
Employer Website Initial Set-up & Data Maintenance Process

Published Date	23/01/2014
Version	0.2
Author	Priya Thirunavukkarasu
Reviewed by	Nadine Woods

Documents Change Control

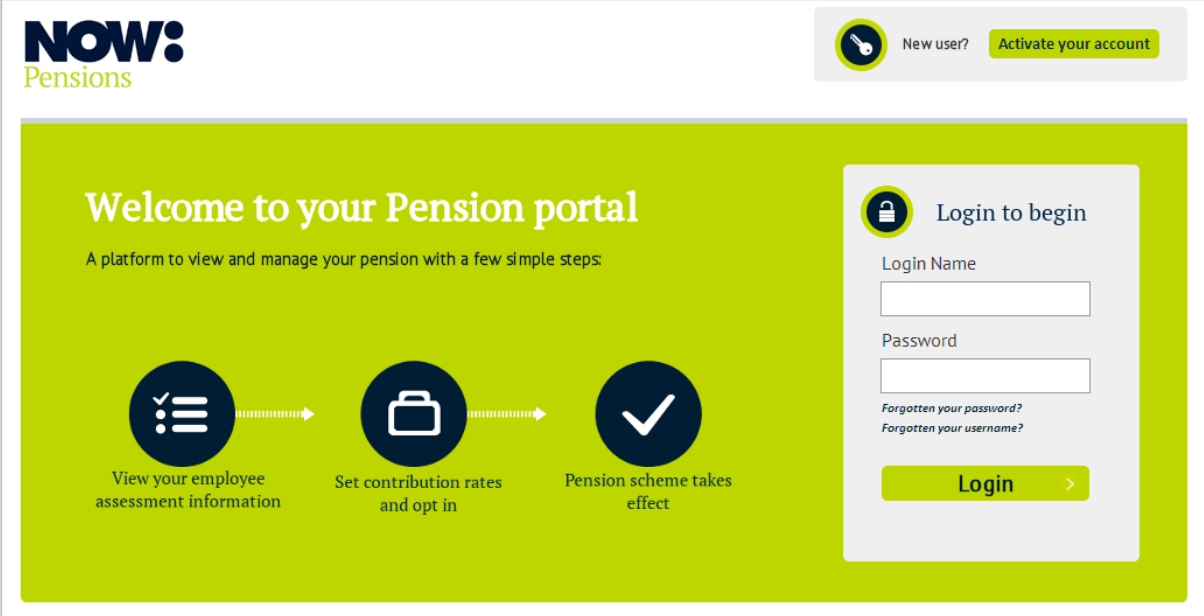
Revision Number	Date of Issue	Author(s)	Brief Description of Change
0.1	23/01/2014	Priya Thirunavukkarasu	Initial Draft
0.2	23/01/2014	Priya Thirunavukkarasu	Minor revision based on Feedback from Nadine Woods

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.



The screenshot shows the 'NOW: Pensions' website. At the top left is the logo. At the top right, there is a 'New user?' link with a key icon and an 'Activate your account' button. The main content area has a green background. On the left, it says 'Welcome to your Pension portal' and 'A platform to view and manage your pension with a few simple steps:'. Below this is a three-step process flow: 1. 'View your employee assessment information' with a checklist icon, 2. 'Set contribution rates and opt in' with a briefcase icon, and 3. 'Pension scheme takes effect' with a checkmark icon. On the right, there is a 'Login to begin' section with a lock icon, 'Login Name' and 'Password' input fields, links for 'Forgotten your password?' and 'Forgotten your username?', and a 'Login >' button.

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.

New user?
 [Activate your account](#)

Welcome to your Pension portal

A platform to view and manage your pension with a few simple steps:

View your employee assessment information

Set contribution rates and opt in

Pension scheme takes effect

Login to begin

Login Name

Password

[Forgotten your password?](#)

[Forgotten your username?](#)

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.

Welcome to your Pension portal

Your personal benefits management centre where you can choose the rewards that suit your lifestyle and manage your Auto-Enrolment pension.

Changing password.

View your employee assessment information

Set contribution rates and opt in

Pension scheme takes effect

Login to begin

On your first attempt to access this site you must change your password to something suitable.
Please change your password to continue.

