

# i-Connect User Management Guide

Setting up user accounts v5



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# Revision History

Vsn	Date	Updated By	Approved By	Details of Amendment
1.00	31/10/2016	P Stocks	C Lewis	First release
2.00	13/06/2018	K Pridgeon	J Dale/E Fisher	Rebrand
2.01	04/07/2018	J Dale	C Lewis	Updated with rebranded images
2.02	01/07/2019	J Dale	C Lewis	Genesee release update
4.00	29/05/2020	J Dale	C Lewis	Hudson release update
5.00	05/02/2024	C Lewis	I Baker	Rebrand and Update to the Wye release

# Introduction

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

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

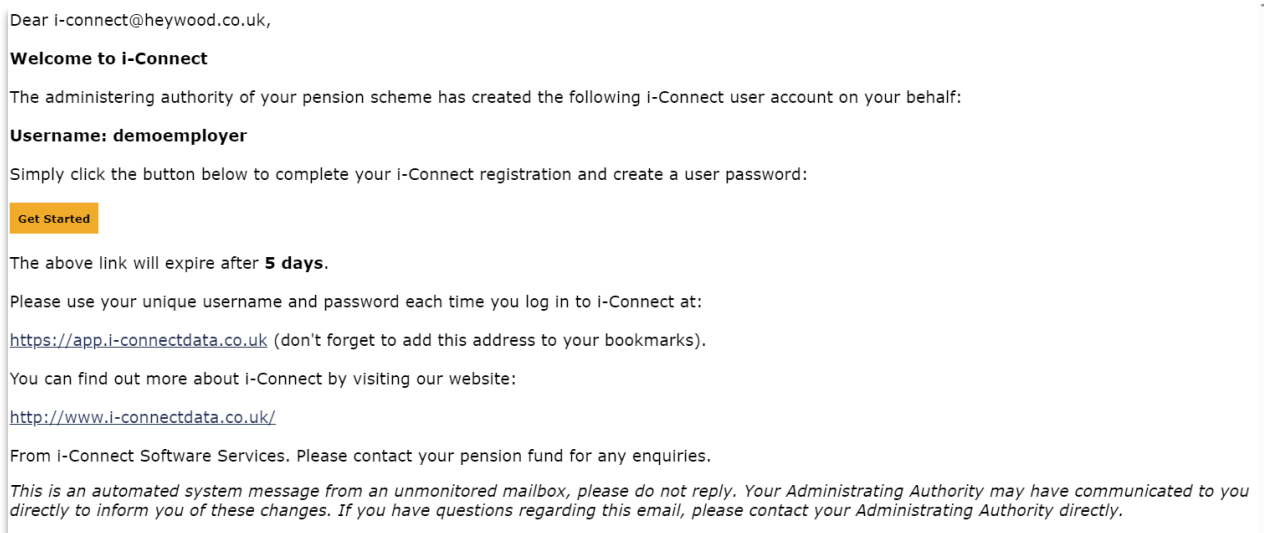
## Who to Contact

If you have any questions about using the i-Connect service, please contact your pension fund.

## First Login

You will receive an email from i-Connect with details of your i-Connect username and a single use hyperlink. Select the hyperlink to create your password and complete the registration process.

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



Dear i-connect@heywood.co.uk,

**Welcome to i-Connect**

The administering authority of your pension scheme has created the following i-Connect user account on your behalf:

**Username: demoemployer**

Simply click the button below to complete your i-Connect registration and create a user password:

[Get Started](#)

The above link will expire after **5 days**.

Please use your unique username and password each time you log in to i-Connect at:  
<https://app.i-connectdata.co.uk> (don't forget to add this address to your bookmarks).

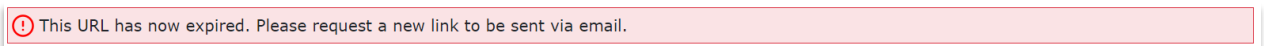
You can find out more about i-Connect by visiting our website:  
<http://www.i-connectdata.co.uk/>


From i-Connect Software Services. Please contact your pension fund for any enquiries.

