Employer Website Initial Set-up & Data Maintenance Process

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Author	Priya Thirunavukkarasu
Reviewed by	Nadine Woods

Documents Change Control

Revision Number	Date of Issue	Author(s)	Brief Description of Change
0.1	23/01/2014	Priya Thirunavukkarasu	Initial Draft
0.2	23/01/2014	Priya Thirunavukkarasu	Minor revision based on Feedback from Nadine Woods

Employer Website Initial Setup and Data Maintenance Process

Whilst your site will contain some basic information on first login, you must verify the data and enter additional information to ensure that your site works correctly. Please follow these steps to complete your setup:
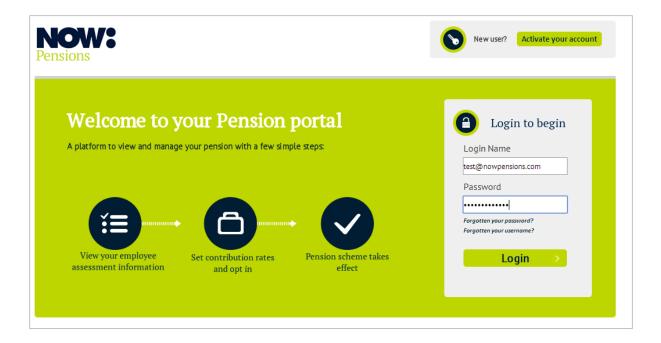
1. **Website link**

   Click on the link provided in the email. The below screen will be available to enter the login details.
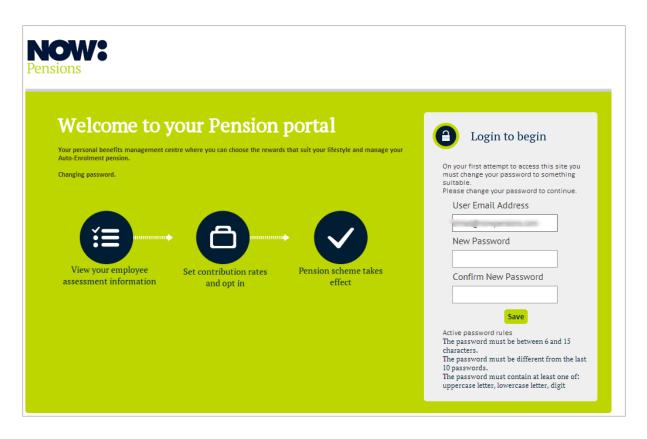

2. **Login Details**

   The login name was issued in the welcome email. A separate email was issued with the password. Enter the password and click on login.
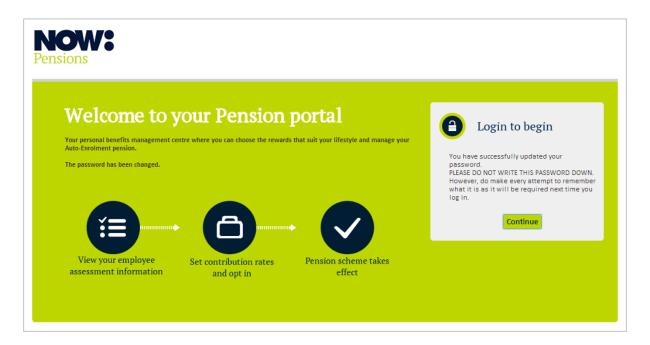
After the login is successful it will prompt you to change the password.

3. **Change Password**

Your e-mail address will appear in the address field. Enter a new password and re-enter the new password to confirm. Click on Save to update the new password.
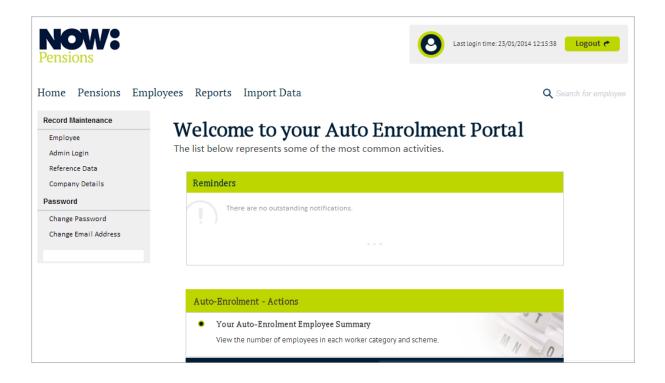
You should change the password on a regular basis to maintain the system security. Change Password option can be accessed from the left hand screen menu. The below screen appears when the password is successfully updated.

4. **Welcome Screen**

Click on continue to view the welcome screen.