User Email Address

New Password

Confirm New Password

Save

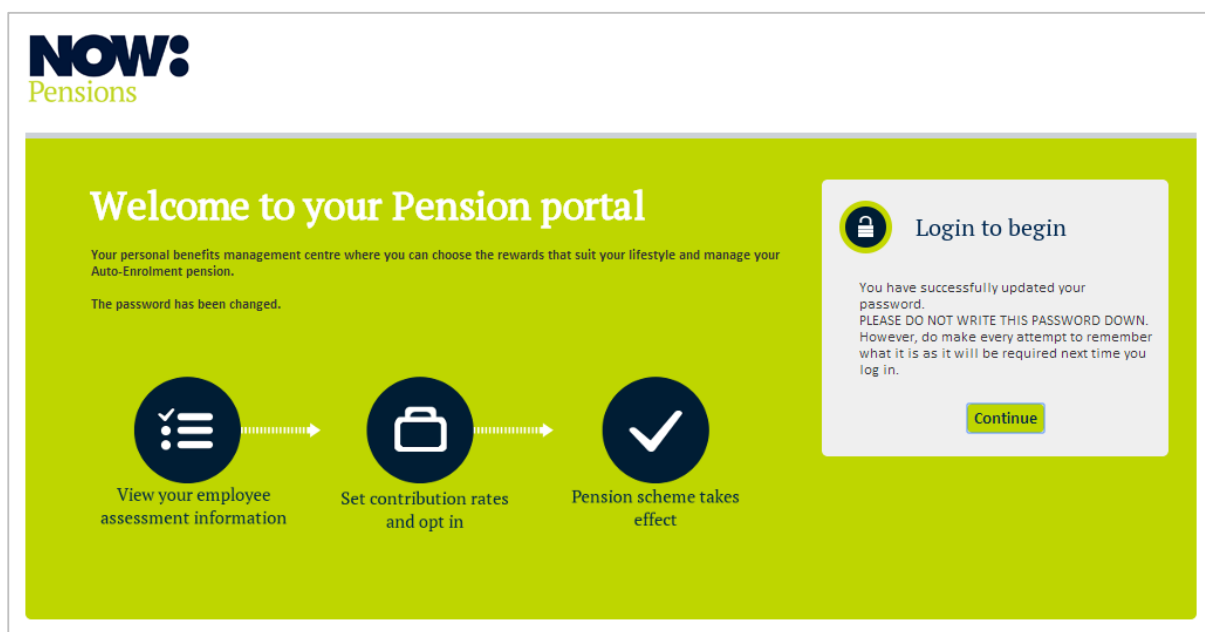
Active password rules

The password must be between 6 and 15 characters.

The password must be different from the last 10 passwords.

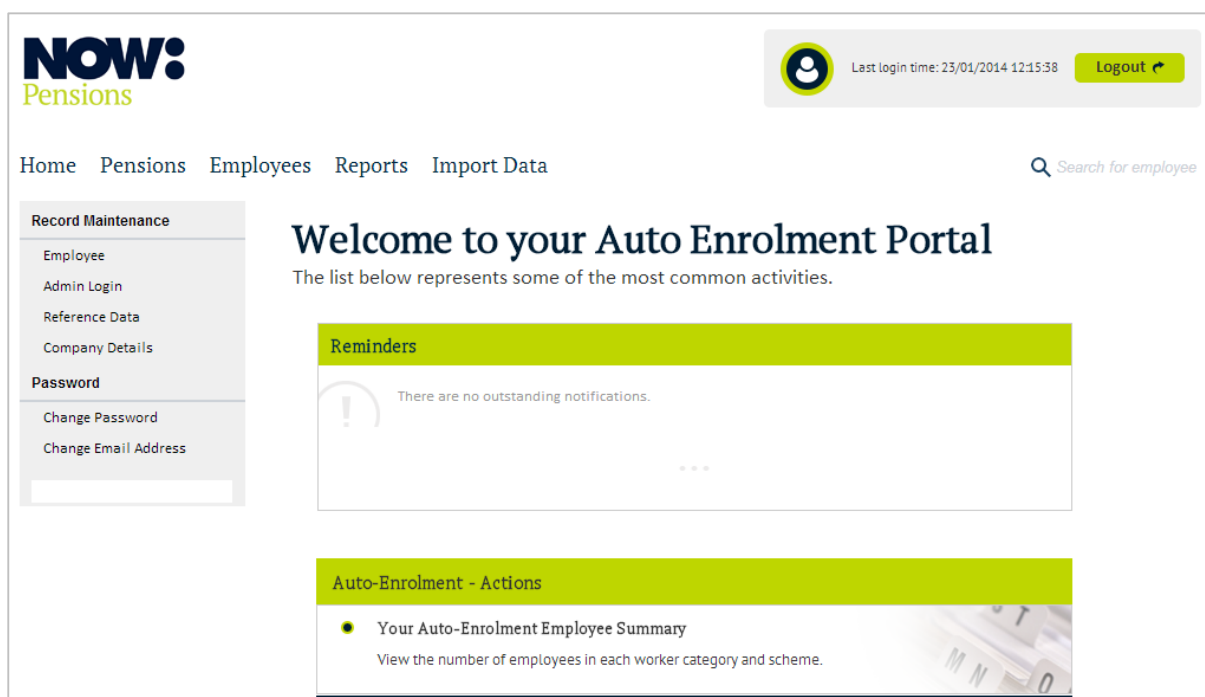
The password must contain at least one of: uppercase letter, lowercase letter, digit