*This is an automated system message from an unmonitored mailbox, please do not reply. Your Administrating Authority may have communicated to you directly to inform you of these changes. If you have questions regarding this email, please contact your Administrating Authority directly.*

### i-Connect: Account registration email

If you attempt to register after this period, you will receive an error stating that the URL has expired, and a new link must be requested.



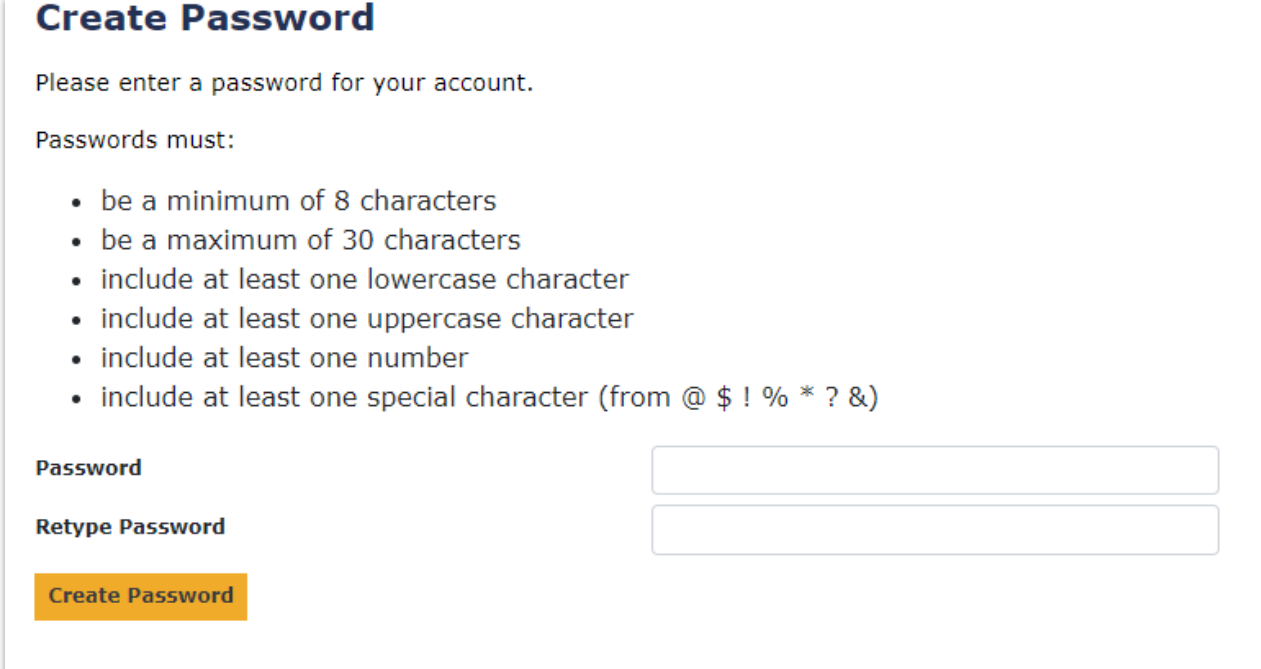
 This URL has now expired. Please request a new link to be sent via email.

### Expired URL error message



Contact your pension fund to request a password reset, this will generate a new registration email.

Select the hyperlink in the email, then enter and confirm a password:



**Create Password**

Please enter a password for your account.

Passwords must:

- be a minimum of 8 characters
- be a maximum of 30 characters
- include at least one lowercase character
- include at least one uppercase character
- include at least one number
- include at least one special character (from @ \$ ! % \* ? &)

Password

Retype Password

**Create Password**

### Create Password page

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 eight and 30 characters in length and include:

- at least one lowercase character
- at least one uppercase character
- at least one number
- at least one special character from the following list:

@ \$ ! % \* ? &

Select the **Create Password** button to complete the i-Connect registration.

