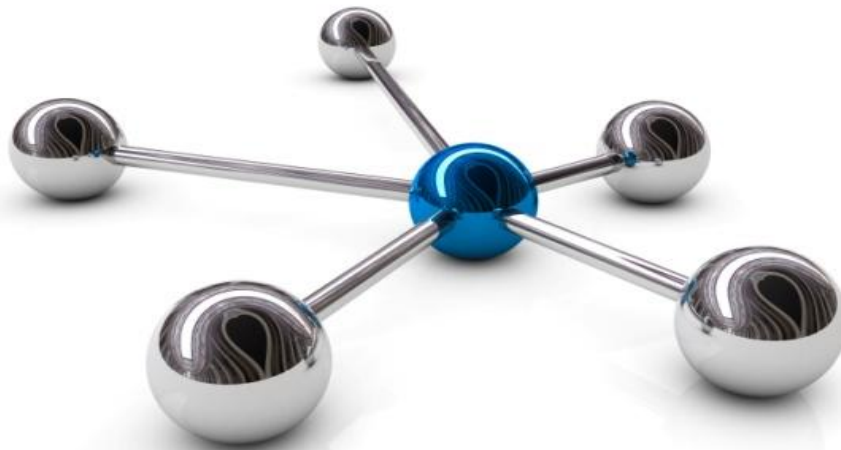




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# Setting up user accounts

**This guide shows you how to complete your user account registration and how to create user accounts for others in order to use the i-Connect service.**



# i-Connect

## Login Guide

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### **Introduction**

This guide explains how to create user accounts on i-Connect so that you can send information about Local Government Pension Scheme (LGPS) members in your organisation to the pension fund.

i-Connect is an Internet application which helps to manage the transfer of employee information from payroll administrators to pensions administrators.

### **Who to Contact**

If you have any questions about using i-Connect service please contact your Pension Fund.

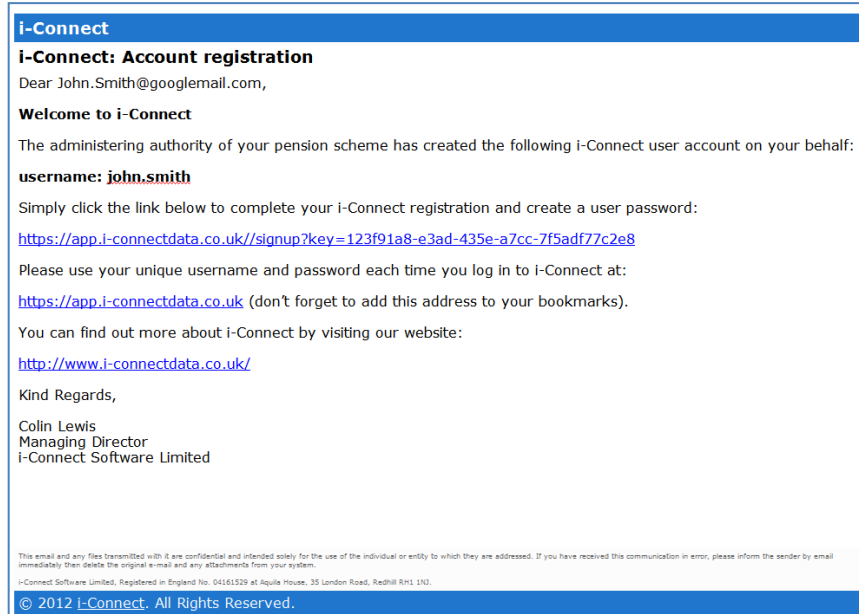
# i-Connect

## Login Guide



### First Login

You will receive an email from i-Connect with details of your i-Connect username and a hyperlink so that you can complete your registration.



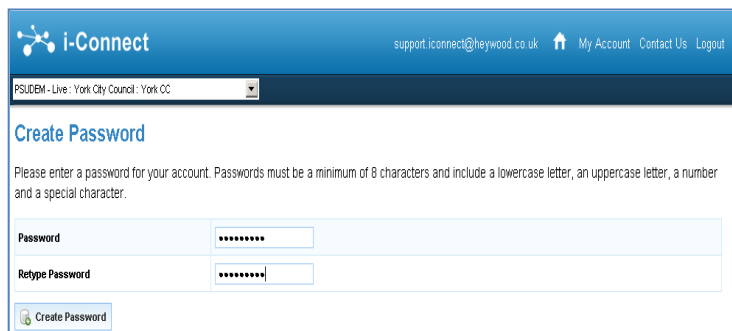
You must complete your i-Connect registration within five days of receiving the i-Connect: Account registration email.

If you attempt to register after this period you will receive the following error:



Contact your pension fund to request that a new registration email is sent.

