File Sharing Portal (FSP)

User Guide

For scheme sponsors, trustees and their advisers.

Fidelity INTERNATIONAL

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Overview

The File Sharing Portal (FSP)is a secure data exchange that allows sensitive data files to be shared securely. This document will guide you through how to upload and download documents via the portal.

Please note that for standard regular file submissions you should continue to use the Submit File functionality from the Administration menu on PlanViewer

Access

The File Sharing Portal is a secure way of sharing data and adhoc files with Fidelity. If you have access to PlanViewer you will find the link conveniently located under your Administration tab. Clicking on the FSP link will take you directly to the File Sharing Portal screen, where you can effortlessly upload and download files.

If you do not have access to PlanViewer please contact the Service delivery team on service.delivery@fil.com who can arrange access.

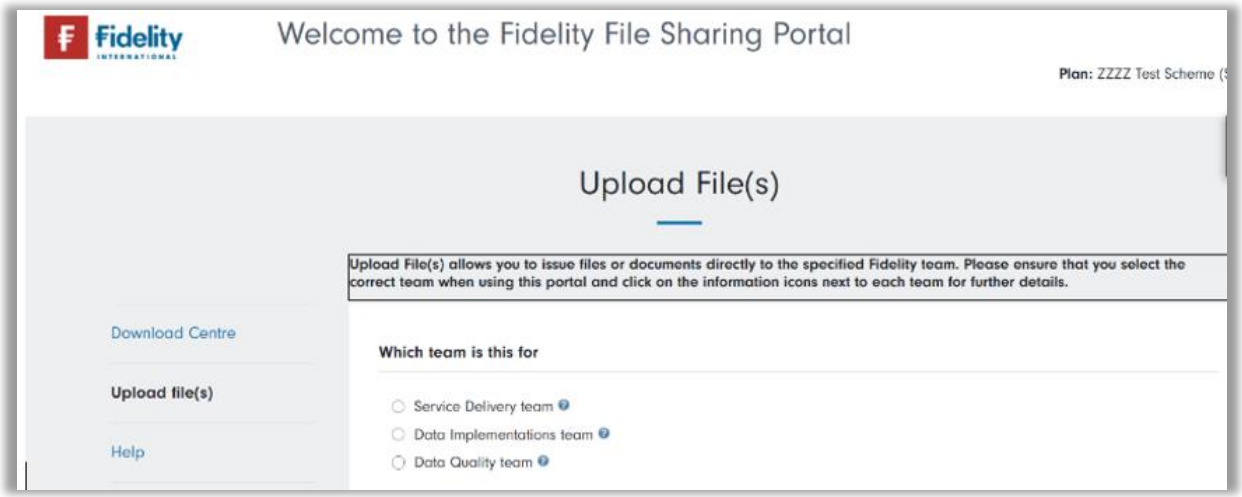
Uploading and Downloading Files

When logging in you will be taken directly to the File Download Centre which is where files can be uploaded and downloaded between you and Fidelity.

Uploading files

- Select 'Upload file(s) on the left-hand side of the screen:

- Select the relevant team you wish to send the data/document to:



If you are unsure which team to send the data to, click on the to icon next to each and this will provide some guidance:

Data Implementation Team: For Scheme implementations or bulk transfers

Service Delivery Team: When the Scheme is in BAU, this is used to send data or documentation

Data Quality Team: When the Scheme is in BAU, this would be used to share missing data if you have been contacted by the data team

- Once you have selected the required team, select 'Browse' to locate and upload your file:

