

# TAS Portal

## **User's Manual:**

### **Inserting Links, Uploading Documents and Adding Information**

WAC December 2013

## **Table of Contents**

Section 1. Adding Links.....	3
Section 2. Uploading Documents.....	7
Section 3. Adding Announcements.....	12
Section 4. Adding Calendar Events.....	15

## 1. ADDING LINKS

To insert links to websites or documents, click on the menu arrow at the top right corner of the links section and select **Edit Web Part**.

The screenshot shows the iXchange Employee Portal interface. At the top, there's a navigation bar with 'Home', 'Locations', 'Resources', 'Sites', and 'Trust Advisory'. The main content area is titled 'Trust Advisory Services' and includes a paragraph about GenSpring's role as a trustee. Below this, there's a 'TAS Team' section with roles like Trust Directors, Trust Advisor, Trust Services Manager, and Trust Services Coordinator. To the right, there's a 'TAS Links' web part with a context menu open, showing options like 'Minimize', 'Close', 'Edit Web Part', and 'Export...'. A red arrow points to the 'Edit Web Part' option. Below the team section, there are 'TAS Areas' represented by icons for SunTrust, Delaware as Trustee, IRAs, and itm Insurance Trust Monitor. At the bottom, there's an 'Announcements' section with three test entries.

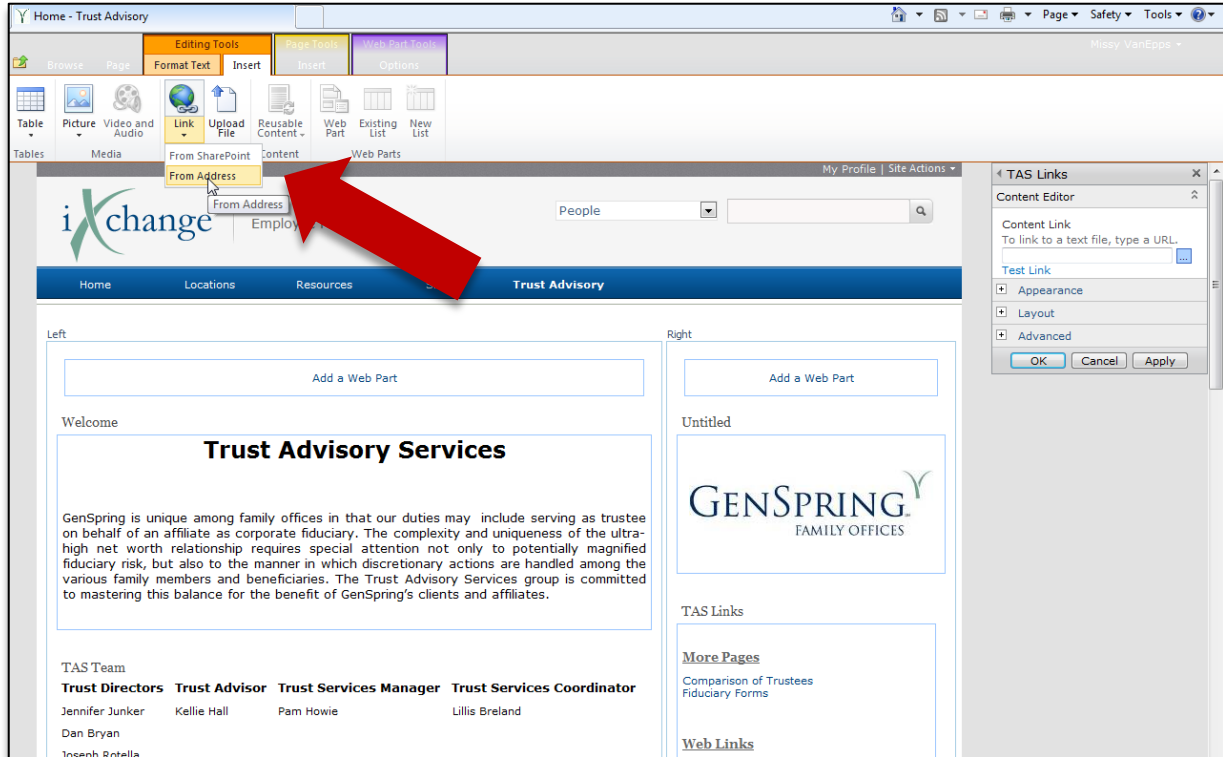
Double click somewhere inside the web part to open the page editing menu at the top of the page. (See next page)