## Subsequent Logins

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

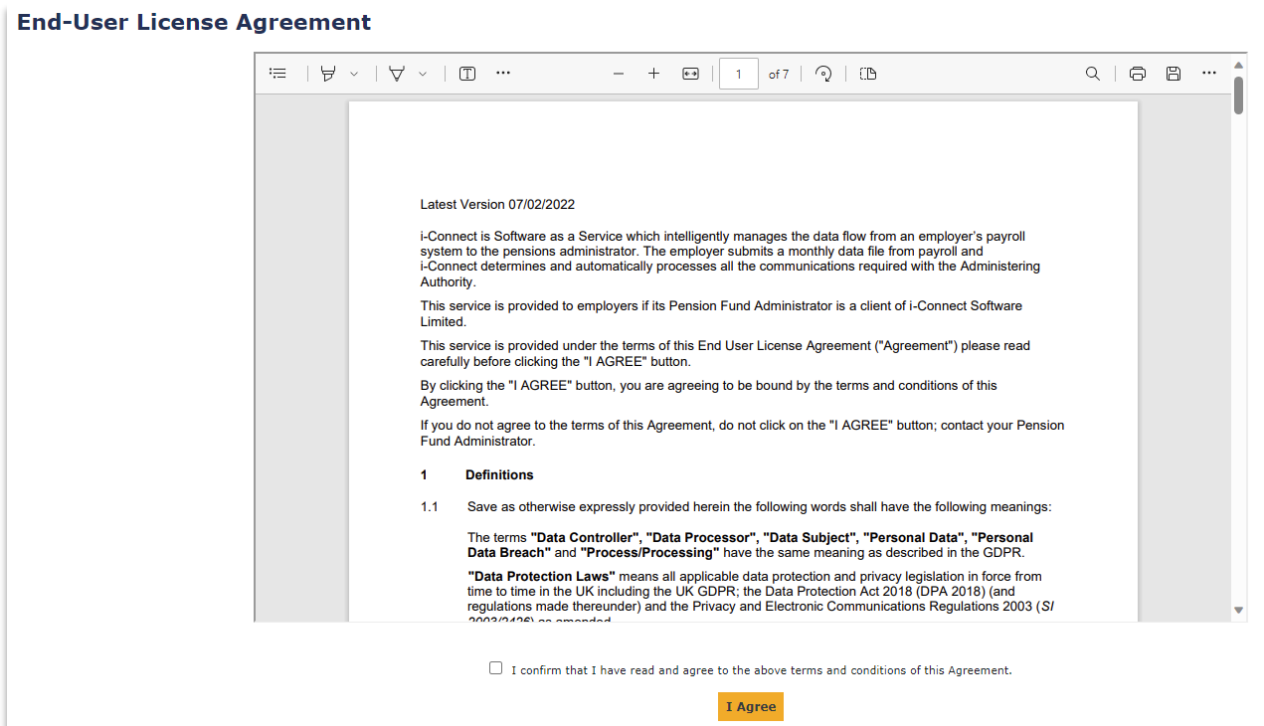




i-Connect login page

Your user account will be locked if the password is entered incorrectly five times. In this case, 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 the i-Connect service desk ([support@i-Connectdata.co.uk](mailto:support@i-Connectdata.co.uk)) to reset your password.

## End-User License Agreement



End-User License Agreement



You must read and agree the terms and conditions of the End-User License Agreement when logging on to the service for the first-time following registration. Tick the **I confirm that I have read and agree to the above terms and conditions of this Agreement** checkbox, then select the **I Agree** button.

