

### Portal User Guide

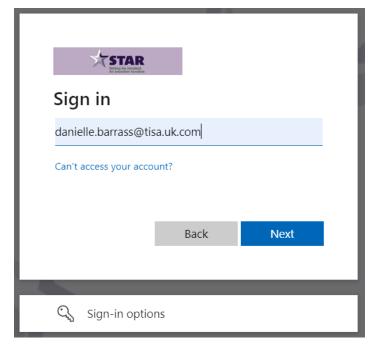
### Contents

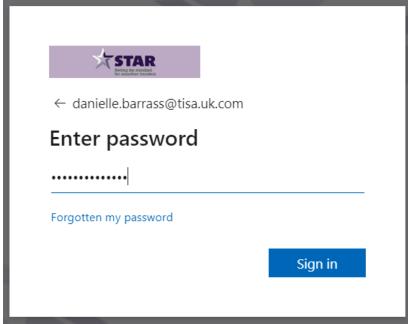
- **★** Logging in
- ★ Home page
- **★** Submitting MI
- ★ MI data analysis
- **★** <u>Viewing contact details</u>
- ★ Your private documents
- **★** STAR shared documents
- ★ Managing your users



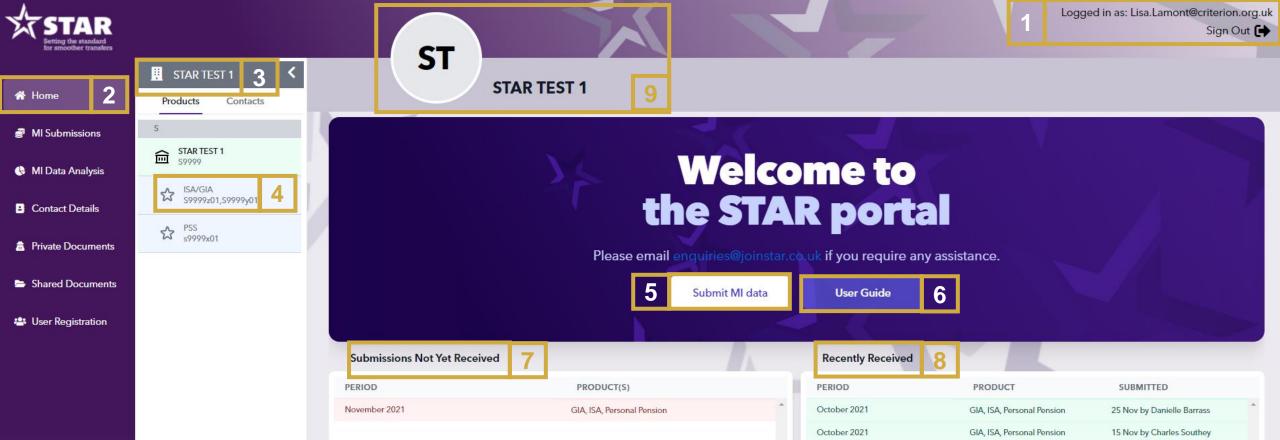
### Logging In

- ★ Test Members Portal access: https://portal.joinstar.co.uk/
- ★ Access to the Portal is linked to your Microsoft Office 365 account. Please ensure you use your corporate login details. An authentication email with a one time code will be sent to your email account.
- ★ For added security, we have introduced two factor authentication (2FA), which will be required each login. Please follow the onscreen instructions to set-up using your mobile number, every login you will be sent a verification code to access.









- 1. User information and sign out.
- 2. Location indicator.
- 3. Organisation information
- Organisation/brand/product SLA details. The reference 9. below your organisation/brand/product name is your STAR reference number.
- 5. Quick access to submit MI.

- 6. Quick access to this User Guide.
- 7. List of outstanding MI submissions for the year.
- 8. List of submitted MI submissions.
- Organisation information. To make changes in the portal for a specific company/brand SLA, please ensure this is correctly selected and displayed as shown in point 3, 4 and 9.



