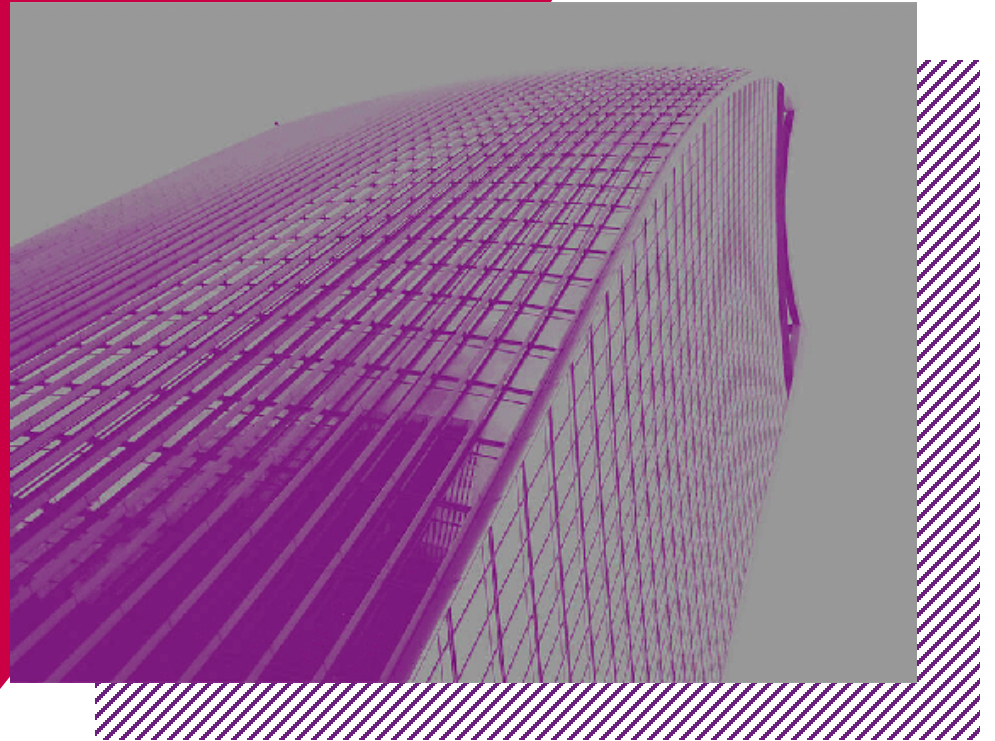


How to Guide

Standards Library



Criterion

YOUR DASHBOARD

Remember your dashboard provides easy access to the information you use regularly, this includes:

1. Your Details (to make changes)
2. Your Standards (recently downloaded and Bookmarked)
3. Your Groups (meeting info and supporting documents)
4. Billing and Invoices (only if key account holder)

You can also access your dashboard, or dashboard items from the navigation bar from anywhere on the website

The image shows four dashboard cards arranged in a 2x2 grid. Each card has a title, a brief description, and a 'VIEW YOUR [CATEGORY]' button. The cards are: 1. 'Your Details' (green background) with a person icon and a '1' in a yellow box. 2. 'Your Standards' (purple background) with a ribbon icon and a '2' in a yellow box. 3. 'Your Groups' (red background) with a calendar icon and a '3' in a yellow box. 4. 'Billing and Invoices' (yellow background) with a document icon and a '4' in a yellow box. The cards are decorated with diagonal lines and small icons.



Search this website



Your account

Logout

ABOUT US

WHAT WE DO

WHO WE WORK WITH

NEWS AND EVENTS

CONTACT US

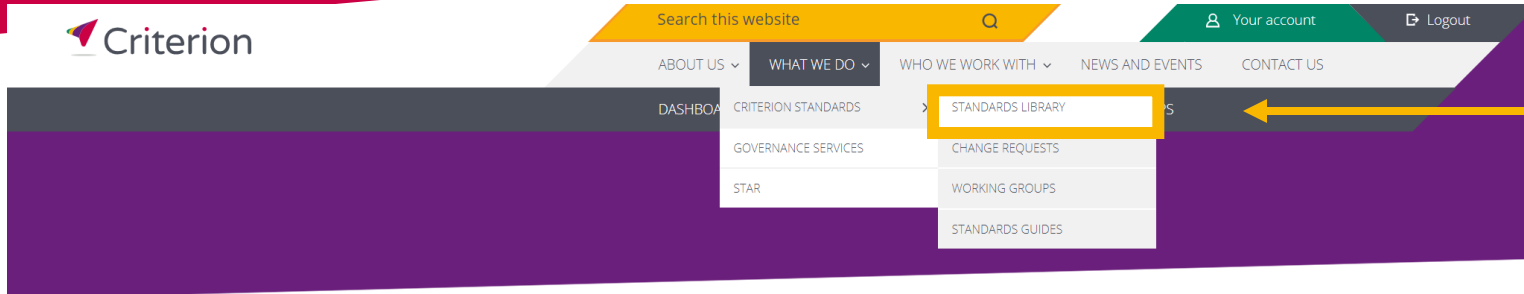
DASHBOARD

YOUR DETAILS

YOUR STANDARDS

YOUR GROUPS

STANDARDS LIBRARY - NAVIGATION



Access Criterion's [Standards Library](#)

