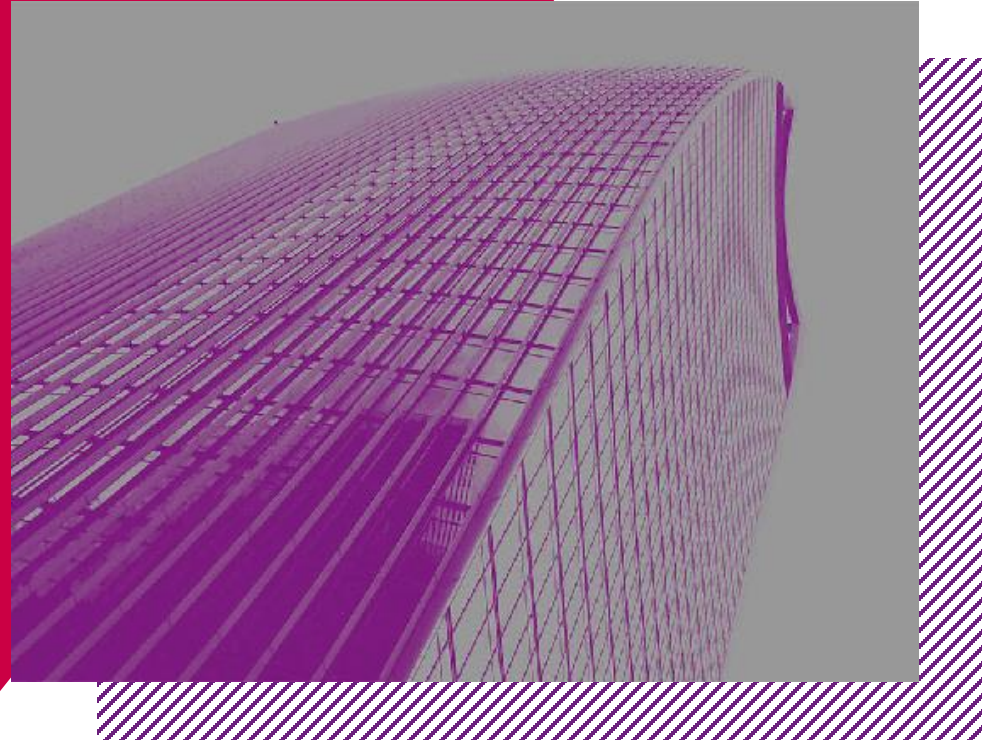


How to Guide

Standards Library



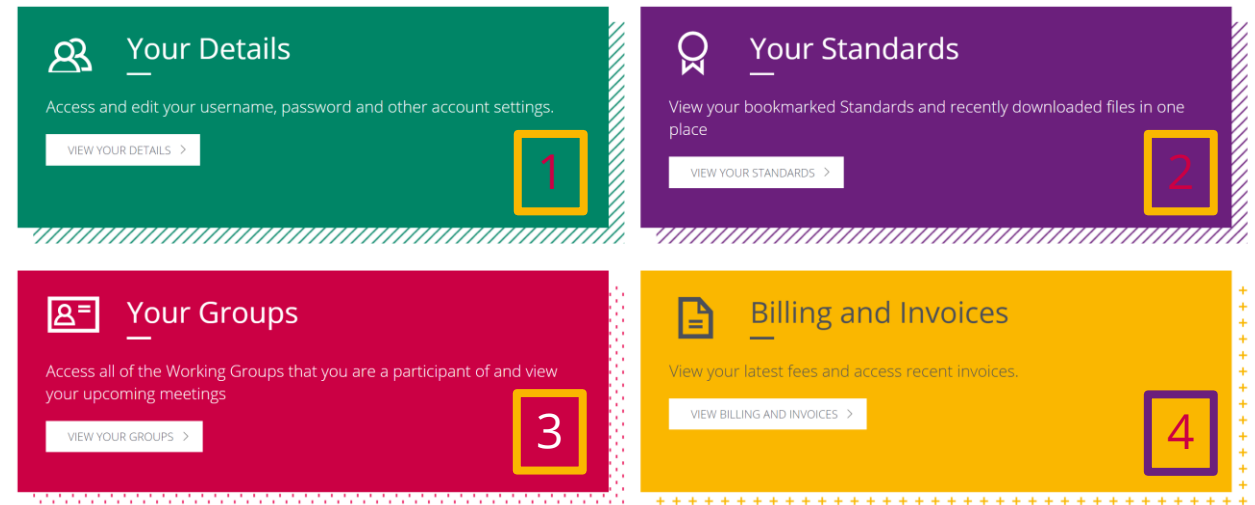
Criterion

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



Search this website



Your account

Logout

ABOUT US ▾

WHAT WE DO ▾

WHO WE WORK WITH ▾

NEWS AND EVENTS

CONTACT US

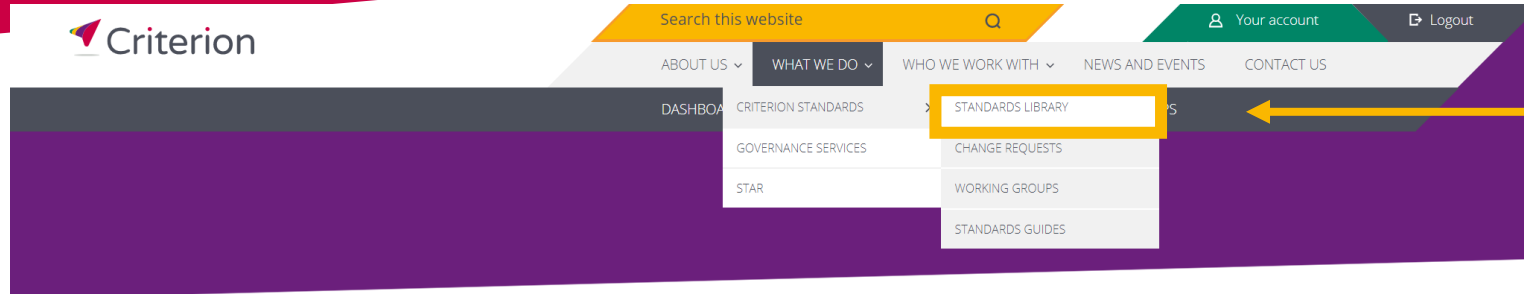
DASHBOARD

YOUR DETAILS

YOUR STANDARDS

YOUR GROUPS

STANDARDS LIBRARY - NAVIGATION



Access Criterion's
[Standards Library](#)

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

Criterion standards define common processes, data and technical details

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

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, the Criterion logo is on the left, and a yellow search bar with a magnifying glass icon is on the right. Below the search bar is a navigation menu with links: ABOUT US, WHAT WE DO, WHO WE WORK WITH, NEWS AND EVENTS, and CONTACT US. A secondary menu below that includes DASHBOARD, YOUR DETAILS, YOUR STANDARDS, and YOUR GROUPS. The main content area has a breadcrumb trail: Home > What we do > Criterion Standards > Standards Library. Below the breadcrumb, the text reads: "Criterion standards define common processes, data and technical details". To the left, under the heading "FILTER", there is a "Markets" button (highlighted with a