February 2022





#### All Firms

3

September 2021



MI Data Analysis

Contact Details

Private Documents

Shared Documents

**User Registration** 



All currently-due submissions must be received by Monday 7 February, 2022

August 2021

2

**Review Your Entries** 

October 2021

November 2021

Submit

ecember 2021

January 2022

#### Upload your submission...

Upload MI Data

July 2021



**Automatic Validation** 

- 1. Outstanding MI submissions in red. Completed in green.
- 2. 4 step process for submitting MI. Upload, validate, review your entries and submit.
- 3. To submit MI, click 'SELECT A FILE' and browse to where your file is saved on the network and click on "ok".



MI Submissions

MI Data Analysis

Contact Details

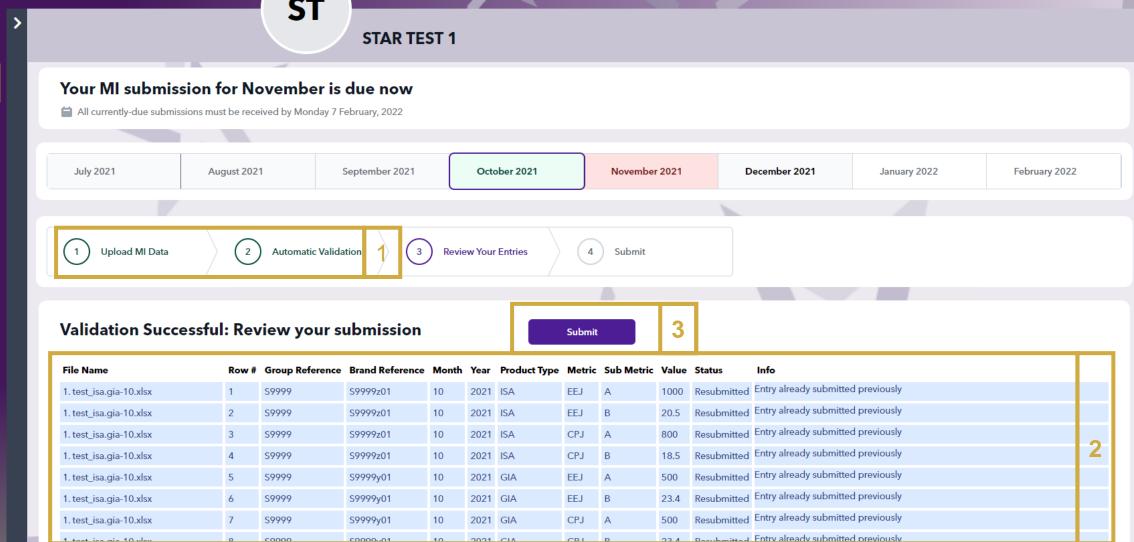
Private Documents

Shared Documents

User Registration

☆ Home

ST



- Once submitted, you will see an overview of where you are in the submission process.
- Review table of MI submissions.
- Once you are happy with your MI entries, select the submit button.