Click the hyperlink in the email. You will be asked to create and confirm a password.



Remember to bookmark

<https://app.i-connectdata.co.uk>

in your browser and make a note of your username for future access to i-Connect

Your password must be between 8 and 30 characters in length and include a minimum of:

- One lowercase letter
- One uppercase letter
- One digit
- One special character, for example '#' or '\*'

Click the 'Create Password' button to complete i-Connect registration:

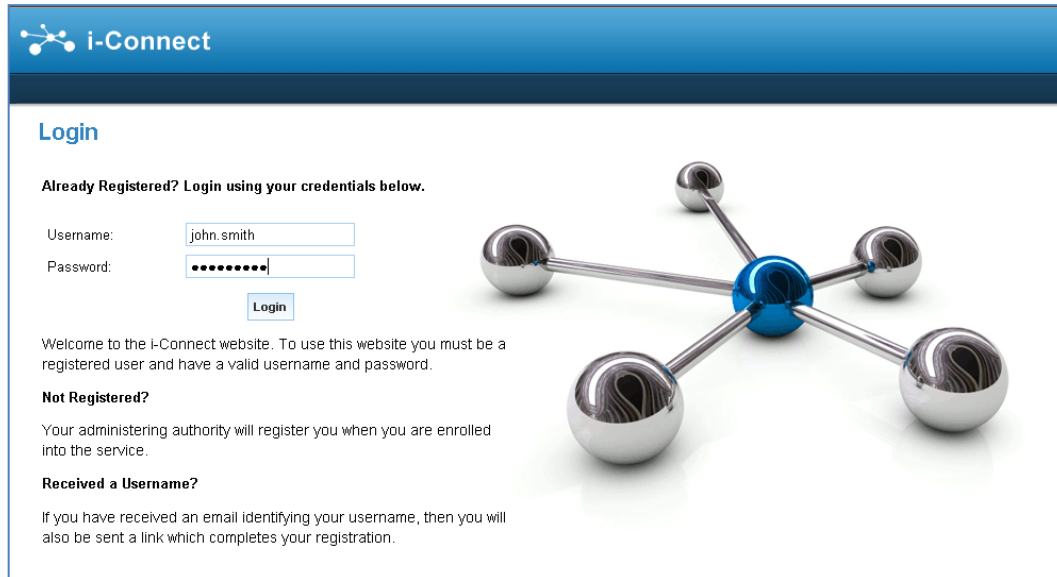
# i-Connect

## Login Guide



### Subsequent Logins

Select the i-Connect link from your bookmarks, enter your username and password and select Login:

A screenshot of the i-Connect login page. The page has a blue header with the i-Connect logo and name. Below the header, the word "Login" is displayed in blue. The main content area is white and contains the following text and form elements:

**Already Registered? Login using your credentials below.**

Username:

Password:

Welcome to the i-Connect website. To use this website you must be a registered user and have a valid username and password.

**Not Registered?**

Your administering authority will register you when you are enrolled into the service.

**Received a Username?**

If you have received an email identifying your username, then you will also be sent a link which completes your registration.

The background of the form area features a large, 3D-rendered version of the i-Connect logo graphic.

Your user account will be locked if the password is entered incorrectly five times. You should ask another i-Connect user in your organisation with a 'Manager' role to reset your password. If no one is available in your organisation, you should ask your Pension Fund or i-Connect Service Desk to reset your password.

### i-Connect Dashboard







The i-Connect Dashboard is displayed when you login:

# i-Connect

## Login Guide



**Dashboard**

 Upload
  Reports
  Employer
  Administering Authority
  User Management
  History

**Recent Activities**

File Name	Period End Date	Expected Submission Date	Submission Date	Submission Type	Status
1.LGPS_1000_Members_30042015_PAY014.csv	30-04-2015	31-03-2015	13-03-2015 16:19:35	Payroll Upload	Pending

**Submission Statistics**

Total Number of Payroll Members Tracked by i-Connect		1,000
Omitted Payroll Members (present on the last submission, and no leaver event processed)		0
Payroll Members submitted this period	1,000	Total Pensionable Pay
Payroll Members in Error	0	£1,457,955.00
Accepted for Processing	1,000	Total Employee Contributions
		£230,784.29
		Total Employer Contributions
		£461,558.73
Submitted By User		qatfredo
Processed By User		

Events	Total	Pending	Submitted	Completed	Failures	Errors	Workflow Errors	Progress
New Starter	7	7	0	0	0	0	0	<div style="width: 100%;"></div>

The Dashboard is the i-Connect home page and is displayed to all users. The options available on the Dashboard will depend on the role allocated to you by your pension Fund or manager



Upload

Load payroll extract files into i-Connect and manage their progress.



Online Return

Submit data manually into i-Connect.



