FEIS

Postal User Guide

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About FEIS

Intended audience

This guide is for local administrators or operations staff of Postal Operators that want to use the UPU's Financial Electronic Inquiry System (FEIS).

How to use this manual

If you are a:
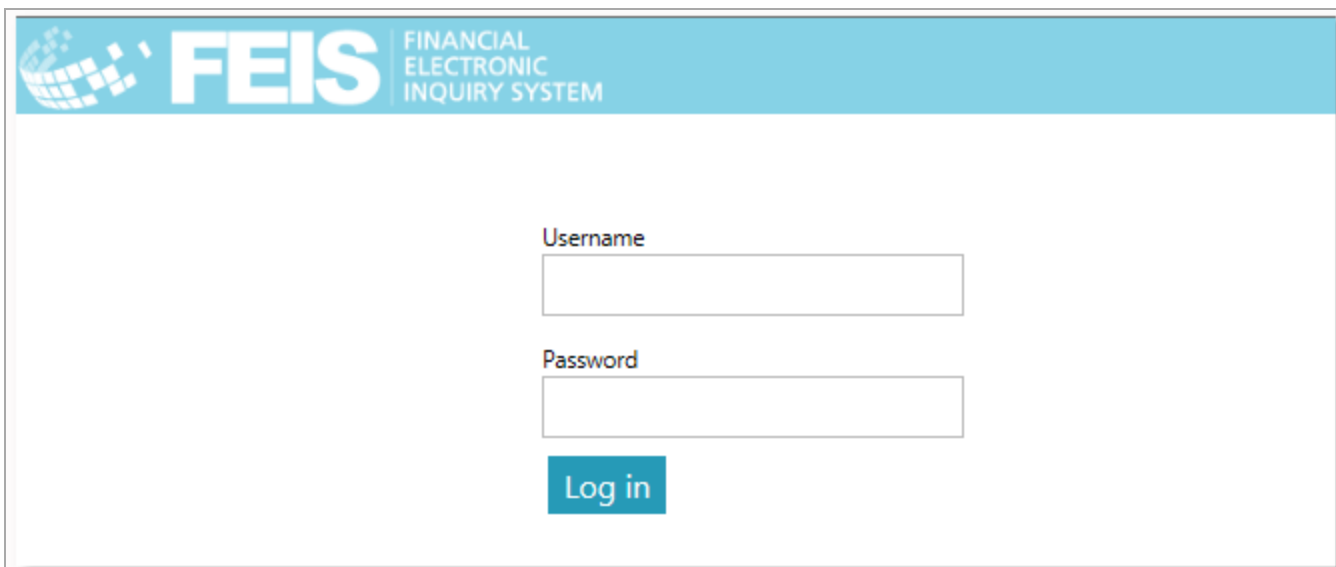
- local administrator, read the chapter for "Local administrator functions" on page 6

- operations staff member, read the chapter for "Postal operator functions" on page 17

- power user, read the chapter for "Power user functions" on page 29

Introduction

Logging in

To log in to FEIS, you will need access to a machine with an internet browser, as well as the following elements from the FEIS administrator:

- Username: this is your identifier for accessing the system

- Password: you can change this after you have logged in to the system

Depending on your user access rights, there will be a number of functions available to you.

Local administrator functions are described starting on page 6.

Postal operator functions are described starting on page 16.

Power user functions are described starting on page 28.

Local administrator functions

Home menu

If you have been granted **Local administrator** rights to FEIS, after logging on, you will see the home menu shown below:
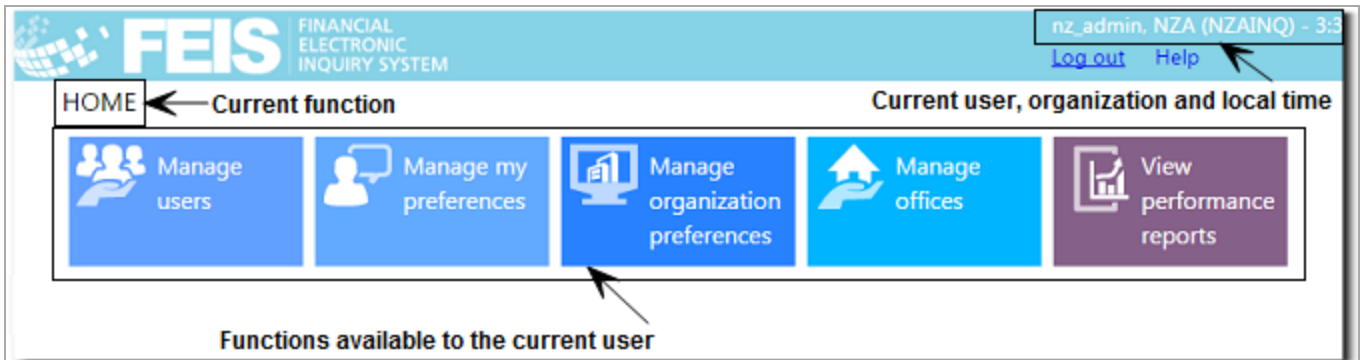
The top of the screen shows some useful information, including the current user, organization and local time. It also shows the **Log out** link and a **Help** link that opens the FEIS Postal User Guide. At the top left of the screen you can see the current function.

Note: This chapter describes the functions that are available to a **Local administrator** user. For information on the basic functions, refer to "Postal operator functions" on page 17 and for information on the power user functions, refer to "Power user functions" on page 29.

The local administrator functions available are shown in the center of the screen. The actual set of functions and reports can vary, depending on your FEIS implementation and configuration.

Note: The following general validation rules apply on screens that require user input:

1. Mandatory fields are indicated by an asterisk:

2. If a form is submitted, mandatory fields that do not have values are highlighted in red with the asterisk after the field name also in red.

3. Invalid data is shown by a red exclamation mark:

Managing users

With the **Manage users** function you can add, edit and delete operator and administrator users within your organization. There is no limit to the permitted number of users in any of the user groups.

