File Sharing Portal (FSP) User Guide

For scheme sponsors, trustees and their advisers.

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Overview

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

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

Please	og in to manage your retirement savings accour online
Usernam	10
🚺 User	name is required
Enter you	# password
Ren	nember me

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:

username & password	
Please choose a unique username and check that you passward meets our requirements.	vr
You can update your password in future, but you will a be able to change your username ofter this point.	null
New usemame	
Resse diases a commente este entretan de cheraches. No con su por present anal acteria su por surmana.	
Current possword	
New possword	_
You connot use any previous posswords	

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., ! f \$ * = [] { } @ # ?
 - 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



Change username and password	
Your username and password have been successfully changed. Please log in to Fidelity PlanViewer using your new username and password.	 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:
Log in	Terms and Conditions For Fidelity PlanViewer (DC pensions secure website) including transactions
You will now be taken to the File Download Centre	IMPORTANT NOTICE:
Note - if the username was amended this will not sh until the next time you log in.	OW NOTE: Member Mobile app and account vertication using one- time paracade is anly applicable for Members and not applicable to internal or external administrators. When you download, access, or use this Ridelity mobile application ("App?) or Website ().e. tidelity on all or any atternate website), you acknowledge your doreement to (1) these Terms (2) Fidelity.

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:

F Fidelity	Welcome to the Fidelity File Sharing Portal Pane: ZZZ Test Scheme (Simplification)
Downlood Centre Uplood file(s) Help	File Download Centre File Download Centre File Download file() will be available in the Download Carrie for 31 days from upload. Via currently have no files available for download

You will now be taken to the File Download Centre

Accept

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



Workplace Investing

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

F Fidelity	Welcome to the Fidelity File Sharing Portal Plan: ZZZZ Test Scheme (
	Upload File(s) Upload File(s) allows you to issue files or documents directly to the specified Fidelity team. Please ensure that you select the correct team when using this portal and click on the information icons next to each team for further details.
Download Centre	Which team is this for
Upload file(s)	○ Service Delivery team ♥
Help	Data Implementations team Data Quality team

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:

Choose files to upload
Choose the member data files you want to submit; we'll check they're titled correctly, in the correct format and not empty.
Then after you upload them, we'll check the quality of the data in them and let you know if there are any issues.
 Upload .csv, .txt, .pdf, .jpg or excel files with your member details
You can upload multiple files at a time to a maximum of 80mb
The maximum file name length is 200 characters. Please check the help section to see which characters are allowed.
Browse for a file Browse
Selected files (1)
ZZZZ_IML_ExcelUpload.xlsx
Add comments for this file
0/300 character entered
Uplood files



- 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'.

ZZZZ_IML_ExcelUpload.xlsx 9.22KB	<u></u>
Add comments for this file	
0/300 character entered	
	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'

	Welcom	ne to the Fig	delity Fi	ile Sha	ring Portal		Plan: ZZZZ Test Scheme (S
	File I	Download Centre prov	File Do		d Centre	ared either with or by you	in respect on the ZZZZ
Download Centre	Test	Scheme (Simplification	n). Uploaded f able for down	file(s) will be nload	available in the Down	nload Centre for 31 days fr	om upload.
Upload file(s)		File name	File type	Date	Uploaded by	Comments (Select 🕄 for details)	
нер		ZZZZ-supertrans pdfUpload.pdf	Template	02-Aug-2 3 08:57:45	iAmSuperTransactor		Download
		ZZZZ-supertrans t xtupload.txt	Template	02-Aug-2 3 08:57:45	IAmSuperTransactor		Download
		ZZZZ-supertrans ExcelUpload.xisx	Template	02-Aug-2 3 08-57-41	iAmSuperTransactor		Download



• 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.

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:

System error encountered	Please contact the relevant team
Sorry it looks like something went wrong. Please logout and retry login after some time.	shown who will be able to help you.
If you need assistance, please contact FIL-WIDataImplementation@fil.com	

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

Change your password	×
You have lagged in using a temporary password.	
Please set a new password to keep your account secure.	
Okoy	

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

Please check th	at your password me	eets our requirements.
Current passwo	rd	
New password		



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