## i-Connect Payroll Dashboard

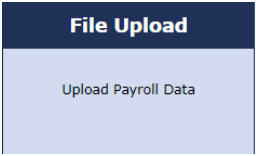
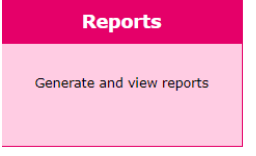
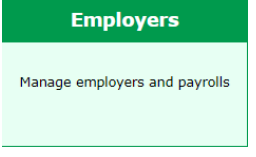
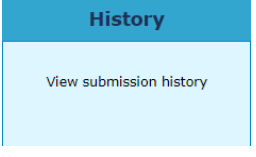
The i-Connect Payroll Dashboard is displayed when you log in.

File Name	Period End Date	Expected Submission Date	Submission Date	Submission Type	Status			
1C.BAU_30042023_Monthly.csv	30-04-2023	30-04-2023	08-09-2023 14:26:00	Payroll Upload	Complete			
Submission Statistics								
Total Number of Payroll Members Tracked by i-Connect					20			
Omitted Payroll Members (present on a previous submission, and no leaver event processed)					0			
Payroll Members Submitted	20	Payroll Members in Error	0	Accepted for Processing	20			
Pay Summary		Contributions This Period		Contributions Year To Date (YTD)				
Pensionable Pay (Period)	£56,737.37	Employee Main Contributions	£3,964.16	Employee Main Contributions	£5,904.78			
Main CARE Pay (YTD)	£56,737.37	Employee 50/50 Contributions	£45.86	Employee 50/50 Contributions	£45.86			
50/50 CARE Pay (YTD)	£0.00	Employer Contributions	£8,510.50	Employer Contributions	£15,153.73			
		Add Conts/ARCs	£0.00	Add Conts/ARCs	£0.00			
		Shared Cost APCs	£336.03	Shared Cost APCs	£336.03			
		Employee APCs	£112.01	Employee APCs	£112.01			
		Secondary Contributions	£1,000.00	Secondary Contributions	£1,000.00			
				AVCs	£78.96			
Employer Overall Contribution Rate (Period)	15%	Expected Employer Contributions (Period)	£8,510.61	Expected Employer Payments (YTD)	£22,552.41			
<a href="#">View schedule of rates</a>		Difference	-£0.11					
		Total Payments Due (Period)	£13,968.56	Total Payments Made (YTD)	£13,968.67			
		Total Payments Provided (Period)	£13,968.67	Difference between Payments Made and Expected (YTD)	-£8,583.74			
		Payment Difference	+£0.11	Reason for difference (if given)	Payroll Rounding			
Submitted By User: demoaa			Processed By User: demoaa					
Events	Total	Pending	Submitted	Completed	Failures	Errors	Suppressed	Progress
New Starter	1	0	0	1	0	0	0	<div style="width: 100%;"></div>
Opt In	0	0	0	0	0	0	0	
Service	7	0	0	0	0	0	7	<div style="width: 100%;"></div>
Salary	20	0	0	20	0	0	0	<div style="width: 100%;"></div>
Contributions	20	0	0	20	0	0	0	<div style="width: 100%;"></div>
Additional Contributions	2	0	0	2	0	0	0	<div style="width: 100%;"></div>
CARE Pay	20	0	0	20	0	0	0	<div style="width: 100%;"></div>
Service Break	0	0	0	0	0	0	0	
Member Details Update	3	0	0	3	0	0	0	<div style="width: 100%;"></div>
Member Address Update	1	0	0	1	0	0	0	<div style="width: 100%;"></div>
Works Address Update	1	0	0	1	0	0	0	<div style="width: 100%;"></div>
Opt Out	0	0	0	0	0	0	0	
Leaver	0	0	0	0	0	0	0	

### i-Connect Payroll Dashboard



The Dashboard is the i-Connect home page and is displayed to all users. The options available on the Dashboard depends on the role allocated to you by your pension fund or manager. See the following table for information on the available dashboard options:

Dashboard Option	Dashboard Option as Displayed on the Dashboard	Dashboard Option Description
File Upload		Load payroll extract files into i-Connect and manage their progress
Online Return		Submit data manually into i-Connect
Match members		Guides you through the member matching process for the selected payroll
Reports		Reporting tools for administrative and compliance purposes
Employers		Employer specific options such as contact detail maintenance
Users		Facilities to create and manage users
History		An online record of i-Connect data processing





# My Account Page

Select the **My Account** link on the i-Connect banner to change your email address or password.