☆ Home

MI Submissions

MI Data Analysis

Contact Details

Private Documents

Shared Documents

User Registration

ST

#### STAR TEST 1

1. test_isa.gia-10.xlsx	4	S9999	S9999z01	10	2021	ISA	CPJ	В	18.5		Entry already submitted previously				
1. test_isa.gia-10.xlsx	5	S9999	S9999y01	10	2021	GIA	EEJ	Α	500		Entry already submitted previously				
1. test_isa.gia-10.xlsx	6	S9999	S9999y01	10	2021	GIA	EEJ	В	23.4	Resubmitted	Entry already submitted previously	1			
1. test_isa.gia-10.xlsx	7	S9999	S9999y01	10	2021	GIA	CPJ	Α	500	Resubmitted	Entry already submitted previously				
1. test_isa.gia-10.xlsx	8	S9999	S9999y01	10	2021	GIA	CPJ	В	23.4	Resubmitted	Entry already submitted previously				
1. test_isa.gia-11.xlsx	1	S9999	S9999z01	11	2021	ISA	EEJ	А	1000	Validated					
1. test_isa.gia-11.xlsx	2	S9999	S9999z01	11	2021	ISA	EEJ	В	20.5	Validated					
1. test_isa.gia-11.xlsx	3	S9999	S9999z01	11	2021	ISA	CPJ	Α	800	Validated					
1. test_isa.gia-11.xlsx	4	S9999	S9999z01	11	2021	ISA	CPJ	В	18.5	Validated					
1. test_isa.gia-11.xlsx	5	S9999	S9999y01	11	2021	GIA	EEJ	Α	500	Validated			2		
1. test_isa.gia-11.xlsx	6	S9999	S9999y01	11	2021	GIA	EEJ	В	23.4	Validated					
1. test_isa.gia-11.xlsx	7	S9999	S9999y01	11	2021	GIA	CPJ	Α	500	Validated					
1. test_isa.gia-11.xlsx	8	S9999	S9999y01	11	2021	GIA	CPJ	В	23.4	Validated					
1. test_isa.gia-NEW Rejected test.xlsx	1	S9999	S9999z01	10	2021	ISA	EEJ	А	1000	Resubmitted	Entry already submitted previously			t	
1. test_isa.gia-NEW Rejected test.xlsx	2	S9999	S9999z01	10	2021	ISA	EEJ	В	20.5	Resubmitted	Entry already submitted previously				
1. test_isa.gia-NEW Rejected test.xlsx	3	S9999		10	2021	ISA	CPJ	Α	800	Rejected	Brand Reference missing				
1. test_isa.gia-NEW Rejected test.xlsx	4	S9999	S9999z01	10	2021	ISA	CPJ	В	18.5	Resubmitted	Entry already submitted previously				2
1. test_isa.gia-NEW Rejected test.xlsx	5	S9999	S9999y01	10	2021	GIA	EEJ	Α	500	Resubmitted	Entry already submitted previously				3
1. test_isa.gia-NEW Rejected test.xlsx	6	S9999	S9999y01	10	2021	GIA	EE	В	23.4	Rejected	The supplied metric `EE` is not valid				
1. test_isa.gia-NEW Rejected test.xlsx	7	S9999	S9999y01	10	2021	GIA	CPJ	А	500	Resubmitted	Entry already submitted previously				
1. test_isa.gia-NEW Rejected test.xlsx	8	S9999	S9999y01	0	2021	GIA	CPJ	В	23.4	Rejected	No valid period (Month & Year) could	be four	id. Make sure these are reco	rd d	d as

- Easily navigate through the MI summary below and review
   your entries. The information column provides detail on the MI 4. validation.
- 2. Blue fields indicate file has already been submitted, please note clicking submit will override all previous entries.
- 3. Green fields indicate file has passed MI validation.
- 4. Red fields indicate issues with the MI submission and reason for rejection.
- 5. Once reviewed, click the "submit" button (see previous slide).



### **STAR TEST 1**

☆ Home

**MI Submissions** 

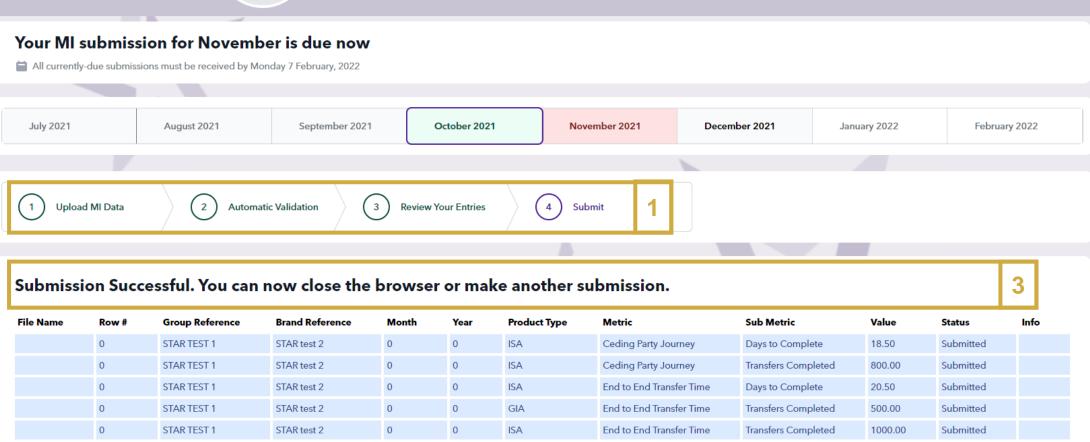
MI Data Analysis

Contact Details

Private Documents

Shared Documents

User Registration



GIA

GIA

GIA

End to End Transfer Time

Ceding Party Journey

Ceding Party Journey

Days to Complete

Days to Complete

Transfers Completed

23.40

500.00

23.40

Submitted

Submitted

Submitted

The overview MI submission process is updated to show MI has been submitted.

