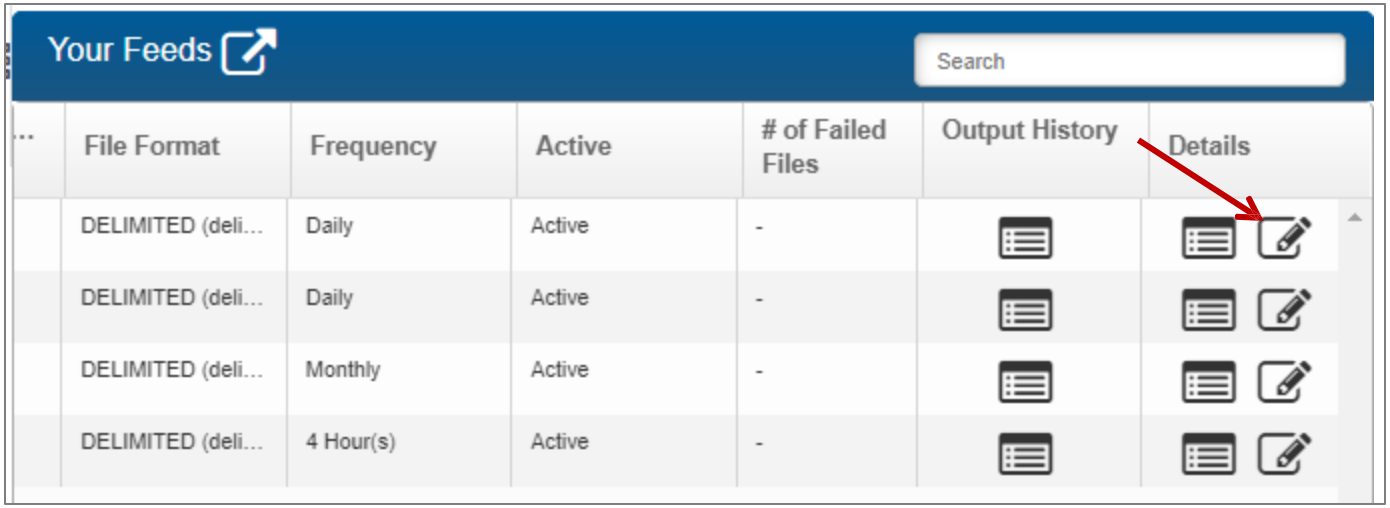
1. On the **Create & Modify Data Feeds** screen, locate the feed in the **Your Feeds** window.
2. Click the **Modify** icon for the feed in the **Details** column.
3. The feed's **Details** page will appear, listing all the settings for the feed.



Modifying a Data Feed

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

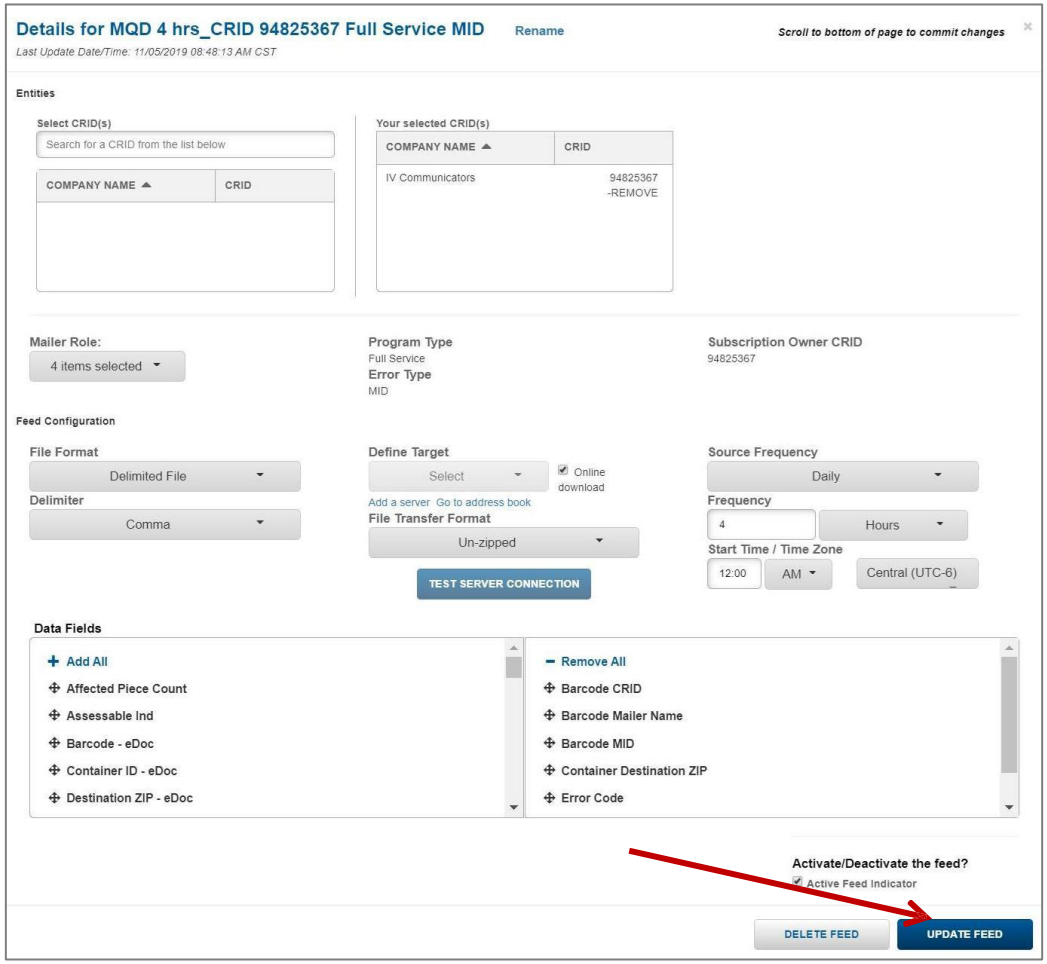
1. On the **Create & Modify Data Feeds** screen, locate the feed in the **Your Feeds** window.
2. In the **Details** column, click the feed's **Modify** icon.



Modifying a Data Feed

3. The feed's **Details** window opens. Make changes as needed.
4. Once your changes are complete, scroll to the bottom of the window and click **Update Feed**.

IMPORTANT: To save changes, you must click **Update Feed**.

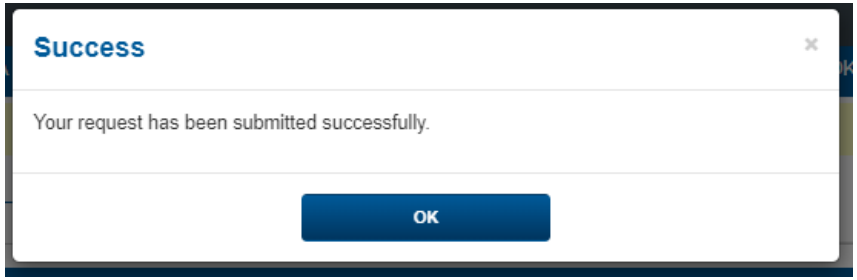


Modifying a Data Feed

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



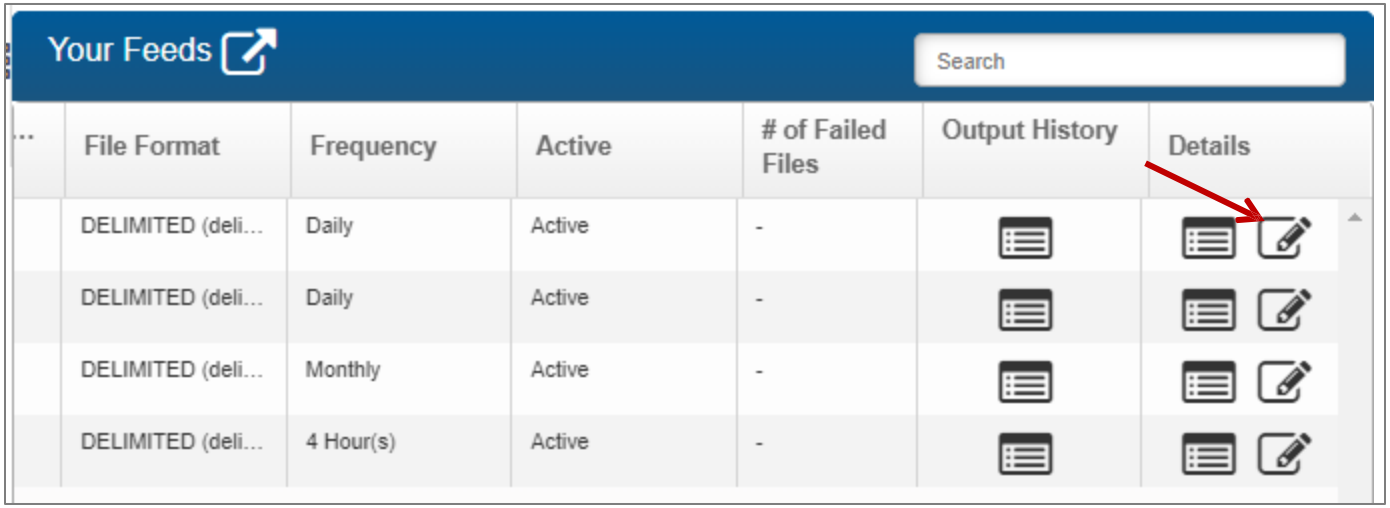
6. If you clicked Confirm, a success screen will appear, confirming the changes have been made. Click **OK.**



Disabling a Data Feed

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

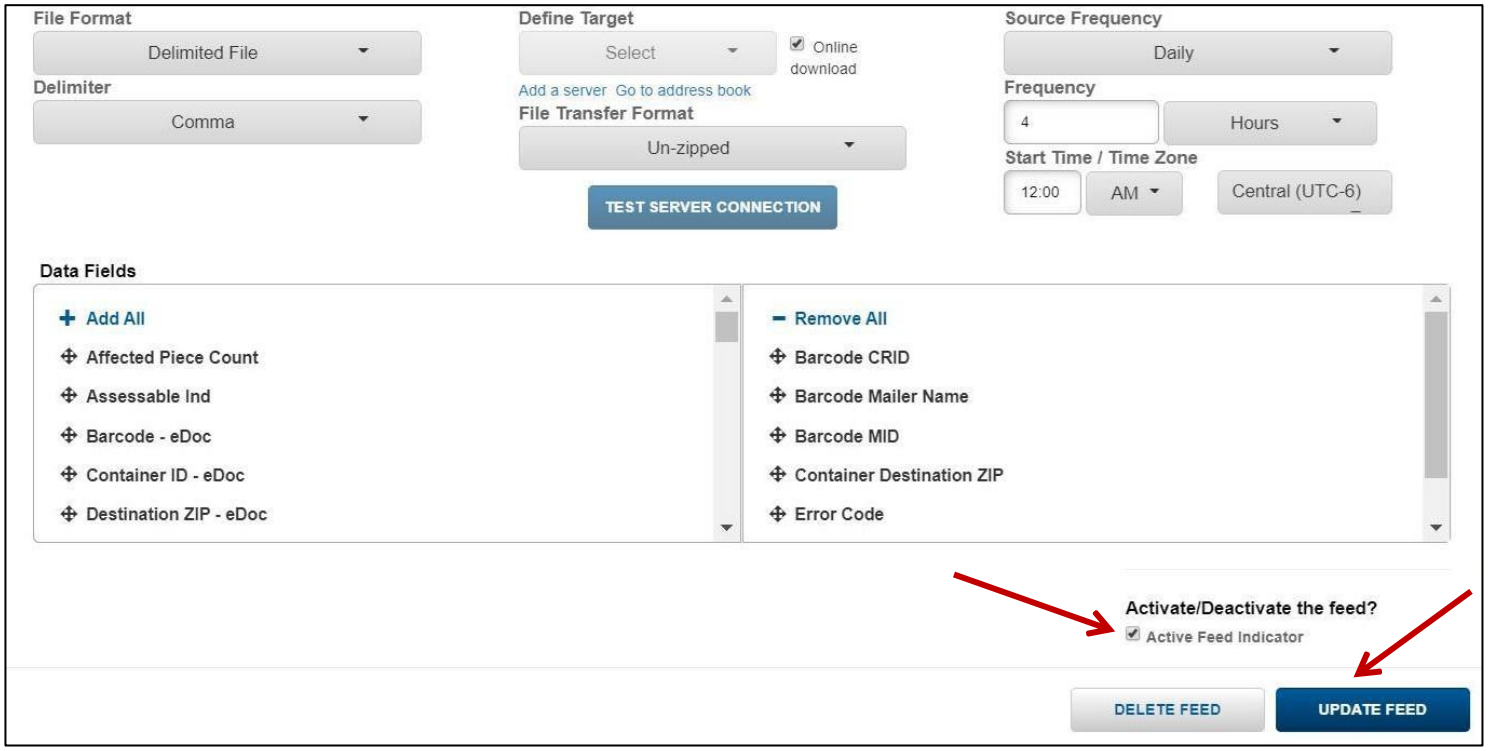
1. On the **Create & Modify Data Feeds** screen, locate the feed in the **Your Feeds** window.
2. Click the **Modify** icon for the feed in the **Details** column.



Disabling a Data Feed

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

IMPORTANT: To save changes, you must click **Update Feed**.



5. The **Create & Manage Data Feeds** screen will appear. The feed will still be listed in the **Your Feeds** section, but will not retrieve new data until you re-activate it.

