

## Accessing the employer EDM (employer documents)

### What is the employer EDM (Electronic Document Management)?

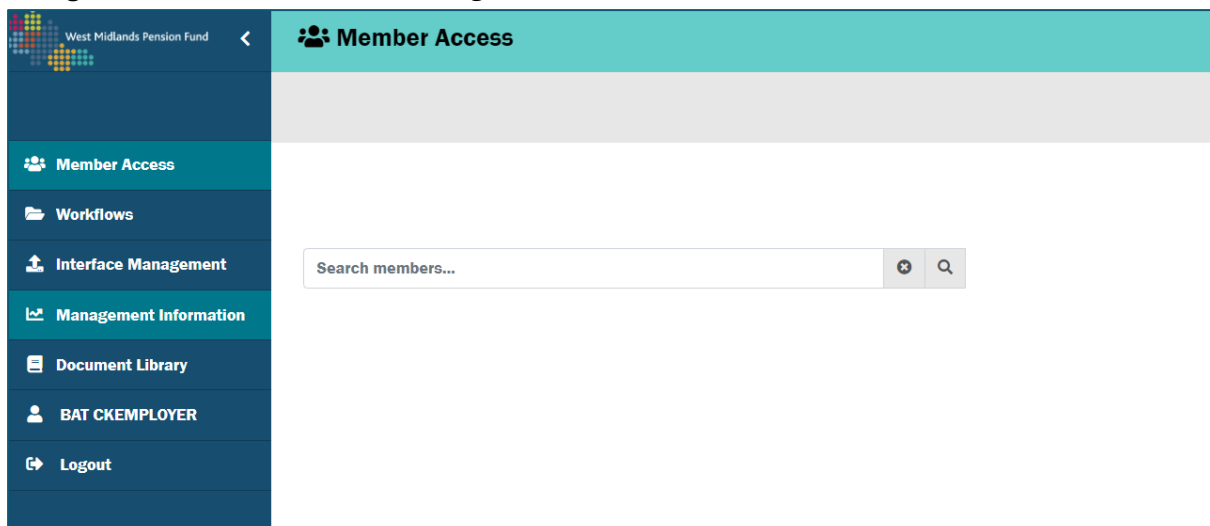
The employer EDM is where you will find all of the documents relating to the cases that you have completed in ESS:

- Interface submission documentation including validation reports and the submitted data file for exit, standard, and monthly data interfaces.
- Message history and any documents loaded as part of Admin Referral workflows.
- Copies of any reports that were produced using the LGPS Employer Reporting workflows.

**Important:** case documents are saved under their relevant case numbers, so it is important that you log case numbers whenever possible.

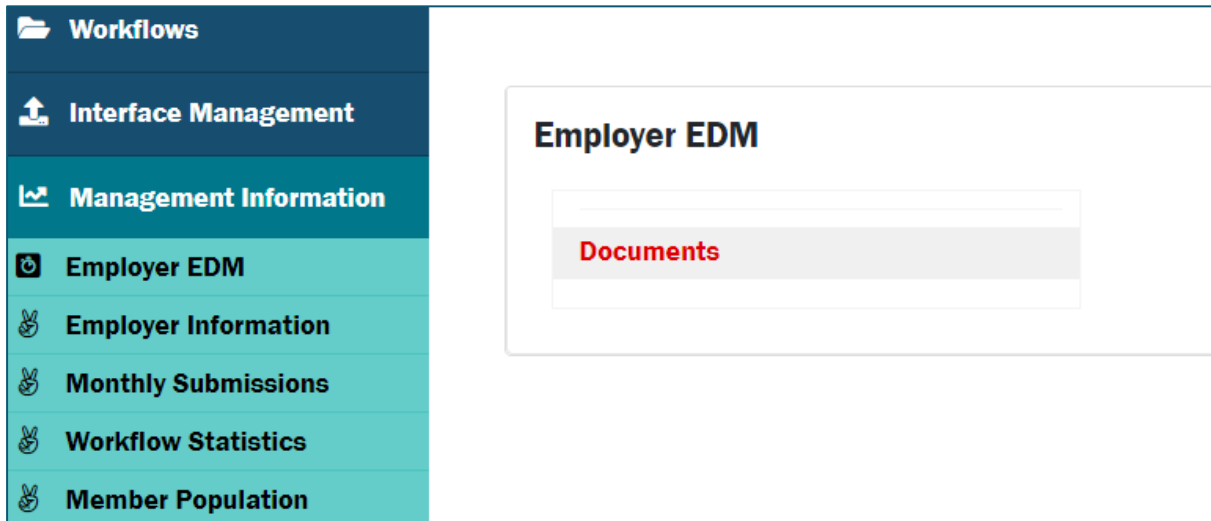
### How do you access the employer EDM?

