



i-Connect

i-Connect Login Guide

Setting up user accounts



29 May 2020

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1 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.

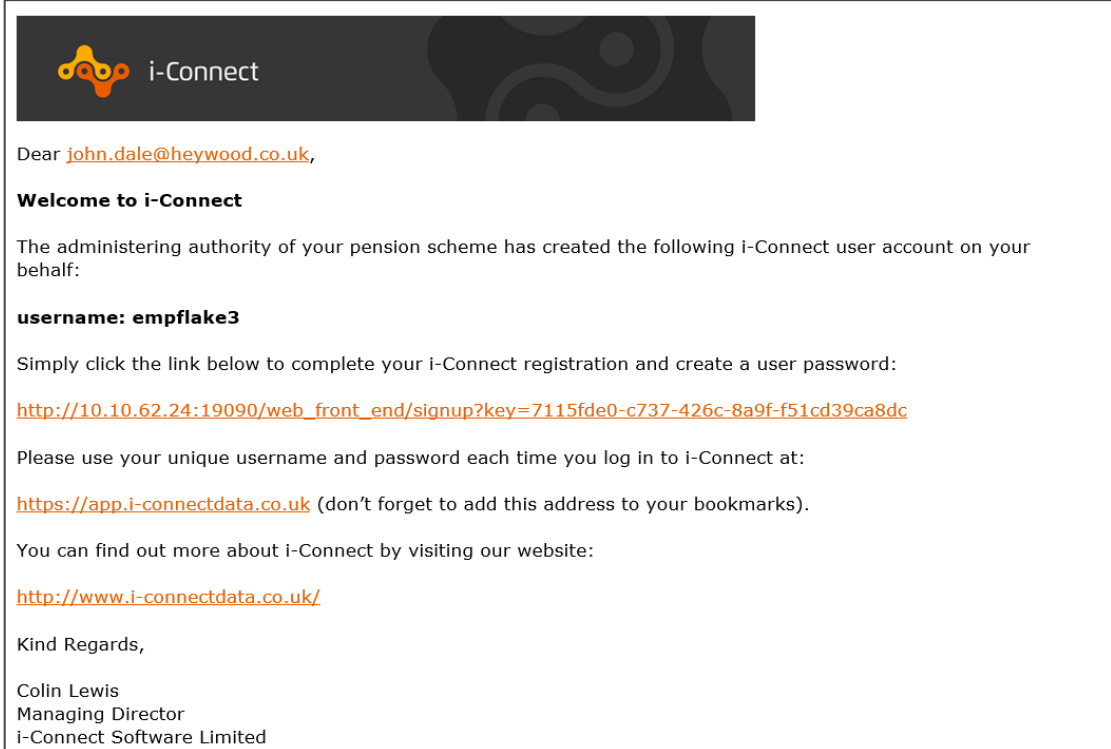
1.1 Who to Contact

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.



The screenshot shows an email header with the i-Connect logo and the recipient's email address, john.dale@heywood.co.uk. The body of the email includes a welcome message, the username 'empflake3', a registration link, login instructions, and contact information for Colin Lewis, Managing Director of i-Connect Software Limited.

 i-Connect

Dear 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

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).

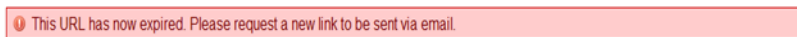
You can find out more about i-Connect by visiting our website:

<http://www.i-connectdata.co.uk/>

Kind Regards,

Colin Lewis
Managing Director
i-Connect Software Limited

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

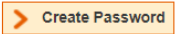
Please enter a password for your account.

Passwords must:

- be a minimum of 8 characters
- 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

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:

@ \$! % * ? &

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':

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) to reset your password.

3.1 End-User License Agreement

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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 Payroll Dashboard

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

Payroll Dashboard

File Upload

Upload & view submissions

Employer

Manage employers and payrolls

Reports

Generate and view reports

Users

Manage users and permissions

History

View submission history

Recent Activities

File Name	Period End Date	Expected Submission Date	Submission Date	Submission Type	Status
IC_BAU_30042020_Monthly.csv	30-04-2020	30-04-2020	14-05-2020 15:28:11	Payroll Upload	Complete

Submission Statistics

Total Number of Payroll Members Tracked by i-Connect 20

i Omitted Payroll Members (present on a previous submission, and no leaver event processed) 1

Payroll Members submitted this period	19	Payroll Members in Error	0	Accepted for Processing	19
Pensionable Pay (Period)	£54,023.24	Employee Main Contributions (Period)	£3,787.74	AVCs (YTD)	£78.96
Main CARE Pay (YTD)	£54,023.43	Employee Main Contributions (YTD)	£3,787.74	Add Contri/ARCs (YTD)	£0.00
50/50 CARE Pay (YTD)	£0.00	Employee 50/50 Contributions (Period)	£45.86	Shared Cost APCs (Period)	£336.03
		Employee 50/50 Contributions (YTD)	£45.86	Shared Cost APCs (YTD)	£336.03
		Employer Contributions (Period)	£9,454.09	Employee APCs (Period)	£112.01
		Employer Contributions (YTD)	£9,454.09	Employee APCs (YTD)	£112.01

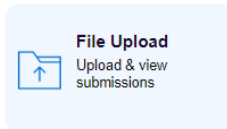
Submitted By User: demoemployer
Processed By User: demoemployer