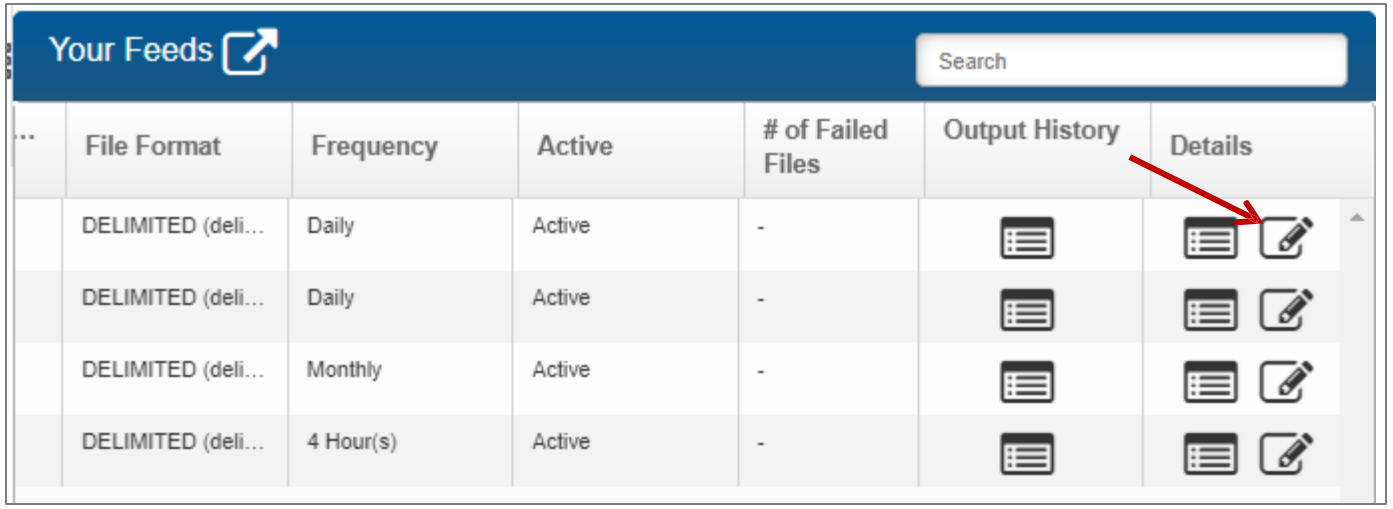
Deleting a Data Feed

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

IMPORTANT: Data Feed deletion cannot be undone.

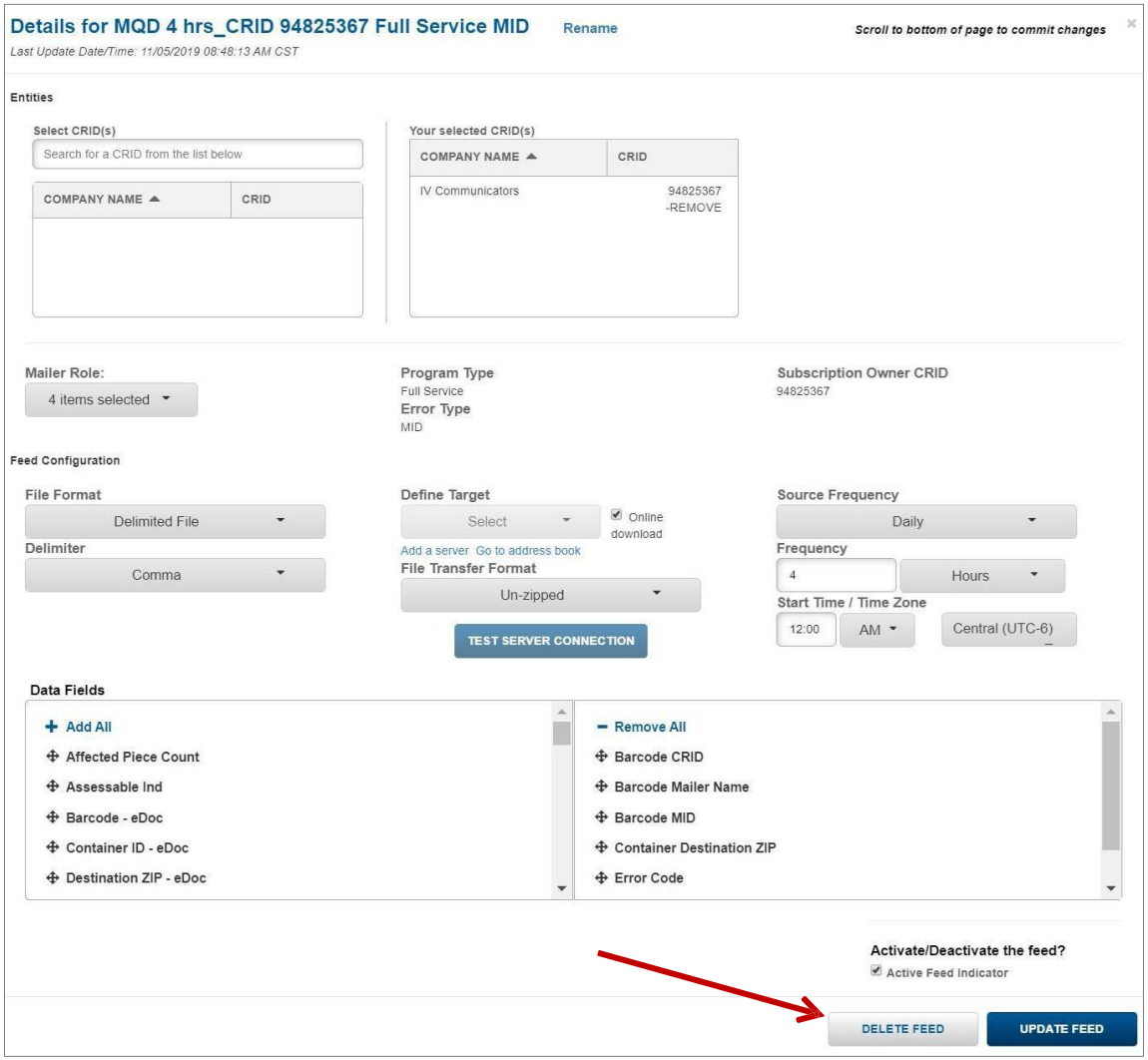
To delete a data feed, complete the following:

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



Deleting a Data Feed

3. The feed's **Details** window opens. Scroll to the bottom of the screen and click **Delete Feed**.



Deleting a Data Feed

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



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

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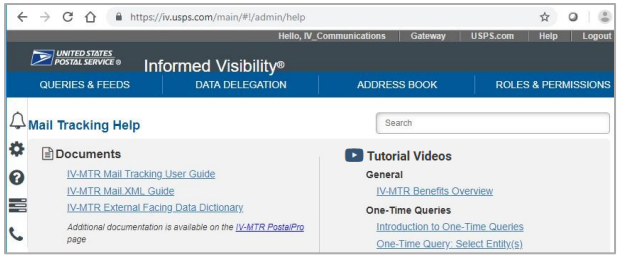
Troubleshooting Resources

Where to Find Help When You Need It

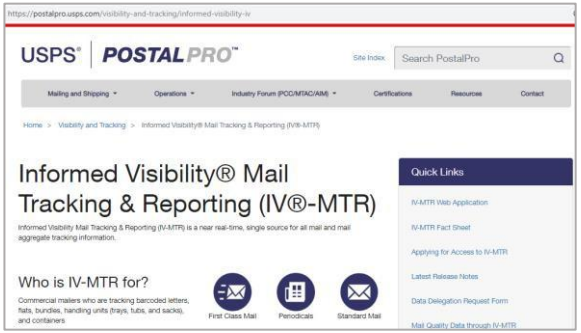
IV-MTR Resources

IV-MTR help is available in three places:

1. **IV-MTR Application** – the Help section of the IV-MTR website hosts the library of tutorial videos and provides links to select references on PostalPro



2. **PostalPro™ IV-MTR page** – a knowledge base with all IV-MTR documentation and resources

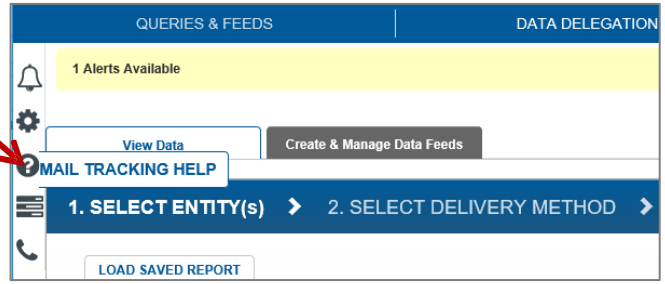


3. **IV Solutions Center® (IVSC)** – a dedicated group of Help Desk professionals who can assist with any questions

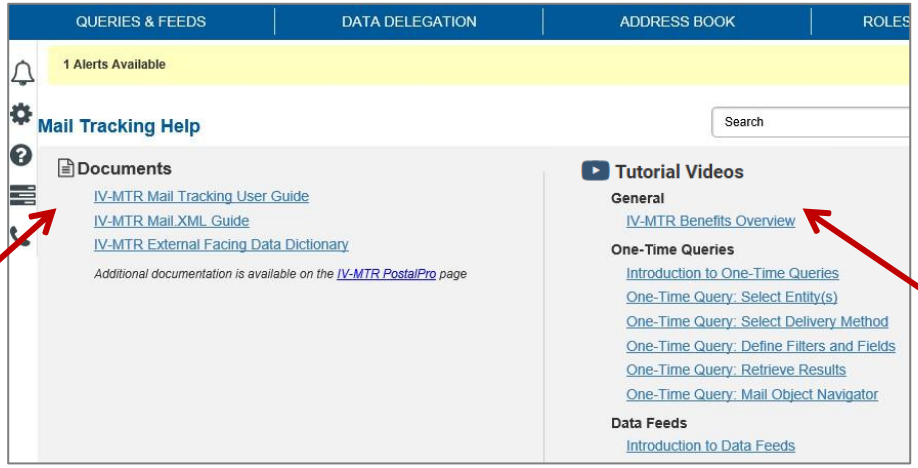
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IV-MTR Help Page

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



The IV-MTR Help page hosts:



PostalPro Document links that give you direct access to select PostalPro resources

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

PostalPro™ IV-MTR Page

- **PostalPro provides a wealth of information about IV-MTR.**
  - **The MQD through IV-MTR page provides MQD-specific resources, including:**
    - MQD Data Dictionary (detailed information about the actual data received)
    - MQD Error Codes (listing of error codes)
    - FAQs
  - **The IV-MTR PostalPro page provides general information about IV-MTR, including:**
    - IV-MTR User Guide (the most in-depth information about IV-MTR)
    - Applying for Access (instructions for setting up a new IV-MTR account)
    - IV-MTR Orientation Training (introduction to application layout and navigation)
    - Release Notes (information about the most recent updates)
    - MQD Data Delegation form (needed when coordinating data delegation with the IV Solutions Center)
    - MTAC User Group 4 materials (information about the open forum for USPS representatives and industry leaders to discuss mail visibility)

IV Solutions Center

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

InformedVisibility@usps.gov

1-800-238-3150, Option #2

7 AM to 5 PM CT, Monday through Friday

(closed USPS holidays)

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Appendix A

Change History

Change History

Date	Version	Description
9/1/2026	7.9	• Updated screenshots/notes throughout user guide for "Test Server Connection" button, which was disabled in the IV-MTR application in a prior release.
2/26/2026	7.8	• Updated table on slide 16 with settings to create a monthly Source Frequency for data feeds.
10/9/2025	7.7	• Updated screenshots on slides 21, 22 to reflect new data type. • Added slides 94-97 with steps to download images.
6/17/2025	7.6	• Updated IV-MTR Landing Page image with Reference Data section/links, updated references to tutorial videos
11/13/2020	7.5	• Expanded Data Delegation appendix • Updated PostalPro URL & added IDPC mention
4/25/2020	7.4	• Updated Data Delegated to My CRIDs slides with new Data Type drop down • Added Orientation Training to PostalPro slide. • Added note about using a non-comma delimiter • Removed MID reference in Select Entities discussion
11/9/2019	7.3	• Updated shots to remove Email Notification options. Reorganized content to enhance usability. Added introductory information and expanded resources section. Updated for clarity throughout.
8/14/2019	7.2	• Updated shots on slides 14-16 to remove Full Service Nesting/Sortation option • Updated shots on slides 18 & 19 to show Last Updated date/timestamp
5/11/2019	7.1	• Updated to show users now have the ability to create a single Mail Quality Data feed for multiple CRIDs and add multiple CRIDs to an existing data feed.

Change History

Date	Version	Description
3/29/2019	7.0	• Changed "IV" to "IV-MTR" and "IV Help Desk" to "IV Solutions Center" throughout. • Refreshed screenshots throughout. • Added hyperlinks to the Contents slide. • Updated instructions for getting access to IV-MTR to reflect that contacting the IV Solutions Center is no longer necessary to obtain authorization code. • Added Manage Data Delegation slides. • Added items to the Resources slide.

Acronyms & Abbreviations

Acronym / Abbreviation	Description
BCG	Business Customer Gateway
BSA	Business Service Administrator
CRID	Customer Registration ID
EPS	Enterprise Payment System
IDPC	Informed Delivery® Post-Campaign
IV®-MTR	Informed Visibility® Mail Tracking & Reporting
JSON	JavaScript Object Notification
LF	Line Feed
MQD	Mail Quality Data
PPC	Package Platform Concept
SFTP	Secure File Transfer Protocol

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Appendix B

MQD File Characteristics & Conventions

File Characteristics

	Delimited	JSON
File Extension	TXT	JSON
Program Types Available	Full Service Seamless Acceptance Move Update eInduction	Full Service Seamless Acceptance Move Update eInduction
Delivery Method	Sent to SFTP server Online Download	Sent to SFTP server or web service Online Download
Option to zip?	Yes	Yes
File Naming Convention	YYYYMMDDhhmmss_MQD_<Program Type>_<Error Type>_<Source Frequency>_<4 random alphanumeric chars for Message Group>_<4 digits for Message #>.txt	YYYYMMDDhhmmss_MQD_<Program Type>_<Error Type>_<Source Frequency>_<4 random alphanumeric chars for Message Group>_<4 digits for Message #>.json
Example File Name	20191207112728_MQD_FS_BQ_M_2XY4_0001.txt	20190616150100_MQD_SA_BQ_D_141U_0001.json
Headers?	Yes	n/a
End of Line	Line feed (LF) "\n"	n/a
Delimiter	As selected by user **Note:** Pipe delimiter recommended because commas are included in error data.	n/a
Handling of Large Number of Records	Multiple files created if more than 100,000 records	The current target is 250 scans per file for message in the message group.
Success/Failure Email Available?	Yes	No
Behavior if No Records	Blank file appears in Output History but not sent; email sent if "On Transfer Success" selected	No file will be sent, though there are enhancements in the future to send blank files.