1. Log into ESS and click on the *Management Information* menu item:



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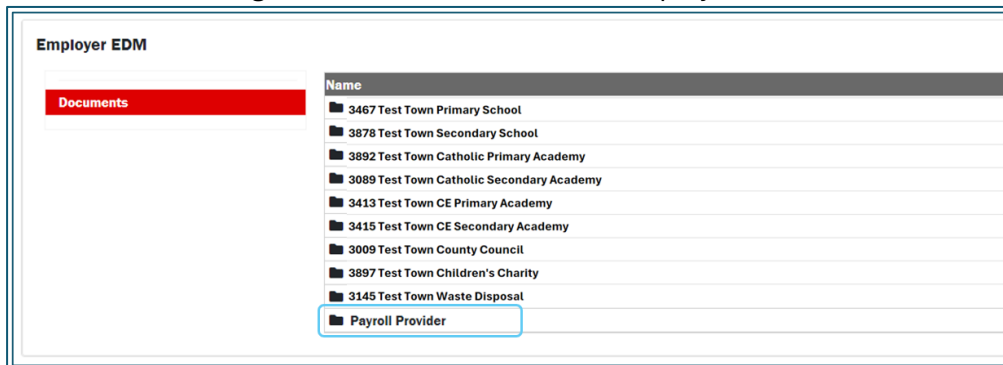
2. Click on documents:



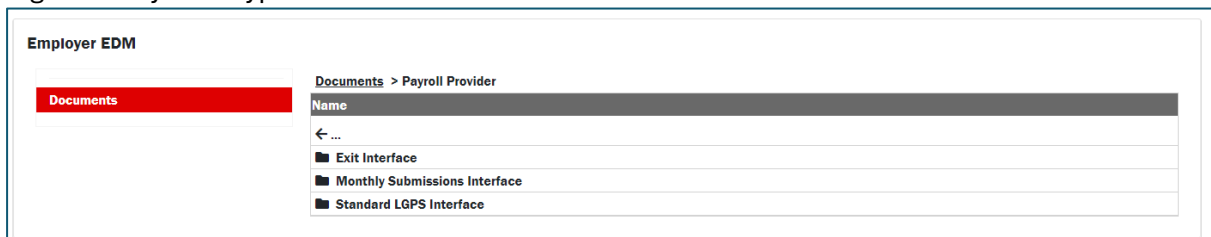
3. If you have access to multiple employer records your documents will be organised in a similar way to the image below.

Where items are stored will depend upon how you submit your data. If you submit your interfaces with multiple employers' data in the files these case documents will be stored in the *Payroll Provider* folder [highlighted in the below image].

Interface files relating to single employers and any admin referrals at a member or employer level will be saved against the relevant individual employers.