STAR test 2

STAR test 2

STAR test 2

STAR TEST 1

STAR TEST 1

STAR TEST 1

Confirmation message that MI submission has been successful. Please note that if you wish to make another submission, you just need to click back on step 1 'Upload MI File'.

0

# **MI Data Analysis**



STAR TEST 1

STAR TEST 1

S9999z01,S9999y01

☆ Home

MI Submissions

MI Data Analysis

Contact Details

Private Documents

Shared Documents

🐸 User Registration



**STAR TEST 1** 

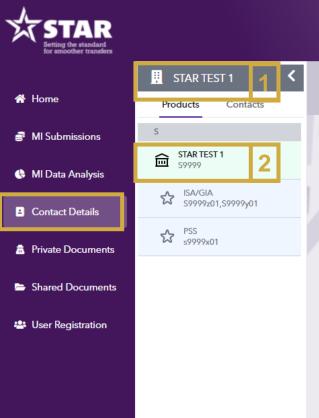
#### 3.....

#### **MI Submissions**

Firm 3	↑ Product	Metric	Sub Metric	Period	Value
4					
STAR TEST 1	Personal Pension	End to End Transfer Time	Transfers Completed	October 2021	200.00
STAR TEST 1	ISA	End to End Transfer Time	Transfers Completed	October 2021	1000.00
STAR TEST 1	GIA	End to End Transfer Time	Days to Complete	October 2021	23.40
STAR TEST 1	Personal Pension	Acquiring Party Journey	Transfers Completed	October 2021	200.00
STAR TEST 1	ISA	End to End Transfer Time	Days to Complete	October 2021	20.50
STAR TEST 1	ISA	Ceding Party Journey	Days to Complete	October 2021	18.50
STAR TEST 1	Personal Pension	End to End Transfer Time	Days to Complete	October 2021	10.50
STAR TEST 1	ISA	Ceding Party Journey	Transfers Completed	October 2021	800.00
STAR TEST 1	GIA	End to End Transfer Time	Transfers Completed	October 2021	500.00
STAR TEST 1	GIA	Ceding Party Journey	Transfers Completed	October 2021	500.00
STAR TEST 1	GIA	Ceding Party Journey	Days to Complete	October 2021	23.40
STAR TEST 1	Personal Pension	Ceding Party Journey	Transfers Completed	October 2021	150.00
STAR TEST 1	Personal Pension	Ceding Party Journey	Days to Complete	October 2021	8.50
STAR TEST 1	Personal Pension	Ceding Party Journey	Transfers Completed	October 2021	15.00
STAR TEST 1	Personal Pension	Ceding Party Journey	Davs to Complete	October 2021	10.20

- 1. View all MI submissions for your organisation/brand or product level.
- 2. Quick access to Group and brand/product SLA level.
- 3. Sort by selecting any column heading and then by using ascending/descending arrow.
- 4. Search for MI under any header using the free text field.

