

Technical Guide: Service Request and Issue Log

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Introduction to the Service and Issue Log

On PlatformplusWRAP, work items, forms and matters for investigation can be submitted using the Service & Issue Log. It is a ticketed, highly monitored query system built within the platform that allows Advisers and their support teams to interact with the Administrator (FNZ).

How to raise Issue Logs and Service Requests

There are two type of enquiry types that can be created:

1. Service Request:

Type 1: Manually created for a specific request that an Adviser or CSO user cannot action themselves; or

Type 2: Automatically created when a document is uploaded via the "Submit Document" Portal

2. Incident: Manually created in situations where there's a platform or portfolio specific issue.

Pro Tip:

- When raising an incident or service request please provide as much information as you can. This will assist with your request being actioned in a timely and complete manner;
- When you first log an issue, you'll get a response confirming that it's been assigned to the relevant team; and
- You'll receive automatic email updates when the status changes and/or additional information is required.

Impact and Urgency

The priority matrix below will help you in selecting the right priority level when you raise an incident.

Pro Tip: Most portfolio-specific issues will be marked as Medium or Low priority. All Type 1 requests are automatically raised with HIGH priority.

		Impact			
		Extensive / Widespread	Significant / Large	Medium / Limited	Minor / Localised
Urgency	Critical	Critical	Critical	High	High
	High	Critical	High	High	Medium
	Medium	High	High	Medium	Medium
	Low	Low	Low	Low	Low

The matrix has two criteria:

1. Impact Levels:

- **Extensive/Widespread:** impacts all or majority of users, portfolios and/or transactions.
- **Significant/Large:** Impacts a large group of users, portfolios and/or transactions.
- **Medium/Limited:** Impacts some users, portfolios and/or transactions
- **Minor/Localized:** Impacts individual users, portfolios and/or transactions

2. Urgency Levels:

- **Critical:** Major production issue, such as a complete application failure or widespread data corruption.
- **High:** Significant platform issues that greatly impact functionality and are persistent.
- **Medium:** Non-critical issues that impacts the platform or portfolios.
- **Low:** Minor issues that aren't critical and where a workaround might be available.

Examples:

1. The automatic cash investment has not worked as I expected for 1 of my clients = LOW
2. The portfolio performance widget is blank and not pulling through any data for any of my clients = HIGH

Progress Statuses

The table below provide you with an explanation of each status within an incident/service request.

Status	Definition
Client Pending	An issue has been raised but not yet allocated to FNZ
Pending /FNZ Pending	Item is in FNZ's queue to be allocated
In Progress	Investigation and/or action has begun and you can expect an update shortly
Awaiting Info/Awaiting Client Info	More information is required from the person who raised the item in order to progress. Please add requested detail and update the status to "Client Feedback Received"
Client Feedback Received	Status set by you after updating the incident/service request with the requested information
Awaiting Release	Internal FNZ state to track movement through test / release process.
Awaiting Client Signoff	Issues that have been resolved and confirmation is required for either from yourself or FNZ for signoff
Rejected Client Signoff	Resolution not accepted by yourself; the issue will be looked at again by FNZ.
Complete	Issue to be completed