Member Matching

Guides you through the member matching process for the selected payroll.



Reports

Reporting tools for administrative and compliance purposes.

# i-Connect Login Guide

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Employer

Employer specific options such as contact detail maintenance.



User  
Management

Facilities to set up, manage and contact users.



History

An online record of i-Connect data processing.

# i-Connect

## Login Guide



### My Account

Click on the 'My Account' link on the i-Connect banner to change your email address or password:



will display this page

#### My Account

This page shows an overview of your account. You can edit your details by using the buttons at the bottom of the page.

Username	empqat2ludge
Email Address	john.dale@heywood.co.uk
Created By	unknown
Account Status	ACTIVE
Proceed if New Starter Validation Errors Detected	ENABLED
Proceed if Existing Member Validation Errors Detected	ENABLED
Granted Roles	Manager Reporter Upload

Accessible Employers:

Target System	Employer
FUDGE-ALTOAT01	Location 00002

Accessible Payrolls:

User has access to all payrolls for the above employers.

[Change My Email Address](#) [Change My Password](#)

### Changing your Email Address

Click the 'Change My Email Address' button,

#### Change Email Address

Please enter your new email address below and click 'Save Email Address'.

Email Address	<input type="text" value="david.jones@bollington.gov.uk"/>
---------------	--

[Save Email Address](#)

Enter your new email address and click the 'Save Email Address' button

### Changing your Password

Click the 'Change My Password' button

#### Change Password

Please enter a new password for your account. Passwords must be a minimum of 8 characters and include a lowercase letter, an uppercase letter, a number and a special character.

Current Password	<input type="password" value="*****"/>
New Password	<input type="password" value="*****"/>
Retype New Password	<input type="password" value="*****"/>

[Save New Password](#)

Enter your current password followed by your new password and click the 'Save New Password' button

# i-Connect

## Login Guide

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### User Management

User Management is available only to users with the 'Manager' role. It allows users to view, create, amend, disable and reset other users on i-Connect.

### Roles

- Manager** Allows a user access to 'User Management' on the Dashboard. This is used for creating and editing users.
- Reporter** Allows a user to access to 'Reporting' on the Dashboard.
- Upload** Allows a user to upload payroll files, and also to proceed or cancel processing of those files. This role is also required for the member matching phase.
- User** Allows a user to view payroll submission history and the status of the latest upload, view the payroll / employer / administering authority details, and contact other users via the Contact Users page. The user can view data, but not modify it. The user can change their own password and email address.



# i-Connect

## Login Guide



### User List

Click the 'User Management' icon on the Dashboard to display the 'User List' page:

#### User List

The list of i-Connect users that you can manage is displayed below. To view more details and make changes to an account, click the 'View' button next to the appropriate user.

Username	Email Address	Created By	Granted Roles	Account Status	
Lewis234	dilly.lewis@bollington.gov.uk	Jones100	Reporter Upload	ACTIVE	<a href="#">View</a>
Dale0432	terry.dale@bollington.gov.uk	Jones100	Reporter Upload	ACTIVE	<a href="#">View</a>
Smith101	susan.smith@bollington.gov.uk	Jones100	Manager Reporter Upload	ACTIVE	<a href="#">View</a>

You can manage any of the users on the list by selecting the 'View' button, which will display the 'User Details' page.

### User Details

Use this page view an existing user, change their details, or reset their password.

#### User Details

This page displays the details of the selected user account.

Username	empqatfudge
Email Address	john.dale@heywood.co.uk
Created By	unknown
Account Status	ACTIVE
Proceed if New Starter Validation Errors Detected	ENABLED
Proceed if Existing Member Validation Errors Detected	ENABLED
Granted Roles	Manager Reporter Upload

Accessible Employers:

Target System	Employer
FUDGE-ALTOAT01	Location 00001

Accessible Payrolls:

User has access to all payrolls for the above employers.

[Edit User](#) [Reset Password](#)

# i-Connect

## Login Guide



### Edit User

Select the relevant checkbox to disable the selected user's account, or to grant or remove roles. Note that changes to the email address field will not be retained:

#### Edit User

Use the form below to amend the privileges for the selected user. Click 'Save' when done.

Username	empqatfudge
Email Address	<input type="text" value="john.dale@heywood.co.uk"/>
Created By	unknown
Disable Account	<input type="checkbox"/>
Disable Proceed if New Starter Validation Errors Detected	<input type="checkbox"/>
Disable Proceed if Existing Member Validation Errors Detected	<input type="checkbox"/>
Granted Roles	
Administering Authority	<input type="checkbox"/>
Manager	<input checked="" type="checkbox"/>
Reporter	<input checked="" type="checkbox"/>
Upload	<input checked="" type="checkbox"/>

Click the Next button to move to the 'Edit Accessible Payrolls' page.