Under **Editing Tools**, select **Insert** from the tabs. (Note the **Content Editor** on the right side of the page—you do not need to utilize this function.)

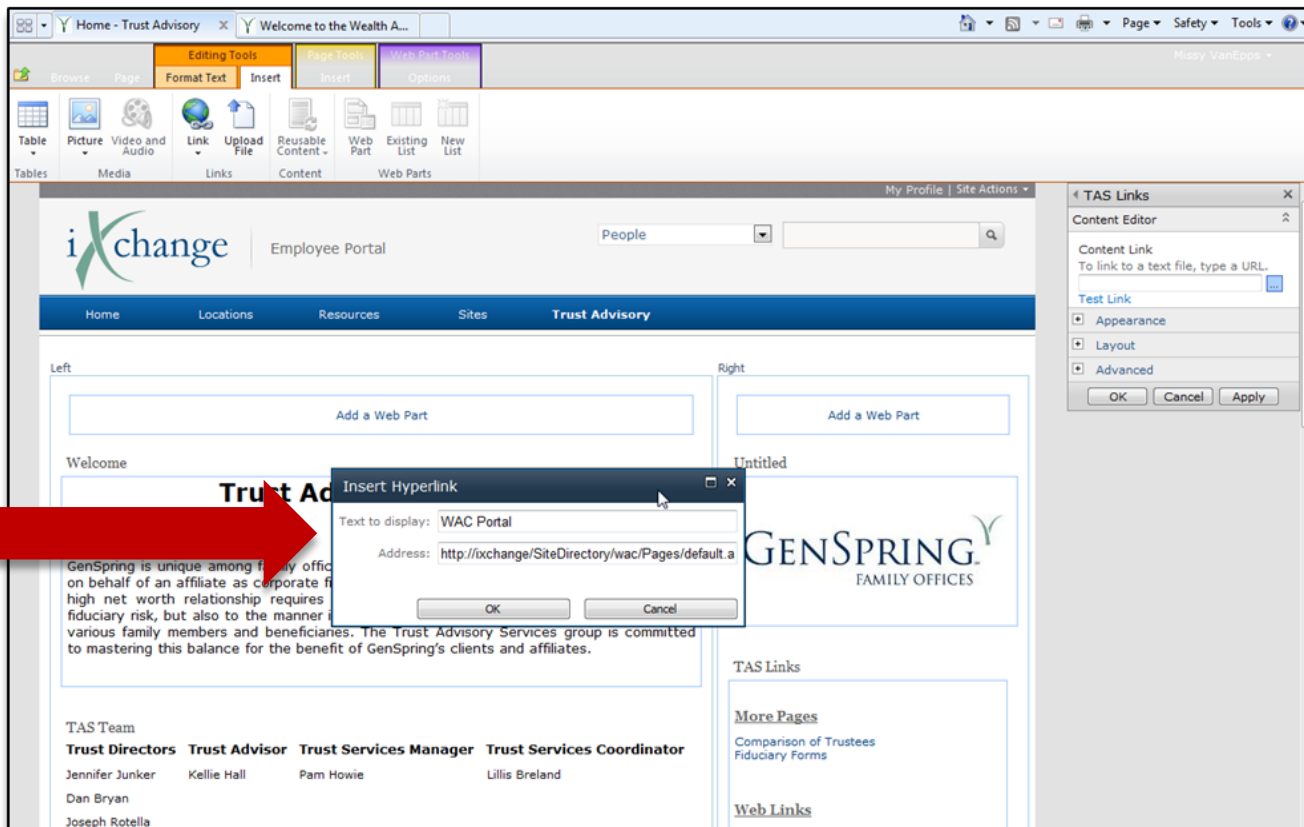
The screenshot displays the iXchange Employee Portal interface. At the top, a navigation bar includes 'Home - Trust Advisory' and various tool icons. Below this, a ribbon-style menu shows 'Editing Tools' with sub-tabs for 'Format Text', 'Insert', and 'Options'. A large red arrow points to the 'Insert' tab. The main content area is divided into 'Left' and 'Right' columns. The 'Left' column features a 'Welcome' message, 'Trust Advisory Services' text, and a 'TAS Team' section with roles like 'Trust Directors' and 'Trust Services Manager'. The 'Right' column contains an 'Untitled' section with the 'GENSPRING FAMILY OFFICES' logo, 'TAS Links', 'More Pages', and 'Web Links' (circled in red). On the far right, a 'Content Editor' sidebar is visible, showing options for 'Content Link', 'Test Link', 'Appearance', 'Layout', and 'Advanced'. The 'Web Links' link in the right column is circled in red.