Procedure

To add a new user:

1. Click the **Manage users** function, and click the **Add new user** button.

   HOME> MANAGE USERS

   —Users—

   Add new user

	Code	Name
Edit Delete	nzadmin	NZ Administrator
Edit Delete	nzops	NZ Operations
Edit Delete	nzuser	nzuser
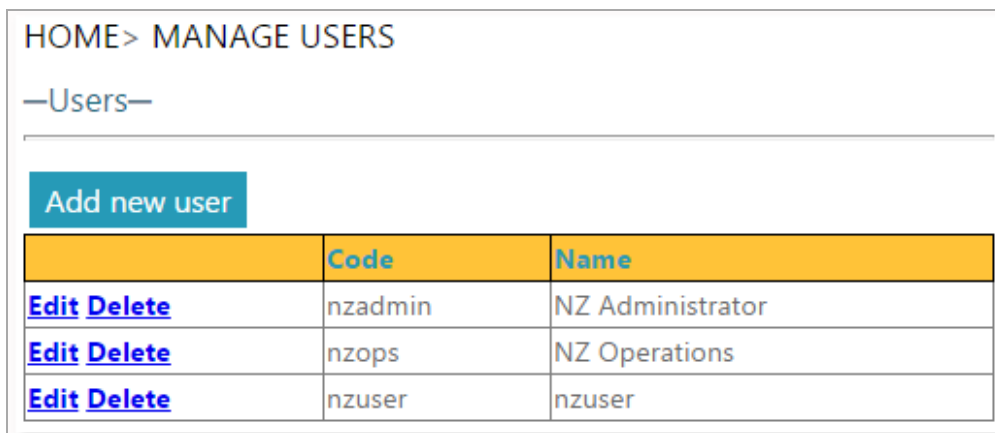
2. In the Add/Edit User screen, enter the username (i.e. User ID), password, and full name of the user you wish to add, and then select the groups associated with the user.

   Note: The **Power operations** group allows the user to perform actions such as answering an inquiry.

HOME> ADD/EDIT USER

Organization code

NZA

Username *

Operator2

Name *

Gabriel Jones

Password *

●●●●●●●●

User group *

☐ Local administrators
☑ Operations
☑ Power operations

Office

NZAINQ (NZ POST - INQUIRY CENTER) ⌄

Store   Cancel

3. Click the **Store** button when you have finished entering the details of the new user.

To edit a user's details:

1. Click the **Edit** link next to the user whose details you want to edit. The Add/Edit User screen appears.

2. Modify the user's password, full name, and user group association.

3. Click **Store** to save the changes.

To delete a user:
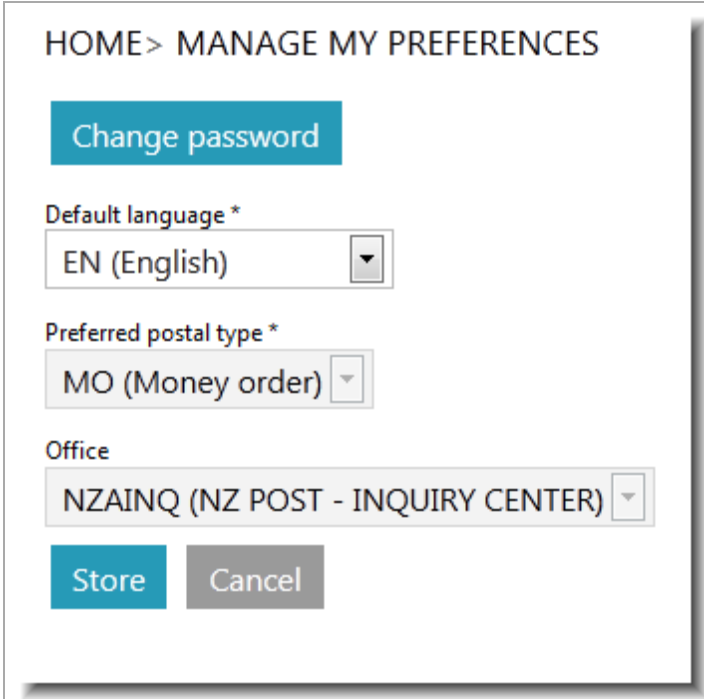
1. Click the **Delete** link next to the user to be deleted. A message prompts you to confirm or cancel the action.

2. Click **OK** to delete the user from the list.

With the **Manage my preferences** function you can configure the following parameters for your FEIS user name:

- **Change password**: allows you to change your current password

- **Default language**: language in which the FEIS user interface will be displayed. It can be different to the organization's default language (EN/FR/RU)

- **Preferred postal type**: the system handles MO (Money order) inquiries only. This field cannot be edited

- **Office**: the office associated with your FEIS user name, which can be the local office or the central office of exchange of inquiry

  Note: The office type you are associated with can only be changed by another user with master administrator rights (UPU admin).

Managing organization preferences

With the **Manage organization preferences** function you can set the organization's default preferences.

HOME> MANAGE ORGANIZATION PREFERENCES

Postal address
Inquiry Center

Email address
N/A

Telephone
+412252525

Fax
+412252525

Currency *
NZD (New Zealand Dollar)

Language
EN (English)

Security token (for accessing RAIS.API)
0f4d6927-3024-495c-930d-54fbafc9   Generate

Date format *
● dd/mm/yyyy   ○ mm/dd/yyyy

Time zone *
(UTC+12:00) Auckland, Wellington

Retentions (in days) for inquiries before archiving *
0

Track and Trace URL
http://pprod-ifsl-ops/IF

Track and Trace Username

Track and Trace Password

Non-Working days

	Holidays (dd.mm.yyyy)(*)	Weekend
Edit	01.01.2017, 01.05.2017	Saturday,Sunday

(*) Add multiple dates separated by comma. i.e: 10.01.2017, 15.05.2017, 23.10.2018

View past years

Configure destinations

	Partners
Edit	---

Store

You can set the following organizational parameters:

Parameter	Description
Postal address, email address, telephone and fax numbers	The default postal and email addresses, telephone and fax numbers at organization level. Different addresses can be specified at office level.
Currency	The default currency code used by the postal organization.
Language	The default user interface language of the postal operators. This parameter can be overridden at the user level with the **Manage my preferences** function. This means a postal operator could have the default language set to English, but its individual users could set their own language preference.
Security token	(Optional) Click the **Generate** button to generate the token which can be used to connect to the Track-&Trace web services (see below).
Date format	The date and time format used to display dates in the system. Currently, day/month/year and month/day/year are available.
Time zone	The default time zone of the organization. Time zones can also be set at office level.
Retentions for inquiries before archiving	The number of days that inquiries are kept on the main operational database before sending them to the archive database.
Track and Trace URL, User-name and Password	The URL of the money order Track&Trace service to prepopulate inquiry form fields. If your organization uses IFS.POST, you will be able to use the Track-&Trace function to prepopulate inquiry form fields. Enter http://pprod-ifsl-ops/IFSPOSTServices/XmlInternationalService.svc in the **Track and Trace URL** field. The **Query available track & trace** button subsequently becomes available in the Raise New Inquiry screen. If left blank, the button is not displayed in the Raise New Inquiry screen. For organizations that do not use IFS.POST, a Track&Trace function can be developed by your organization. Please contact the UPU for details.
Non-working days	Specify non-working days for each year. Note that