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 *.

The screenshot shows the 'NOW: Pensions' web interface. The top navigation bar includes 'Home', 'Pensions', 'Employees', 'Reports', and 'Import Data'. A search bar on the right says 'Search for employee'. The left sidebar has a 'Record Maintenance' section with 'Employee', 'Admin Login', 'Reference Data', 'Company Details' (highlighted), 'Bank Details', and 'Company Address'. Below this is a 'Password' section with 'Change Password' and 'Change Email Address'. The main content area is titled 'Company Details' and contains a form with the following fields: 'Company Name' (text input), 'Company Trading Name' (text input with a red asterisk), 'Company Number' (text input with a red asterisk), 'Type of Company' (dropdown menu showing 'Limited Liability Company' with a red asterisk), 'PAYE Reference' (text input with a red asterisk), 'Staging Date' (date input showing '01/01/2014' with a calendar icon and a red asterisk), 'Pension Regulator Reference' (text input with a question mark icon and a red asterisk), 'Company Code' (text input with a question mark icon), 'Is Holding Company' (checkbox), 'Bureau' (text input), and 'Bureau Code' (text input). The top right of the interface shows a user profile icon, the text 'Last login time: 23/01/2014 12:15:38', and a 'Logout' button.

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	<input type="text" value="101-150"/>
No Of Included Employees Actual	<input type="text"/>
Start Date	<input type="text" value="01/01/2014"/>
Payroll Contact Name	<input type="text"/>
Payroll Contact Email	<input type="text"/>
Payroll Contact Phone	<input type="text"/>
Payroll Provider	<input type="text"/>
Assessment Responsibility	<input type="text"/>

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

Save

Bank Details ?

Add

Company Address ?

Address Line 1	Postcode	
<input type="text"/>	<input type="text"/>	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**.

Last login time: 23/01/2014 12:29:25 [Logout](#)

[Home](#) [Pensions](#) [Employees](#) [Reports](#) [Import Data](#)

Search for employee

Record Maintenance

- Employee
- Admin Login
- Reference Data
- Company Details
- Bank Details
- Company Address

Bank Details

Effective Date

The date and time when this data will become effective, and can be seen in the system.

Last Updated Date

Bank

Bank Sort Code

Account Number

Account Name

Building Society Roll Number

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

[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.

Last login time: 23/01/2014 12:29:25 [Logout](#)

[Home](#) [Pensions](#) [Employees](#) [Reports](#) [Import Data](#)

Search for employee

Record Maintenance

- Employee
- Admin Login
- Reference Data
- Company Contact Details
- Pensionable Salary Definition
- Company Type
- Company Details

Reference Data

Effective Date

The date and time when this data will become effective, and can be seen in the system.

28/01/2010 12:58:24

Company Contact Details

Valid from	Valid until	Company Contact Type	Contact Name	Email Address	
					Open Delete

[Add](#)

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.

The screenshot shows the NOW: Pensions web application interface. At the top left is the NOW: Pensions logo. At the top right, there is a user profile icon, the text 'Last login time: 23/01/2014 12:15:57', and a 'Logout' button. Below the logo is a navigation menu with links: Home, Pensions, Employees, Reports, and Import Data. On the right side of the menu is a search bar with the placeholder text 'Search for employee'. On the left side of the main content area is a sidebar menu with the following items: Record Maintenance, Employee, Admin Login (highlighted in green), Reference Data, Company Details, Password, Change Password, and Change Email Address. The main content area is titled 'Admin Login List' and contains a table with two columns: 'Login Name' and 'Email Address'. The table lists eight users, each with a green circular icon to the left of their name and a small lock icon to the right of their email address. At the bottom right of the table is an 'Open' button. At the bottom center of the page is an 'Add' button.