Place the cursor where you would like to put the web or document link.

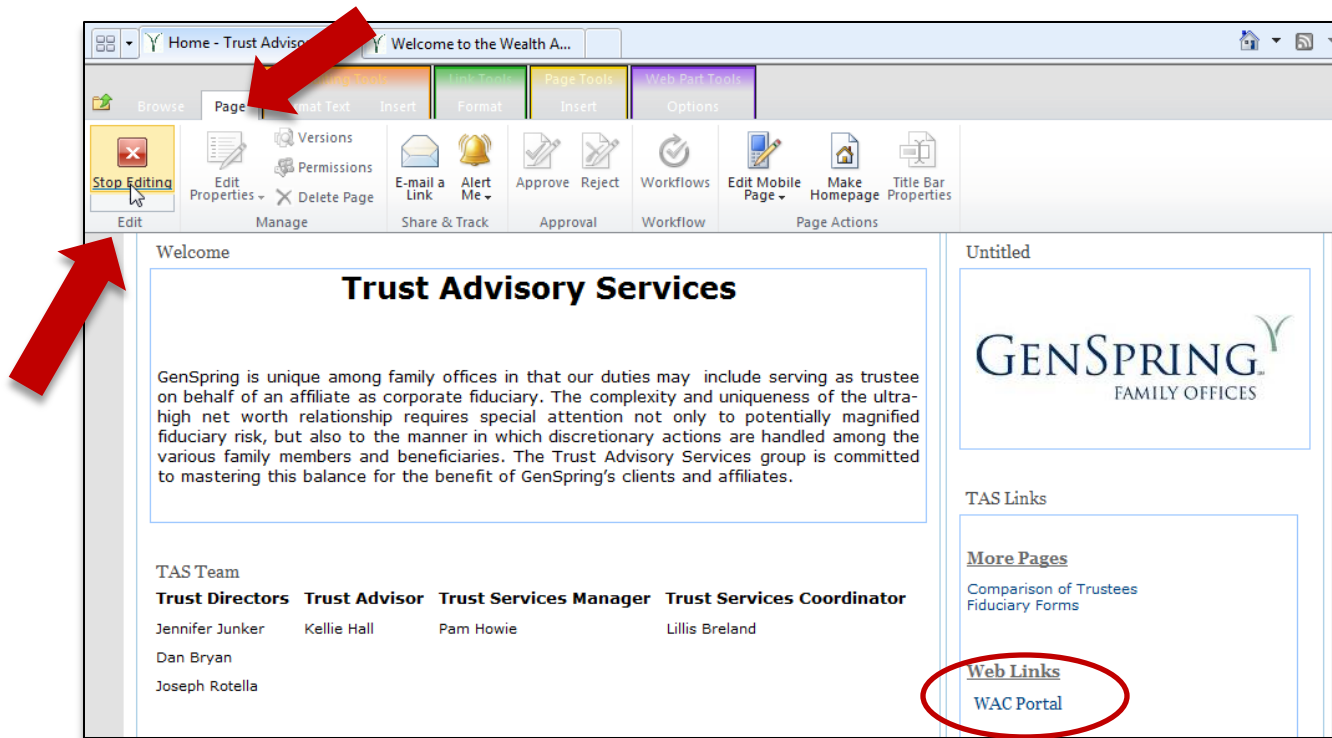
Click on **Link** and then click on **From Address**.