File Naming Convention

Program Type	Short
Full Service	FS
Move Update	MU
Seamless Acceptance	SE
eInduction	EI

Source Frequency	Short
Daily	D
Weekly	W
Monthly	M

Error Type	Short
Barcode Uniqueness	BQ
By/For	BF
Delivery Point	DP
Duplicate	D
Entry Facility	EF
Entry Point Discount	EPD
Mail Characteristic	MC
MID	MID
Misshipped	M
Move Update	MU
Nesting/Sortation	NS
Payment	PYMT
Postage	P
STID	STID
Undocumented	U
Unlinked Copal	UC
Warning	W
Weight	WT
Zone	Z

File Name Examples

- Read two files Full Service – Barcode Uniqueness – Daily:
  - 20171019045510_MQD_FS_BQ_D_0F2D_0001.json
  - 20171019045510_MQD_FS_BQ_D_0F2D_0002.json
- Read one file for Seamless Acceptance – Nesting Sortation – Weekly:
  - 20171020223045_MQD_SA_NS_W_0F2D_0001.txt

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Appendix C

Adding a Server to the Address Book

Adding a Server to the Address Book

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

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

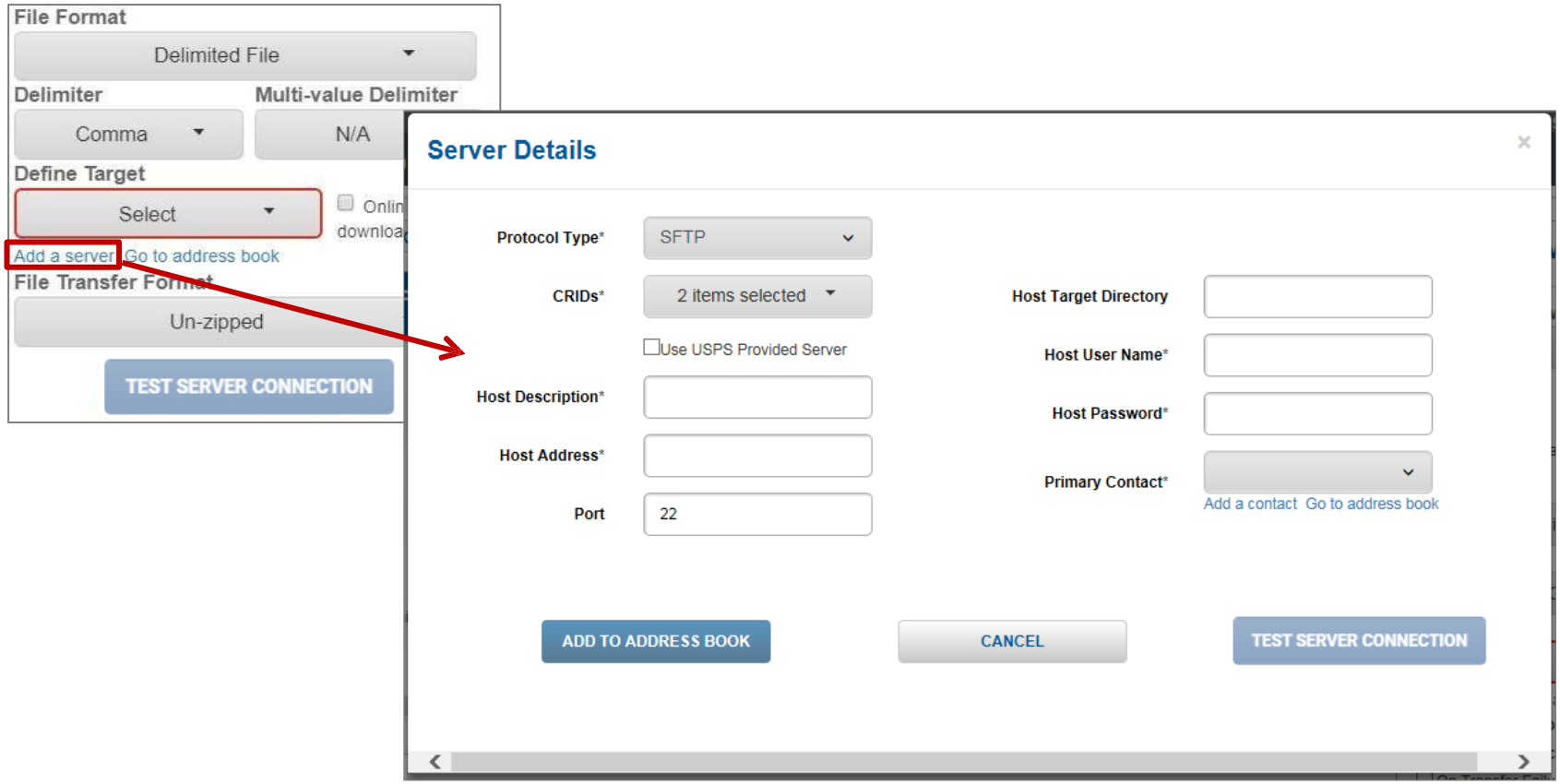
If you would like more information about the IV-MTR Address Book, please see the IV-MTR User Guide.

Adding a Server during Feed Setup

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

Select the **Protocol Type** and complete the remaining fields. When you are finished, click **Add to Address Book**. The new server or web service is added to your address book and is now available from the **Define Target** menu. Continue with the data feed setup instructions.

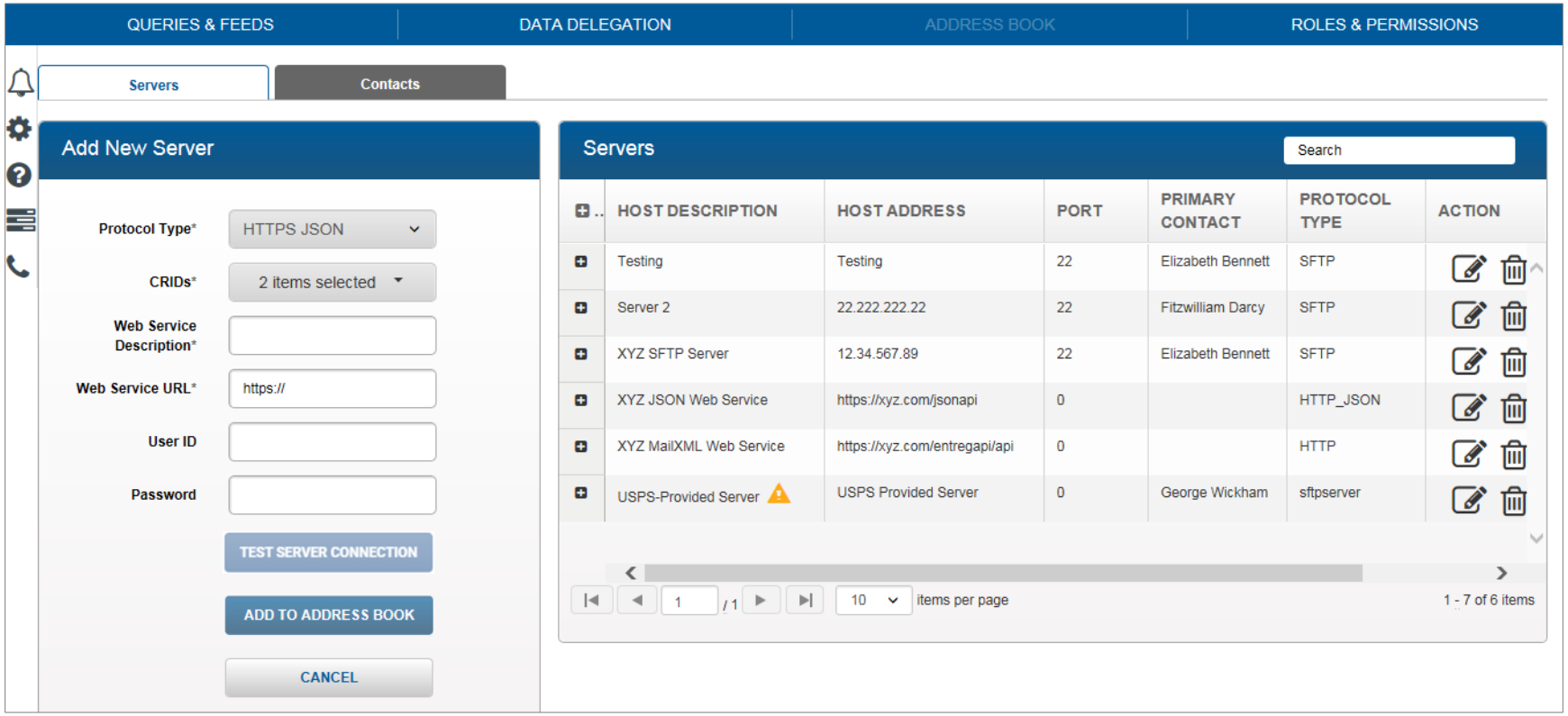
Note: *The **Test Server Connection** functionality has been disabled, so the button is grayed out.*



Adding a Server before Feed Setup

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

Note: *The **Test Server Connection** functionality has been disabled, so the button is grayed out.*



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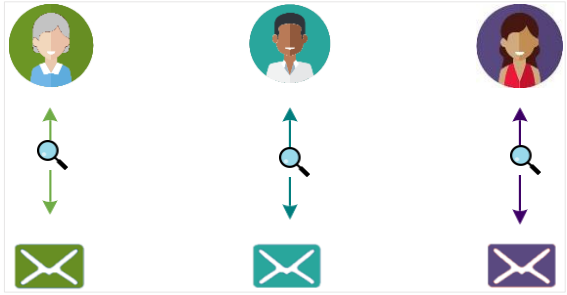
Appendix D

Data Delegation Overview

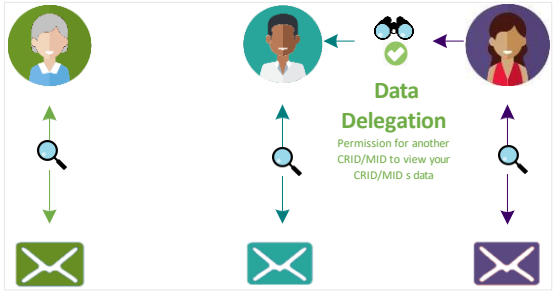
What is Data Delegation?

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

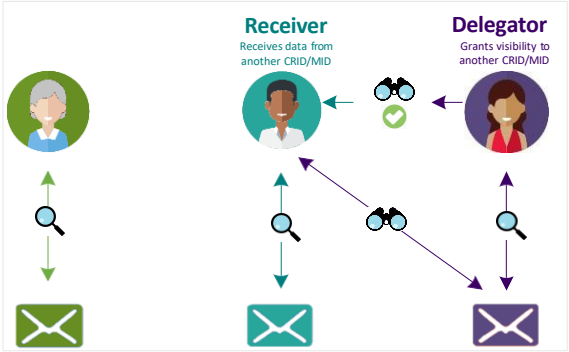
- In IV-MTR, each CRID has visibility of its own data.



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



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



What is Data Delegation?

- **There are two roles in data delegation:**
  1. **Delegator:** The CRID that shares its data with another CRID or MID.
  2. **Receiver:** The CRID that receives data from another CRID.

- **Data Delegation can be initiated by either a delegator or a receiver.**
  - Instructions for both methods are provided in this section.

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

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

How Data Is Shared

Data Delegation in IV-MTR hinges on the following:

1. **Level of Delegation –** MQD is delegated at the CRID-level.
   - This provides visibility of all MIDs – current ***and future*** – for a particular CRID.

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

How Data Is Shared (continued)

Data Delegation in IV-MTR hinges on the following:

3. **Discretion of Delegator –** Delegating CRIDs have final say on what visibility is shared.
   - Receivers can request the data and dates they prefer, but the delegator can modify any delegation at any time.
     - Receivers can be notified about modifications made to data delegated to them. See the IV-MTR User Guide, section 12.4: Managing Notification Preferences.
   - If a new data type becomes available, the receiving party will need to submit a new data delegation form to receive that data type.

4. **Manual Updating of Feeds/Reports with Delegated Data –** Delegated data is not automatically added to existing data feeds or saved reports.
   - After the receiver is granted visibility, they must update any existing data feeds or reports or create new feeds/saved reports manually.
   - Data feeds will only begin delivering data from the time the delegation was approved by the delegators forward (regardless of what dates the receiver requested visibility of).

Delegation Setup Options

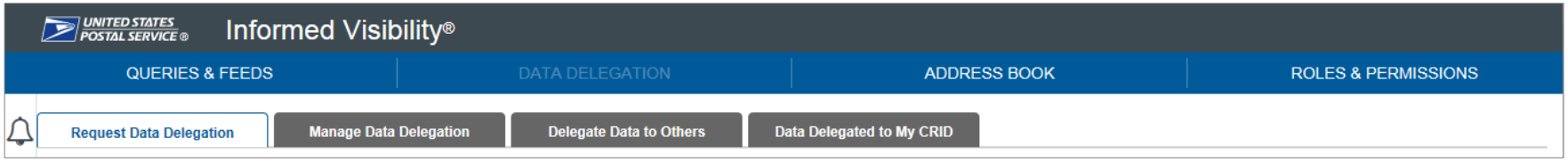
- The IV-MTR application provides **a self-service data delegation area** that allows organizations with IV-MTR accounts to **share data without having to contact the Postal Service**.
  - Instructions for doing this are provided in this section.
  - Only BSAs, BSA Delegates, or Data Delegation Managers can set up delegations.