Login Name	Email Address
chrisd@nowpensions.com	chrisd@nowpensions.com
anna@nowpensions.com	anna@nowpensions.com
garry@nowpensions.com	garry@nowpensions.com
justin@nowpensions.com	justin@nowpensions.com
nadine@nowpensions.com	nadine@nowpensions.com
owen@nowpensions.com	owen@nowpensions.com
NOWOSU	Implementations@nowpensions.com
matthewl@nowpensions.com	matthewl@nowpensions.com


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.




Last login time: 23/01/2014 12:29:25
[Logout](#)

[Home](#)
[Pensions](#)
[Employees](#)
[Reports](#)
[Import Data](#)


Search for employee

Record Maintenance

Employee
Admin Login
Reference Data
> Company Contact Details
> Payrolls
> Pensionable Salary Definition
> Company Type
Company Details

Password

Change Password
Change Email Address

Payrolls

Payroll Code


Payroll Type
Monthly

[Payrolls List](#)
[Save](#)

Payroll Details

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.

Payrolls


Rectangular Snip

Payroll Code
ABBC

Payroll Type
Fortnightly

[Payrolls List](#)
[Save](#)
[Save All](#)

Payroll Details

[Add](#)

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	<input type="text" value="1"/>
Processing Date	<input type="text" value="25/01/2014"/>
Pay Period Start Date	<input type="text" value="01/01/2014"/>
Processed	<input type="button" value="No"/>
Processed Date	<input type="text" value="11/11/2011"/>
	<input type="button" value="00"/> : <input type="button" value="00"/> : <input type="button" value="00"/>
Pay Date	<input type="text" value="27/01/2014"/>

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	<input type="button" value="Open"/> <input type="button" value="Delete"/>
AABB	Monthly	<input type="button" value="Open"/> <input type="button" value="Delete"/>
ABCD	Weekly	<input type="button" value="Open"/> <input type="button" value="Delete"/>
ABDD	Monthly	<input type="button" value="Open"/> <input type="button" value="Delete"/>
<input type="button" value="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?

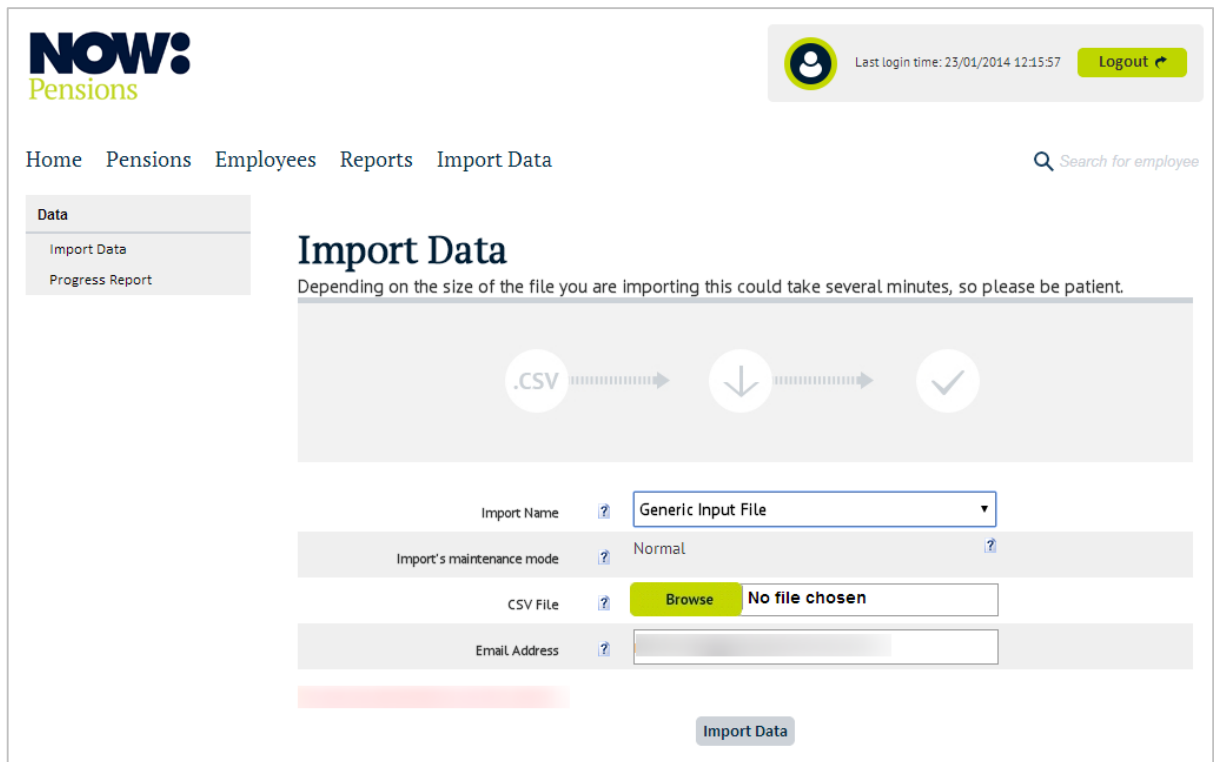
Your employee data will come from your payroll system. This data should be in the required format for the system to recognise during a data import.

b. How is my employee data uploaded to the system?