The **Insert Hyperlink** box will appear. Fill in the link or document title and web address.



Click **ok** and the link will be in the web part. When you are finished, select the **Page** tab and click on **Stop Editing** to save and return to the normal view of the TAS Portal.



You have now inserted a live link to a web page or document.

## 2. UPLOADING DOCUMENTS

On the TAS Portal main page, click on ***TAS Library All Docs***.

The screenshot shows the iXchange Employee Portal. The top navigation bar includes Home, Locations, Resources, Sites, and Trust Advisory. The main heading is "Trust Advisory Services". Below this, a paragraph describes GenSpring's role as a trustee. To the right is the GenSpring Family Offices logo. The "TAS Team" section lists roles and names: Trust Directors (Jennifer Junker, Dan Bryan, Joseph Rotella), Trust Advisor (Kellie Hall), Trust Services Manager (Pam Howie), and Trust Services Coordinator (Lillis Breland). The "TAS Areas" section features four tiles: "As Trustee" (SunTrust logo), "Delaware as Trustee" (SunTrust logo), "IRAs" (Forms & Information), and "GenSpring Information" (itm Insurance Trust Monitor logo). On the right, the "TAS Links" sidebar contains sections for "More Pages" (Comparison of Trustees, Fiduciary Forms), "Web Links" (WAC Portal), "Documents" (TAS Library All Docs, 11 Commandments, GenSpring Statement Guidance, Investment Guidelines for Trusts, Risk and Family Enterprise, Trustee Roles and Responsibilities, Use of Alternatives in Trusts), and "Contact" (TAS Email). A red arrow points to the "TAS Library All Docs" link. The "Announcements" section at the bottom shows two test messages from Ben Barber dated 12/6/2013 2:46 PM.

Home - Trust Advisory

My Profile | Site Actions

iXchange Employee Portal

Home Locations Resources Sites Trust Advisory

### Trust Advisory Services


GenSpring is unique among family offices in that our duties may include serving as trustee on behalf of an affiliate as corporate fiduciary. The complexity and uniqueness of the ultra-high net worth relationship requires special attention not only to potentially magnified fiduciary risk, but also to the manner in which discretionary actions are handled among the various family members and beneficiaries. The Trust Advisory Services group is committed to mastering this balance for the benefit of GenSpring's clients and affiliates.

**GENSPRING**  
FAMILY OFFICES

**TAS Team**

Trust Directors	Trust Advisor	Trust Services Manager	Trust Services Coordinator
Jennifer Junker Dan Bryan Joseph Rotella	Kellie Hall	Pam Howie	Lillis Breland