5. Verify Company Details

Company Details can be verified by selecting **Company Details** from the left hand screen menu. Check the existing details and make any changes or additions as required. Please enter all the mandatory fields marked with *.

Please ensure that you add your Pension Regulator Reference, which is a 10 digit number. Select the Save button to update the entered company details.

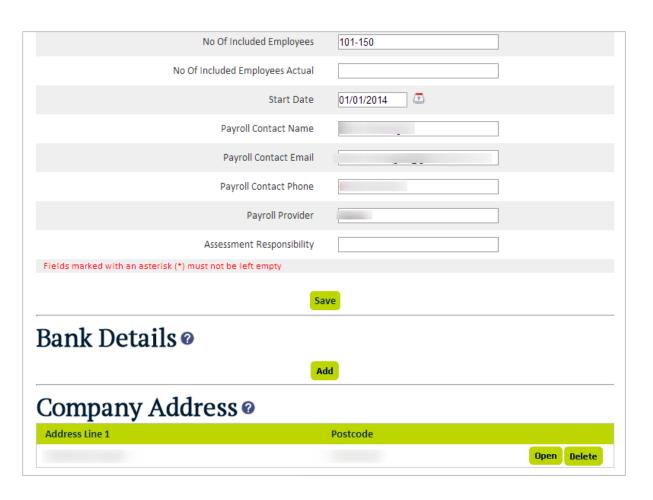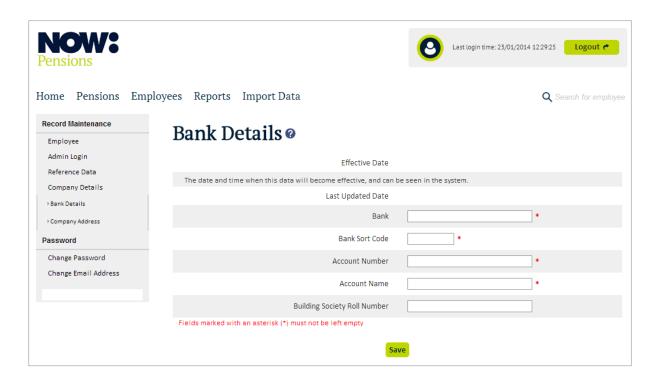|	
No Of Included Employees	101-150
No Of Included Employees Actual	
Start Date	01/01/2014
Payroll Contact Name	
Payroll Contact Email	
Payroll Contact Phone	
Payroll Provider	
Assessment Responsibility	

Fields marked with an asterisk (*) must not be left empty

Save

Bank Details ❓

Add

Company Address ❓

Address Line 1	Postcode	
		Open Delete

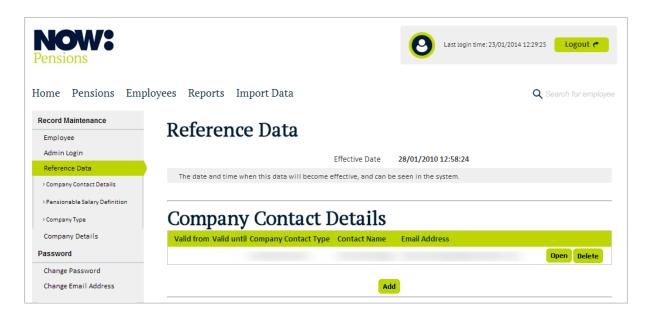6. **Adding Bank Details**

   Bank details are required from which contributions will be made as well as to make payments in respect of reversals for Auto Enrolment (AE) opt outs. To access the bank details input screen, select Company Details from the left hand screen menu, then Bank Details. Select the Add button and enter your company bank details in the fields provided and click on **Save**.
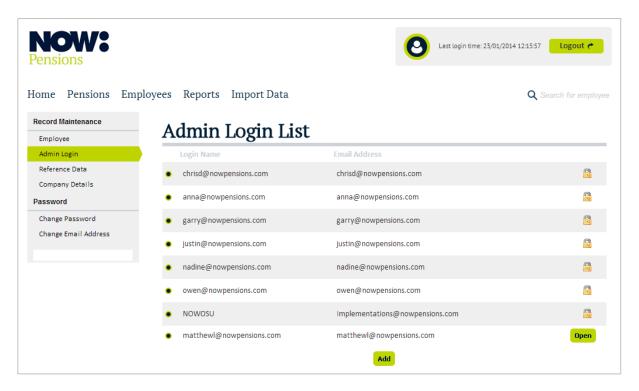
Once the save button has been selected, the screen will display the effective date and time of when these changes will be effective. Existing bank details can be amended in the same place at a later date if required.

7. **Employer/Admin role account setup**

As the site owner, you are able to create or edit login details for other members of staff, authorised to use this system. To create additional users, navigate to Admin Login on the left hand screen menu. Select the Add button to enter the input screen.