- **However,** if one or both of the organizations **do not have access** to IV-MTR or **do not wish to set the delegation up** themselves, the **IV Solutions Center** can help facilitate the delegation.
  - Please contact the IV Solutions Center for more information.

- This appendix provides the essential instructions for setting up MQD-specific delegations.
  - If you need more detailed information about Data Delegations at any time, see the IV-MTR User Guide.

Data Delegation Area

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



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

To delegate or request MQD, you will need the following:

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

Use the table below to proceed.

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

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Requesting Data Delegation

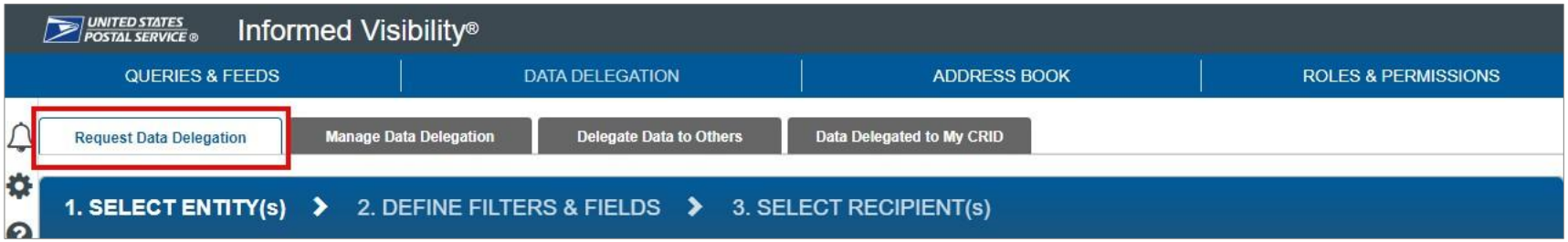
(BSA, BSA Delegate, and Data Delegation Managers Only)

Requesting Data Delegation

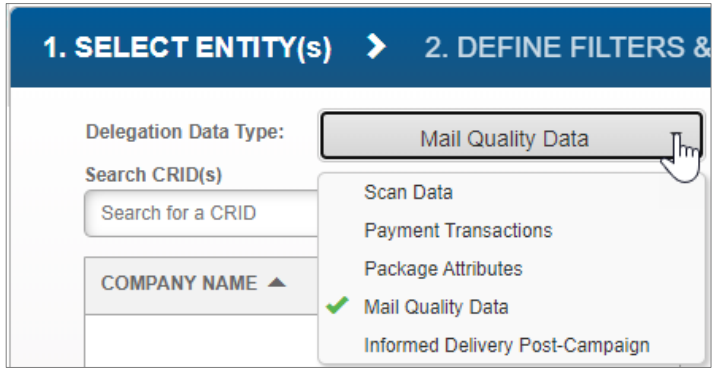
This section is restricted to BSAs, BSA Delegates, and Data Delegation Managers.

Follow these steps to request data delegation:

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

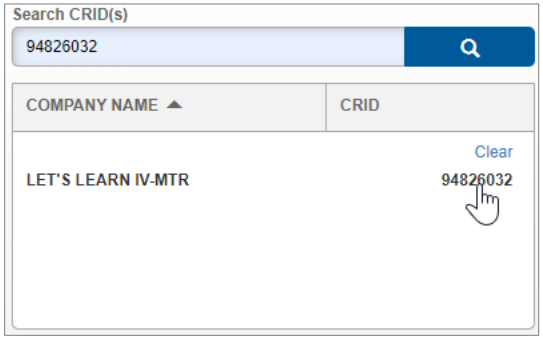


3. In the **Delegation Data Type** dropdown, select **Mail Quality Data**.

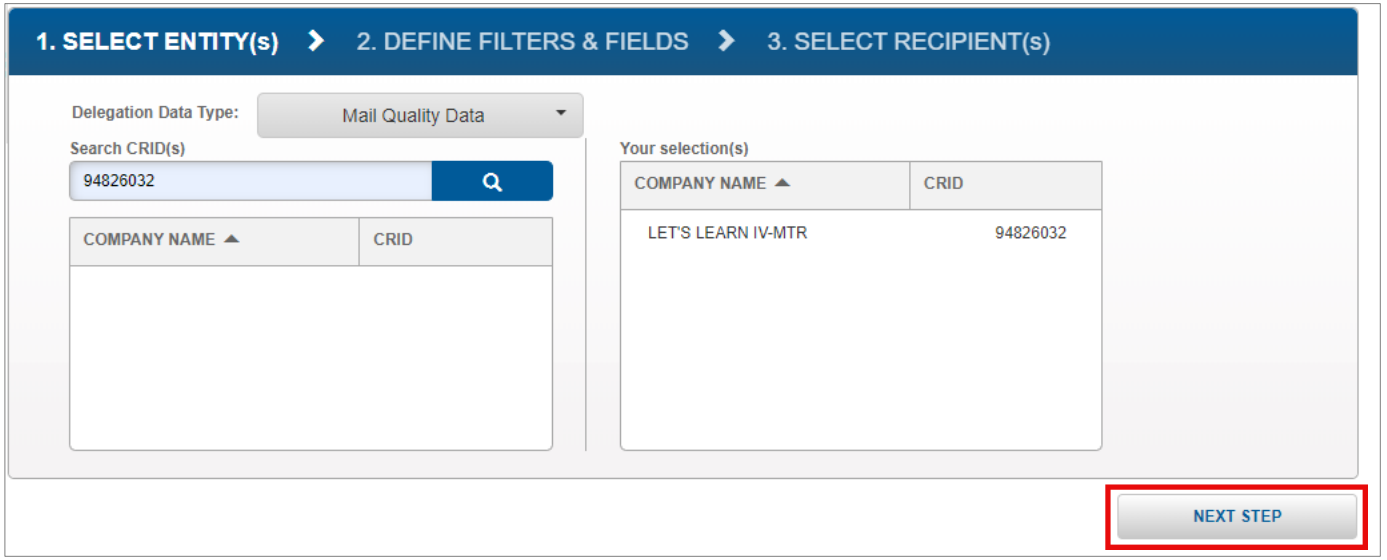


Requesting Data Delegation

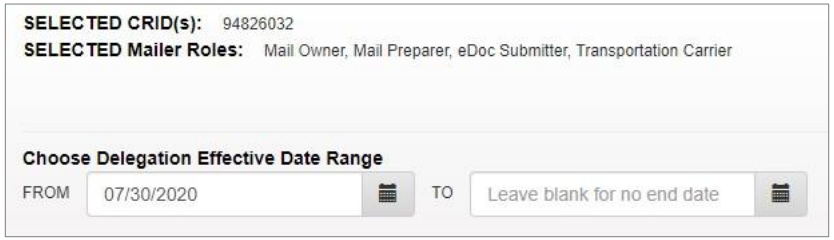
4. Use the **Search CRIDs** pane to locate and add the CRIDs you would like visibility for. For best results, use the full CRID.
   - Selected CRIDs will move from the Search CRID(s) pane to the Your selection(s) pane.



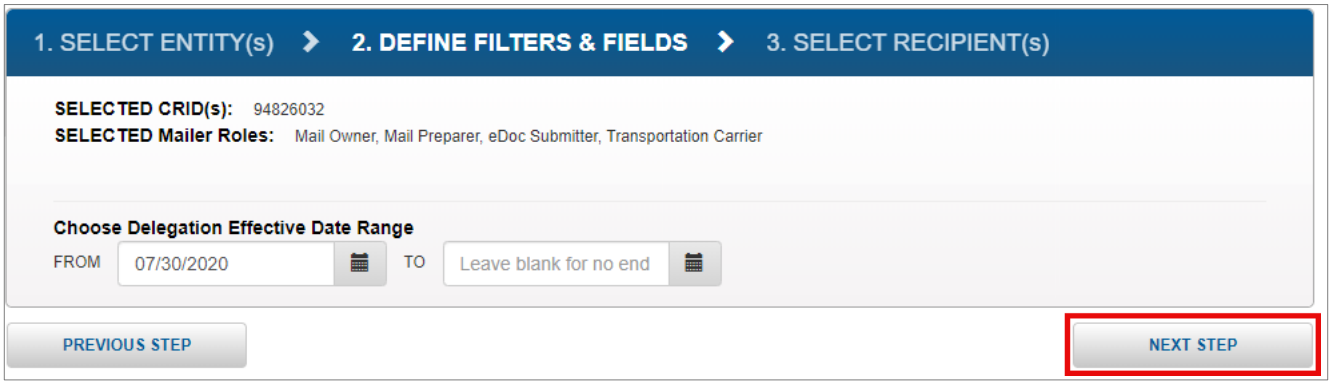
5. When you have finished adding CRIDs, click **NEXT STEP**.



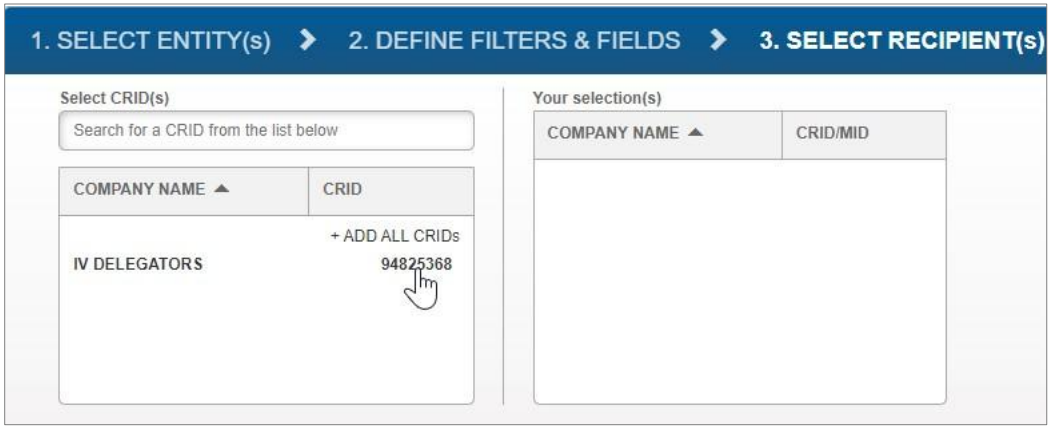
6. The Define Filters & Fields screen will appear. In the **Choose Delegation Effective Date Range** section, select the dates you would like visibility for.
   - You cannot select dates in the past.
   - Data feeds will only begin delivering data from the time the delegation was approved by the delegators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



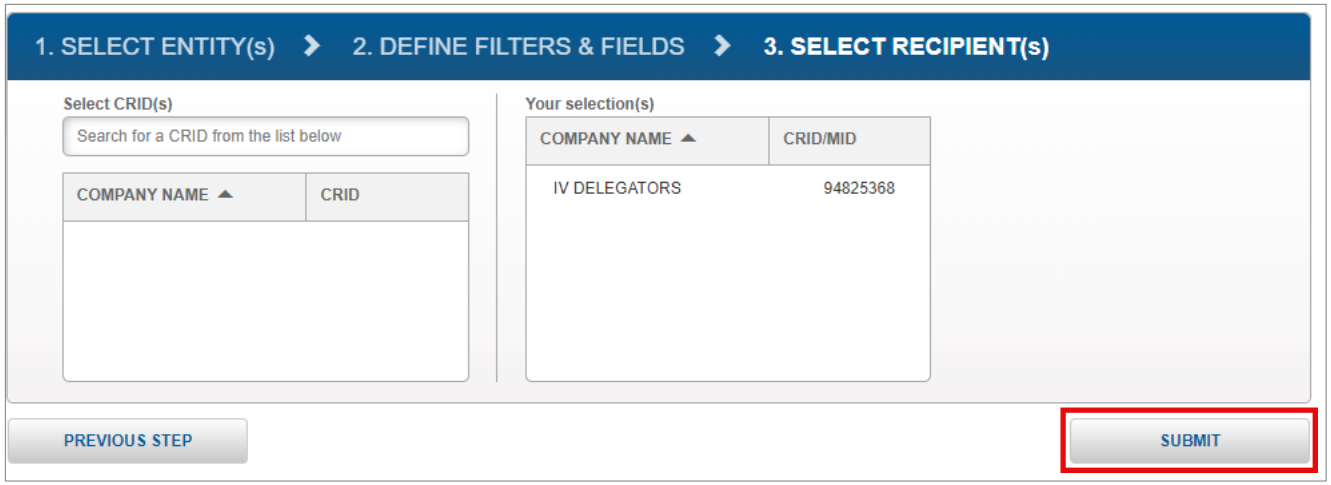
7. When you have chosen your dates, click **NEXT STEP**.



8. The Select Recipient(s) screen will appear. Use the **Select CRID(s)** pane to select the CRIDs that will receive the data. Selected CRIDs will move from the Select CRID(s) pane to the Your selection(s) pane.