**My Account**

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

Username	employeruser
Email Address	colin.lewis@i-connectdata.co.uk
Created By	demoaa
Account Status	ACTIVE
Proceed if New Starter Validation Errors Detected	ENABLED
Proceed if Existing Member Validation Errors Detected	ENABLED
Granted Roles	Manager Document Uploader Reporter Upload
Last Logged In	03-10-2023 15:33:49

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

**Accessible Employers:**

Target System - HDA-Live

Employer / MPP
Altrincham Town Council
JD Payroll Services
South Hale Dist Council
Timperley Parish Council
Trafford Park Trust
Uttlesford District Council

**Accessible Payrolls:** User has access to all payrolls for the above employers.

**My Account page**

## Changing Your Email Address

Select the **Change My Email Address** button, enter your new email address and select the **Save Email Address** button to change your email address.

### Change Email Address

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

Email Address	<input type="text" value="colin.lewis@i-connectdata.co.uk"/>
<a href="#">Save Email Address</a>	

**Change Email Address page**



## Changing Your Password

Select **Change My Password**. Enter your current password followed by your new password and select the **Save New Password** button.

### Change Password

Please enter your current password and a new password for your account.

Passwords must:

- be a minimum of 8 characters
- be a maximum of 30 characters
- include at least one lowercase character
- include at least one uppercase character
- include at least one number
- include at least one special character (from @ \$ ! % \* ? &)

**Current Password**

**New Password**

**Retype New Password**

**Save New Password**

Change Password page

## User Management

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

### Roles

Role	Details
Manager role	Users with this role are only able to grant the Manager, Reporter, and Upload roles to other users. This role inherits the Document Uploader, Reporter, and Upload role.
HR role	Users with this role can request strain cost reports. This role can only be granted by LGPS administrating authorities. This role inherits the Reporter role.
Document Uploader role	Users with this role can upload documents for a member through i-Connect that will be transmitted to the



	member's record in Altair. This user will be able to perform a member search. This role should not be confused with the upload role. This role inherits the Reporter role.
Reporter role	Users with this role can generate and view reports.
Upload role	Users with this role can do payroll submissions such as file uploads or online returns. Not to be confused with the document uploader role.
Final Pay Submitter Role	Users with this role can view members who are eligible for either the McCloud remedy or require a leaver Final Pay submission. This is also able to submit final pay data to Altair through i-Connect for Members who meet these criteria.

## User List Page

Select 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.

[Export to CSV](#)

Username	Email Address	Created By	Granted Roles	Account Status	Last Logged In	
demohr01	colin.lewis@outlook.com	demoaa	Human Resources Reporter	DISABLED		<a href="#">View</a>
demoemployer	i-connect@heywood.co.uk	demoaa	Manager Document Uploader Reporter Upload	DISABLED		<a href="#">View</a>
demouser	support@i-connectdata.co.uk	demoaa	Manager Human Resources Document Uploader Reporter Upload	DISABLED	12-09-2022 00:00:00	<a href="#">View</a>
demoreport	support@i-connectdata.co.uk	demoaa	Reporter	DISABLED		<a href="#">View</a>
demoemp	support@i-connectdata.co.uk	demoaa	Manager Human Resources Document Uploader Reporter Upload	ACTIVE	19-07-2023 00:00:00	<a href="#">View</a>

### User List page

You can manage any of the users on the list by selecting the **View** button, which displays the **User Details** page.

# User Details Page

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

### User Details

This page displays the details of the selected user account.