User Roles:

Please note that you should only select 'Employer' when creating additional users on the system.

8. **Setting up the Payroll**

It is essential to set up your payroll data in the system to ensure that your employee pension information is correctly calculated and exported to your pension provider. To set up your payroll, please navigate to Reference Data from the left hand screen menu, then Payrolls.

Add your 4 letter Payroll Code and select a Payroll Type from the drop down menu. Select save. Once you have added your payroll code, select Payrolls List. The payroll code you have just created will appear in the list.

Now input the details for this payroll code by selecting the payroll from the list and then click on the Add button below the heading Payroll Details.

Payroll Details

Pay Period	1
Processing Date	25/01/2014
Pay Period Start Date	01/01/2014
Processed	No
Processed Date	11/11/2011 00 : 00 : 00
Pay Date	27/01/2014

Payroll Details List   Save   Save All

Once you have selected the Add button, the input screen will appear.

1. Now enter the required information in the fields provided. Ignore the Processed and Processed Date fields.
2. Select the save button.
3. Select Payrolls on the left screen menu, and then select Add under the Payroll Details heading for the payroll code you are working on, which takes you back to the input screen. Now enter the details for the next pay period e.g. Pay Period
4. Continue with steps 1 – 3 until you have created all the periods for this payroll type e.g. 12 periods for a monthly payroll.

A completed payrolls list might look like this.

Payrolls List

Payroll Code	Payroll Type		
ABBC	Fortnightly	Open	Delete
AABB	Monthly	Open	Delete
ABCD	Weekly	Open	Delete
ABDD	Monthly	Open	Delete

Add

A completed monthly payroll setup might look like this.

Payrolls

Payroll Code	AABB	
Payroll Type	Monthly	

Payrolls List   Save   Save All

Payroll Details

Pay Period	Processing Date	Pay Period Start Date	Processed	Processed Date	Pay Date		
1	25/01/2014	01/01/2014	No		27/01/2014	Open	Delete
2	25/02/2014	01/01/2014	No		27/02/2014	Open	Delete
3	25/03/2014	01/01/2014	No		27/03/2014	Open	Delete
4	25/04/2014	01/01/2014	No		27/04/2014	Open	Delete
5	25/05/2014	01/01/2014	No		27/05/2014	Open	Delete
6	25/06/2014	01/01/2014	No		27/06/2014	Open	Delete
7	25/07/2014	01/01/2014	No		27/07/2014	Open	Delete
8	25/08/2014	01/01/2014	No		27/08/2014	Open	Delete
9	25/09/2014	01/01/2014	No		27/09/2014	Open	Delete
10	25/10/2014	01/01/2014	No		27/10/2014	Open	Delete
11	25/11/2014	01/01/2014	No		27/11/2014	Open	Delete
12	20/12/2014	01/01/2014	No		23/12/2014	Open	Delete

9. **Importing Employee Data**

   You are required to input your employee data into the system. This data needs to be imported for each pay period, to ensure that up to date information is passed to your pension administrator. You will receive a reminder before each upload is due, to ensure that your employee details are received and processed in good time.

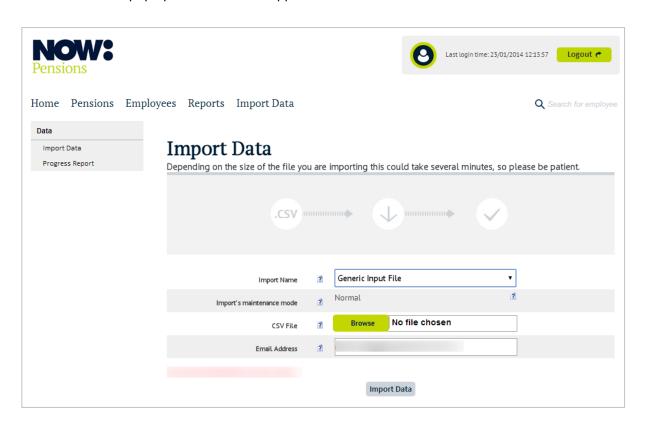   a. **Where does my employee data come from?**

      Your employee data will come from your payroll system. This data should be in the required format for the system to recognise during a data import.
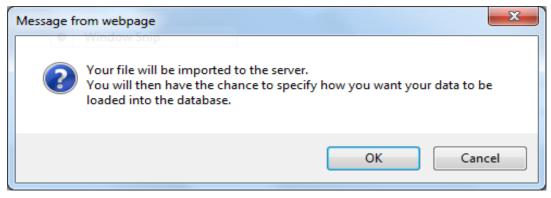
   b. **How is my employee data uploaded to the system?**

      To import employee data, navigate to the Import Data menu at the top of your screen.
      - From the Import Name drop down field, select Generic Input File.
      - Browse to locate your employee data file.
      - The e-mail address will be used to send notifications once the import is complete.
      - Select the Import Data button.