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

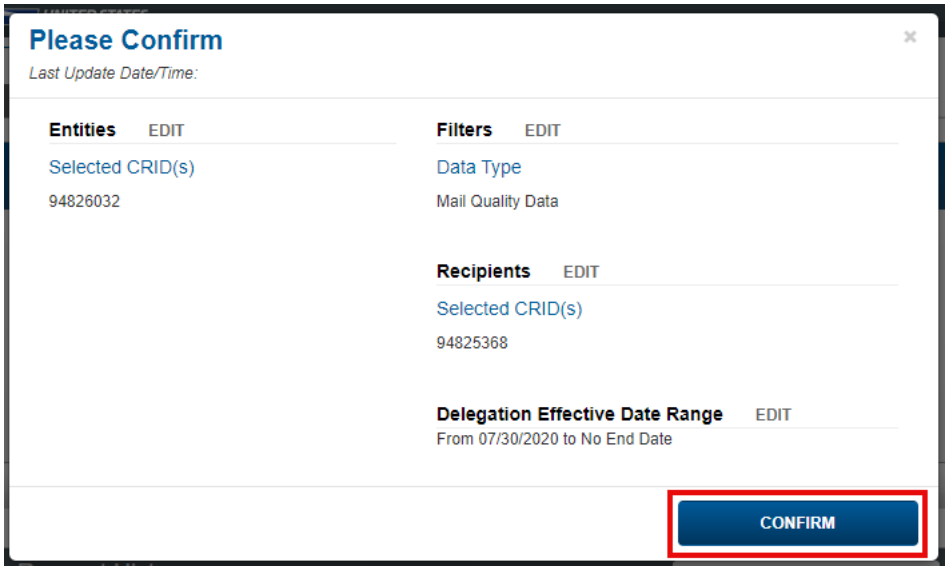


Requesting Data Delegation

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

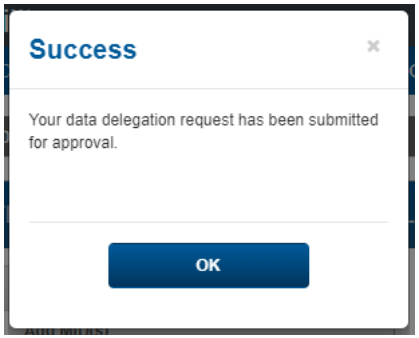


    - **If your request is ready to submit,** click **CONFIRM**.



Requesting Data Delegation

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



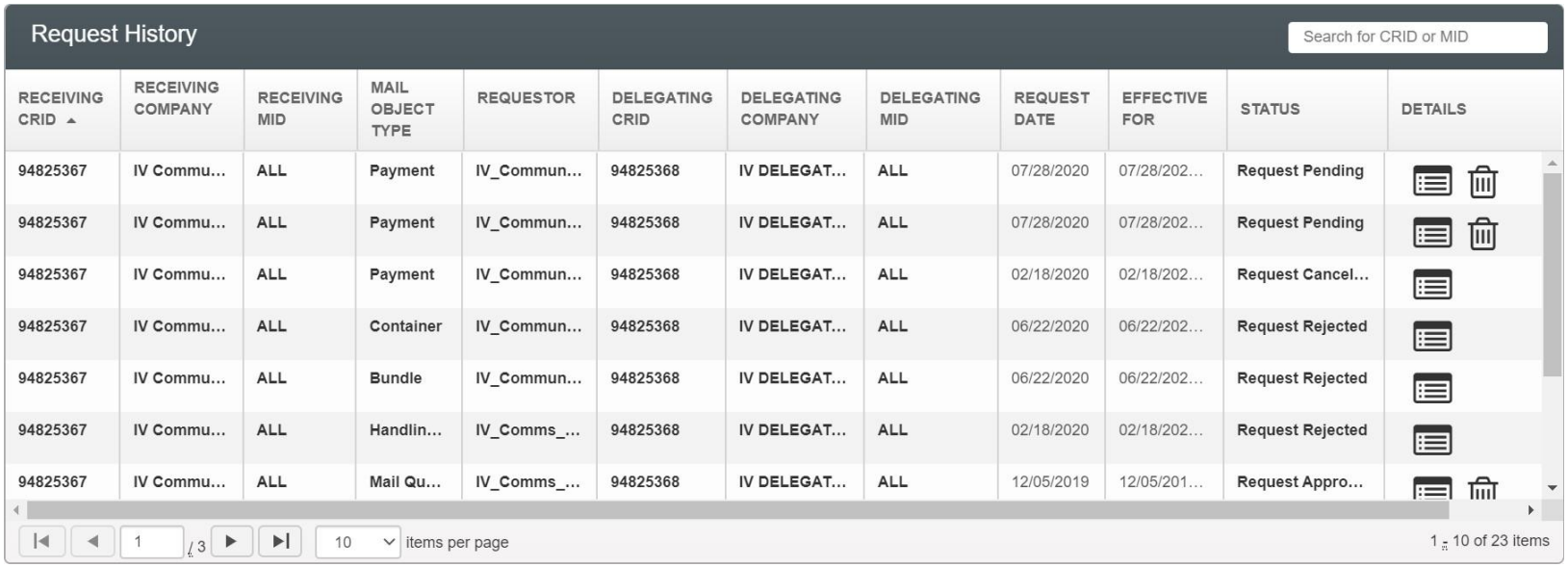
12. Your data delegation request is now complete and with the delegators for review.
    - **If you would like to review the status of your request,** see the next slide.
    - **If your request is approved and you would like to begin using the data:**
        - Add the delegated CRIDs to your existing MQD data feeds using the instructions here.
        - Create a new MQD data feed using the instructions here.

Data Delegation Request Status

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

In this table, you can:

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

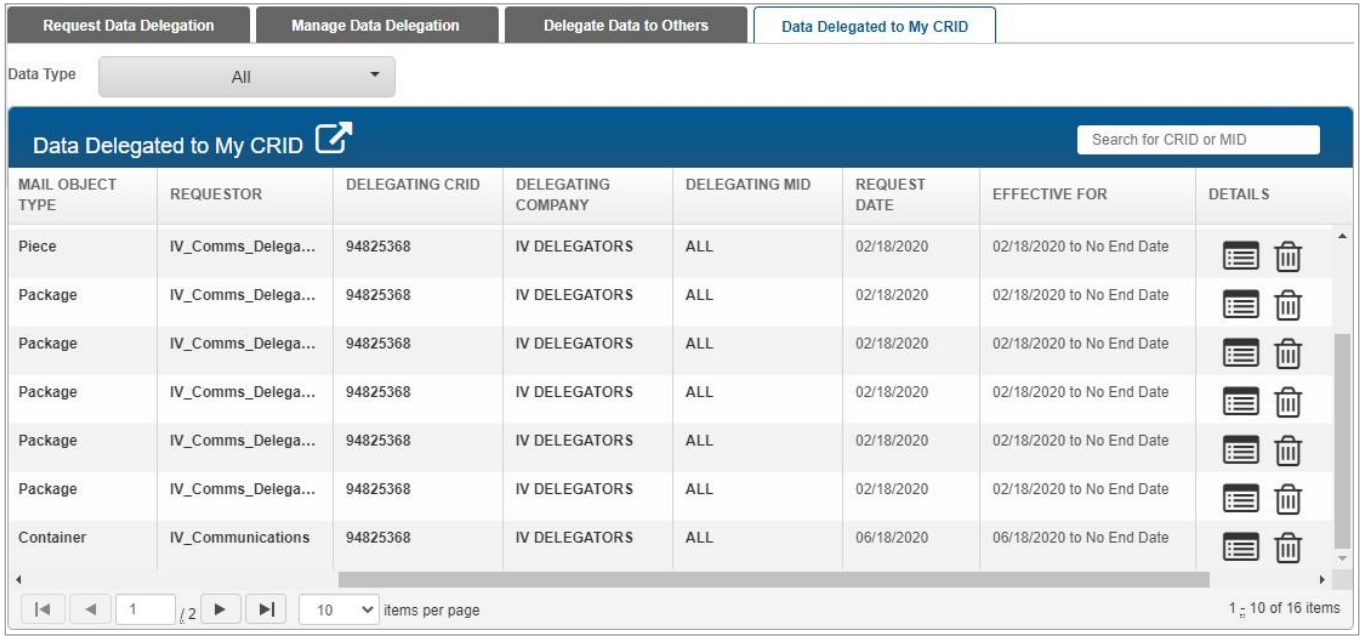


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Viewing Data Delegated to You

Viewing Data Delegated to You

- Follow these steps to view the data other CRIDs are sharing with you:
  1. Log into IV-MTR and click the **Data Delegation** tab.
  2. In the Data Delegation area, click **Data Delegated to My CRID**.
  3. The Data Delegated to My CRID screen appears, with a table listing all active delegations.
- The **Data Type** drop down allows you to filter delegations records by data type.
  - **Note: If you have over 50,000 records,** you will be required to choose a data type from the menu before records will display.
- The Export icon allows you to download a list of all delegations.
- The Details icon allows you to view the details of each delegation.



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Deleting Data Delegated to You

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

Deleting Data Delegations

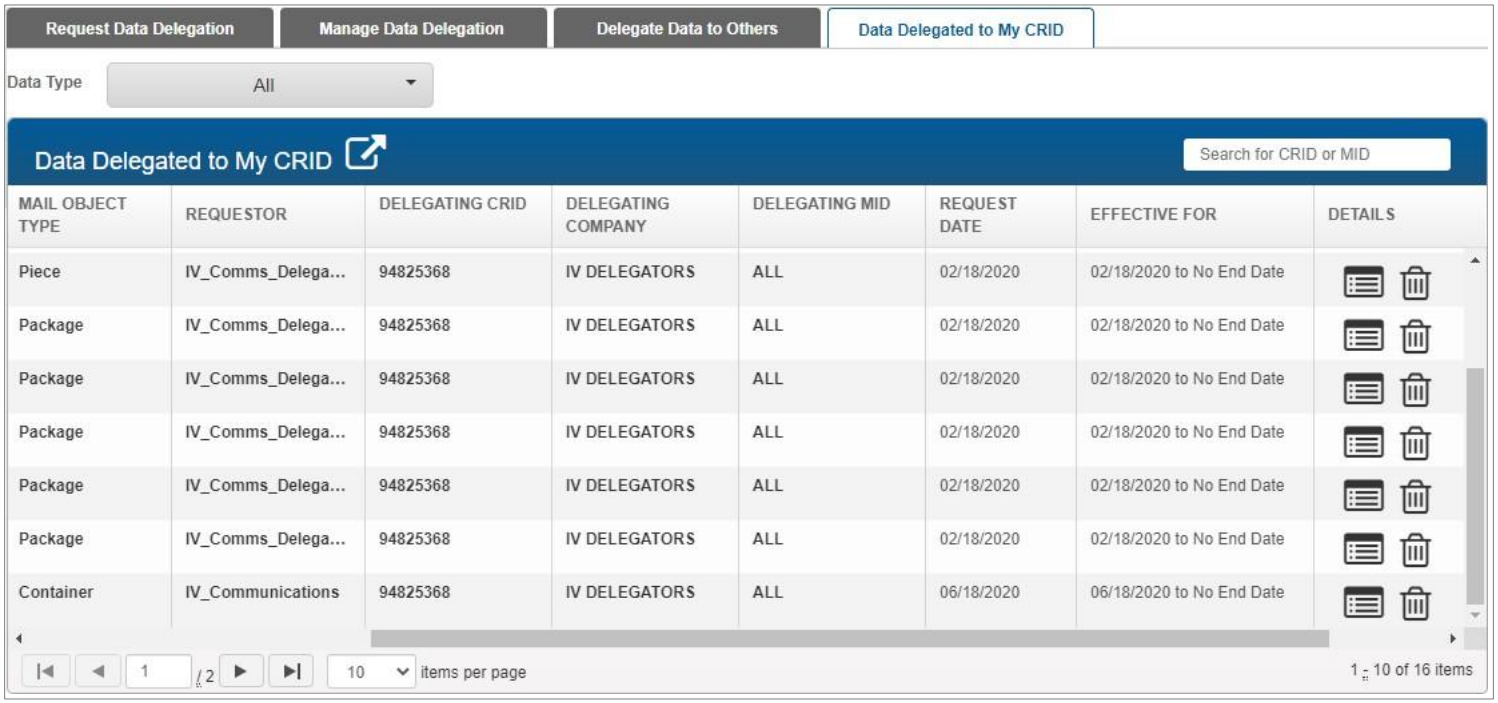
This section is restricted to BSAs, BSA Delegates, and Data Delegation Managers.

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

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

To delete an existing delegation, complete the following:

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

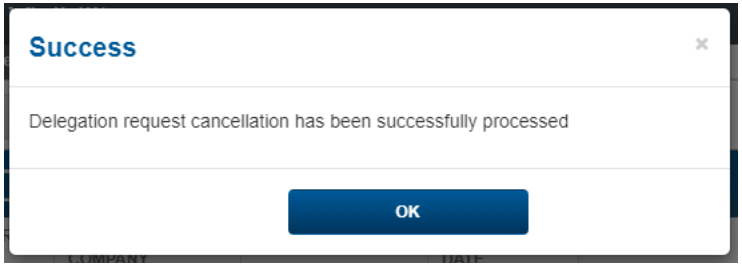


Deleting Data Delegations

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



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



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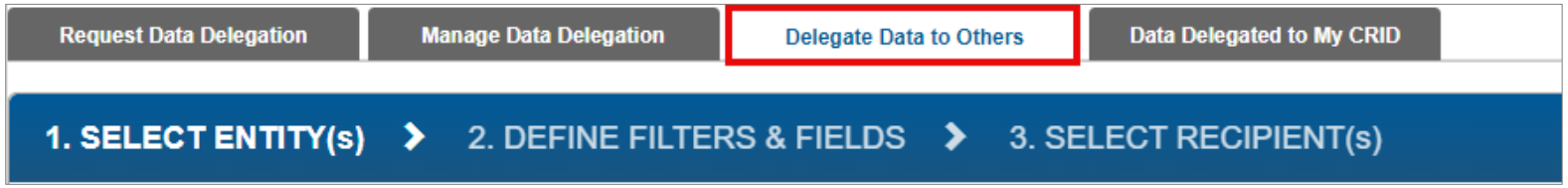
Delegating Data to Others

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

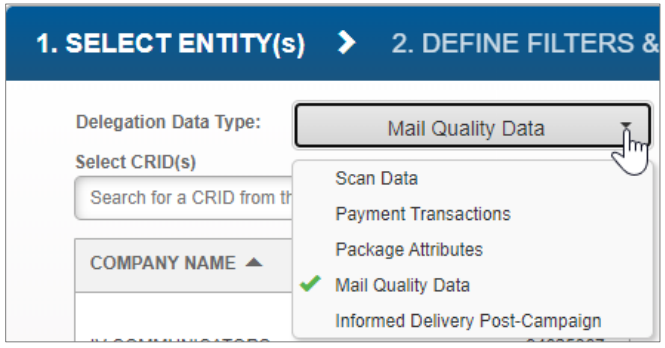
Delegating Data to Others

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

- To begin, access the Delegate Data to Others area of the application:
  1. Log into IV-MTR and click the **Data Delegation** tab.
  2. In the Data Delegation area, click **Delegate Data to Others**.

