

ESS Monthly Submission Reporting

As a WMPF employer there are a few ways to monitor your monthly data submissions – you need to have access to ESS to be able to do so. If you don't have access, or are unsure if you already do, please email us at WMPFEmployerSystemSupport@wolverhampton.gov.uk.

The two quickest ways to view monthly submissions are either through the *Interface Management* tab or the *Management Information* tab. You can also run and download a monthly submission history report from the *Workflows* tab which produces an Excel spreadsheet. This guide shows you all three methods.

Interface Management

You can quickly identify the status of your monthly submissions from the 'doughnuts' on the *Interface Management* tab. To get there, click *Interface Management* (1) then select 'Monthly Submission' from the *Interface type* (2) drop down menu. Make sure that you click the *Include clean files?* button (3).

Each 'doughnut' represents a monthly data file:

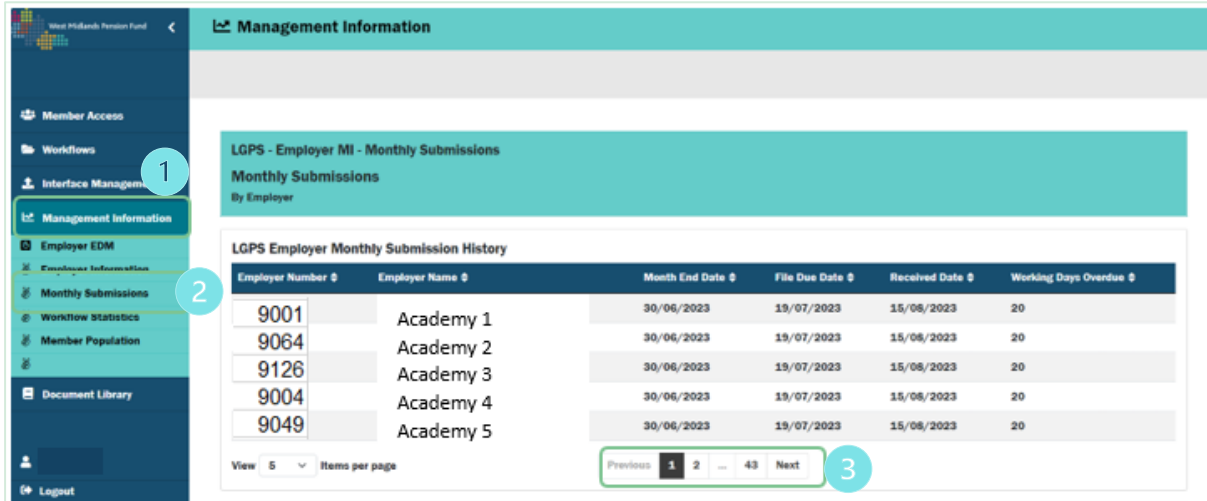
- The date above the doughnut is the date the file was loaded.
- Below the date is the name of the file that was loaded.
- A green doughnut means that the file has been successfully submitted to us.
- A doughnut with any orange or red in it represents a file that has errors or warnings that need to be reviewed and has not been successfully submitted to us.



These doughnuts can also be used to monitor the submission of Exit and Standard Interfaces – just choose the relevant interface type from the dropdown menu (2).

Management Information

The Management Information dashboards show you real-time data about your membership and submissions. To view your monthly data submissions, click on the *Management Information* (1) tab and then the *Monthly Submissions* tab (2). You will then see a full list of all of the successful monthly data submissions that have been made for the employers that you have access to. This list can get quite long, so you might need to tab across pages using the buttons highlighted at (3).



Management Information

Member Access

Workflows

Interface Management

Management Information **1**

Employer EDM

Employee Information

Monthly Submissions **2**

Workflow Statistics

Member Population

Document Library

Logout

LGPS - Employer MI - Monthly Submissions

Monthly Submissions
By Employer

LGPS Employer Monthly Submission History

Employer Number	Employer Name	Month End Date	File Due Date	Received Date	Working Days Overdue
9001	Academy 1	30/06/2023	19/07/2023	15/06/2023	20
9064	Academy 2	30/06/2023	19/07/2023	15/06/2023	20
9126	Academy 3	30/06/2023	19/07/2023	15/06/2023	20
9004	Academy 4	30/06/2023	19/07/2023	15/06/2023	20
9049	Academy 5	30/06/2023	19/07/2023	15/06/2023	20