**TAS Areas**




As Trustee



Delaware as Trustee



Forms & Information



GenSpring Information

**TAS Links**

More Pages  
Comparison of Trustees  
Fiduciary Forms

Web Links  
WAC Portal

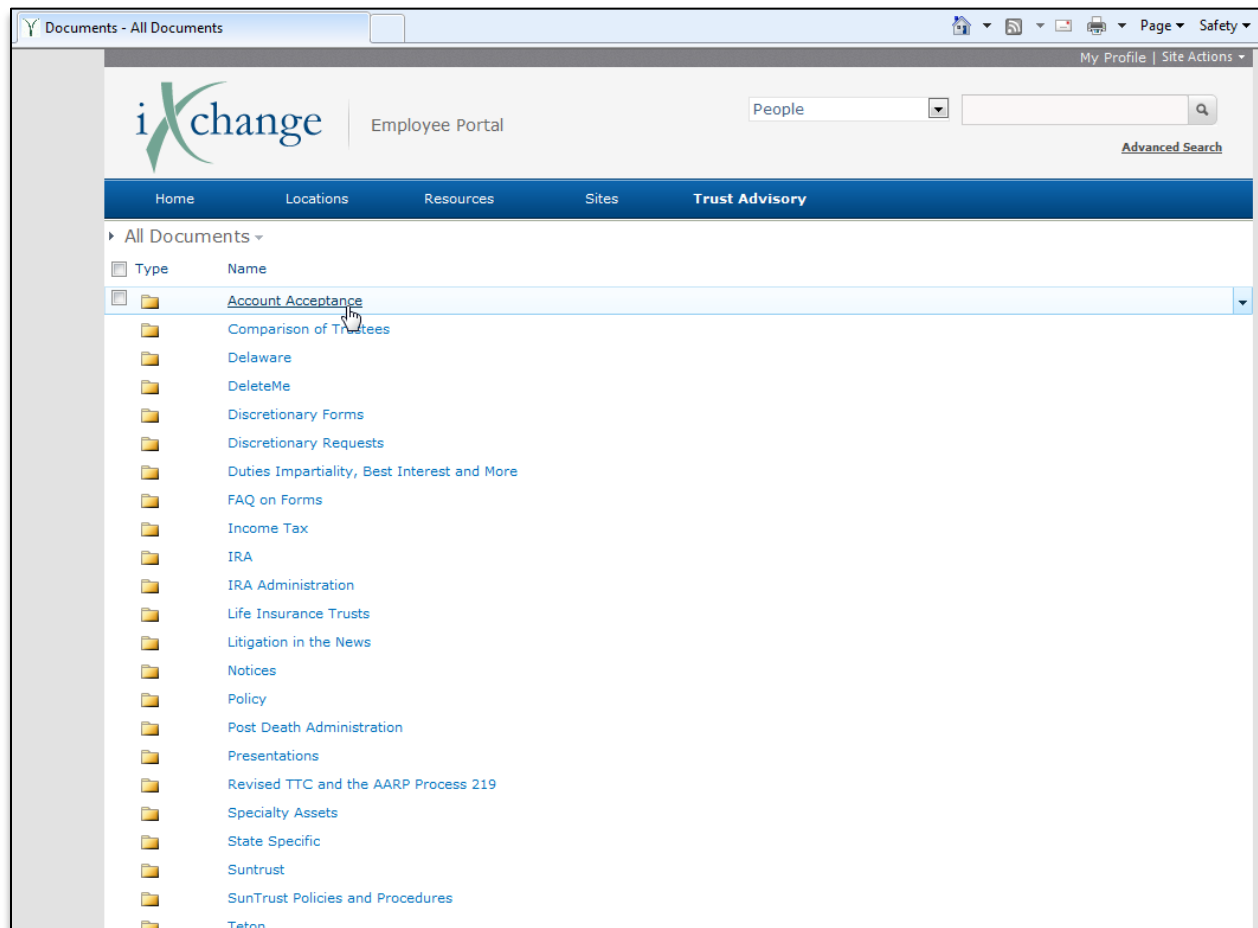
Documents  
TAS Library All Docs  
11 Commandments  
GenSpring Statement Guidance  
Investment Guidelines for Trusts  
Risk and Family Enterprise  
Trustee Roles and Responsibilities  
Use of Alternatives in Trusts