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

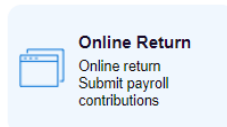
Events	Total	Pending	Submitted	Completed	Failures	Errors	Suppressed	Progress
New Starter	0	0	0	0	0	0	0	
Opt In	0	0	0	0	0	0	0	
Service	8	0	0	0	0	0	8	<div style="width: 100%; height: 10px; background-color: #90EE90;"></div>
Salary	19	0	0	19	0	0	0	<div style="width: 100%; height: 10px; background-color: #90EE90;"></div>
Contributions	19	0	0	19	0	0	0	<div style="width: 100%; height: 10px; background-color: #90EE90;"></div>
Additional Contributions	2	0	0	2	0	0	0	<div style="width: 100%; height: 10px; background-color: #90EE90;"></div>
CARE Pay	19	0	0	19	0	0	0	<div style="width: 100%; height: 10px; background-color: #90EE90;"></div>
Service Break	1	0	0	1	0	0	0	<div style="width: 100%; height: 10px; background-color: #90EE90;"></div>
Member Details Update	4	0	0	4	0	0	0	<div style="width: 100%; height: 10px; background-color: #90EE90;"></div>
Member Address Update	1	0	0	1	0	0	0	<div style="width: 100%; height: 10px; background-color: #90EE90;"></div>
Works Address Update	0	0	0	0	0	0	0	
Opt Out	0	0	0	0	0	0	0	
Leaver	1	0	0	0	0	0	1	<div style="width: 100%; height: 10px; background-color: #90EE90;"></div>

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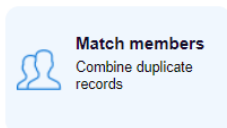
The Dashboard is the i-Connect home page and is displayed to all users. The options available on the Dashboard depends on the role allocated to you by your pension fund or manager:



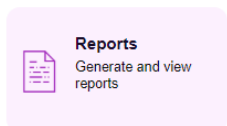
Load payroll extract files into i-Connect and manage their progress



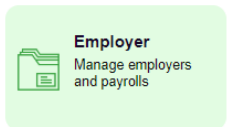
Submit data manually into i-Connect



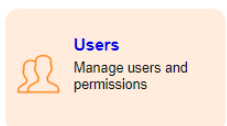
Guides you through the member matching process for the selected payroll



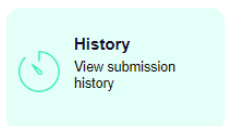
Reporting tools for administrative and compliance purposes



Employer specific options such as contact detail maintenance



Facilities to create and manage users



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.

Username	empflake3
Email Address	john.dale@heywood.co.uk
Created By	qatflake
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
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 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	<input type="password"/>
New Password	<input type="password"/>
Retype New Password	<input type="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

Manager	Gives a user access to User Management on the Dashboard. This is used for creating and editing users.
Reporter	Gives a user access to Reporting on the Dashboard.
Upload	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.
Default Permissions for the Reporter and Upload Roles	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:

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	
LotusElan	devtest10@heywood.co.uk	iconnecttower	Administering Authority Manager Reporter Upload	DISABLED	View
JowetJupiter	devtest10@heywood.co.uk	iconnecttower	Administering Authority Manager Reporter Upload	ACTIVE	View
DaimlerDart	devtest10@heywood.co.uk	iconnecttower	Administering Authority Manager Reporter Upload	ACTIVE	View
WolseleyHornet	devtest10@heywood.co.uk	iconnecttower	Administering Authority Manager Reporter Upload	ACTIVE	View
FordPrefect	devtest10@heywood.co.uk	iconnecttower	Administering Authority Manager Reporter Upload	DISABLED	View
MGMagnet	devtest10@heywood.co.uk	iconnecttower	Administering Authority Manager Reporter Upload	DISABLED	View
AustinHealey	devtest10@heywood.co.uk	iconnecttower	Administering Authority Manager Reporter Upload	ACTIVE	View
TriumphStag	devtest10@heywood.co.uk	iconnecttower	Manager Reporter Upload	ACTIVE	View

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, reset their password or delete them.

User Details

This page displays the details of the selected user account.

Username	Bob Down
Email Address	john.dale@aquilaheywood.co.uk
Created By	demoemployer
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-Live	Altrincham Town Council
	Sale Town Council
	Timperley Parish Council
	Trafford Park Trust

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

> Edit User
> Reset Password
> Delete

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 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.

i 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.

Username
Email Address
Disable Proceed if New Starter Validation Errors Detected
Disable Proceed if Existing Member Validation Errors Detected
Granted Roles
 Administering Authority
 Manager
 Reporter
 Upload

[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](#)

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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:

Target System	Employer	Payroll
Heywood-Live	Tower District Council	EMPLIVE

Accessible Payrolls:

Accessible Payrolls:

> Save

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

i User credentials have been created successfully.

6.9 User Deletion

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

User Details

This page displays the details of the selected user account.

Username	Rex Harrison
Email Address	rex.harrison@drdoolittle.com
Created By	jdaleshrops
Account Status	DISABLED
Proceed if New Starter Validation Errors Detected	ENABLED
Proceed if Existing Member Validation Errors Detected	ENABLED
Granted Roles	Manager Reporter Upload

Accessible Employers:

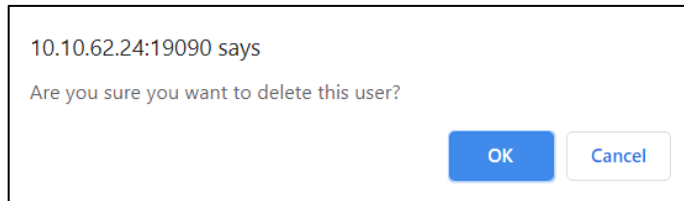
Target System	Employer
Heywood-Live	Altrincham Town Council

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

> Edit User > Reset Password > Delete

Click the 'Delete' button to delete the user, the following confirmation box will be displayed:

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Click the 'OK' button to complete the deletion.

7 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](#)