# Viewing contact details



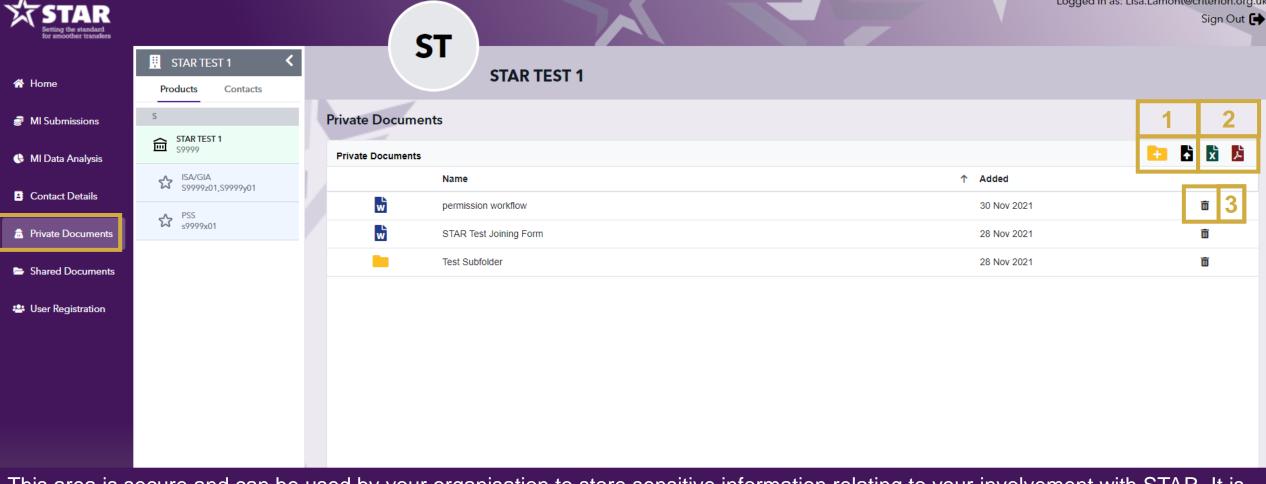
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<b>J</b> I	
	STAR TE

#### TAR TEST 1

Contact D	Contact Details											
User	3	<b>↑</b>	Email	Job Title	Phone	Permission	Last Login					
	4											
Alex Wilber TE	EST		AlexW@contengodev.onmicrosoft.com			Star Member						
Alex Wilber TE	Alex Wilber TEST AlexW@contengodev.onmicrosoft.com					Star Member						
Alistair Johnst	ton		alistair.johnston@criterion.org.uk	Business Analyst	0131 357 0100	Star Member	Tuesday 16 Nov 2					
Danielle Barra	5 ass		danielle.barrass@tisa.uk.com	Operations Manager	07549614880	Star Admin	Monday 16:11					
Lisa Lamont			Lisa.Lamont@criterion.org.uk	Marketing Manager		Star Admin	26 minutes ago					
Lisa Lamont			Lisa.Lamont@criterion.org.uk	Marketing Manager		Star Relationship Manager	26 minutes ago					
Lisa Test Shar	red		enquiries@criterion.org.uk	Marketing	07552207968	Star Relationship Manager						

- 1. View all contacts for your organisation.
- 2. Quick access to Group and brand/product SLA level.
- 3. Sort by selecting any column heading and then by using ascending/descending arrow.
- 4. Search for MI under any header using the free text field.
- 5. High level contact details can be viewed by selecting name. To manage contacts, please go to "User Registration" tab.

