

File Sharing Portal (FSP)

User Guide

For scheme sponsors, trustees and their advisers.

Contents

	Page
Overview	3
Logging in for the first time	3
Uploading and downloading files	4
Uploading files	4
Downloading files	6
Error warnings	7
Files restrictions	7
Forgotten password	7

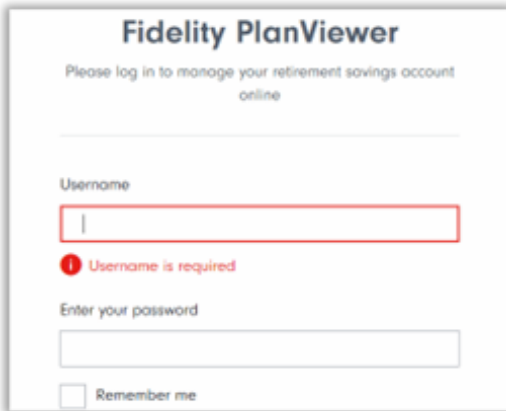
Overview

The Fidelity File Sharing portal is a secure data exchange that allows sensitive data files to be shared securely. This document will guide you through how set up your access, and how to upload and download documents via the portal.

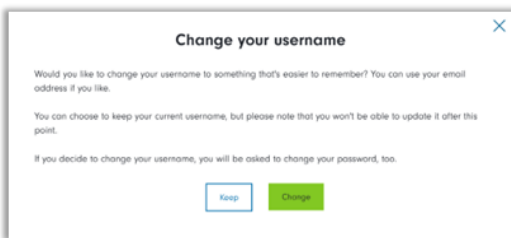
Logging in for the first time

Please log in using the link below and the details provided by your Fidelity contact:

<https://www.planviewer.fidelity.co.uk/planviewer/DisplayLogin.do>



You will then receive a prompt to ask if you wish to change your username:



If you select 'Change', you will be prompted to amend your Username as well as the password:



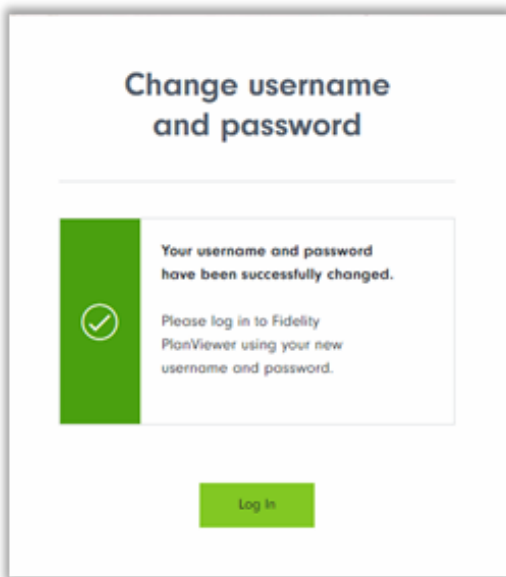
If you select 'Keep' you will be prompted to amend your Password only.

Note - the requirements for a new password are as follows:

- Must contain any three of the following:
 - Lower case, i.e., a-z
 - Numbers, i.e., 0-9
 - Upper case letters, i.e., A-Z
 - Allowable symbols, i.e., ! £ \$ * = [] { } @ # ?
 - Must be between 8 and 25 characters long

Please note that this will be the only time you will have an option to change your username

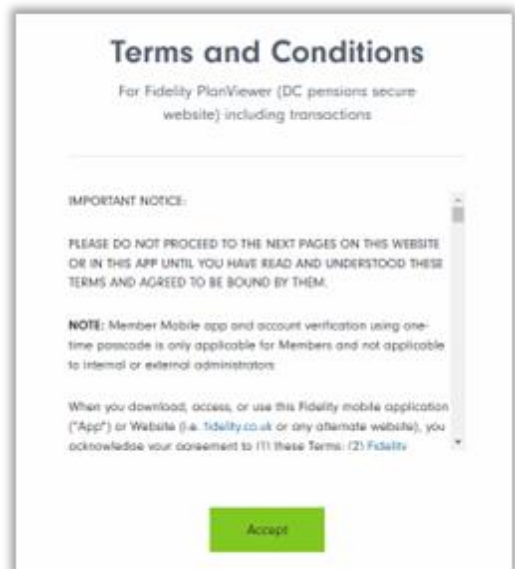
- Click 'Confirm' when this has been changed
- You will now be prompted to login to the File Sharing Portal



- Click 'Log in' and sign in with your new Username and Password
- The first time you log in you will need to accept the **Terms and Conditions** before proceeding:

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.