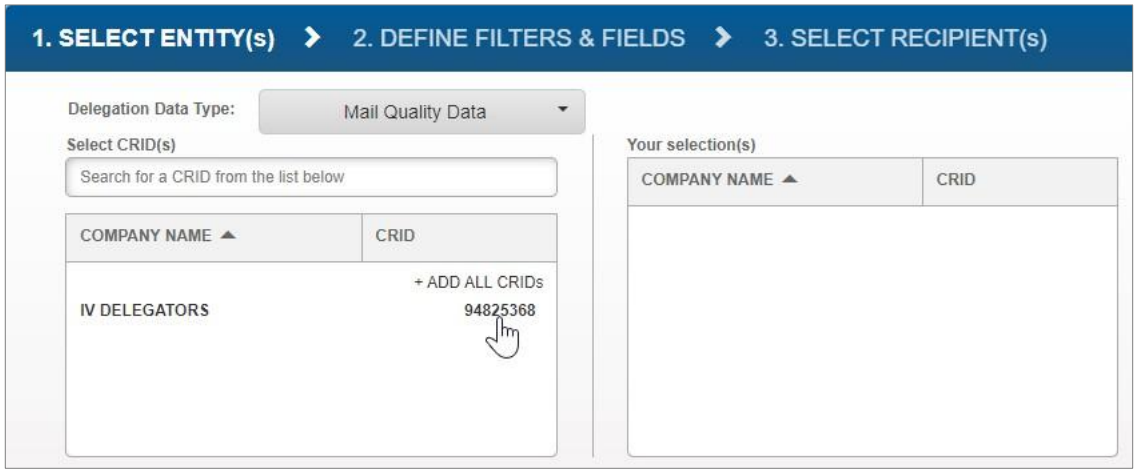


- Follow these steps to delegate data:
  1. In the **Delegation Data Type** dropdown, select **Mail Quality Data**.

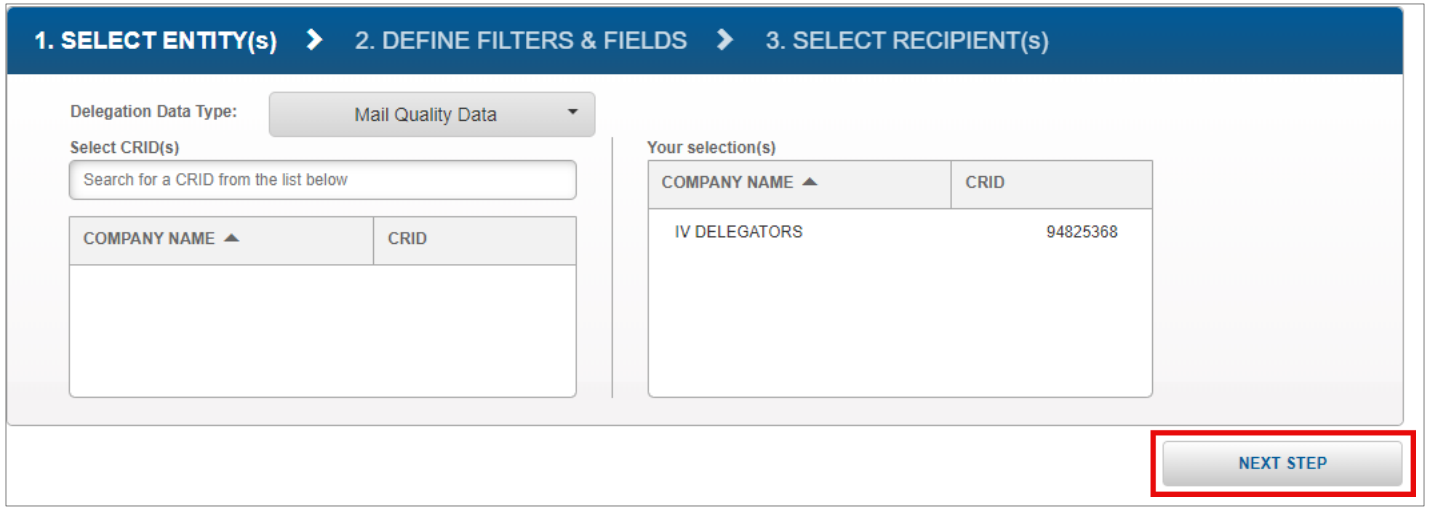


Delegating Data to Others

2. Use the Select CRID(s) pane to select the CRIDs that will receive the data. Selected CRIDs will move from the Select CRID(s) pane to the Your selection(s) pane.

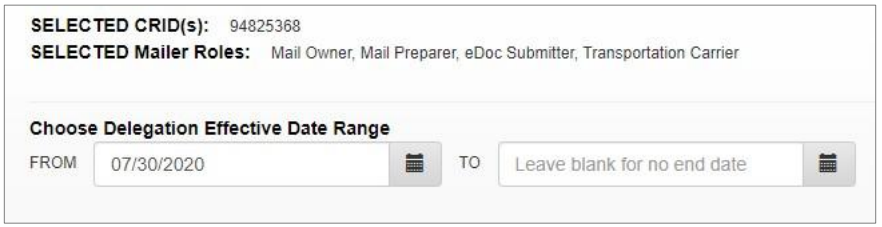


3. When you have finished selecting your CRIDs, click **NEXT STEP**.

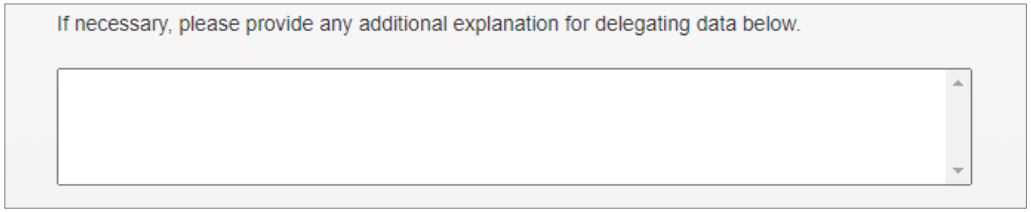


Requesting Data Delegation

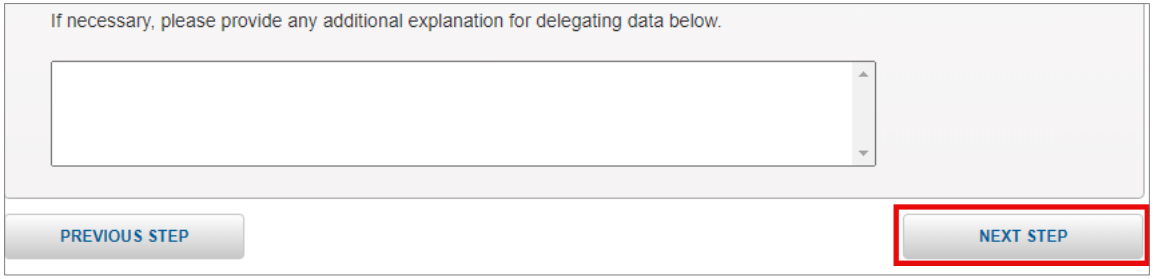
4. The Define Filters & Fields screen will appear. In the **Choose Delegation Effective Date Range** section, select the dates you would like visibility for.
   - You cannot select dates in the past.
   - Data feeds will only begin delivering data from the time the delegation was approved by the delegators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



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

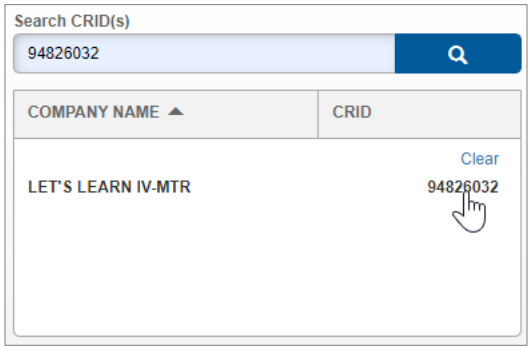


7. When you have finished, click **NEXT STEP**.

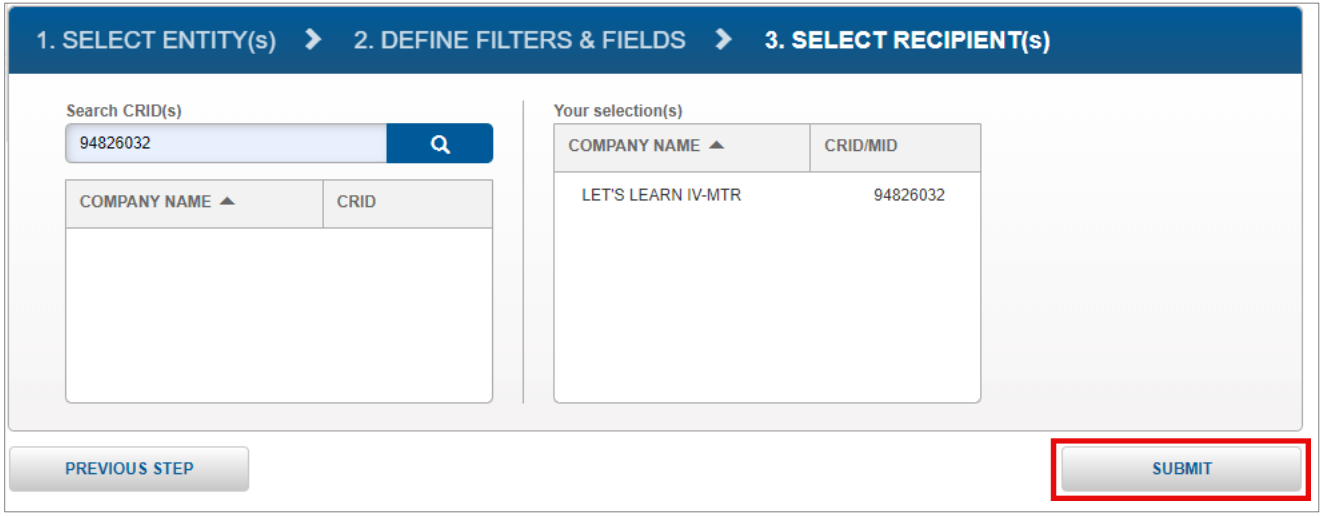


Delegating Data to Others

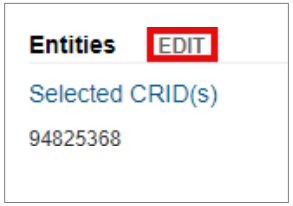
8. Use the **Search CRIDs** pane to locate and add the CRIDs you would like to provide visibility to. For best results, use the full CRID.
   - Selected CRIDs will move from the Search CRID(s) pane to the Your selection(s) pane.



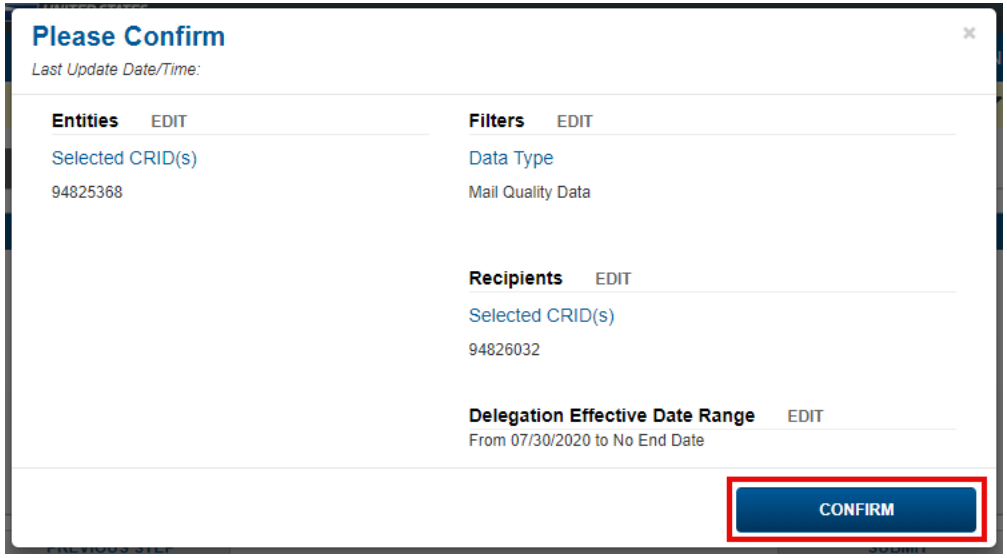
9. When you have finished adding CRIDs, click **SUBMIT**.



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

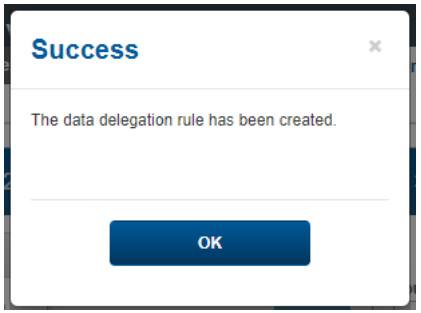


    - **If your delegation is ready to submit,** click **CONFIRM**.