Parameter	Description
	you cannot specify holidays in the past or the current month as this would affect performance calculations. To specify multiple holidays, click the **Edit** link then enter the dates in the **Holidays (dd.mm.yyyy)** column. Separate multiple entries with a comma. Once done, click the **Update** link then click the **Store** button to save the holidays. In the **Weekend** column, the system checks the check boxes for **Saturday** and **Sunday** by default. If your organization defines the weekend as Thursday, Friday or Saturday instead, make the change by checking the check box next to these options. Click the **View past years** button to see the previous years' non-working days.
Configure destinations	Configure the list of destinations that is shown in the **Money order destination** drop-down when a user raises an inquiry. To show only the destinations with which your organization exchanges money orders and inquiries, click **Edit**, then check the checkbox of the relevant destinations. To show all destinations in the list, click **Activate all**. To deselect, click **Deactivate all**. Click **Update** to save the changes you have made. Otherwise, click **Cancel**.

Managing offices

With the **Manage offices** function you can create, edit and delete offices where inquiries are handled.

HOME> MANAGE OFFICES

—Offices of exchange—

Add New

	Code	Name
Edit	NZAINQ	NZ POST - INQUIRY CENTER

—Local offices—

Add New

	Code	Name
Edit Delete	NZ	NZSUBOFFICE

Procedure

To add a new office:

1. Click the **Add New** button to add a new office (central office or local office).

2. Enter the office code, name, time zone, parent office (for local offices only, see note below). Enter the postal address, email address, telephone and fax number and non-working days at office level if different from the ones specified at the organization level.

👆Note: If the **Local office** check box is checked (i.e. you are adding a local office), you must select a parent office from the **Parent Office** drop-down list. This is the office which will be used for redirecting inquiries to and from the local office (local office -> parent office for inquiries raised and parent office -> local office(s) for inquiries received).

3. To save the new office, click **Store**.

To edit an office's details:

1. Click the **Edit** link next to the office whose details you want to change. The Add/Edit Office screen is displayed.

2. Enter changes to the office's details.

3. To save your changes, click **Store**.

To delete an office:

1. Click the **Delete** link next to the office you want to delete. If the office has users associated to it, FEIS displays an error message and you will not be able to complete the action. Otherwise, a message prompts you to confirm or cancel the deletion.

2. Click **OK** to delete the office from the list.

Viewing performance reports

You can use the **Performance reports** function to monitor the performance of handling inquiries in the current organization against the standards specified by the UPU administrator.

Only the performance reports of the previous months can be generated.

Procedure

1. Choose the **Period** (month) and **Year** for the report.

2. Click the **Execute** button. The system displays the results.

HOME> VIEW PERFORMANCE REPORTS

Period *
August

Year *
2016

Execute

Organization	Time O-L				Time O-O				Time Origin				Time D-O				Time D-L				Time Destination			
	Total	In time	Late	Efficiency	Total	In time	Late	Efficiency	Total	In time	Late	Efficiency	Total	In time	Late	Efficiency	Total	In time	Late	Efficiency	Total	In time	Late	Efficiency
NZA	16	16	0	100%	2	0	2	0%	16	14	2	87.5%												

The descriptions of the fields displayed in the report are as follows:

- Time Origin: inquiries that originate in the current organization
  - Time O-L: inquiries originating in the current organization handled in local offices

- Time O-O: inquiries originating in the current organization handled in offices of exchange

- Time Destination: inquiries addressed to the current organization
  - Time D-O: inquiries addressed to the current organization handled in offices of exchange

  - Time D-L: inquiries addressed to the current organization handled in local offices

Postal operator functions

Home menu

If you have been granted **Operations** rights to FEIS, after logging on, you will see the home menu shown below:
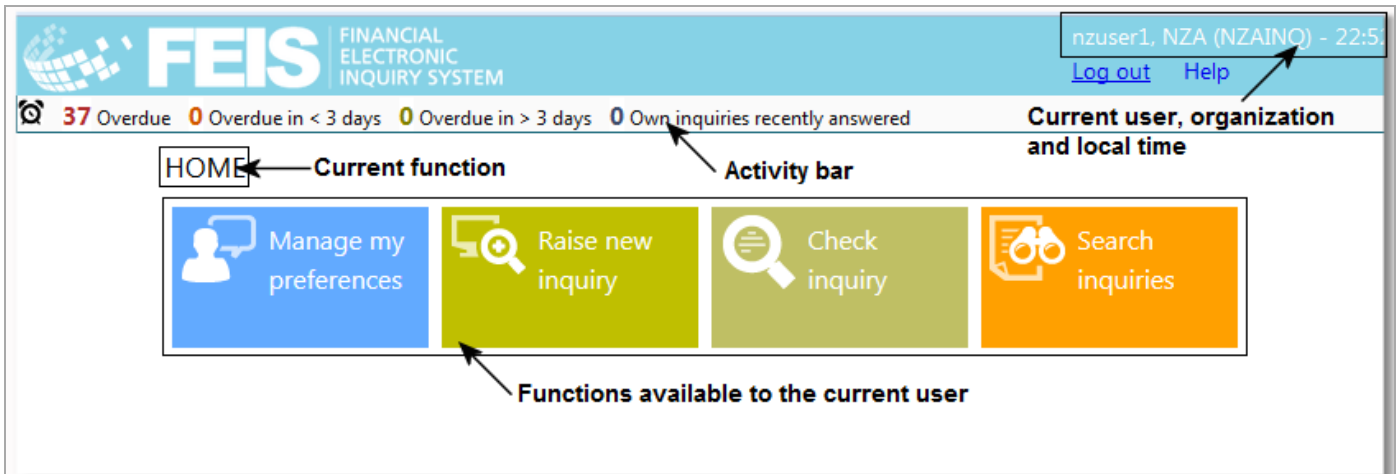
The top of the screen shows some useful information, including the current user, organization and local time. It also shows the **Log out** link and a **Help** link that opens the FEIS Postal User Guide. At the top left of the screen you can see the current function.