- A pop up notification will appear – select OK.

- You will now be presented with the Importer Options Screen. This screen allows you to select 'Add' and/or 'Update' options, depending on your preference. Most commonly, both options are selected, which will allow the system to import additional (new) records, as well as update existing records.

Generic Input File Options

Importer Options

Please specify the options below according to how you wish to manage your data import. An option will appear against each section depending on how it can be manipulated through the import process. Options will not be provided to sections that can <u>only</u> be updated.

Add   New records to be added.

Update   Existing records to be updated.

Delete   Remove all existing records before importing new data.

Company

Employee

Add ☑ Update ☑

Forename
Middle Name
Surname
NI Number
Title
Employee Number
Payroll

Personal Details

Personal Details will automatically update.

Date of Birth
Sex

Address

Address will automatically update.

Address Line 1
Address Line 2
Address Line 3
Address Line 4
Address Line 5
Postcode

- Once you have made your selection, select the button below this screen to begin the data import process.

Begin Loading Data into the Database

- You will be presented with a progress screen. Depending on how much data you are importing, this process may take a little while.

Importing (Step 2 of 2)

Your data has been successfully processed and is now being loaded into the database. Any exceptions will be emailed to your specified address.

Progress so far...

Estimated time remaining: 00:00:18

Abort

Details

Import:	Generic Input File
File:	GIF3a.csv
Started:	03/01/2014 10:02:58
User:	
Status:	Running
Options:	Add, Update

- Once the import is complete, a results page will appear. Be sure to note the 'Results' section of this screen, where any import errors will be listed. You will also receive notification via e-mail which confirms how many files were imported successfully as well as any rejected or skipped files.

Import No. 11 is complete

Details

Import:	Generic Input File
File:	GIF3a.csv
Started:	03/01/2014 09:20:50
Finished:	03/01/2014 09:21:34
User:	
Time Taken:	0:00:44.627
Status:	Complete
Status Detail:	Import complete with some records rejected (Failure)
Options:	Add, Update
Starting Maintenance Mode:	Normal
Requested Maintenance Mode:	Normal
Notification E-Mail Address:	
ValidationThreshold:	100
Retention period (days):	0 (Forever)
Imported file:	CSV
Results:	Import completed with error(s) - please check the error report for further details. 4 record(s) in the import file 1 record(s) rejected 3 record(s) skipped 0 record(s) imported into the database
Error Log:	CSV

c. **What if an error occurs?**

Should you receive notification that an import or part of an import has failed you will be required to correct the affected files. This may be due to unexpected data in a field/s or using a data file which does not match the required format.

   i. How will I know if a failure has occurred?

   The system will display a results screen, which lists any records which have failed to import.

Import No. 11 is complete

Details

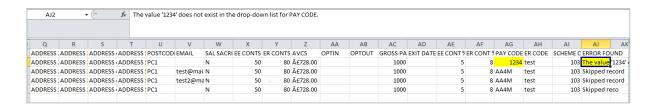| Import:	Generic Input File
File:	GIF3a.csv
Started:	03/01/2014 09:20:50
Finished:	03/01/2014 09:21:34
User:	
Time Taken:	0:00:44.627
Status:	Complete
Status Detail:	Import complete with some records rejected (Failure)
Options:	Add, Update
Starting Maintenance Mode:	Normal
Requested Maintenance Mode:	Normal
Notification E-Mail Address:	
ValidationThreshold:	100
Retention period (days):	0 (Forever)
Imported file:	**CSV**
Results:	Import completed with error(s) - please check the error report for further details. 4 record(s) in the import file 1 record(s) rejected 3 record(s) skipped 0 record(s) imported into the database
Error Log:	**CSV**

Rejected records: records that contain an error

Skipped Records: existing records that have not changed since the last import

ii. How do I know what has caused the failure?

The above screen contains an Error Log. Click on the CSV button. This action will call your data file. The error message will appear in the last column of the file.

In the example above, the PAY CODE for one of the records does not follow the expected format. This may be due to an error in data entry, or due to that particular pay code not being present in the system. To correct this error, follow the process as described in **Setting up the payroll**. Once you have created the pay code reference and entered the payroll details, you can reimport your data. The error should not reoccur, as the pay code will now be recognised.

Note that the e-mail notification received after the data import process has completed, will also contain hyperlinks to your system login screen, as well as the CSV file, where you can read the error message.