Delegating Data to Others

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



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

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Reviewing Data Delegation Requests

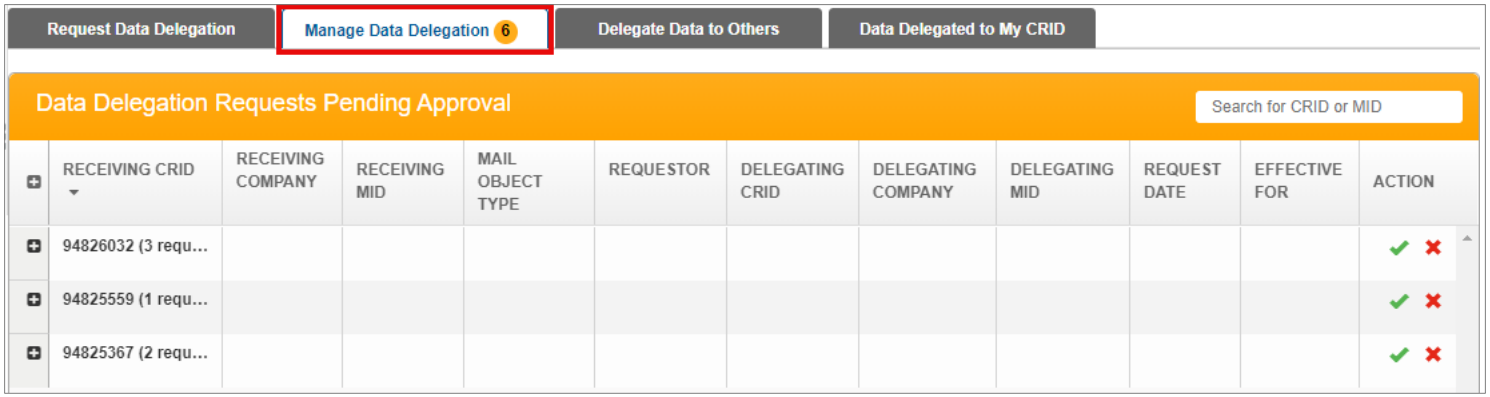
(BSA, BSA Delegate, and Data Delegation Managers Only)

Reviewing Delegation Requests

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

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

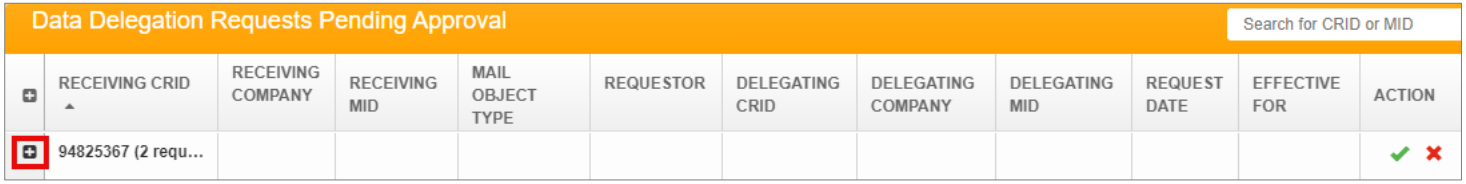
- To begin, access the Manage Data Delegation area of the application:
  1. Log into IV-MTR and click the **Data Delegation** tab.
  2. In the Data Delegation area, click **Manage Data Delegation**.
  3. The Manage Data Delegation screen appears, with the number of pending requests listed in the tab and the requests themselves in the Data Delegation Requests Pending Approval table.
     - Requests are grouped by the CRID that is requesting the delegation.



Reviewing Delegation Requests

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

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



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



3. Proceed as follows:
   - Approving requests
   - Denying requests

Approving Delegation Requests

- **To approve requests:**
  - **Individually:** Click on the green checkmark for the request and select **APPROVE**. A success message will appear.



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



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

Denying Delegation Requests

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

To deny requests:

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



	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
⊟	94825367 (2 requ...										✓ ✗
	94825367	IV COMM...	ALL	Payment	IV_Commu...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	✓ ✗
	94825367	IV COMM...	ALL	Payment	IV_Commu...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	✓ ✗

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



	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
⊟	94825367 (2 requ...										✓ ✗
	94825367	IV COMM...	ALL	Payment	IV_Commu...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	✓ ✗

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

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Modifying & Deleting Existing Delegations

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

Managing Data Delegated to Others

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

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

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

The following modifications are available for MQD delegations:

1. **Updating the end date to a date (today or future)**
   - If you would like to update the end date so data is delegated indefinitely, please contact the IV Solutions Center.

If you would like to change any other aspect of the delegation (including the recipients or data types), a new delegation must be created.

- If desired, you can delete the existing delegation using the instructions in this section.

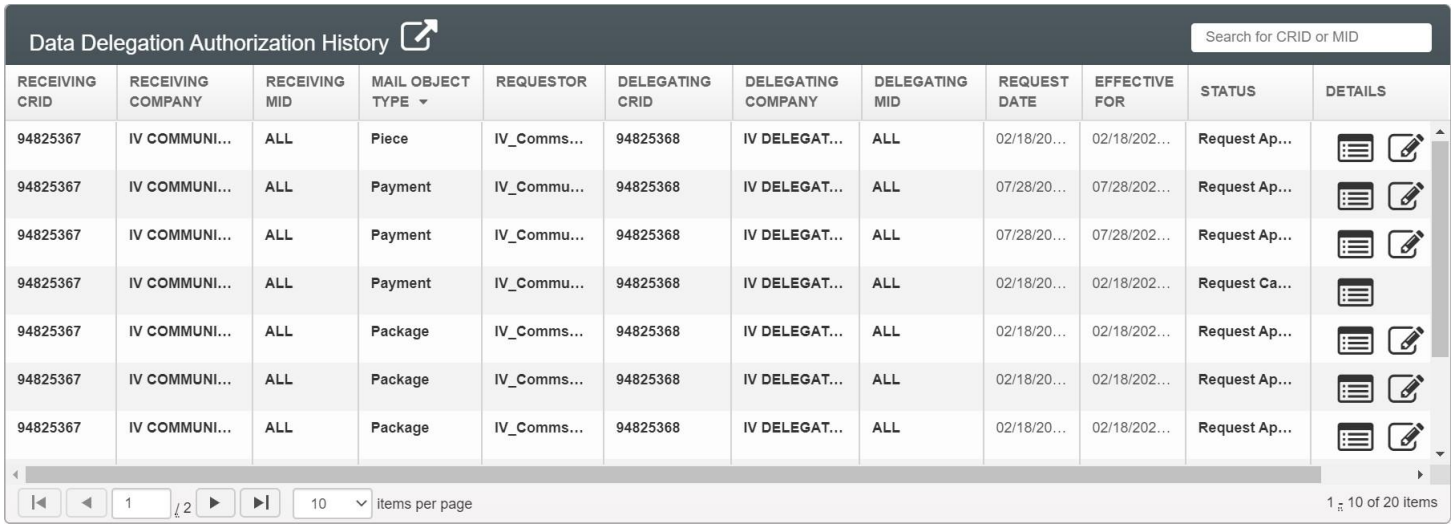
Proceed as follows:

- Modifying an Existing Delegation
- Deleting an Existing Delegation

Modifying Existing Delegations

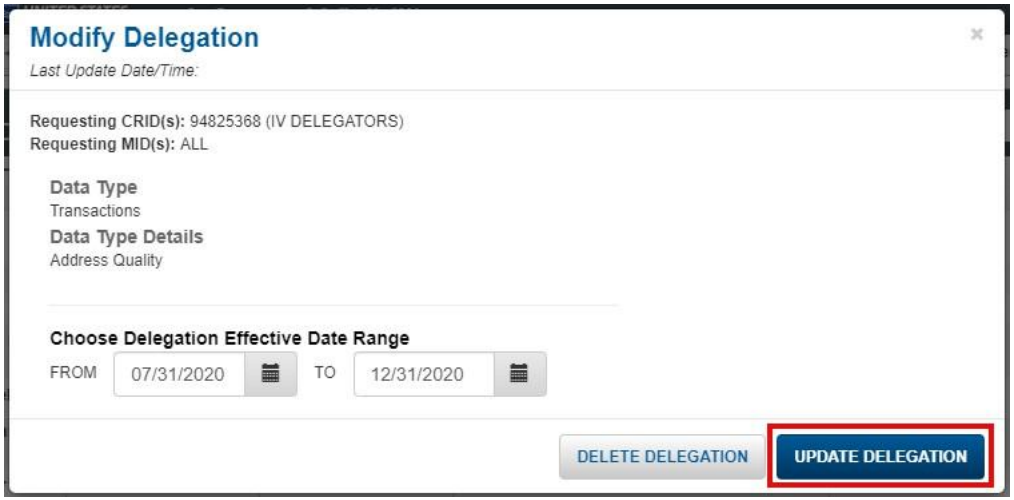
To modify an existing delegation, complete the following:

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

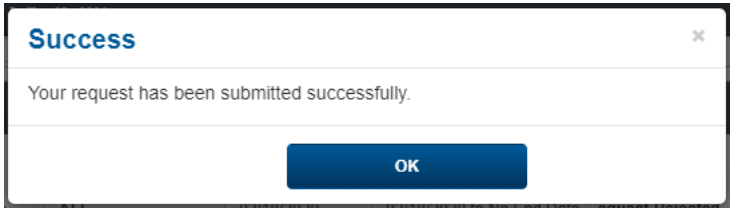


Modifying Existing Delegations

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



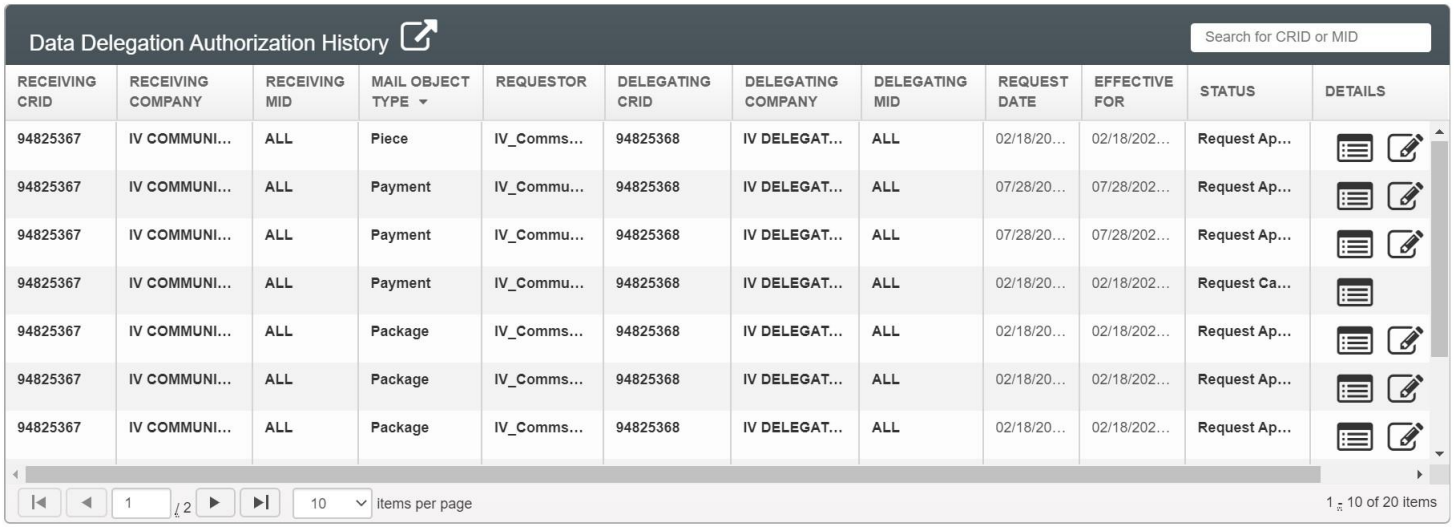
3. A success message will appear. The delegation recipients will be notified of the modifications according to their notification settings.



Deleting Data Delegations

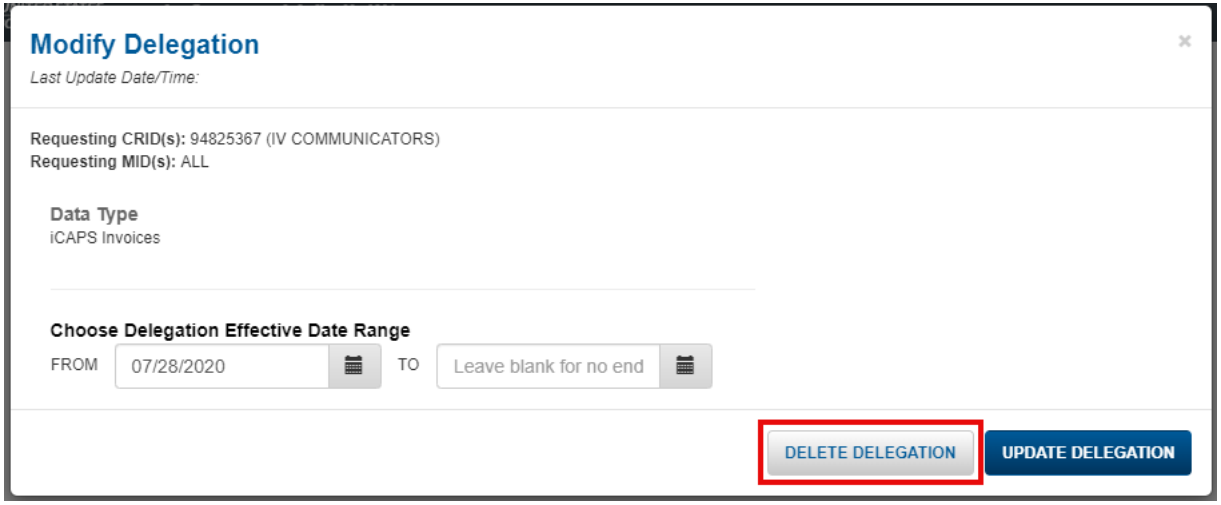
- Delegators can delete any delegation at any time, for any reason.
  - Once a deletion is made, the change will be reflected within about 15 minutes.
  - All deletions are final. If a delegation is deleted by accident, a new delegation must be created.