The **Activity bar** (which is available on all operations screens and is shown below) lets the user quickly navigate to:

- Inquiries currently assigned for investigation already overdue

- Inquiries currently assigned for investigation with a deadline in the next 3 days

- Inquiries currently assigned for investigation with a deadline in more than 3 days

- Inquiries raised in the local office that have recently been answered
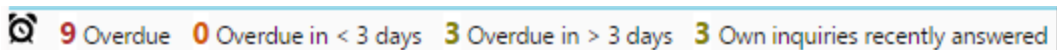
Note: The following general validation rules apply in screens that require user input:

1. Mandatory fields are indicated by an asterisk:

2. If a form is submitted, mandatory fields that do not have values are highlighted in red with the asterisk after the field name also in red.

Money order destination

3. Invalid data is shown by a red exclamation mark:

Created after date

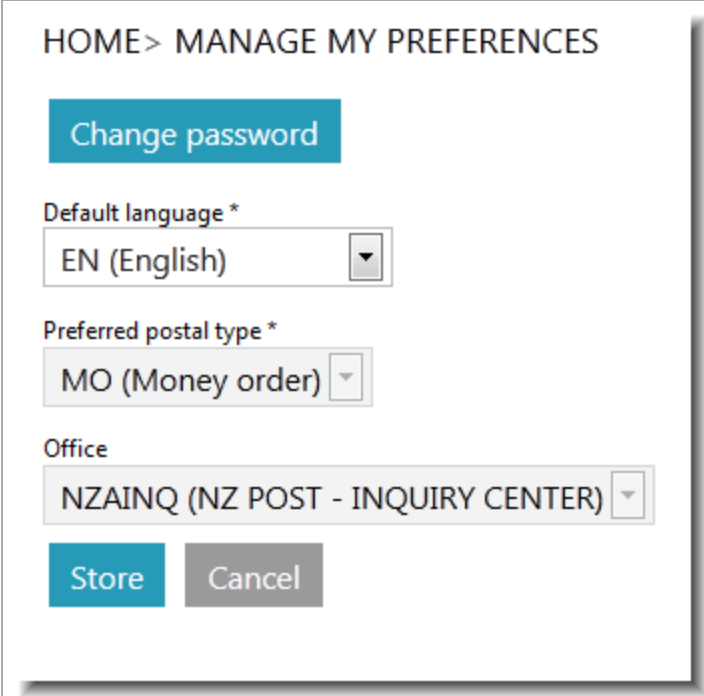| aa | / | bb | / | ssss | ! |

Managing my preferences

With the **Manage my preferences** function you can configure the following parameters associated with your FEIS username:

- **Change password**: allows you to change your current password

- **Default language**: language in which you will see the FEIS user interface. It can be different to the organization's default language (EN/FR/RU)

In addition, the following settings defined by your local administrator are displayed as read-only fields:

- **Preferred postal type**: this displays MO (Money order)

- **Office**: the office that is associated with your FEIS user name

Important: Before a user can access the operations functions, he must be associated with one of the offices of the postal organization. The association with an office type can only be done by a user with local administrator rights.

You can raise an inquiry and forward it to another party within your organization.

Procedure

1. In the Raise New Inquiry screen, enter the money order identifier. You can enter up to 35 characters.

   After the money order identifier has been entered, FEIS displays the inquiry capture screen. If your organization uses IFS.POST as its remittance software and your administrator has specified the **Track and Trace URL** value when setting up the organization's preferences, the **Query available track & trace information button** becomes visible in this screen. Use this button to prepopulate the fields with the MO information. Otherwise, fill out the screen manually.

HOME> RAISE NEW INQUIRY
—Money order identifier—
J2017ANZ000000000005X
—General information—

Query available trace & trace information

Inquiry type *
MOIN (Inquiry)

Money order destination *
ESA (CyT Espagne)

Current state
Inquiry now in NZ POST / NZSUBOFFICE New

Inquiry origin
NZ POST / NZSUBOFFICE

Creation date
16/03/2017

—Details—

Inquiry info (filled at origin)	Inquiry reply (filled at destination)

Transmission type *
Electronic means

Money order details
Description *

Money order type*

Origin organization *
NZA (NZ POST)

Issuing service

Internal ID

Amount sent *

Currency *
ex. SDR

Date* (dd/mm/yyyy)
/   /

Additional info

Money order sender
Name *

Address

Account

The inquiry details are shown on two tabs which resemble the MP2 form:

- **Inquiry info** (entered at the originating office)
- **Inquiry reply** (entered at the destination office)

2. Fill in the following inquiry data:

Field	Description
Inquiry type	The type of the inquiry: • MOCL (Claim) • MOIN (Inquiry), shown as the default value • MORE (Reimbursement request)
Money order destination	The destination organization of the money order Note: FEIS displays only the list of destinations with which your organization exchanges money orders and inquiries if your administrator has previously configured the list using the **Manage Organization Preferences** function. Otherwise, all destinations are displayed
Details	Details of the money order as per MP2 form. Required fields are indicated with an asterisk (*)

Note: If the destination DO is also a FEIS user, the system displays *Electronic means* as the default value in the **Transmission type** field.

3. Scroll down to the bottom of the screen to choose the inquiry reason.

You can choose from the following inquiry reasons:

1. The sender states that the amount has not been received

2. The payee states that the amount has not been received

3. Please return the money order to us for delivery to sender

4. The sender wishes to know if the MO has been paid to the payee

5. Other

4. To attach supporting documents, click the **Edit** link in the **Documents** table. Browse to the directory of the file to be uploaded, select the file, and then click the **Attach File** button.

5. After the inquiry data has been entered, forward the inquiry to another domestic party. You can type additional information in the **Comments** field (optional), then take an action:
   - **Select next domestic party** - click this button to select a domestic party; once you have selected the local office, you need to click **Send** to forward the inquiry. (Note: This button is visible only if there are local offices defined in your organization)

- **Show next party** - click this button to show the next party where FEIS will send or forward the inquiry, if a domestic party was selected

- **Send** - click this button to create the inquiry and send it to the next destination, which can be either:
  - the central inquiry office in your organization
  - another domestic party or office, if you have selected one