- » Home
- » What we do
- » Criterion Standards
- » Standards Library

[Home](#) > [What we do](#) > [Criterion Standards](#) > Standards Library

Criterion standards define common processes, data and technical details

FILTER

Markets

- Protection (9)
- Retirement (23)
- Wealth (12)
- Non Specific (33)

Category

- Business Process-Agnostic Standards (2)
- Business Process-Specific

REFINE RESULTS

Type keywords e.g. Investments

Showing 1-20 of 71 results

[Commission \(EDIFACT\)](#)

2.0

[Commission Transfer \(XML\)](#)

1.0.1



STANDARDS LIBRARY - SEARCHING

Standards can be searched in a number of ways

1. Using the yellow search bar
2. Applying filters under 'Filter'
3. Combination of the two
4. Navigating the full library using the pagination at the bottom of the list

The screenshot shows the Criterion website's Standards Library search interface. At the top, there is a navigation bar with the Criterion logo, a search bar, and links for 'Your account' and 'Logout'. Below this is a secondary navigation bar with links for 'ABOUT US', 'WHAT WE DO', 'WHO WE WORK WITH', 'NEWS AND EVENTS', and 'CONTACT US'. A third navigation bar contains 'DASHBOARD', 'YOUR DETAILS', 'YOUR STANDARDS', and 'YOUR GROUPS'. The main content area shows a breadcrumb trail: 'Home > What we do > Criterion Standards > Standards Library'. Below the breadcrumb is the heading 'Criterion standards define common processes, data and technical details'. The search interface includes a 'FILTER' section with 'Markets' selected (highlighted with a red '2'), and two unselected options: 'Protection (9)' and 'Retirement (23)'. To the right is a 'REFINE RESULTS' section with a search bar containing 'Type keywords e.g. Investments' (highlighted with a red '1') and a search icon. Below the search bar, it says 'Showing 1-20 of 71 results'. At the bottom, there is a pagination control with navigation arrows and page numbers 1, 2, and 3. The number '4' is highlighted with a red '4', indicating the current page.



STANDARDS LIBRARY – SEARCH BAR

For example, looking for 'contract enquiry' returns 15 results

REFINE RESULTS

contract enquiry



Showing 1-15 of 15 results

[Contract Enquiry Bulk Transaction History](#)

1.0

[Contract Enquiry Bulk Valuations](#)

1.1

[Contract Enquiry Collective Investments Valuation](#)

1.5



STANDARDS LIBRARY – SEARCH BAR

- You can scroll to view all 15 results
- You can preview a search result by selecting the version flag in the top right hand corner

REFINE RESULTS

contract enquiry 

Showing 1-15 of **15** results

Contract Enquiry Bulk Transaction History	1.0
Contract Enquiry Bulk Valuations	1.1
Contract Enquiry Collective Investments Valuation	1.5



STANDARDS LIBRARY – APPLYING FILTERS

- Alternatively, you can apply filters to find Standards
- You can filter by markets, categories and product type to help narrow your search or find groups of Standards

The screenshot displays the 'STANDARDS LIBRARY' interface. On the left, a 'FILTER' sidebar is visible with the following sections:

- Tools**
- Add content**
- Standard set**
 - Common Declarations (3)
 - Life, Pensions and Investments (20)
- Markets**
 - Retirement (23)
 - Wealth (4)
- Category** (with a checkmark icon)
 - Business Process-Specific Standards (23)
- Product type**
 - Non Specific (42)
 - Annuity (2)
 - Bond (4)
 - Pension (23)
 - Collective Investments (2)
 - Whole Life Protection (2)
 - Endowment (4)
 - Wrap (4)
 - Protection (2)
 - Equity Release (2)
 - Group Risk (2)

On the right, the 'REFINE RESULTS' section features a search bar with the text 'Type keywords e.g. Investments' and a magnifying glass icon. Below the search bar, it indicates 'Showing 1-20 of 23 results'. The results are displayed as a list of horizontal bars, each representing a standard. Each bar has a dark grey background with a red triangle on the right side containing a version number. The standards listed are:

- [Common Annuity Declarations](#) 2.11
- [Common Bulk Transfer Declarations](#) 1.3
- [Common Transfer Declarations](#) 2.11
- [Contract Enquiry Pensions Valuation](#) 2.5
- [Contract Enquiry Transaction History Pension](#) 2.4
- [Legal Framework Auto Enrolment](#) 2.0
- [New Business Group Pensions](#) 3.10
- [New Business Individual Pensions](#) 3.10



STANDARDS LIBRARY – PREVIEW WINDOW

A preview window appears displaying:

1. Name of Standard
2. Description
3. Versions
4. Ability to Bookmark a Standard
5. Specific version description
6. Change Request details
7. Related Standards

Contract Enquiry Pensions Valuation 1

The Criterion Contract Enquiry Pensions Valuation Standard enables you to obtain portfolio valuations and portfolio information online from a provider or platform. 2

This helps you:

- Get up to the minute portfolio valuations and information on a current product;
- Reduce the phone calls to providers and platforms to get this information.