<b>Username</b>	demouser
<b>Email Address</b>	support@i-connectdata.co.uk
<b>Created By</b>	demoaa
<b>Account Status</b>	DISABLED
<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 Human Resources Document Uploader Reporter Upload
<b>Last Logged In</b>	12-09-2022 00:00:00

**Accessible Employers:**

**Target System - HDA-Live**

Employer / MPP
Trafford Park Trust

**Accessible Payrolls:** User has access to all payrolls for the above employers.

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

User Details page

## Edit User Page

Select the relevant checkbox to disable the selected user's account, grant or remove roles.

### Edit User

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

<b>Username</b>	demouser
<b>Email Address</b>	<input type="text" value="support@i-connectdata.co.uk"/>
<b>Created By</b>	demoaa
<b>Disable Account</b>	<input checked="" type="checkbox"/>
<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>	
<b>Manager</b>	<input checked="" type="checkbox"/>
<b>Reporter</b>	<input checked="" type="checkbox"/>
<b>Upload</b>	<input checked="" type="checkbox"/>

Next

**Edit User page**

The following options are available:

Option	Details
Disable Account	Tick this option to disable the selected users account
Disable Proceed if New Starter Validation Errors Detected	Tick this option to prevent users completing a submission if there are any new starter validation errors
Disable Proceed if Existing Member Validation Errors Detected	Tick this option to prevent users completing a submission if there are any new starter validation errors
Granted Roles	Select the relevant role or roles for the user

Select the **Next** button to move to the **Edit Accessible Payrolls** page.

## Edit Accessible Payrolls Page

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

### Edit Accessible Employers

Username	demouser
Email Address	support@i-connectdata.co.uk
Created By	employeruser
Account Status	DISABLED
Proceed if New Starter Validation Errors Detected	DISABLED
Proceed if Existing Member Validation Errors Detected	DISABLED
Granted Roles	Manager Document Uploader Reporter Upload

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

**Accessible Employers:**

Employer  ⓘ

**Target System - HDA-Live**

Employer / MPP		
<input type="checkbox"/> Altrincham Town Council	<input type="checkbox"/> JD Payroll Services	<input type="checkbox"/> South Hale Dist Council
<input type="checkbox"/> Timperley Parish Council	<input checked="" type="checkbox"/> Trafford Park Trust	<input type="checkbox"/> Uttlesford District Council

**Next**

### Edit Accessible Payrolls page

Select the **Next** button to proceed to the **Confirm User** page.

## Confirm User Page

Select the **Save** button to save changes made to the user account.

### Confirm User

The user will be saved with the details below.

<b>Username</b>	demouser
<b>Email Address</b>	support@i-connectdata.co.uk
<b>Created By</b>	employeruser
<b>Account Status</b>	DISABLED
<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 Document Uploader Reporter Upload
<b>Last Logged In</b>	
<b>Accessible Employers:</b>	
<b>Target System - HDA-Live</b>	
<b>Employer / MPP</b>	Trafford Park Trust
<b>Accessible Payrolls:</b>	User has access to all payrolls for the above employers.

**Save** **Back** **Cancel**

### Confirm User page

A message is displayed stating that the details have been amended successfully.

✓ The details for the user have been amended successfully.

### Success message



## Resetting a User's Password

Select 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.

<b>Username</b>	demouser
<b>Email Address</b>	support@i-connectdata.co.uk
<b>Created By</b>	demoaa
<b>Account Status</b>	DISABLED
<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 Human Resources Document Uploader Reporter Upload
<b>Last Logged In</b>	12-09-2022 00:00:00

**Accessible Employers:**

**Target System - HDA-Live**

<b>Employer / MPP</b>
Trafford Park Trust

**Accessible Payrolls:** User has access to all payrolls for the above employers.

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

### User Details page

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

✓ The password for the user has been reset successfully.

### Password reset success message





# Create User Wizard

Select the **Create User** button on the navigation bar to create a new user.



## Create User button

The **Create User** 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.