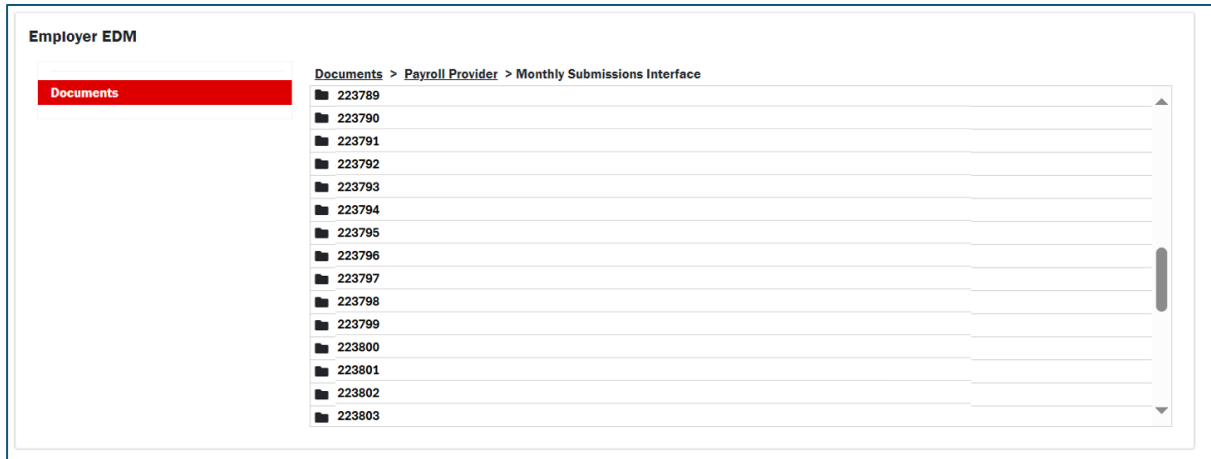


4. Clicking on the employer or *Payroll Provider* folder will open a folder structure that is organised by case type:

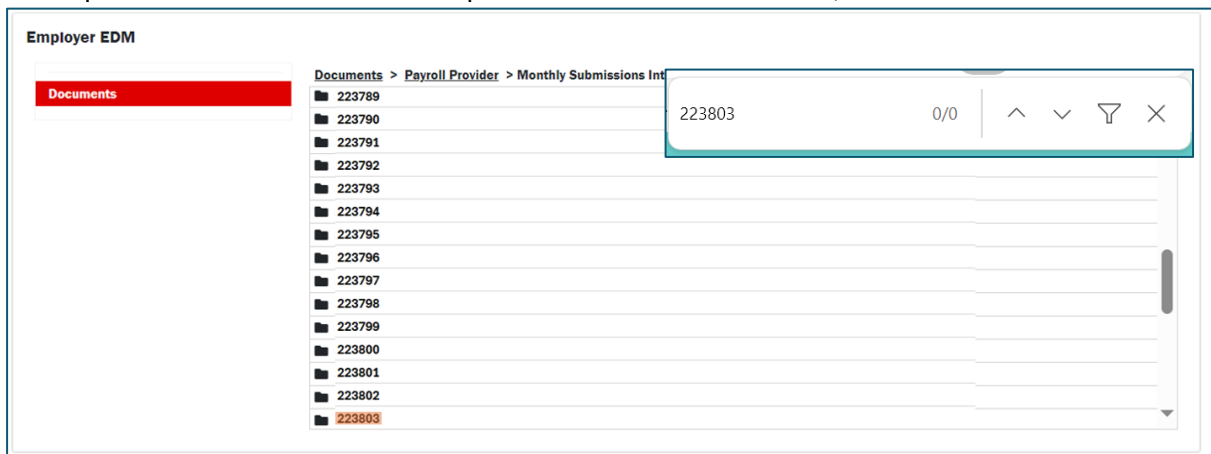


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5. Documents are saved against the relevant case numbers – we recommend ensuring that you make a note of case numbers in your administration of the scheme to ensure that you can easily locate required documents:



6. It is possible to use 'ctrl+f' to find specific case numbers in a list, as illustrated below:



7. Clicking on the required case will make the files associated with that case available.

