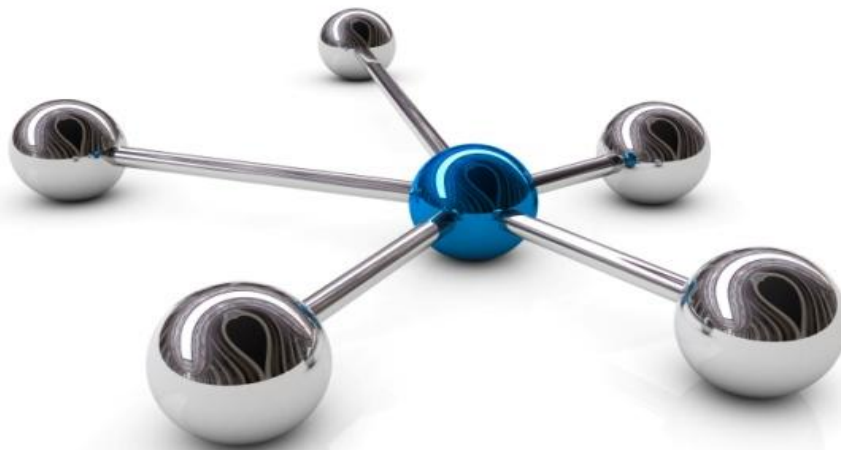# Reporting

This guide provides details on the various reports that are available in i-Connect.

i-Connect

Reporting Guide

Introduction

This guide provides details of the reports that are generated automatically by i-Connect and instructions to run self-generated reports.

i-Connect is an Internet application which helps to manage the transfer of employee information from payroll administrators to pensions administrators.

Who to Contact

If you have any questions about using the i-Connect service please contact your Pension Fund.

Reports

i-Connect includes a set of reports to provide you with additional information for each file upload and to assist with your auto-enrolment obligations. All reports are available for two weeks before being deleted and can be downloaded to your local network.

Viewing Reports

Click the 'Reports' icon on the i-Connect Dashboard to display the 'View Reports' page:

View Reports

Below are the generated reports which are currently available for download. Click on the 'Download Report' button for a report to download it. If you wish to save the report and specify the file name, right-click on the 'Download Report' button and select 'Save Link as...'.

Auto Generated Reports:

Report Template	Payroll	Date Generated	Generated By	Expiry Date	Status	
Submission Contributions Summary Report	Coverage Care Crowmoor	26-01-2017 16:21:07		09-02-2017	Available	Download Report
Auto Enrolment Omissions Report	Coverage Care Crowmoor	26-01-2017 16:20:47		09-02-2017	Available	Download Report
Submission Contributions Summary Report	Coverage Care	26-01-2017 16:07:51		09-02-2017	Available	Download Report
Auto Enrolment Omissions Report	Coverage Care	26-01-2017 16:07:42		09-02-2017	Available	Download Report
Submission Contributions Summary Report	AIP - Thomas Adams	26-01-2017 13:42:47		09-02-2017	Available	Download Report
Auto Enrolment Omissions Report	AIP - Thomas Adams	26-01-2017 13:42:33		09-02-2017	Available	Download Report
Submission Contributions Summary Report	AIP - Oldbury Wells	26-01-2017 13:34:18		09-02-2017	Available	Download Report
Auto Enrolment Omissions Report	AIP - Oldbury Wells	26-01-2017 13:34:11		09-02-2017	Available	Download Report
Submission Contributions Summary Report	AIP - Grange Primary School	26-01-2017 13:26:53		09-02-2017	Available	Download Report
Auto Enrolment Omissions Report	AIP - Grange Primary School	26-01-2017 13:26:47		09-02-2017	Available	Download Report
Submission Contributions Summary Report	AIP - Ludlow School	26-01-2017 13:11:43		09-02-2017	Available	Download Report
Auto Enrolment Omissions Report	AIP - Ludlow School	26-01-2017 13:11:35		09-02-2017	Available	Download Report
Submission Contributions Summary Report	AIP - SAT	26-01-2017 13:10:50		09-02-2017	Available	Download Report
Auto Enrolment Omissions Report	AIP - SAT	26-01-2017 13:10:43		09-02-2017	Available	Download Report
Submission Contributions Summary Report	Meres & Mosses HA	26-01-2017 12:36:03		09-02-2017	Available	Download Report
Auto Enrolment Omissions Report	Meres & Mosses HA	26-01-2017 12:35:34		09-02-2017	Available	Download Report
Submission Contributions Summary Report	South Shropshire HA	26-01-2017 12:11:18		09-02-2017	Available	Download Report
Auto Enrolment Omissions Report	South Shropshire HA	26-01-2017 12:11:10		09-02-2017	Available	Download Report
Submission Contributions Summary Report	Bayston Hill PC	25-01-2017 13:13:39		08-02-2017	Available	Download Report
Auto Enrolment Omissions Report	Bayston Hill PC	25-01-2017 13:13:37		08-02-2017	Available	Download Report
Submission Contributions Summary Report	Ketley Parish Council	25-01-2017 12:43:42		08-02-2017	Available	Download Report
Auto Enrolment Omissions Report	Ketley Parish Council	25-01-2017 12:43:40		08-02-2017	Available	Download Report
Submission Contributions Summary Report	Hadley & Leegomery PC	25-01-2017 11:24:53		08-02-2017	Available	Download Report
Auto Enrolment Omissions Report	Hadley & Leegomery PC	25-01-2017 11:24:48		08-02-2017	Available	Download Report
Submission Contributions Summary Report	Shifnal Town Council	24-01-2017 10:04:13		07-02-2017	Available	Download Report
Auto Enrolment Omissions Report	Shifnal Town Council	24-01-2017 10:04:08		07-02-2017	Available	Download Report

i-Connect
Reporting Guide

The following reports are available:

Matching Report – Automatically Generated	This matching report provides details of all matched members for the selected payroll. It is automatically generated at the end of the matching process.
Auto Enrolment Omissions Report – Automatically Generated	The auto-enrolment report is automatically generated after each file upload and identifies employees who have reached the age of 22 and/or who have hit an earnings trigger.
Workforce Evaluation Assessment (PDF) Report – Automatically Generated	This report provides details of the worker classification of each employee on the payroll extract file. The report is produced only for uploads with a payroll period end date prior to your staging date.
Workforce Evaluation Assessment (CSV) Report – Automatically Generated	This report includes all the information from the above report, plus additional member related data and is output in a comma separated values (CSV) format. The CSV output can be used as a mail merge data source when communicating auto enrolment status to members.
Transactions Report - Manually Generated	This report provides details of the event processing for each upload within the selected date range event for the selected payroll.
TPR Report - Manually Generated	This report provides a summary count of new starters by auto-enrolment classification, opt-outs, re-enrolments for all payrolls for an employer and a calendar month.
File Submission Report - Manually Generated	This report provides a list of payroll extract files submitted within the specified date range. Details include the number of successful, unsuccessful and partially successful members processed (as a percentage), together with the number of transactions, date submitted and the expected submission date.

Generate Reports

Click the 'Generate Report' button to generate one of the three manually generated reports:

Generate Report

The following page is displayed:

Generate Report

The reports you can generate are listed below. Click on the report you would like to generate.

1. File Submission Report
2. The Pensions Regulator (tPR) Report
3. Transaction Report

Select a report, complete the input parameters, then click the 'Generate Report' button:

Report Parameters

The report you have selected requires parameters to define the output of the report. Use the form below to fill in all of the required parameters for the report.

Template Name	File Submission Report			
Report Name	2016 Submissions			
Date From	01-12-2016		Date To	31-12-2016
Select Target System	BOOST-ALTQAT01 ▼			

Generate Report

User generated reports appear at the bottom of the View Reports page:

View Reports

Below are the generated reports which are currently available for download. Click on the 'Download Report' button for a report to download it. If you wish to save the report and specify the file name, right-click on the 'Download Report' button and select 'Save Link as...'.

User Generated Reports:

Report Name	Report Template	Date Generated	Generated By	Expiry Date	Status	
2016 Submissions	File Submission Report	27-01-2017 11:30:18	qatboost	10-02-2017	Available	Download Report
2017 Submissions	File Submission Report	27-01-2017 11:21:03	qatboost	10-02-2017	Available	Download Report

A PDF reader is required to view some of the reports. If you do not have a PDF reader, you can download one using the link below.

i-Connect
Reporting Guide

History

The History page displays details of previous i-Connect member matching, synchronisation and business as usual uploads for the selected payroll

Viewing History

Click the '+' symbol to expand the view and display further details for the selected file upload submission:

Recent Activities

File Name	Period End Date	Expected Submission Date	Submission Date	Submission Type	Status
PAY001_Nov_2014.csv	30-11-2014	30-11-2014	02-03-2015 17:37:53	Payroll Upload	Target System Failures

Submission Statistics

Total Number of Payroll Members Tracked by i-Connect		18
Omitted Payroll Members (present on the last submission, and no leaver event processed)		0

Payroll Members submitted this period	18	Total Pensionable Pay	£72,093.85
Payroll Members in Error	0	Total Employee Contributions	£6,754.35
Accepted for Processing	18	Total Employer Contributions	£13,508.66

Submitted By User	dolly	Processed By User	dolly

⚠ Some events have failed for this submission but are recoverable. Click here to view the failed events.

ⓘ 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	Workflow Errors	Progress
New Starter	3	0	0	0	3	0	0	
Member Address Update	3	0	0	0	3	0	0	
Contributions	18	0	0	15	3	0	0	
Salary	18	0	0	15	3	0	0	
NI Contributions	18	0	0	15	3	0	0	
Member Details Update	3	0	0	0	3	0	0	
Service	0	0	0	0	0	0	0	
Opt In	0	0	0	0	0	0	0	
Opt Out	0	0	0	0	0	0	0	
Leaver	0	0	0	0	0	0	0	
Leaver Absence	0	0	0	0	0	0	0	
Works Address Update	3	0	0	0	3	0	0	
Additional Contributions	18	0	0	15	3	0	0	
CARE Pay	18	0	0	15	3	0	0	

Click the '-' symbol to collapse the view for the selected file upload submission.

Want to Know More?

Look at these guides

- **Reporting**
- **Online Return**

- **On boarding**
- **File Upload**