- To delete an existing delegation, complete the following:
  1. Access the **Manage Data Delegation** page and locate the delegation in the Data Delegation Authorization History table at the bottom of the page.

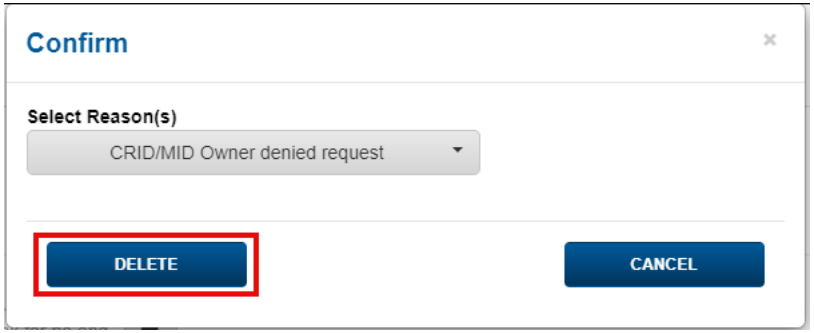


Deleting Data Delegations

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

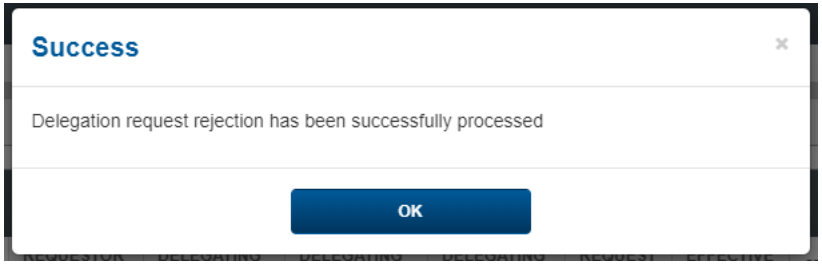


3. A Confirm pop-up will appear, listing the CRIDs and MIDs in the delegation. In the **Select Reason(s)** dropdown, choose a reason and click **DELETE**.



Deleting Data Delegations

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

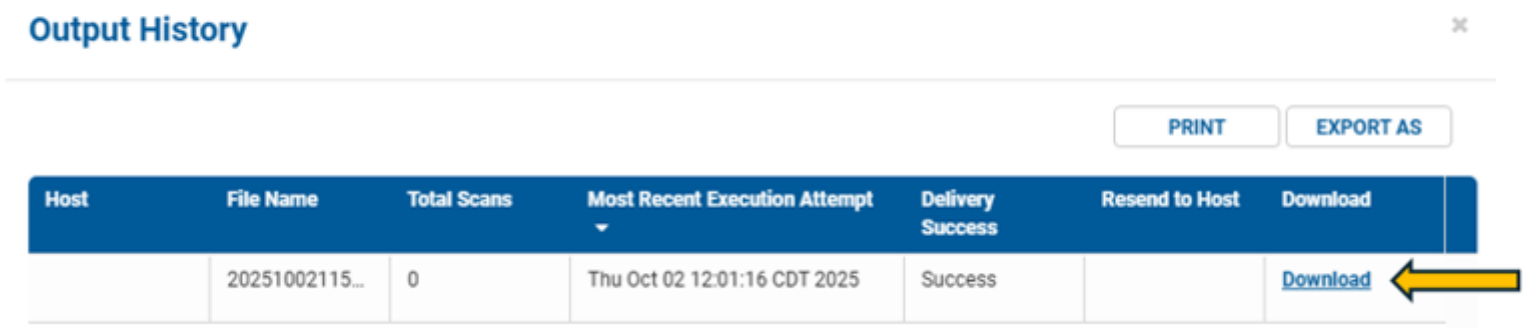


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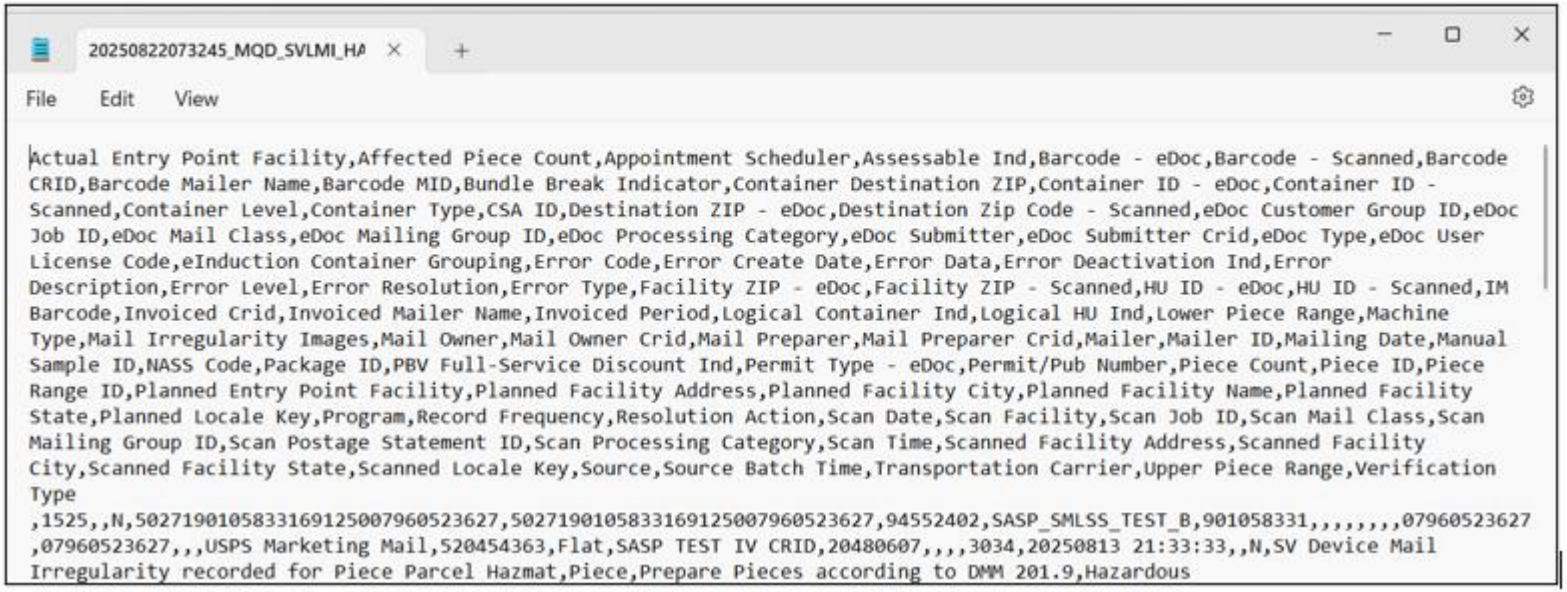
MQD Download Image Steps

MQD Download Image

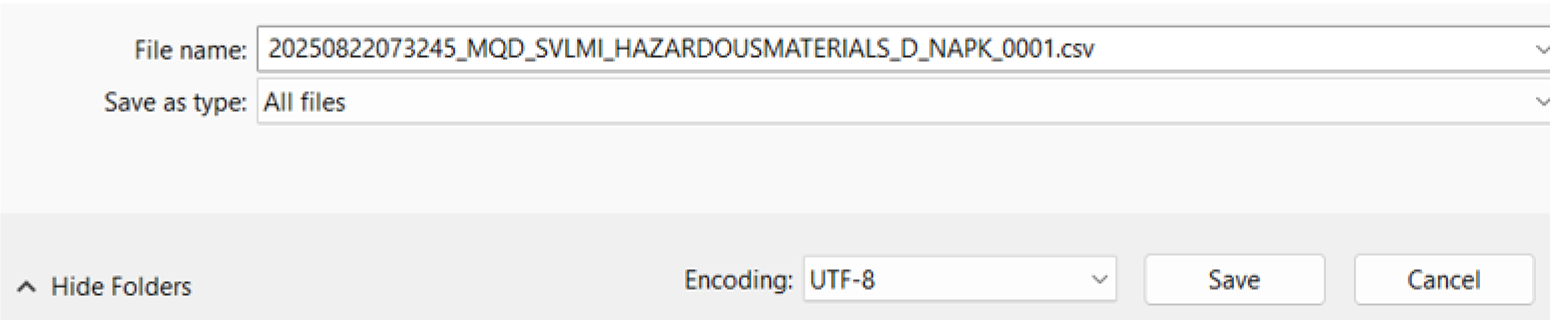
1. Download the file(as zip file) from **Output history**.



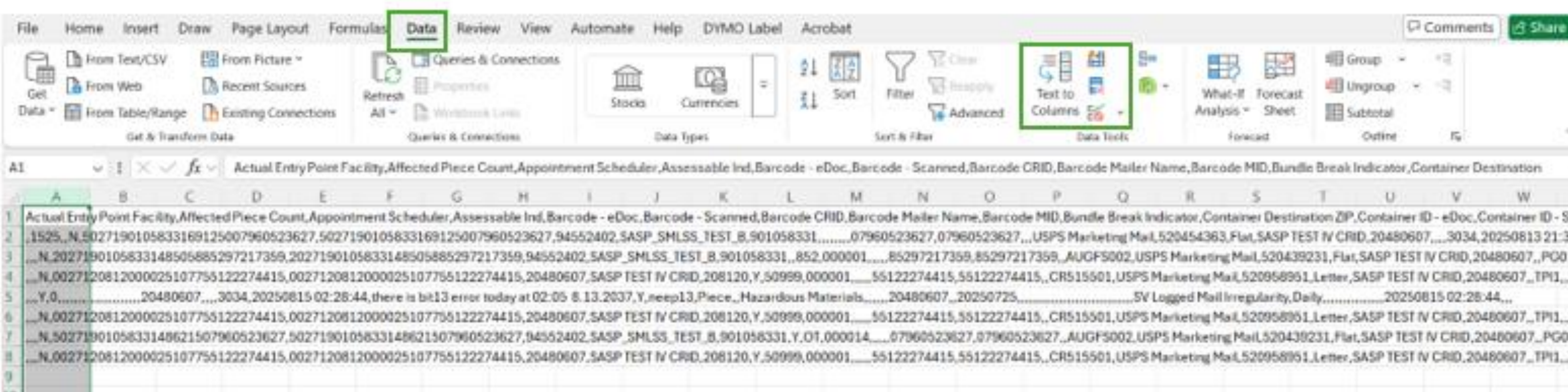
2. Extract the downloaded zip file and open file in **notepad**.



3. Save file as all files (add **.csv** to the end of the file name)

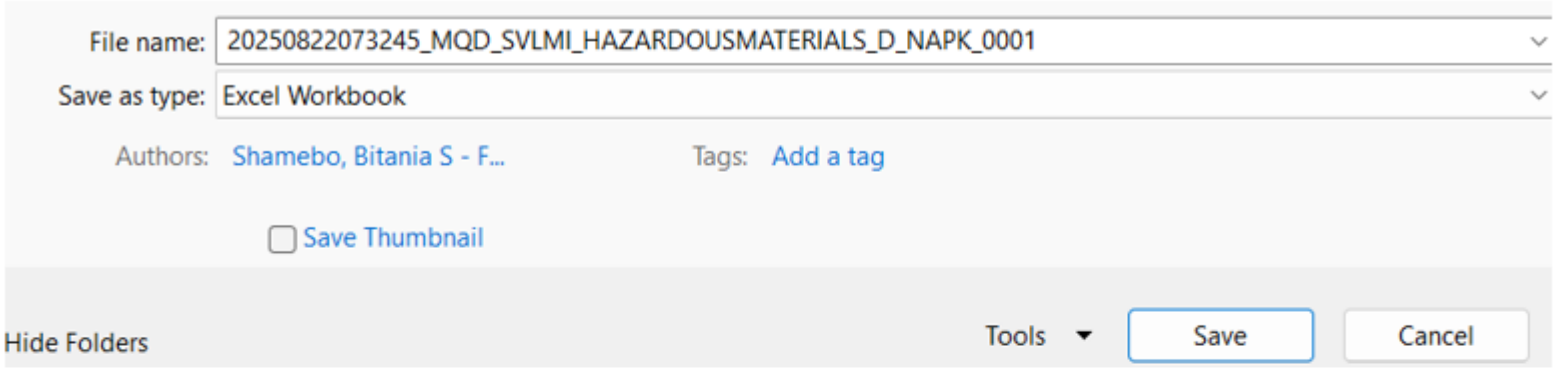


4. Open the saved **csv file.**
5. Continue to **step 6** if csv file is **not** comma-delimited. Otherwise, if file opens in **comma delimited format**, select column A, Data on top row and text to data to column to covert file.



MQD Download Image

6. Open csv file saved and **repeat save step** to save as **excel workbook.**



7. Access the **URL** in the excel workbook in column **AW** to double click on URL and click save.

AS	AT	AU	AV	AW	AX	AY	AZ	BA
Logical Co	Logical HU	Lower Piec	Machine Ty	Mail Irregularity Images	Mail Owne	Mail Owne	Mail Prepa	Mail Prepa
			DBCS		SASP_TEST	5104098		UNKNWN
			DBCS	https://sit3a.uspspostalone.com/	SASP_SML	94552402	SASP_TEST	5104098
			DBCS	https://sit3a.uspspostalone.com/	SASP TEST	20480607	SASP TEST	20480607
			DBCS	https://sit3a.uspspostalone.com/	SASP TEST	20480607	SASP TEST	20480607
			DBCS		SASP_SML	94552402	SASP_TEST	5104098
			DBCS	https://sit3a.uspspostalone.com/	SASP TEST	20480607	SASP TEST	20480607