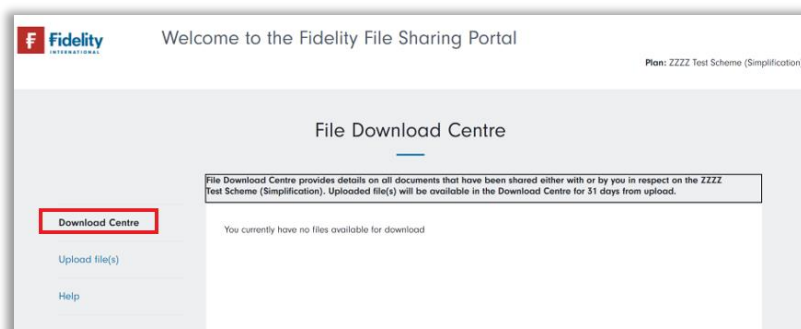


Uploading and Downloading Files

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

Uploading files

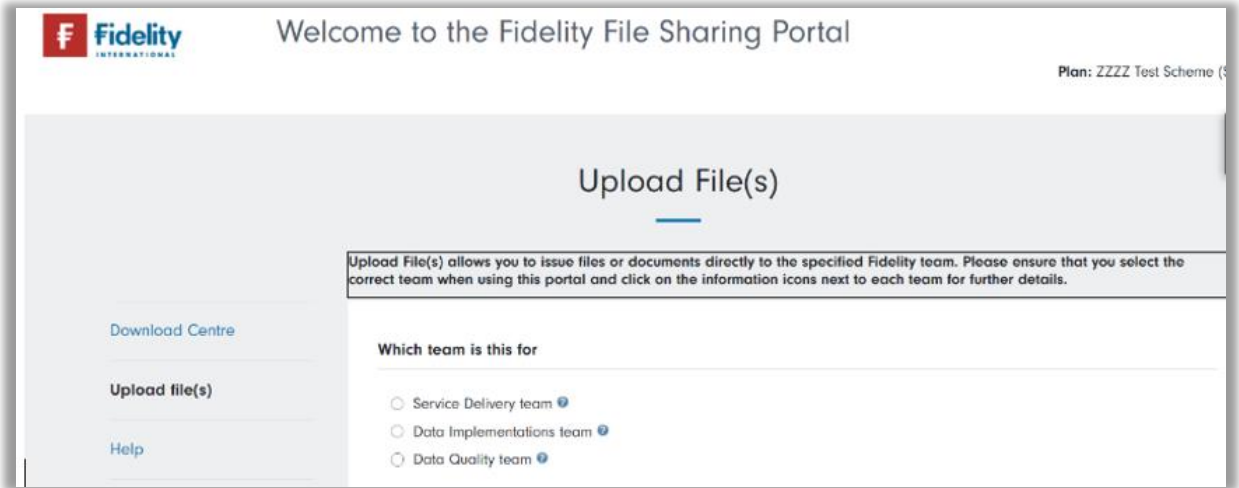
- Select 'Upload file(s)' on the left-hand side of the screen:




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.