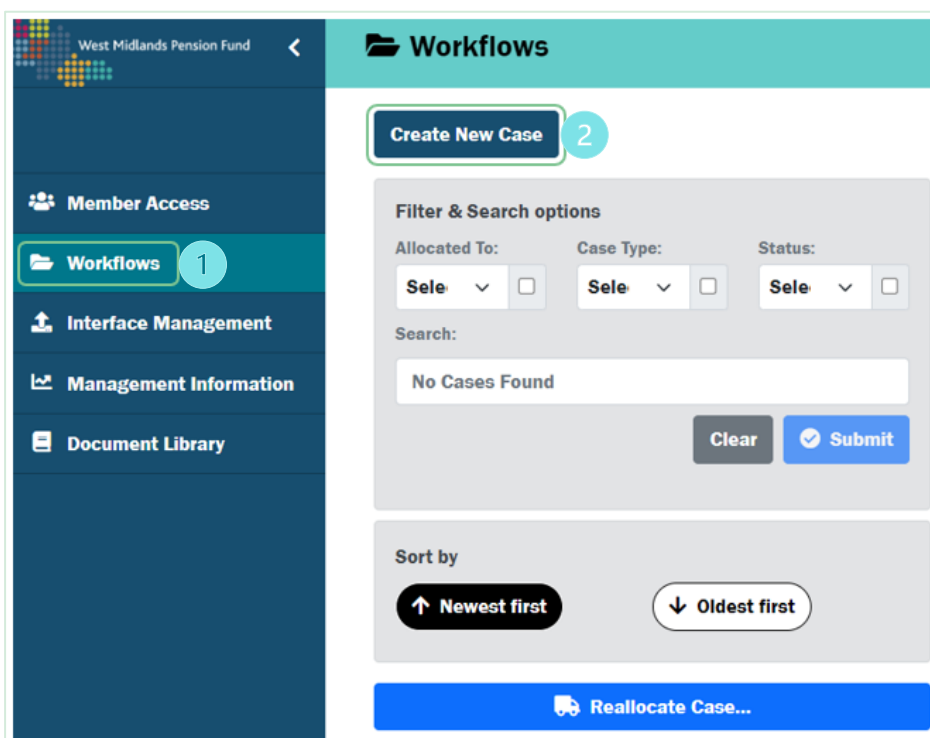
View 5 Items per page

Previous **1** 2 ... 43 Next **3**

Reporting workflow

There are a number of reports that are available for you to run from the *Workflows* tab. This guide talks about the monthly submission report, but the guidance applies to the other reports as well.

Click on the *Workflow* tab (1) and click *Create New Case* (2).



West Midlands Pension Fund

Workflows

Member Access

Workflows **1**

Interface Management

Management Information

Document Library

Create New Case **2**

Filter & Search options

Allocated To: Sele Case Type: Sele Status: Sele

Search:

No Cases Found

Clear Submit

Sort by

↑ Newest first ↓ Oldest first

Reallocate Case...

Select 'ESS LGPS Employer Reporting' from the *Select case type* dropdown menu (1) and give your case a title (2). Click *Create case*.



Create case [X]

Select case type

ESS LGPS Employer Reporting (1)

Enter case title

monthly submission (2)

Please use this process to generate Employer MI Reports

Cancel [3] Create case

Click on *Go to case #####* (1).



Create case [X]

Case successfully created 452606

Go to case 452606 (1)

Create another case

Cancel

Choose an employer from the *Select an Employer* dropdown menu (1). It doesn't matter which employer you choose – the report will run for all employers that you have access to. Click *Next* (2).

Start Employer Workflow

Workflow Information

This workflow allows the user to run a selection of Employer Reports.

Which Employer(s) does this workflow relate to?

Select an Employer(s): *

Academy 1

▼

1

Refresh

2

Next

Click the *Select* button and a red dot will appear (1). Select the employer from the dropdown (2) and click *Next* (3).