FEIS notifies you about the outcome of the store operation and about the next party the inquiry has been routed to.
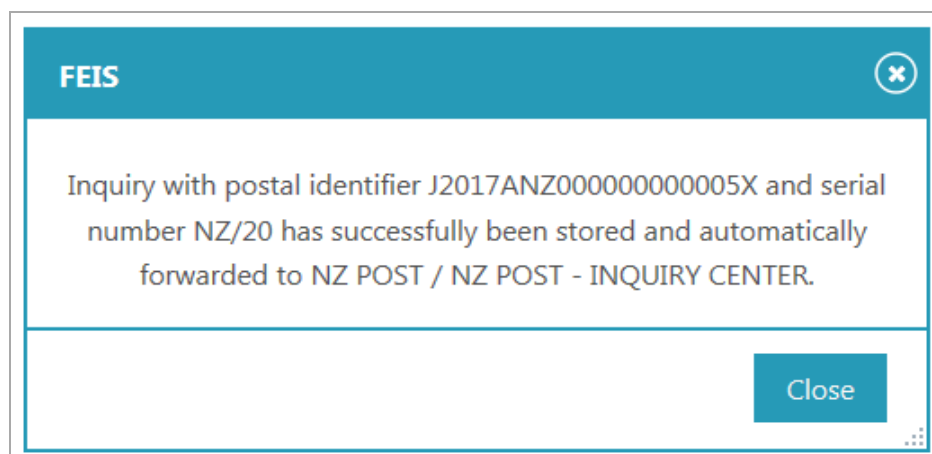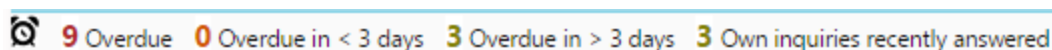

Checking inquiries and taking action

Inquiries currently assigned to the office and/or organization to which the user belongs must be investigated and either answered or forwarded to the next party, if resolution is not possible.

Procedure

1. To access the assigned inquiries, use the **Check inquiry** function and enter the money order identifier (e.g. mail item id), or display the inquiries directly from the **Activity bar**:

After an assigned inquiry has been selected, FEIS displays the inquiry screen:

The **Check Inquiry** screen is made up of various elements to make the inquiry resolution faster and easier.

- Inquiry deadline - The inquiry deadline is displayed just below **General inform-ation**. If the deadline has passed, the text is displayed in red. If the deadline will be passed soon (in the next 3 days) it is displayed in orange.