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



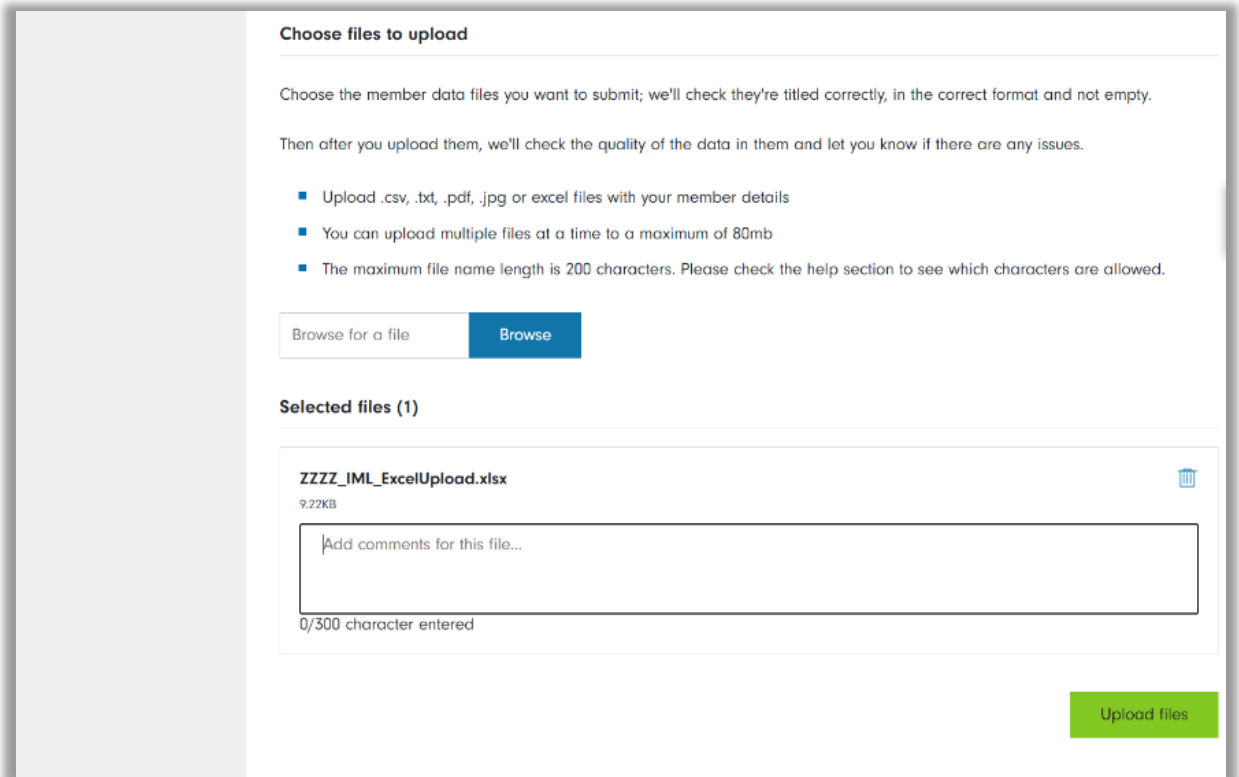
If you are unsure which team to send the data to, click on the  next to each team and this will provide some guidance:

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:



- 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.

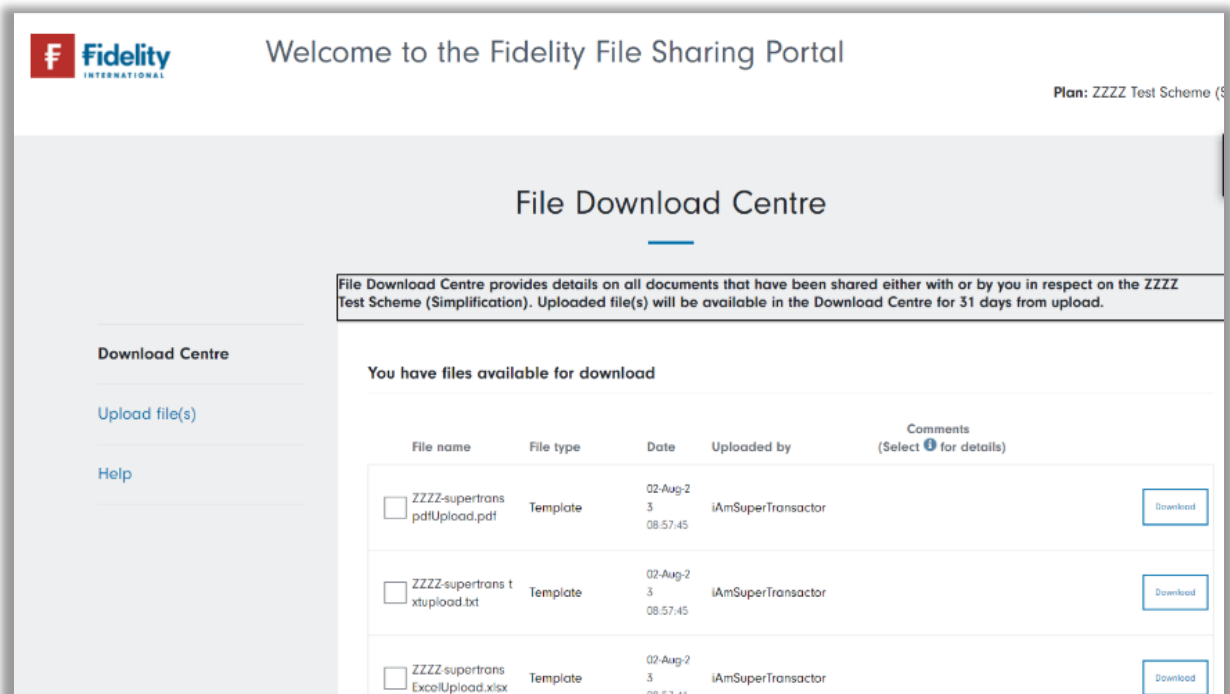
- Once the file has been uploaded, you will see a notification confirming that the files have been uploaded successfully
- You can upload more files if required by clicking 'Add more files'.