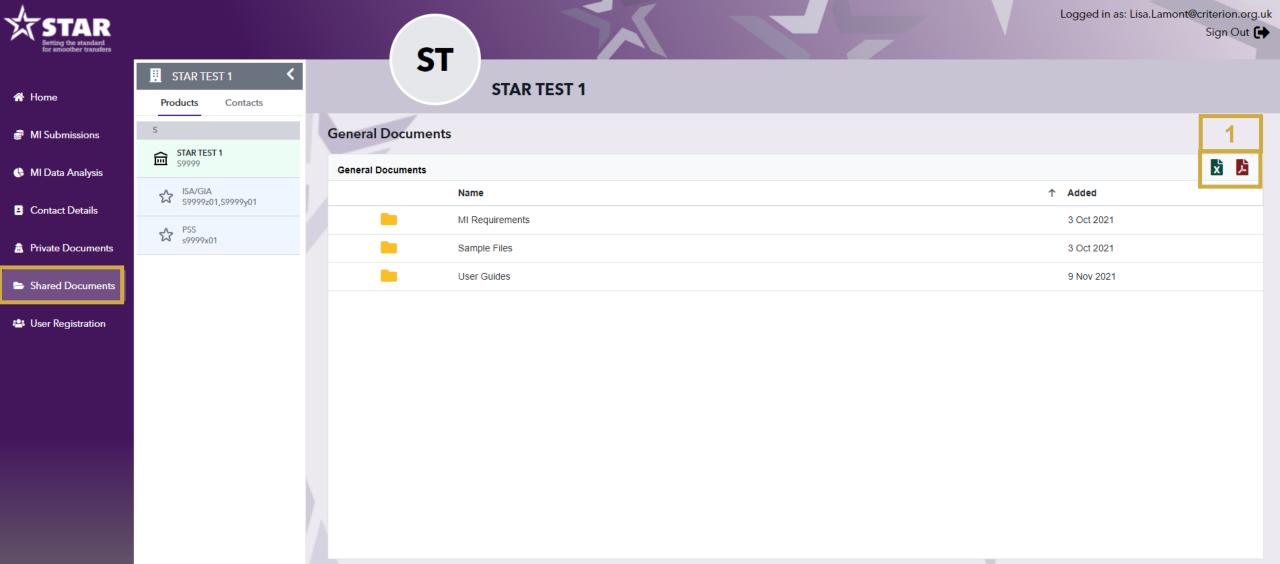
### Your private documents



This area is secure and can be used by your organisation to store sensitive information relating to your involvement with STAR. It is private to your organisational group and is not user specific, all registrations under the group can see all documents added if they have the relevant permissions.

- You can use create a new folder and easily upload any files to this private documents area.
- Documentation stored in this folder can be exported to excel or PDF. Please note, only those contacts with the correct permissions can access, view, upload and extract documents saved in this area.
- Documentation can be deleted if needed.

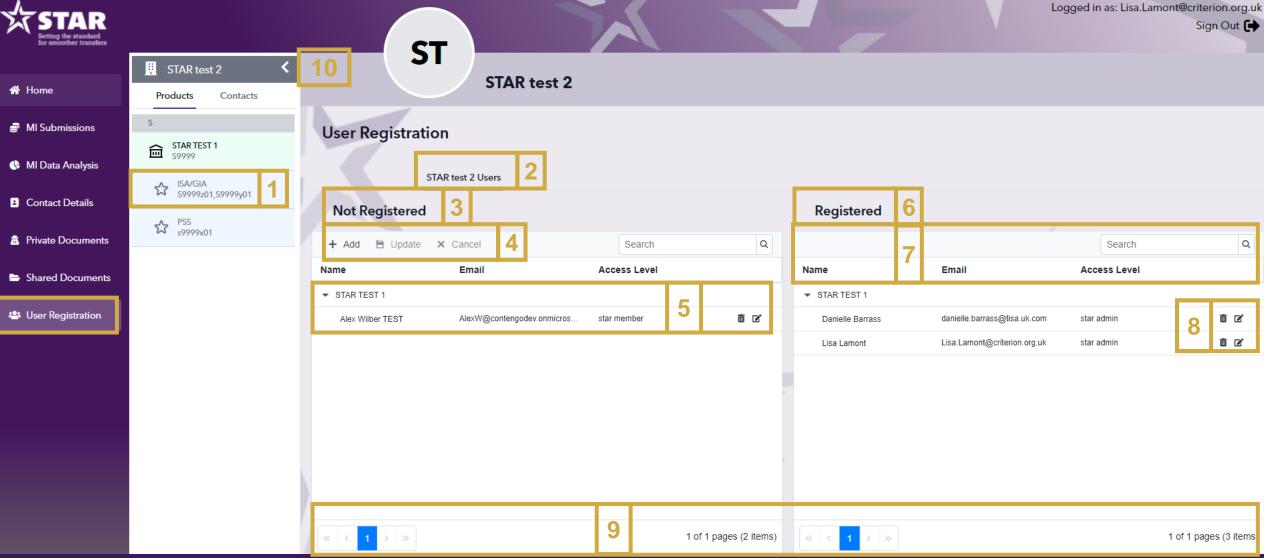
### **STAR** shared documents



This area is used by STAR to store important information, which cannot be stored on the website.