Contact  
TAS Email

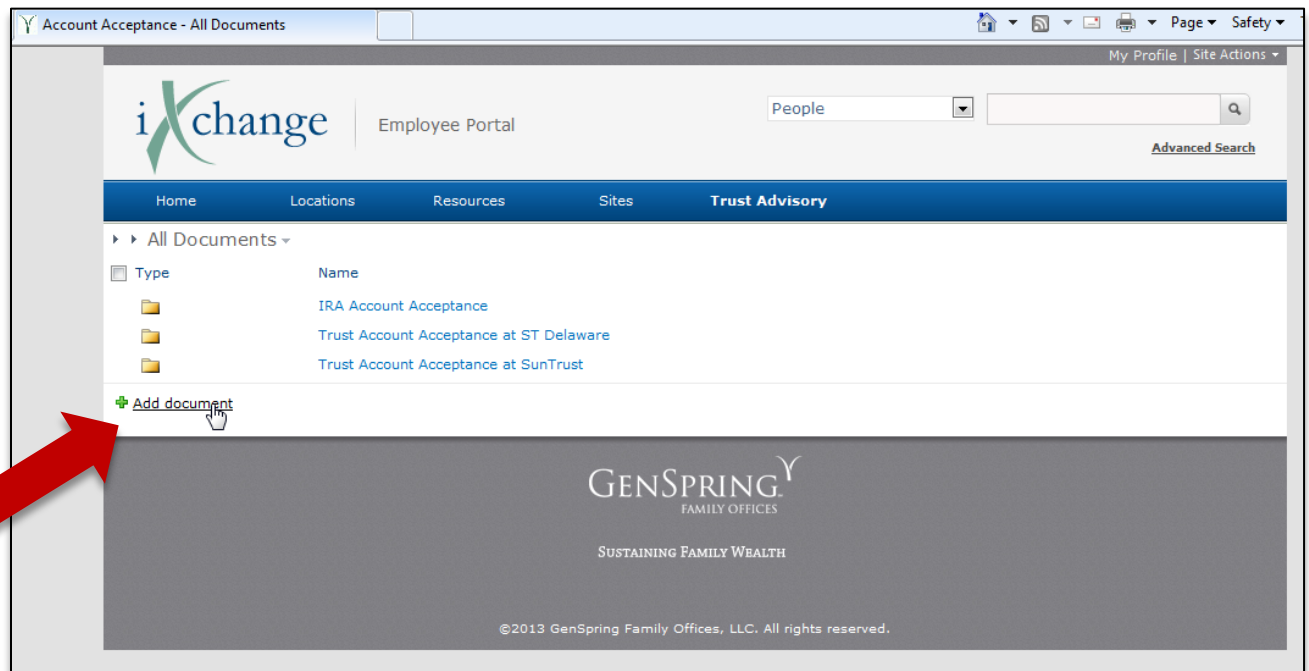
**Announcements**

test 3 by Ben Barber	12/6/2013 2:46 PM
test 2 by Ben Barber	12/6/2013 2:46 PM

When in the **All Documents Library**, choose the folder or section to which you would like to add a document.



When in the folder or section to which you'd like to add a document, click on **Add document** under the last folder in that section.