- History - If the inquiry has traveled back and forth between the originating DO and destination DO several times, a **View history** link is displayed.
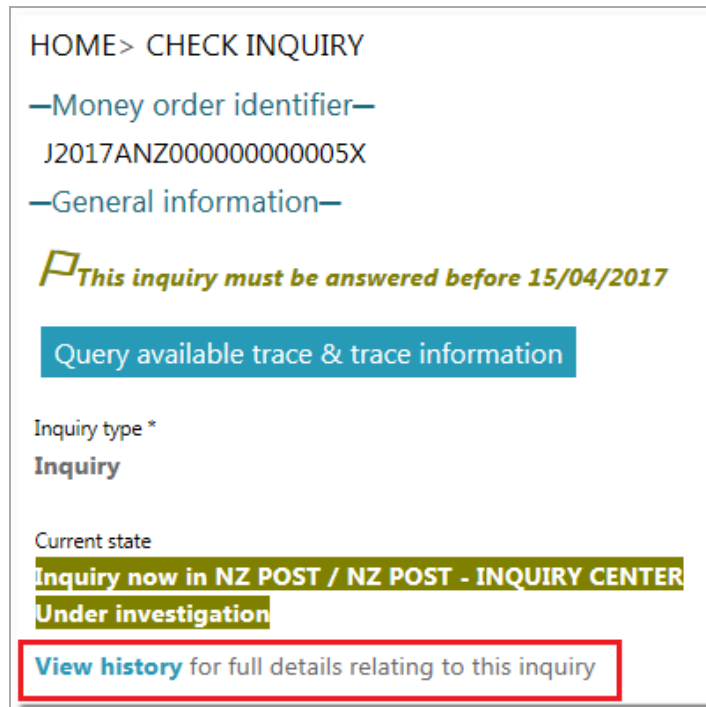
The link is displayed prominently at this part of the screen for speedier resolution to the inquiry. Clicking on the link displays the history of events for the inquiry and the inquiry route up to the present moment.
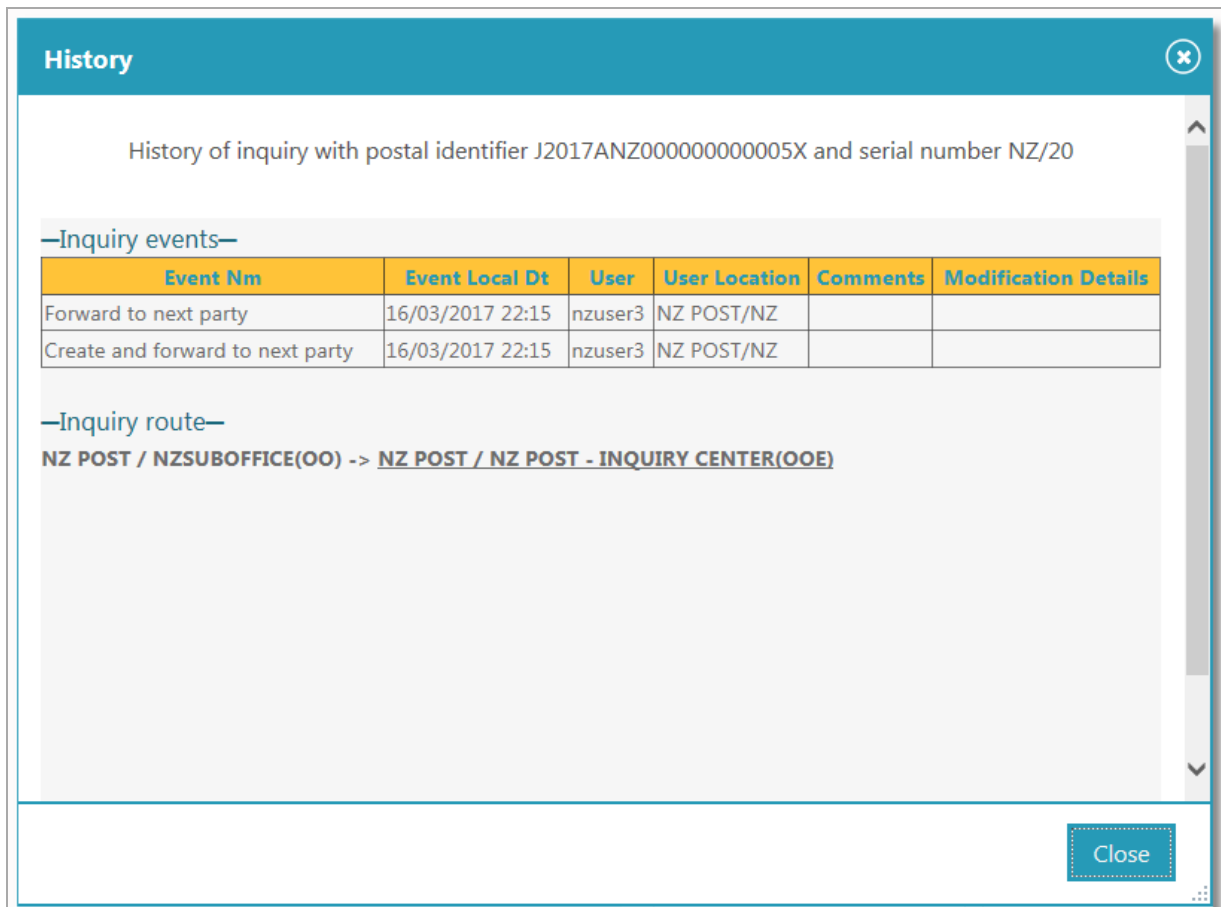
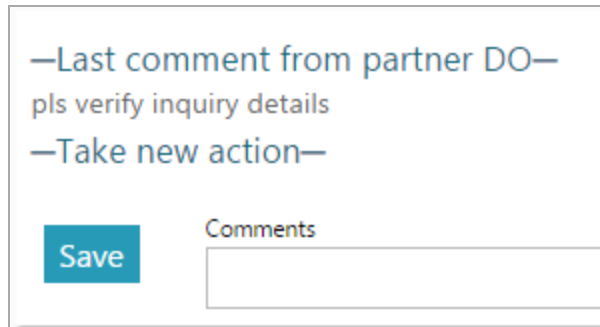You can also view the inquiry's history details by clicking the **View history** button at the bottom of the page.
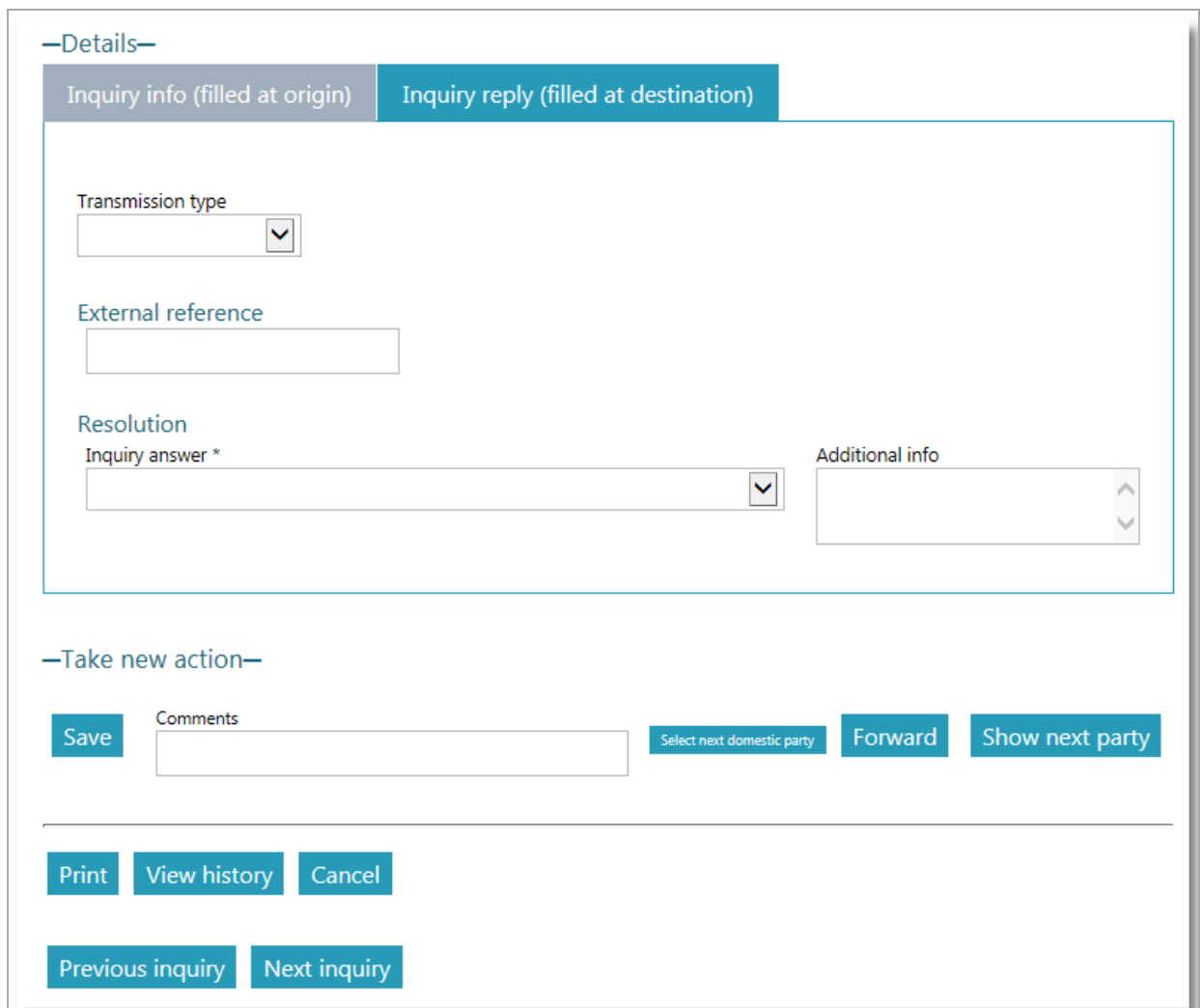
- Comment - To further speed up the inquiry's resolution, the forwarding DO's latest comment associated with the last action taken on the inquiry, if there's any, appears under the **Last comment from partner DO** line. This line becomes visible to both the originating DO and the destination DO each time a new comment is added to the inquiry before it gets routed to the next appropriate party.