### Edit Accessible Payrolls

Select the relevant checkbox to grant or remove access to payrolls:

#### Edit Accessible Employers

Username	empqatfudge
Email Address	john.dale@heywood.co.uk
Created By	qatfudge
Account Status	ACTIVE
Proceed if New Starter Validation Errors Detected	DISABLED
Proceed if Existing Member Validation Errors Detected	DISABLED
Granted Roles	Manager Reporter Upload

Please select the relevant Employers for each Target System you wish this user to have access to.

Accessible Employers:

Target System	Employer
FUDGE-ALTQAT01	<input checked="" type="checkbox"/> Location 00001 <input type="checkbox"/> Location 00002

Click the Next button to proceed to the 'Confirm User' page.

# i-Connect

## Login Guide



### Confirm User

Click the 'Save' button to save changes made to the user account.

#### Confirm User

The user will be saved with the details below.

Username	empqatfudge
Email Address	john.dale@heywood.co.uk
Created By	qatfudge
Account Status	ACTIVE
Proceed if New Starter Validation Errors Detected	DISABLED
Proceed if Existing Member Validation Errors Detected	DISABLED
Granted Roles	Manager Reporter Upload


Accessible Employers:

Target System	Employer
FUDGE-ALTQAT01	Location 00001

Accessible Payrolls:

User has access to all payrolls for the above employers.

The following message is displayed:

 User details have been amended successfully.

### Reset Password

Click the 'Reset Password' button on the 'User Details' page to reset the user's password:

#### User Details

This page displays the details of the selected user account.

Username	empqatfudge
Email Address	john.dale@heywood.co.uk
Created By	unknown
Account Status	ACTIVE
Proceed if New Starter Validation Errors Detected	ENABLED
Proceed if Existing Member Validation Errors Detected	ENABLED
Granted Roles	Manager Reporter Upload


Accessible Employers:

Target System	Employer
FUDGE-ALTQAT01	Location 00001

Accessible Payrolls:

User has access to all payrolls for the above employers.

The following message is displayed to confirm that the password has been successfully reset and that 'i-Connect has sent a password reset email to user's email address.

 The password for this user has been reset successfully.



## Create User Wizard

Click the 'Create User' button on the navigation bar to create a new user:



The following page is displayed:

### Create User

Enter the credentials for a new user in the form below. You may only grant the new user privileges which you possess. The new user will be sent a link via email to set up an i-Connect account and password.

<b>Username</b>	<input type="text" value="Jsmith029"/>
<b>Email Address</b>	<input type="text" value="john.smith@gmail.com"/>
<b>Disable Proceed if New Starter Validation Errors Detected</b>	<input checked="" type="checkbox"/>
<b>Disable Proceed if Existing Member Validation Errors Detected</b>	<input checked="" type="checkbox"/>
<b>Granted Roles</b>	
Administering Authority	<input type="checkbox"/>
Manager	<input type="checkbox"/>
Reporter	<input checked="" type="checkbox"/>
Upload	<input checked="" type="checkbox"/>

Next

Choose a username (minimum of 8 characters), enter the new user's email address and select the relevant roles. Then, click the Next button to choose payrolls they will have access to.

### Edit Accessible Employers

<b>Username</b>	empqatfudge
<b>Email Address</b>	john.dale@heywood.co.uk
<b>Created By</b>	qatfudge
<b>Account Status</b>	ACTIVE
<b>Proceed if New Starter Validation Errors Detected</b>	DISABLED
<b>Proceed if Existing Member Validation Errors Detected</b>	DISABLED
<b>Granted Roles</b>	Manager Reporter Upload

Please select the relevant Employers for each Target System you wish this user to have access to.

**Accessible Employers:**

Target System	Employer
FUDGE-ALTOAT01	<input checked="" type="checkbox"/> Location 00001 <input type="checkbox"/> Location 00002

Next

# i-Connect

## Login Guide



Grant access to the relevant payroll by ticking the checkboxes and then click Next to move to the 'Confirm User' page:

### Confirm User

The user will be saved with the details below.

Username	empqatfudge
Email Address	john.dale@heywood.co.uk
Created By	qatfudge
Account Status	ACTIVE
Proceed if New Starter Validation Errors Detected	DISABLED
Proceed if Existing Member Validation Errors Detected	DISABLED
Granted Roles	Manager Reporter Upload


Accessible Employers:

Target System	Employer
FUDGE-ALTQAT01	Location 0001

Accessible Payrolls:

User has access to all payrolls for the above employers.

Click the 'Save' button to confirm the user, the following confirmation message is displayed:

 User credentials have been created successfully.

### Want to Know More?

Look at these guides

- **Reporting**
- **Online Return**
- **On boarding**
- **File Upload**