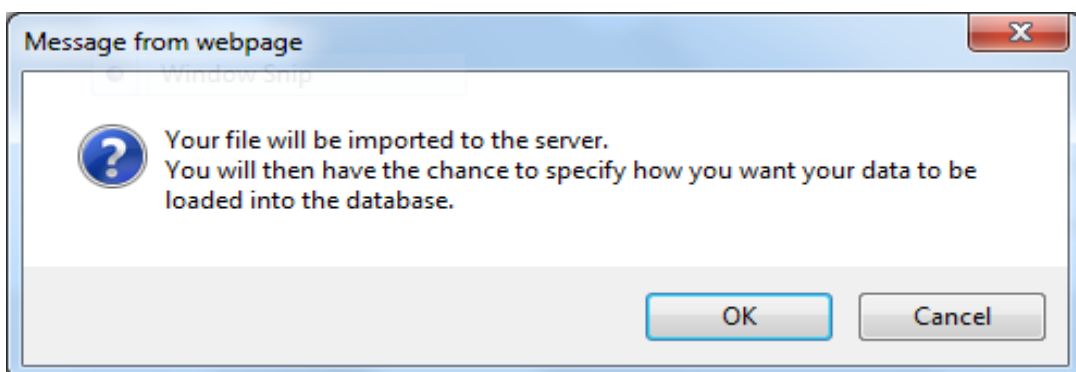
To import employee data, navigate to the Import Data menu at the top of your screen.

- 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.



The screenshot shows the 'NOW: Pensions' web application. The top navigation bar includes 'Home', 'Pensions', 'Employees', 'Reports', and 'Import Data'. A user profile section in the top right shows a last login time of 23/01/2014 12:15:57 and a 'Logout' button. A search bar on the right says 'Search for employee'. On the left, a sidebar menu has 'Data' selected, with sub-items 'Import Data' and 'Progress Report'. The main content area is titled 'Import Data' and includes a warning: 'Depending on the size of the file you are importing this could take several minutes, so please be patient.' Below this is a process diagram showing a '.CSV' file being imported and then checked. The form contains several fields: 'Import Name' (a dropdown menu currently showing 'Generic Input File'), 'Import's maintenance mode' (a dropdown menu currently showing 'Normal'), 'CSV File' (a 'Browse' button next to a text box saying 'No file chosen'), and 'Email Address' (an empty text box). At the bottom right of the form is an 'Import Data' button.



- 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 only 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:	TestUser@company.com
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:	<input type="button" value="CSV"/>
Results:	<p>Import completed with error(s) - please check the error report for further details.</p> <p>4 record(s) in the import file</p> <p>1 record(s) rejected</p> <p>3 record(s) skipped</p> <p>0 record(s) imported into the database</p>
Error Log:	<input type="button" value="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:	GLF3a.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.

AJ2		The value '1234' does not exist in the drop-down list for PAY CODE.																			
Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	
ADDRESS : ADDRESS : ADDRESS : ADDRESS : POSTCODE EMAIL		SAL		SACRI	EE	CONTS	ER	CONTS	AVCS	OPTIN	OPTOUT	GROSS PA	EXIT DATE	EE	CONT %	ER	CONT %	PAY CODE	ER CODE	SCHEME C	ERROR FOUND
ADDRESS : ADDRESS : ADDRESS : ADDRESS : PC1		N		50		80		£728.00				1000		5		8		1234	test	103	The value '1234'
ADDRESS : ADDRESS : ADDRESS : ADDRESS : PC1		test@mai		N		50		80		£728.00		1000		5		8		AA4M	test	103	Skipped record
ADDRESS : ADDRESS : ADDRESS : ADDRESS : PC1		test2@ma		N		50		80		£728.00		1000		5		8		AA4M	test	103	Skipped record
ADDRESS : ADDRESS : ADDRESS : ADDRESS : PC1		N		50		80		£728.00				1000		5		8		AA4M	test	103	Skipped reco

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.