—Last comment from partner DO—
pls verify inquiry details
—Take new action—

Save

Comments

2. To reply to the inquiry, click the **Inquiry reply (filled at destination)** tab.

—Details—

Inquiry info (filled at origin)　　Inquiry reply (filled at destination)

Transmission type

External reference

Resolution
Inquiry answer *　　　　　　　　　　　　　　　　　Additional info

—Take new action—

Save　　Comments　　　　　　　　　　Select next domestic party　Forward　Show next party

Print　View history　Cancel

Previous inquiry　Next inquiry

3. If you have all the necessary information to resolve the inquiry, select the inquiry answer from the **Inquiry answer** drop-down list. Choose from the following inquiry answers:

Inquiry answer	Description
1 (MO paid)	The money order was duly paid to the payee. Enter the date of payment.
2 (MO returned)	The money order was returned to the country of issue. Enter the date.
3 (MO paid in time)	The money order was credited to the payee's account. Enter the date of credit.
4 (MO amount paid according to fx rate)	Enter details in the **Additional info** field.
5 (Address incomplete)	Enter details in the **Additional info** field.
6 (Wrong account No.)	Enter details in the **Additional info** field.
7 (Receiver name incomplete)	Enter details in the **Additional info** field.
8 (Missing information)	Enter details in the **Additional info** field.
9 (MO not received)	The money order has not arrived at the post office or giro center. Enter the name of office.
10 (Client could not provide valid ID)	Enter details in the **Additional info** field.
11 (MO in payment)	The money order is still being dealt with at the post office or giro center. Enter the name of office.
12 (MO reimbursed to sender)	The money order was returned to the country of issue. Enter the date.
13 (Error accepted - amount to be returned in next statement)	Enter details in the **Additional info** field.
14 (Other)	Enter details in the **Additional info** field.

4. To perform additional tasks before choosing an action, use the available buttons:
   - **Print**: prints the inquiry form (e.g. MP2)

   - **View history**: displays the history of events and the inquiry route up to the present moment

   - **Cancel**: cancels the changes being done on the screen and brings the user back to the previous screen

- **Previous inquiry**: displays the previous inquiry

- **Next inquiry**: displays the next inquiry

5. Choose an action to take for the inquiry:
   - **Save**: the inquiry will be simply updated but will stay assigned to your office/organization

   - **Select next domestic party**: click to select an office within your organization

   - **Forward**: click this button to forward the inquiry

   - **Show next party**: click this button for confirmation of the domestic party in your organization where the inquiry is to be forwarded

Note: Only users with 'Power operations' rights can answer an inquiry and send it back to the organization that raised it. See "Power user functions" on page 29.

Searching inquiries

Use the **Search inquiries** function to search inquiries raised or received in your office/organization.

Procedure
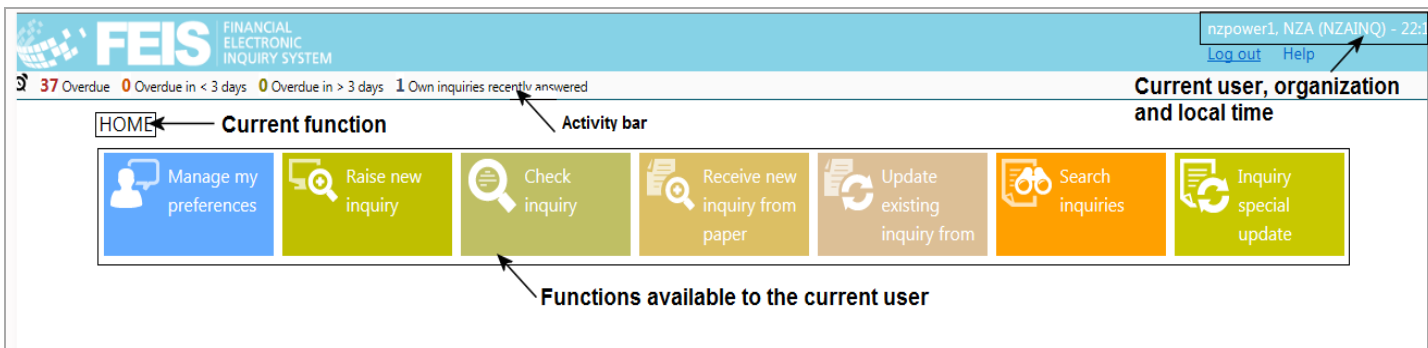
1. Enter your search criteria and click **Search**.

2. Click **Select** next to an inquiry to view its details.

    Note: If the inquiry is currently not assigned to your office/organization you will not be able to modify it.

Power user functions

Home menu

If you have been granted **Power operations** rights to FEIS, after logging on, you will see the home menu shown below:

The top of the screen shows some useful information, including the current user, organization and local time. It also shows the **Log out** link and a **Help** link that opens the FEIS Postal User Guide. At the top left of the screen you can see the current function. The **Activity bar** provides quick navigation to inquiries.

As a **Power operations** user, you will have access to additional functions as follows:

- Inquiry special update

- Update existing inquiry from paper

- Receive new inquiry from paper

In addition, you can send inquiries directly to the destination partner's central office, and answer, dispute, or close inquiries assigned to their organization.

Note: This chapter describes the additional operations functions that are available to a **Power operations** user. For information on the basic operations functions, refer to the "Postal operator functions" on page 17 .

Sending inquiries to the destination central office

As a power user, you can send an inquiry from the origin office (local office or central office) directly to the destination central office.

Procedure

1. Display the details of the inquiry assigned to your office either by using the **Check inquiry** function and entering the money order identifier, or by clicking the assigned inquiries from the **Activity bar.** You can also raise a new inquiry.

2. Click **Send**. Otherwise, if you want to attach a document to support the inquiry, click the **Edit** link in the **Documents** table to select the file before clicking **Send**.

Documents

	Attachment	Observations
Edit Delete		
Edit Delete		
Edit Delete		

—Take new action—

| Send | Comments | Show next party |

The inquiry is then sent to the destination partner's central office of inquiry.

Sending an inquiry to a non-FEIS office

When you click **Send**, if the office of destination is not a user of FEIS, FEIS displays a Send email screen where you can enter your email address and that of the destination organization, the title and the contents of the email, and finally click the **Send email** button.

Answering an inquiry

You can answer inquiries assigned to your organization and send the reply back to the origin office that sent or forwarded the inquiry. This can either be the local office or the central office.

Procedure

1. Display the details of the inquiry assigned to your office by using the **Check inquiry** function and entering the money order identifier, or by clicking the assigned inquiries from the **Activity bar**.

2. Click the **Inquiry reply (filled at destination)** tab then select the **Inquiry answer**.

3. Click **Answer**. FEIS sends the inquiry reply back to the inquiry origin office that raised the inquiry.

Disputing or closing an inquiry

If you receive an inquiry answer from the inquiry destination DO that you want to contest, you can perform a 'Dispute' action to show your disagreement. Similarly, if you find the inquiry answer you received from the destination DO to be satisfactory, you can perform a 'Close' action to close the inquiry.

