



i-Connect

# **i-Connect Login Guide**

Setting up user accounts



01 July 2019

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Published by i-Connect Software Limited

Hamilton House Church Street Altrincham Cheshire WA14 4DR

0161 613 4200

[www.i-connectdata.co.uk](http://www.i-connectdata.co.uk)

[documentation@heywood.co.uk](mailto:documentation@heywood.co.uk)

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# 1 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 your pension fund.

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


## 1.1 Who to contact

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

## 2 First login

You will receive an email from i-Connect with details of your i-Connect username and a single use hyperlink. Click on 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 [john.dale@heywood.co.uk](mailto:john.dale@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: empflake3**

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

[http://10.10.62.24:19090/web\\_front\\_end/signup?key=7115fde0-c737-426c-8a9f-f51cd39ca8dc](http://10.10.62.24:19090/web_front_end/signup?key=7115fde0-c737-426c-8a9f-f51cd39ca8dc)

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/>

Kind Regards,

Colin Lewis  
Managing Director  
i-Connect Software Limited

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

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

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

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Click 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 and include a lowercase letter, an uppercase letter, a number and a special character.

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

[> Create 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 eight and 30 characters in length and include a minimum of:

- One lower-case letter
- One digit
- One upper-case letter
- One special character, for example, '#' or '\*'

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

### 3 Subsequent logins

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

**Login**

Already Registered? Login using your credentials below.

qatfiake3  
.....

> Login

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.

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.

#### 3.1 End-user license Agreement

**End-User License Agreement**

Last updated: 10/01/2019

i-Connect is Software as a Service which intelligently manages the data flow from an employer's payroll system to the pensions administrator. The employer submits a monthly data file from payroll and i-Connect determines and automatically processes all the communications required with the Administering Authority.

This service is provided to employers if its Pension Fund Administrator is a client of i-Connect Software Limited.

This service is provided under the terms of this End User License Agreement ("Agreement") please read carefully before clicking the "I AGREE" button.

By clicking the "I AGREE" button, you are agreeing to be bound by the terms and conditions of this Agreement.

I confirm that I have read and agree to the above terms and conditions of this Agreement.

> I Agree

## i-Connect Login Guide


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. Click on the 'I confirm that I have read and agree to the above terms and conditions of this Agreement.', then click the 'I Agree' button.





## 4 i-Connect Dashboard


The i-Connect Dashboard is displayed when you log in:


**Dashboard**


  
**Upload**

  
**Reports**

  
**Employer**

  
**Administering Authority**

  
**User Management**

  
**History**

**Recent Activities**

File Name	Period End Date	Expected Submission Date	Submission Date	Submission Type	Status
N:\iConnect\Product\CQA\Genesee Release\Test Files\12 Months\June 2018.csv	30-06-2018	30-06-2018	08-05-2019 11:17:16	Payroll Upload	Complete

**Submission Statistics**

Total Number of Payroll Members Tracked by i-Connect		11
Omitted Payroll Members (present on a previous submission, and no leaver event processed)		0

Payroll Members submitted this period	11	Payroll Members in Error	0	Accepted for Processing	11
Pensionable Pay (Period)	£34,083.33	Employee Main Contributions (Period)	£1,082.50	AVCs (YTD)	£332.28
Main CARE Pay (YTD)	£51,000.00	Employee Main Contributions (YTD)	£3,247.50	Add Conts/ARCs (YTD)	£365.28
50/50 CARE Pay (YTD)	£51,249.99	Employee 50/50 Contributions (Period)	£845.63	Shared Cost APCs (Period)	£0.00
		Employee 50/50 Contributions (YTD)	£845.63	Shared Cost APCs (YTD)	£0.00
		Employer Contributions (Period)	£5,964.58	Employee APCs (Period)	£0.00
		Employer Contributions (YTD)	£17,893.74	Employee APCs (YTD)	£0.00

Submitted By User: gmpf      Processed By User: gmpf

! Tolerance failures were detected and confirmed by the user to proceed with submission processing. [Click here to view the failures.](#)

