Workplace Investing

Fidelity File Sharing portal

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The Fidelity File Sharing portal is a secure data exchange that allows sensitive data files to be shared securely.

Please email the Service Delivery Team on service.delivery@fil.com to request a user to be set up on the File Sharing Portal. The team will then arrange for the log in credentials to be created and forwarded accordingly.

Uploading a file

Open PlanViewer using the following web address: **https://www.planviewer.fidelity.co.uk/newlogin/#/**

Log in with your dedicated File Sharing Portal log in details. You will not be able to access the FSP with your normal PlanViewer credentials
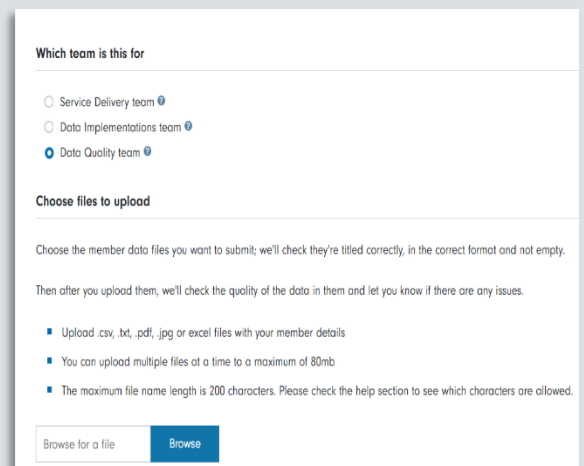
To upload a file:

- Click Upload file(s),
- Select the team the file is for
- Select the file type
- Click Browse to find the file

The file should be in the following format "*Scheme Code*": *File Title"*

The file can be in the following format .csv, .txt, .pdf, .jpg or excel file

In the comments box, please add a note, confirm your name and, if possible, who the file is for

Click Upload files when ready

Downloading a file

Open PlanViewer using the following web address:
https://www.planviewer.fidelity.co.uk/newlogin/#/

Log in with your dedicated File Sharing Portal log in details. You will not be able to access the FSP with your normal PlanViewer credentials.

To download a file:

- Click Download Centre
- All files that are available to download will display a Download button
- The File will be downloaded to the defined download location on your computer
- If the uploaded file is more than 14 days old, it will expire and will not be available to download

File download centre

You have files available for download

File name	File type	Date ↓	Uploaded by	Comments
Missing Member Data for Mailing 2022 03 02.xlsx	Data Query	02-Mar-22 12:18:19		Download
-Member Data for Client.xlsx	Data Query	18-Feb-22 12:06:00	GA33	Download Expired
-Member Data for Client.xlsx	Data Query	21-Jan-22 16:52:35	vkala	Download Expired
-Member Data for Client.xlsx	Data Query	08-Dec-21 18:03:43		Download Expired

Important Things to remember:

File restrictions

- Files must be in .csv, .txt, .pdf, .jpg, .jpeg or excel format
- The file cannot be blank
- 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.
- For the data in the files you can use letters, numbers and these following special characters:+:@#~£.',()%&_$/`"ÀÁÂÃÄÅÆÇÈÉÊËÌÍÎÏÑÒÓÔÕÖÙÚÛÜÝßàáâãäåæçèéêëìíîïñòóôõöùúûüýÿšÆǽŒ'n§ŦŧĿŀƊŋđıIJ

Important information

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