2.4 2.3 2.2 3

4 Bookmark this standard

This is version 2.4 (11/04/2019) of the Contract Enquiry Pensions Valuation Standard. 5

Details of the Change Requests applied in creating this version can be found [here](#). 6

GO TO VERSION 2.4 >

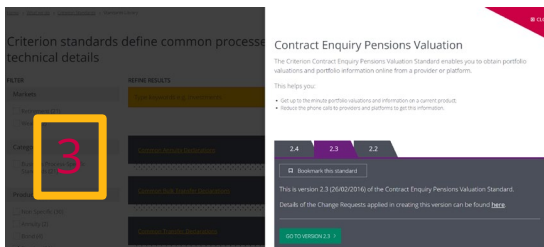
Related Standards

HTTP Message Transmission 7 2.2



STANDARDS LIBRARY – PREVIEW WINDOW

1. You can switch between the versions from the preview window by selecting the purple tab
2. Access version directly by clicking 'GO TO VERSION 2.3' from the preview window
3. Easily return to your search results by clicking back into the main screen

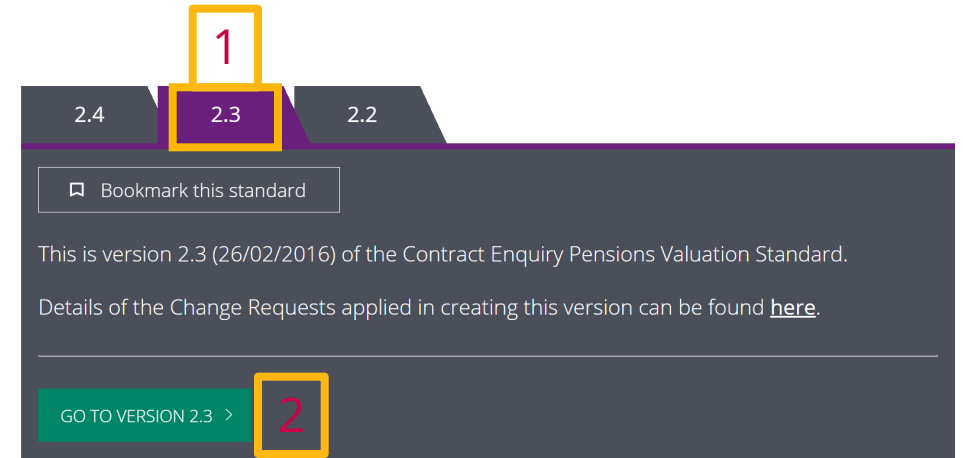


Contract Enquiry Pensions Valuation

The Criterion Contract Enquiry Pensions Valuation Standard enables you to obtain portfolio valuations and portfolio information online from a provider or platform.

This helps you:

- Get up to the minute portfolio valuations and information on a current product;
- Reduce the phone calls to providers and platforms to get this information.



Related Standards

HTTP Message Transmission

CLOSE

2.2

STANDARDS LIBRARY – STANDARD FILES

Once you have selected your Standard version, you will be taken to a page with all files associated with that Standard

From this page, you can:

1. Filter by classification to look for a specific file type
2. Navigate to other Standard versions
3. Bookmark a Standard
4. View related Change Requests
5. Download all files for this Standard
6. Submit a Change Request
7. Download specific files you require

Version 2.4 of Contract Enquiry Pensions Valuation

FILTER 1

Classification

- API
- Design
- Management
- MIG
- Models
- Requirements
- Samples
- Schema

APPLY >

2.4 2.3 2.2 2

3 Bookmark this standard

This is version 2.4 (11/04/2019) of the Contract Enquiry Pensions Valuation Standard.

Details of the Change Requests applied in creating this version can be found [here](#). 4

5 DOWNLOAD ALL FILES FOR THIS STANDARD (4.48 MB) ↓

SUBMIT CHANGE REQUEST > 6

7 CE_BusinessErrors.pdf (265.49 KB)
CE Business Errors Document ↓ Download

CE_PensionMultiContractAcknowledgement.pdf (492.89 KB)
Multi Contract Acknowledgement ↓ Download



CONTACT US – WE'RE HAPPY TO HELP



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