**Username**

**Email Address**

**Disable Proceed if New Starter Validation Errors Detected**

**Disable Proceed if Existing Member Validation Errors Detected**

**Granted Roles**

**Manager**

**Reporter**

**Upload**

**Next**

## Create User page

Choose a username (minimum of eight characters), enter the new user's email address, and select the relevant roles. Then select the **Next** button to grant access to payrolls.

### Edit Accessible Payrolls

**Username** testuser

**Email Address** test.email@employer.co.uk

**Created By** employeruser

**Account Status** DISABLED

**Proceed if New Starter Validation Errors Detected** DISABLED

**Proceed if Existing Member Validation Errors Detected** DISABLED

**Granted Roles** Reporter

**Last Logged In**

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

**Accessible Payrolls:**

Payroll

**Target System - HDA-Live**

Employer / MPP	Linked Employers	Payroll
Altrincham Town Council		<input checked="" type="checkbox"/> ATC Monthly
JD Payroll Services	0 out of 10 Selected	<input type="checkbox"/> JD Payroll Monthly
JD Payroll Services		<input type="checkbox"/> JD Weekly
Timperley Parish Council		<input type="checkbox"/> TPC Monthly
Trafford Park Trust	AGGS AGSB Blessed Thomas Holford	<input checked="" type="checkbox"/> TPT Monthly
Uttlesford District Council	Brooklands Primary School	<input checked="" type="checkbox"/> UDC Monthly

**Next**

## Edit Accessible Payrolls page

Grant access to the relevant payroll by ticking the checkboxes, then select the **Next** button to move to the **Confirm User** page.

**Confirm User**

The user will be saved with the details below.

**Username** testuser  
**Email Address** test.email@employer.co.uk  
**Created By** employeruser  
**Account Status** DISABLED  
**Proceed if New Starter Validation Errors Detected** DISABLED  
**Proceed if Existing Member Validation Errors Detected** DISABLED  
**Granted Roles** Reporter  
**Last Logged In**  
**Accessible Employers:**  
**Accessible Payrolls:**

**Target System - HDA-Live**

Employer / MPP	Payroll
Altrincham Town Council	ATC Monthly
Trafford Park Trust	TPT Monthly
Uttlesford District Council	UDC Monthly

**Save** **Back** **Cancel**

**Confirm User page**

Select the **Save** button to confirm the user. A confirmation message stating that the details have been created successfully is displayed.

✓ The details for the new user have been created successfully.

**Details created successfully message**

# User Deletion

Select the relevant user from the **User List** page by selecting the **View** button. The **User Details** page will be displayed.

**User Details**

This page displays the details of the selected user account.

**Username** demohr01  
**Email Address** colin.lewis@outlook.com  
**Created By** demoaa  
**Account Status** DISABLED  
**Proceed if New Starter Validation Errors Detected** ENABLED  
**Proceed if Existing Member Validation Errors Detected** ENABLED  
**Granted Roles** Human Resources  
Reporter

**Last Logged In**

**Accessible Employers:**

**Accessible Payrolls:**

**Target System - HDA-Live**

Employer / MPP	Payroll
Altrincham Town Council	ATC Monthly
Timperley Parish Council	TPC Monthly
Trafford Park Trust	TPT Monthly
Uttlesford District Council	UDC Monthly

**Edit User** **Reset Password** **Delete**

**User Details page**

Select the **Delete** button to delete the user. A confirmation box will then be displayed, asking if you are sure you want to delete the user.

**demo-wfe.services.aquilaheywood.co.uk says**

Are you sure you want to delete this user?

**OK** **Cancel**

**Delete user confirmation box**

Select the **OK** button to complete the deletion.



## Want to Know More?

Look at these guides:

- [i-Connect File Upload Guide](#)
- [i-Connect Onboarding Guide](#)
- [i-Connect Online Return Guide](#)
- [i-Connect Reporting Guide](#)