Procedure

1. Display the details of the inquiry you want to dispute or close by using the **Check inquiry** function and entering the money order identifier, or by clicking the assigned inquiries from the **Activity bar**.

2. With the **Inquiry info (filled at origin)** tab shown by default, enter changes to the inquiry as necessary.

3. Take the desired action using the available buttons:
   - **Dispute**: click this button after you have entered your comments to support your claim in the **Inquiry reason** text field. Otherwise, the system displays a validation error. The

> inquiry is then routed back to the destination organization and office where it was answered

- **Close**: click this button to close the inquiry if you find the inquiry answer from the inquiry destination DO sufficient. You can enter optional **Comments**

Updating an inquiry after forwarding the inquiry to the next party

After the inquiry has been forwarded to the next party, it is normally no longer possible to update the inquiry in the office where the inquiry was processed.

However, if you belong to the **Power operations** group, you can update an inquiry that has just been forwarded to the next party using the function **Inquiry special update** provided that the inquiry has not yet been processed in the office to which it was forwarded.

To use this function, follow the procedure described in "Checking inquiries and taking action" on page 22 and click **Forward** to re-forward the inquiry to the party to which it had been previously forwarded.

Receiving a new inquiry from paper

Inquiries received from non-FEIS organizations are not available in the system and must be captured manually.

The organizations that are not using FEIS are expected to send their inquiries on paper (e.g. printed MP2 or PDF).

Note: In the future it will be possible for non-FEIS organizations to send inquiries to FEIS organizations via eClaims.

You can use the function **Receive new inquiry from paper** to capture inquiries received from non-FEIS users.

The function is similar to the **Raise new inquiry** function described in the previous chapter.

After the money order identifier has been entered, FEIS displays the inquiry capture screen. Follow the procedure in the "Raising an inquiry" on page 19. Enter the money order identifier and complete the form from the paper form.

Updating an existing inquiry from paper

Inquiries that are raised and routed to organizations that do not use FEIS will not be able to receive automatic electronic feedback.

The organizations that are not using FEIS are expected to provide their feedback on paper (e.g. printed MP2 or PDF).

Note: In the future it will be possible for non-FEIS organizations to provide inquiry feedback to FEIS organizations via eClaims.

You can use the function **Update existing inquiry from paper** to capture feedback received from non-FEIS users.

To use this function, follow the procedure described in "Checking inquiries and taking action" on page 22.

Inquiry routing

Routing means forwarding the inquiry from office to office, from the moment the inquiry is created in the origin local office to the moment the inquiry is answered and closed.

Raising an inquiry

When an inquiry is raised in FEIS by an operator in the origin local office, the inquiry is then forwarded to the origin central office. A power user in the origin central office then sends the inquiry to the destination central office. However, if there is a power user in the origin local office, the power user can send the inquiry directly to the destination central office.
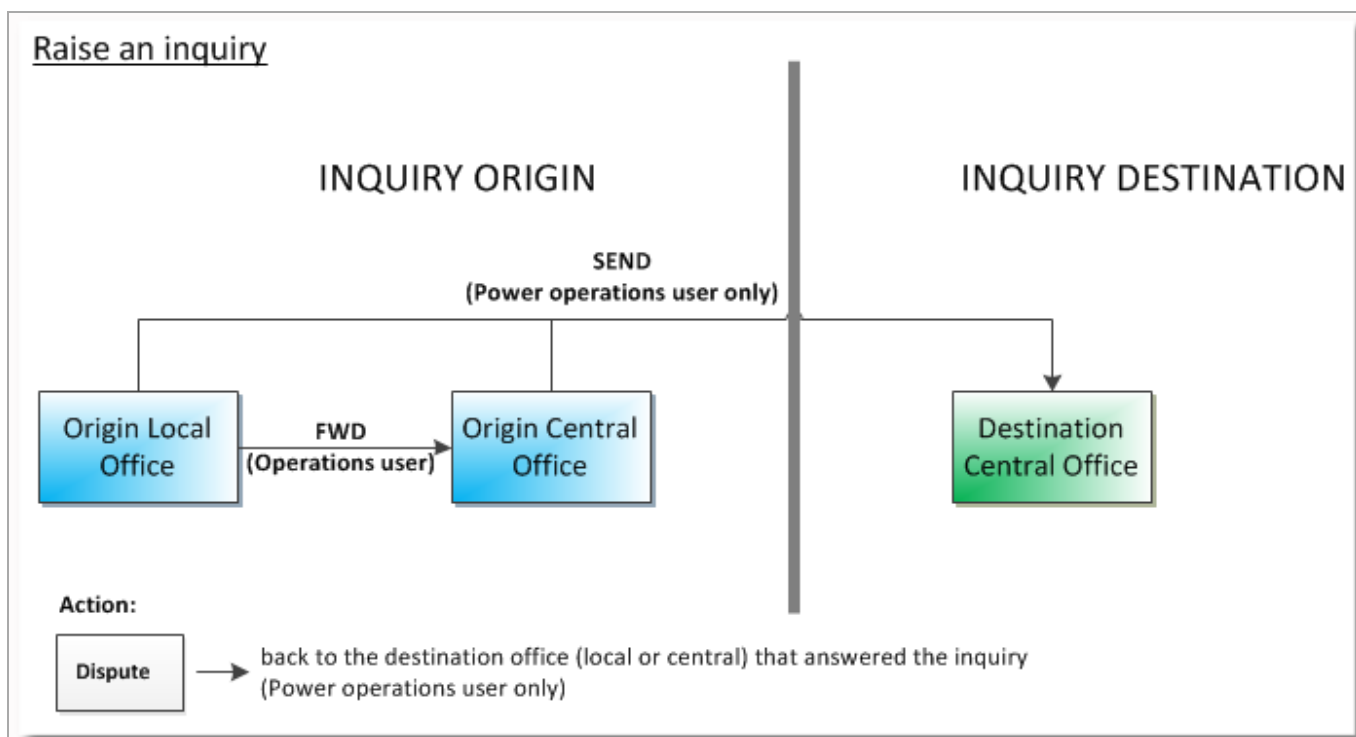
In addition, on receipt of the inquiry response, when a power user in the inquiry origin office performs a 'Dispute' action, the inquiry is sent back to the destination office or organization that answered it.

Replying to an inquiry

If the destination office has a power user who can reply to the inquiry, the answer can be sent directly to the inquiry origin office (local or central) where the inquiry was first raised. If more information is required, or, if the inquiry has been forwarded to a local office where the user has only operational rights, the destination office can forward the inquiry to another domestic party within the same organization.