Case ID : 452606

Select Employer

Validation Messages

Select Employer

Select Option *

Select

1

Select Employer In Focus *

Academy 1

▼

2

Refresh

3

Next

There are only two fields that you need to complete on the next screen: *Report Type* (1) and *Report Format* (2). In all cases select 'Standard Report' for the *Report Type* (1). You can choose whether you would prefer Excel or CSV for the *Report Format* (2). You can skip the remaining parameters and you will be taken to the report selection screen when you click *Next* (3).

Case ID : 452606

ESS Touch Reporting Parameters

Report Parameters

Scheme: *
 LGPS - West Midlands Pension Fur

Report Type: *
 Standard Report **1**

Report Format: *
 Excel **2**

Save Report to Scheme EDM

Save to EDM: *
 No

Report Name:

Email Notifications

To:

CC:

Run report at specific time?

Select Date *
 04 April 2024

Select Hours *
 13.00

Select Minutes *
 1.00

Schedule Report?

If you select to schedule the report, you will only be able to select one report to schedule.

Frequency: *
 Do not schedule

Refresh **3 Next**

Select the report that you would like to run – in this case ‘Monthly Submission History’ (1) and click *Next* (2).

Case ID : 452606

Touch Standard Report Selection

Standard Reports Available

Select a Standard Report to Run *

Monthly Submission History 1

Refresh 2 Next

You can choose any date range for your report, but you need to be aware of a few things:

- The *start date* (1) can be any month, but the date you choose must always be the first of the month.
- The *end date* (2) can be any month, but the date you choose must always be the last day of the month.
- The report will only show submissions after the date of transition to ESS. In most cases this will be from the May 2023 file.

Click *Next* (3).

Case ID : 452606

Inputs for Monthly Submission History

Enter the report inputs

Start Date * 1
01 February 24


End Date * 2
30 April 2024

Refresh 3 Next

Your report is then produced: click on the icon to download your report (1).

Case ID : 452606

Click the link to access the document:

Downloaded Document 1
 Monthly Submission History Report.xlsx

Refresh Continue

Your report is then opened with auto-filters applied so that you can filter by date due, month end date, or employer. This report can be saved locally like any other Excel file.


Employer Number	Employer Name	Month End Date	File Due Date	Received Date	Working Days Overdue
9001	ACADEMY 1	29/02/2024	19/03/2024	15/03/2024	-1
9064	ACADEMY 2	29/02/2024	19/03/2024	19/03/2024	1
9126	ACADEMY 3	29/02/2024	19/03/2024	19/03/2024	1
9004	ACADEMY 4	29/02/2024	19/03/2024	19/03/2024	1
9049	ACADEMY 5	29/02/2024	19/03/2024	19/03/2024	1
9665	ACADEMY 6	29/02/2024	19/03/2024	19/03/2024	1
9104	ACADEMY 7	29/02/2024	19/03/2024	19/03/2024	1
9213	ACADEMY 8	29/02/2024	19/03/2024	19/03/2024	1
9312	ACADEMY 9	29/02/2024	19/03/2024	19/03/2024	1
1430	ACADEMY 10	29/02/2024	19/03/2024	19/03/2024	1
9426	ACADEMY 11	29/02/2024	19/03/2024	19/03/2024	1
9581	ACADEMY 12	29/02/2024	19/03/2024	19/03/2024	1
9785	ACADEMY 13	29/02/2024	19/03/2024	19/03/2024	1
9857	ACADEMY 14	29/02/2024	19/03/2024	19/03/2024	1
9891	ACADEMY 15	29/02/2024	19/03/2024	19/03/2024	1
9440	ACADEMY 16	29/02/2024	19/03/2024	22/03/2024	4
9611	ACADEMY 17	29/02/2024	19/03/2024	28/03/2024	8

When you come back to ESS you will see this screen again – click *Continue* (1).

Case ID : 452606

Downloaded Document

Click the link to access the document:

 Monthly Submission History Report.xlsx

1

Refresh

Continue

You can choose to run more reports or not. If you choose 'Yes' (1) and click *Next* (2) you will be taken back to the report parameters screen to select a new report. If you choose 'No' (1) and click *Next* (2) the report workflow will complete and leave your schedule.

Case ID : 452606

Touch Reporting More Reports

More Reports?

Do you want to produce more reports? *

No
▼

1

Refresh

Next

2