Events	Total	Pending	Submitted	Completed	Failures	Errors	Suppressed	Progress
<b>New Starter</b>	1	0	0	1	0	0	0	<div style="width: 100%; height: 10px; background-color: green;"></div>
Opt In	0	0	0	0	0	0	0	
<b>Salary</b>	11	0	0	11	0	0	0	<div style="width: 100%; height: 10px; background-color: green;"></div>
<b>Contributions</b>	11	0	0	11	0	0	0	<div style="width: 100%; height: 10px; background-color: green;"></div>
<b>Additional Contributions</b>	11	0	0	11	0	0	0	<div style="width: 100%; height: 10px; background-color: green;"></div>
<b>CARE Pay</b>	11	0	0	11	0	0	0	<div style="width: 100%; height: 10px; background-color: green;"></div>
Service	0	0	0	0	0	0	0	
<b>Service Break</b>	2	0	0	2	0	0	0	<div style="width: 100%; height: 10px; background-color: green;"></div>
<b>Member Details Update</b>	1	0	0	1	0	0	0	<div style="width: 100%; height: 10px; background-color: green;"></div>
<b>Member Address Update</b>	11	0	0	0	0	11	0	<div style="width: 100%; height: 10px; background-color: red;"></div>
Works Address Update	0	0	0	0	0	0	0	
Opt Out	0	0	0	0	0	0	0	
<b>Leaver</b>	1	0	0	1	0	0	0	<div style="width: 100%; height: 10px; background-color: green;"></div>

## i-Connect Login Guide

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:



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**



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**

## 5 My Account page

Click on 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 at the bottom of the page.

<b>Username</b>	empflake3
<b>Email Address</b>	john.dale@heywood.co.uk
<b>Created By</b>	qatflake
<b>Account Status</b>	ACTIVE
<b>Proceed if New Starter Validation Errors Detected</b>	ENABLED
<b>Proceed if Existing Member Validation Errors Detected</b>	ENABLED
<b>Granted Roles</b>	Manager Reporter Upload

**Accessible Employers:**

Target System	Employer
ICNCT-FLAKE	Mid Devon District Council

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

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

### 5.1 Changing your email address

Click the 'Change My Email Address' button, enter your new email address and click the Save Email Address button:

**Change Email Address**

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

**Email Address**

[> Save Email Address](#)

### 5.2 Changing your password

Click 'Change My Password'. Enter your current password followed by your new password and click the 'Save New 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**

**New Password**

**Retype New Password**

[> Save New Password](#)

## 6 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.

### 6.1 Roles

<b>Manager</b>	Gives a user access to User Management on the Dashboard. This is used for creating and editing users.
<b>Reporter</b>	Gives a user access to Reporting on the Dashboard.
<b>Upload</b>	Allows a user to upload payroll files and to proceed or cancel processing of those files. This role is also required for the member matching phase.
<b>Default Permissions for the Reporter and Upload Roles</b>	Users can view payroll submission history and the status of the latest upload, in addition they can view the payroll/employer/administering authority details and contact other users via the Contact Users page. Users can also change their own password and email address.

### 6.2 User List page

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

<b>User List</b>					
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	
LotusElan	devtest10@heywood.co.uk	iconnecttower	Administering Authority Manager Reporter Upload	DISABLED	<a href="#">View</a>
JowettJupiter	devtest10@heywood.co.uk	iconnecttower	Administering Authority Manager Reporter Upload	ACTIVE	<a href="#">View</a>
DaimlerDart	devtest10@heywood.co.uk	iconnecttower	Administering Authority Manager Reporter Upload	ACTIVE	<a href="#">View</a>
WolseleyHornet	devtest10@heywood.co.uk	iconnecttower	Administering Authority Manager Reporter Upload	ACTIVE	<a href="#">View</a>
FordPrefect	devtest10@heywood.co.uk	iconnecttower	Administering Authority Manager Reporter Upload	DISABLED	<a href="#">View</a>
MGMagnet	devtest10@heywood.co.uk	iconnecttower	Administering Authority Manager Reporter Upload	DISABLED	<a href="#">View</a>
AustinHealey	devtest10@heywood.co.uk	iconnecttower	Administering Authority Manager Reporter Upload	ACTIVE	<a href="#">View</a>
TriumphStag	devtest10@heywood.co.uk	iconnecttower	Manager Reporter Upload	ACTIVE	<a href="#">View</a>

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

## 6.3 User Details page

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

### User Details

This page displays the details of the selected user account.