red box and the number 2) and two checkboxes: "Protection (9)" and "Retirement (23)". To the right, under the heading "REFINE RESULTS" (highlighted with a red box and the number 1), there is a yellow search bar with the placeholder text "Type keywords e.g. Investments" and a magnifying glass icon. Below this search bar, it says "Showing 1-20 of 71 results". At the bottom, there is a pagination section with navigation buttons: a double left arrow, a single left arrow, a button with the number 4 (highlighted with a red box and the number 4), a button with the number 1, a button with the number 2, a button with the number 3, a single right arrow, and a double right arrow.



STANDARDS LIBRARY – SEARCH BAR

For example, looking for 'contract enquiry' returns 14 results

REFINE RESULTS

contract enquiry 

Showing 1-14 of 14 results

[Contract Enquiry Bonds Valuation](#)

2.2

[Contract Enquiry Bulk Transaction History](#)

1.0

[Contract Enquiry Bulk Valuations](#)

1.0



STANDARDS LIBRARY – SEARCH BAR

- You can scroll to view all 14 results
- You can preview a search result by selecting the version flag in the top right hand corner

REFINE RESULTS

contract enquiry



Showing 1-14 of **14** results

[Contract Enquiry Bonds Valuation](#)

2.2

[Contract Enquiry Bulk Transaction History](#)

1.0

[Contract Enquiry Bulk Valuations](#)

