## Process to extract active member listing from MercerSpectrum.

This document will assist you with extracting an active member list that includes the members fund details (fund name, ABN, SPIN and USI).

- 1. Log in to MercerSpectrum.
- 2. Go to 'Reports' in the links bar and click 'Member Reports'.

Home   Contributions	Members Search	Change Details C	hoice of Fund	Feedback	Reports
SuperStream					Member Reports
					Employee Advices

3. On the Member reporting page, please ensure you have ticked 'Include Payroll Number' and the member status is correct. All other fields can be left blank as per below. Click Search and Download.

Member F		
	Return Search and Display Search and Down	nload Clear All Values
	Note: All highlighted fields accept * wi	ildcard searches
Fund Name	<all></all>	
Member First Name		
Member Last Name Member Number		
Member Status	<current></current>	
TFN Supplied Status	<a) > ¥</a) >	
Date Created ( DD-MM-YYYY)		
Include First Contribution		
Include Payroll	2	
TFN Supplied Status		

4. A .txt file of all active members will download. Save this to your computer. Open the below Excel spreadsheet 'Member List with funds' and navigate to Data>Get external data and click From Text. Search for your txt file you saved to your computer and click import.

From Web   From Other   Existing Sources*   From Table   Properties   From Properties   Filter   Reapply   Free Reapply   Text to Columns   Text to Columns   Filter   Reapply   Text to Columns   Text to Columns	From Access   Image: Connections   Image: Connectio	From Access   Image: Connections   Image: Connectio	From Access         From Web         From Other         Sources-         Get External Data            Existing         Get & Transform            £114           £1           £12           £12           £12           From Text           Sources-           From Taxt           Sources-           Connections           £12           Y           Filter           Flash Fill           Hemove Duplicates           Belationships           What             Itat           Itat           Itat           Sort & Filter           Data Validation           Belationships           What         Analy:             Itat           Itat           Itat           Sort & Filter           Data Validation           Belationships           What         Analy:	From Access   Image: Connections   Image: Connectio	85	<b>•</b> ।< <u>₹</u> = =						Me	mber i	ist with fun	ds.xlsx - Exc	el			1C	
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5. In the Text Import wizard ensure to follow the below steps.

## • Set file type to delimited and click next

	- Step 1 of 3					?	×
The Text Wizard has	determined that j	your data is [	Delimited.				
If this is correct, cho	ose Next, or choo	se the data t	ype that be	st describes yo	ur data.		
Original data type							
Choose the file typ		-					
Delimited	- Characters su						
O Fixed width	- Fields are alig	ined in colur	nns with sp	aces between e	ach field.		
Start import at row:	1	File origin:	MS-DOS	PC-8)			~
Preview of file C:\L		Desktop\Aus	net- <mark>Mondo</mark>	P\Ausnet 780	179798173 EQ9018	3.txt.	
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## • Set the delimiters to comma and click next.

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ta <u>p</u> review						
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• Click Finish. You will see a pop up. Ensure the data is going into the existing worksheet at =\$A\$2 as shown below.

Text Import Wizard - Step 3 of 3			?	×h			
This screen lets you select each colu	mn and set the Data Format.			c			
Column data format © <u>G</u> eneral ) Iext ) <u>D</u> ate: <u>DMY</u> ) Do not import column (skip)	'General' converts numeric v all remaining values to text.	alues to numbers, date val	ues to dat	t es, and ic	Import Data	?	×
Data <u>p</u> review				r.	Select how you want to view this data i	n your wo	rkbook.
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					= \$A\$2	1	
				~	O New worksheet		
<				>	Add this data to the Data Model		
	Cancel	< <u>B</u> ack	<u> </u>	sh	P <u>r</u> operties OK	Ca	ncel

You now have a list of all of your active members. You may need to change the member number field to the correct format. You can do this following below steps.

Highlight the column you need to change. Right click and select format cells. Then ensure it is set to number and the decimal places is set to 0.

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	Click Here		🖌 Cu <u>t</u>	Ou	Format Cells		? ×
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19	944627325 Ac	100	<b>C</b>	-	General	Sample MEMBER NUMBER	
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How to add USI and fund list.

6. Go to 'change details' in the links bar and click 'Funds'.

Home   Contributions   Members   Search	Change Deta	Is Choice of Fund   Feedback   Reports
SuperStream	Employer	
	Users	
2 Click here t	Funds	d Administrator feedback
	Members	

7. Highlight fund list, copy and paste into the Master Fund List in the excel spreadsheet.



When you paste in excel ensure you press ctrl on your keyboard or click the clipboard. Then select 'Match destination formatting'.

1	A	В	C	D	E	F	G	н	1	J
10	Fund Name	USI	Abbr. Name	Fund Employe r Number						
2	AMP FLEXIBLE LIFETIME SUPER	AMP0195 AU	C- PDAMP01 95	n/a						
3	AMP FLEXIBLE SUPER - SUPER	AMP1248 AU	C- AMPFLEXI 001	n/a						
4	AMP SIGNATU RESUPER	AMP0735 AU	C- PDAMP07 35	n/a						
5	AMP SUPERLE ADER PLAN ANZ	AMP0278 AU	C- PDAMP02 78	n/a			Paste Opt	ions:		
	SMART CHOICE	MMF2076 AU	C- ANZSMAR T001	n/a			Mate	h Destinatio	on Formattin	g (M)

You will then have a list of all your funds. You can remove duplicates by highlighting all you columns going to Data>Remove duplicates and clicking OK in the pop up box.

E S	T C = ₹		-					Memb	er list with	funds.xlsx - Exce	el		
File	Home li	nsert Page Lay	out Formulas	Data	Review	View	Develope	r e	Working	MMC Temp	olates	PDF-XChange	♀ Tell me wi
From A From W	/eb From O	her Existing	New D P		Refresh All •	Connect	es Z↓	Z A A Z Sort	Filter	Clear	Text to Colum	Flash Fill	
	Get External	Data	Get & Trans	form	C	onnections			Sort & Fi	lter		1	Data Tools

8. Adjust the fund list to have the Abbr. Name/Fund Code at the beginning. This is necessary for the Vlookup formula to work. It should appear as per below.

1	A	B	C		
1	Fund Code	USI	¥		
2	C-PDAMP0195	AMP FLEXIBLE LIFETIME SUPER	AMP0195/	U	
3	C-AMPFLEXI001	AMP FLEXIBLE SUPER - SUPER	AMP12484	U	
4	C-PDAMP0735	AMP SIGNATURESUPER	AMP07354	U	
5	C-PDAMP0278	AMP0278A	U		
6	C-ANZSMART001	ANZ SMART CHOICE SUPER	MMF2076AU		
8	C-PDASG0007	ASG0007AU			
10	C-ASGARDIN001	ASGARD INFINITY EWRAP SUPER ACCOUNT	901944103650		
12	C-PDAET0100	AUSTRALIAN ETHICAL RETAIL SUPERANNUATION FUND	AET0100AU		
13	C-PDSTA0100	AUSTRALIANSUPER	STA0100AU		

9. Navigate back to your active member list and enter below formulas in the columns specified

Fund Name: =VLOOKUP(G2,'Master Fund List'!A:C,2,FALSE) USI: =VLOOKUP(G4,'Master Fund List'!A:C,3,FALSE)

You can then fill the formula down by double clicking in the bottom right hand corner of the cell.

0	P
FUND NAME	- usi
	Double Click Here

You should now have an active member list including Fund Name and USI for all members. This can be provided to your payroll system to update their records.