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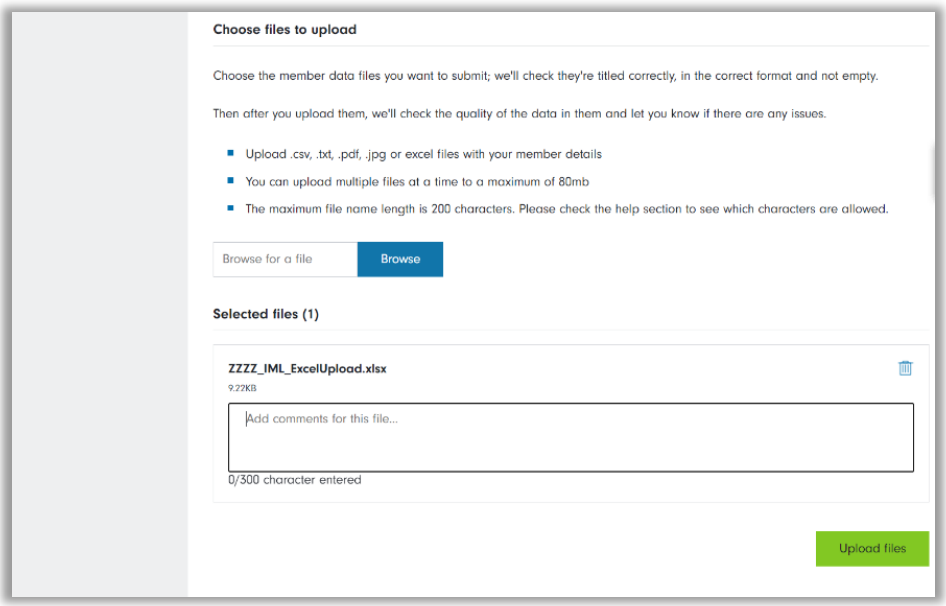

- Once you have selected your file, it will show below the file that you have selected to upload to the portal.
- If you wish to add a comment, this can be inserted in the box below before clicking ‘Upload files’.

The file will start to upload and can take up to 10 minutes depending on the size of the file.

- Once the file has been uploaded, you will see a notification confirming that the files have been uploaded successfully
- You can upload more files if required by clicking ‘Add more files’.

The relevant team will receive an email communication to confirm that a file has been uploaded to the portal.

*NOTE - If there are any issues with uploading your file, please refer to the **Errors and Warnings** Section.*

Downloading files

- If you have received a file via the portal, you will receive an email to notify you.
- You can access this file selecting the ‘Download Centre’

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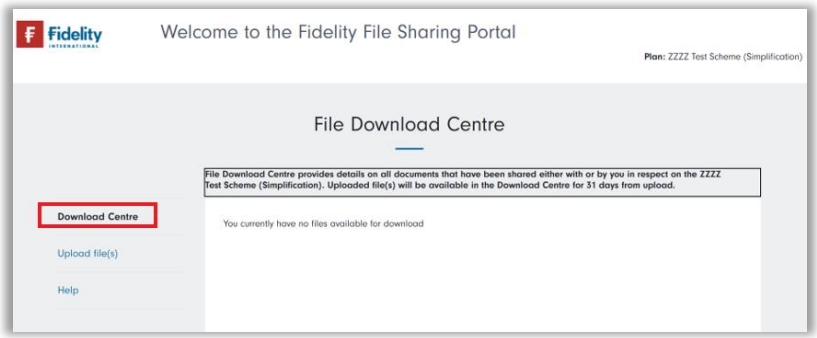
You will now be taken to the File Download Centre

Note - if the username was amended this will not show until the next time you log in.



- Once you have opened the **Download Centre**, you will see a list of all documents which have been exchanged which can be identified by File Name, Date and Updated by.

Note, the file types are driven by Fidelity uploaded and will be one of the following:

Initial member files: contains member data you have uploaded

Template files: uploaded by us which show the list of data fields required for each member.

Data queries: uploaded by us, these will be questions we have about the data you uploaded.

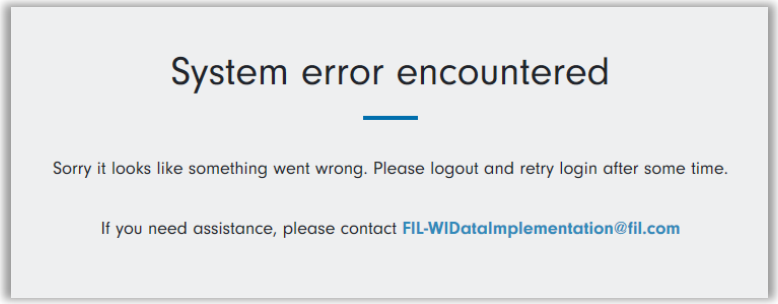
- By selecting **'Download'** you cand download these files to your desktop.

NOTE - all files will automatically be made unavailable from the portal 31 days after the upload date.

Files Restrictions

- The file cannot be blank
- Files must be in a .csv, .txt, .pdf, .jpeg or excel formats
- A maximum of 80mb can be uploaded at one time
- The maximum filename length is 200 characters. You can only use letters, numbers and underscore when naming a file.

Should any errors occur throughout the upload or download process the following screen will show:



Please contact the relevant team shown who will be able to help you.

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