1.0



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

Criterion standards define common processes, data and technical details

FILTER

Markets

- ☐ Retirement (21)
- ☐ Wealth (2)

Category

- ☐ Business Process-Specific Standards (21)

Product type

- ☐ Non Specific (30)
- ☐ Annuity (2)
- ☐ Bond (4)
- ☒ Pension (21)
- ☐ Collective Investments (2)
- ☐ Whole Life Protection (2)
- ☐ Endowment (4)

REFINE RESULTS

Type keywords e.g. Investments



Showing 1-20 of 21 results

[Common Annuity Declarations](#)

2.10

[Common Bulk Transfer Declarations](#)

1.2

[Common Transfer Declarations](#)

2.8

[Contract Enquiry Pensions Valuation](#)

2.4



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

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.

The screenshot shows a preview window for the 'Contract Enquiry Pensions Valuation' standard. At the top, there are tabs for versions 2.4, 2.3, and 2.2, with 2.4 selected. Below the tabs is a 'Bookmark this standard' button. The main text area contains the description: '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](#).' At the bottom, there is a green button labeled 'GO TO VERSION 2.4 >'. A 'CLOSE' button is visible in the top right corner of the window.

Related Standards

The screenshot shows the 'Related Standards' section. It features a card for the 'HTTP Message Transmission' standard, version 2.2. The card has a dark background with a red triangle on the right side.



STANDARDS LIBRARY – PREVIEW WINDOW

CLOSE

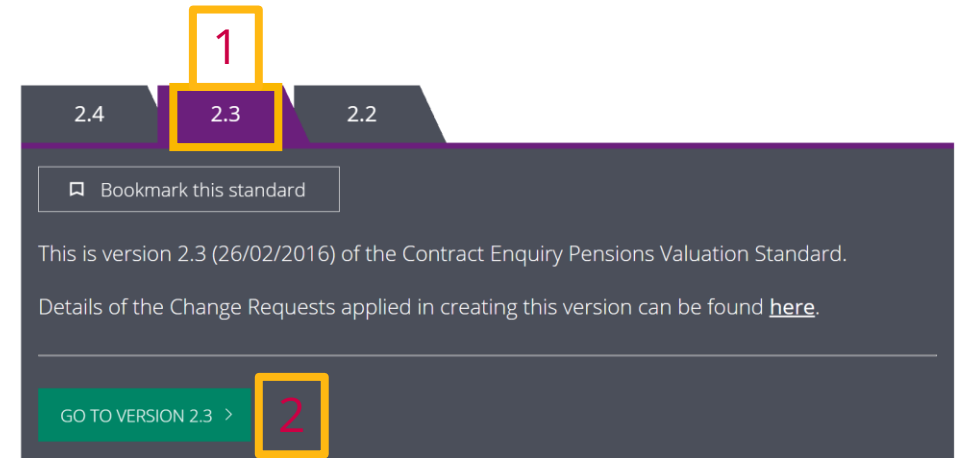
1. You can switch between the versions from the preview window by selecting the purple tab
2. Access version directly by clicking 'GO TO VERSION 2.3' from the preview window
3. Easily return to your search results by clicking back into the main screen

Contract Enquiry Pensions Valuation

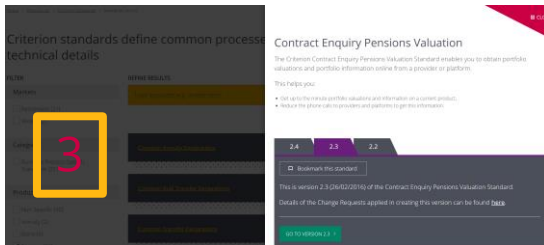
The Criterion Contract Enquiry Pensions Valuation Standard enables you to obtain portfolio valuations and portfolio information online from a provider or platform.

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



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

Classification

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

APPLY >

2.4

2.3

2.2

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](#).

DOWNLOAD ALL FILES FOR THIS STANDARD (4.48 MB)

SUBMIT CHANGE REQUEST >

CE_BusinessErrors.pdf (265.49 KB)
CE Business Errors Document

CE_PensionMultiContractAcknowledgement.pdf (492.89 KB)
Multi Contract Acknowledgement

Download

Download



CONTACT US – WE'RE HAPPY TO HELP



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enquiries@criterion.org.uk



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