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'



- 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 can download these files to your desktop.

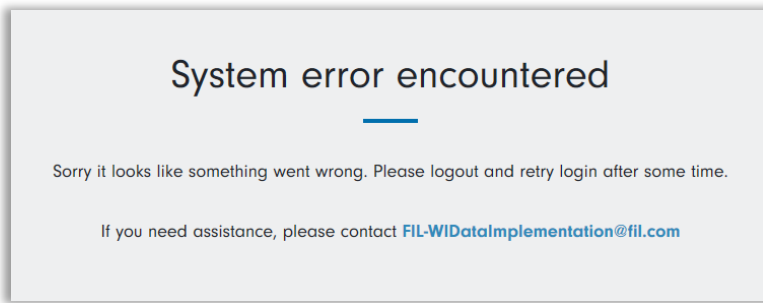
NOTE - all files will automatically be made unavailable from the portal 31 days after the upload date.

Errors and Warnings

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:

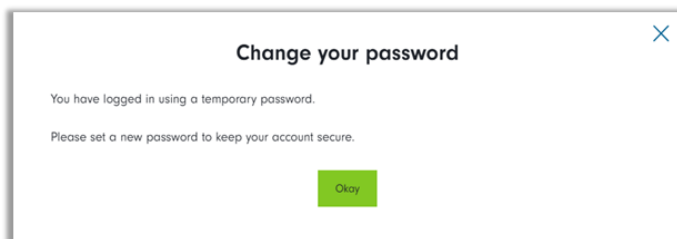


Please contact the relevant team shown who will be able to help you.

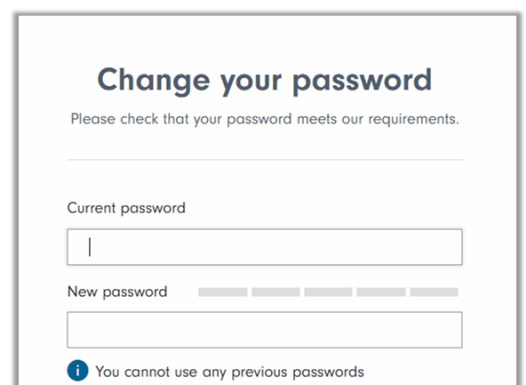
Forgotten Password

If you forget your password, please:

- Contact your data contact or Service Delivery Manager team who will complete a password reset and advise you of the new password.
- Login with your original username and new password. Once you have logged in, you will be prompted that you will now be able to reset your password



- Update your password by inputting the temporary current password and confirming your new password



For schemes sponsors, trustees, their advisers and consultants use only and should not be relied upon by individual investors. This is for information purposes only and the views contained in it are not to be taken as advice or a recommendation for any course of action to buy or sell any investment product. This market analysis is based on our interpretation of the current market conditions and any forward-looking statements are based on Fidelity International's current expectations and projections and are subject to change without notice.

Issued by FIL Life Insurance Limited (Reg No. 3406905). Authorised in the UK by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Registered Office at: Beech Gate, Millfield Lane, Lower Kingswood, Tadworth Surrey, KT20 6RP. Fidelity, Fidelity International, the Fidelity International logo and the F symbol are trademarks of FIL Limited. WI 0923/WFxxxxxxx/CSO/0924