Username	TriumphStag
Email Address	devtest10@heywood.co.uk
Created By	iconnecttower
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
Heywood-Test	Swan Housing Association

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

> Edit User
> Reset Password

## 6.4 Edit User page

Select the relevant checkbox to disable the selected user's account, 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	TriumphStag
Email Address	<input style="width: 90%;" type="text" value="devtest10@heywood.co.uk"/>
Created By	iconnecttower
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"/>

> Next

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The following options are available:

- **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

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

## 6.5 Edit Accessible Payrolls page

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

### Edit Accessible Employers

Username	TriumphSlag
Email Address	devtest10@heywood.co.uk
Created By	iconnecttower
Account Status	ACTIVE
Proceed if New Starter Validation Errors Detected	ENABLED
Proceed if Existing Member Validation Errors Detected	ENABLED
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
Heywood-Live	<input type="checkbox"/> REDBRIDGE CHL <input type="checkbox"/> Tower District Council
Heywood-Test	<input checked="" type="checkbox"/> ECovert FM Ltd <input checked="" type="checkbox"/> Swan Housing Association <input type="checkbox"/> Tower District Council

[Next](#)

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

## 6.6 Confirm User page

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

**Confirm User**

The user will be saved with the details below.

Username	TriumphStag
Email Address	devtest10@heywood.co.uk
Created By	iconnecttower
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
Heywood-Test	ECovert FM Ltd Swan Housing Association

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

> Save

The following message is displayed:

i User details have been amended successfully.

## 6.7 Resetting a user's password

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

**Confirm User**

The user will be saved with the details below.

Username	TriumphStag
Email Address	devtest10@heywood.co.uk
Created By	iconnecttower
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
Heywood-Test	ECovert FM Ltd Swan Housing Association

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

> Save

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 the user's email address.

 The password for this user has been reset successfully.

## 6.8 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="ReliantRobin"/>
<b>Email Address</b>	<input type="text" value="reliant.robin@towerdc.gov.uk"/>
<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 eight characters), enter the new user's email address and select the relevant roles. Then click the 'Next' button to grant access to payrolls:



### Edit Accessible Payrolls

**Username** ReliantRobin  
**Email Address** reliant.robin@towerdc.gov.uk  
**Created By** iconnecttower  
**Account Status** ACTIVE  
**Proceed if New Starter Validation Errors Detected** DISABLED  
**Proceed if Existing Member Validation Errors Detected** DISABLED  
**Granted Roles** Reporter Upload

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

Accessible Payrolls:

Target System	Employer	Payroll
Heywood-Live	Tower District Council	<input checked="" type="checkbox"/> EMPLIVE
	ECovert FM Ltd	<input type="checkbox"/> E Covert Ltd
Heywood-Test	Swan Housing Association	<input type="checkbox"/> Swan Housing
	Tower District Council	<input type="checkbox"/> EPM Schools
		<input type="checkbox"/> Resource Link

[Next](#)

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

The following page will be displayed:

### Confirm User

The user will be saved with the details below.

**Username** ReliantRobin  
**Email Address** reliant.robin@towerdc.gov.uk  
**Created By** iconnecttower  
**Account Status** DISABLED  
**Proceed if New Starter Validation Errors Detected** DISABLED  
**Proceed if Existing Member Validation Errors Detected** DISABLED  
**Granted Roles** Reporter Upload

**Accessible Employers:**  
**Accessible Payrolls:**

Target System	Employer	Payroll
Heywood-Live	Tower District Council	EMPLIVE

[Save](#)

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

**i** User credentials have been created successfully.

## 7 Want to know more?

Look at these guides:

- Reporting
- Onboarding
- Online Return
- File Upload