1. You cannot upload any documentation to this area, however, you can access, view and extract in excel or PDF.

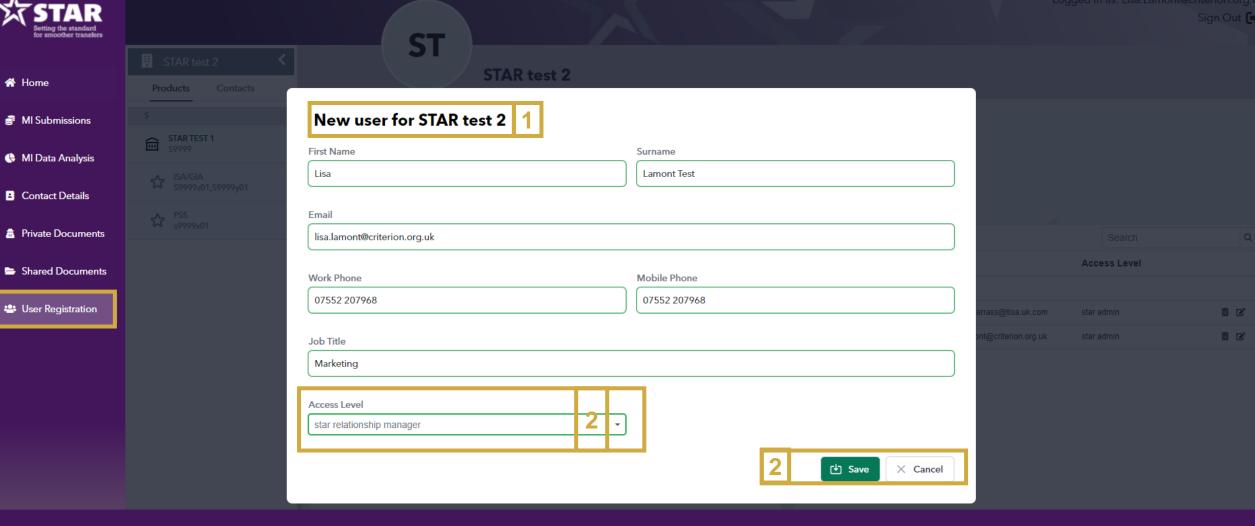
# Managing your users



- Organisation/brand/product level.
- 2. Brand/product name.
- 3. List of unregistered users.
- 4. You can add/update a user (see next slide).
- 5. Once the user has been added and

- email verified, you can drag them to the registered list.
- . Registered user list.
- You can view user details and permission levels.
- 8. Users can be edited and deleted as

- needed. Please note, this is your responsibility to keep up-to-date.
- 9. Page navigation.
- 10. Collapse chevron if you are unable to see the edit user button.



- To add a new user, select add (as per previous slide). Please note you need to click onto the product level (star icon) for the add users option to be clickable.
- Complete all fields of the online user form, permission level and select save. An email verification will be sent to the users email.

Once the email has been verified, the user will appear in the "Not registered" user list. To activate, drag the user details to the "Registered User" list on the right hand side.

- STAR test 2
- MI Submissions

☆ Home

- MI Data Analysis
- Contact Details
- ♠ Private Documents
- Shared Documents
- 🐣 User Registration

- ★ If a user has multiple relationship types for different product registrations then the menu items are available to the permission of a combined set that is available for either access level.
- ★ There is only one RM per company registration which has full admin access, but we allow you the ability to add additional admin users to support your role if required.
- ★ If the RM does not assign a specific MI contact it will be assumed the RM or admin will submit MI

Role	Admin	Relationship Manager	Member	MI	Supplier	
Home	Υ	Υ	Υ	Υ	Υ	
MI Submissions	Υ	Υ	N	Υ	Υ	
MI Data Analysis	Υ	Υ	N	Υ	Υ	
Contacts Details	Y- edit all	Y- edit all	Y- edit own	Y- edit own	N	
Private Documents	Y- edit	Y- edit	Y - view	Y - view	N	
Shared Documents	Y - view	Y - view	Y - view	Y - view	N	
User Registration	Υ	Υ	N	N	N	

Overview of how the permissions are assigned to each user role

- Y Give the user access to that section
- N User will not be able to see the section

If you have any questions regarding how to use The Members Portal or about the STAR initiative, please do not hesitate to contact us.

★enquiries@joinstar.co.uk
★www.joinstar.co.uk

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