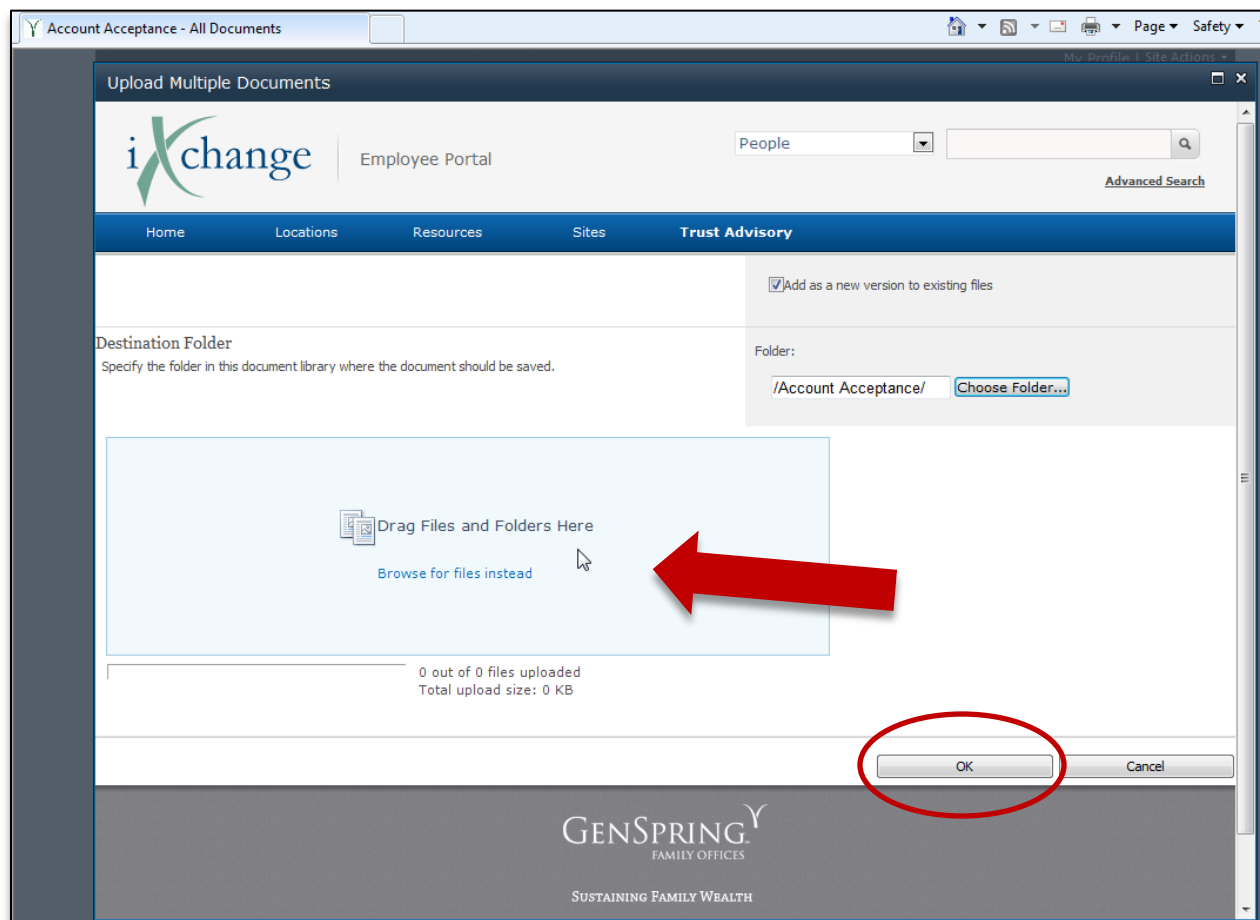


The Upload Document screen will pop up. From here you can browse folders for documents and files that you can upload. (NOTE: Unclick the **Add as new version to existing files** box.)

The screenshot shows a web browser window with the title 'Account Acceptance - All Documents'. The main content area is titled 'Upload Document' and features the 'iXchange' logo and 'Employee Portal' text. A navigation bar includes links for Home, Locations, Resources, Sites, and Trust Advisory. The 'Upload Document' section contains a text box for the document name, a 'Browse...' button, and a checkbox labeled 'Add as a new version to existing files' which is currently checked. A red arrow points to the 'Upload Multiple Files...' link. Below this, there is a 'Destination Folder' section with a text box showing '/Account Acceptance/' and a 'Choose Folder...' button. A 'Version Comments' section includes a text area for comments. At the bottom of the dialog are 'OK' and 'Cancel' buttons. The footer of the page displays the 'GENSPRING FAMILY OFFICES' logo and the tagline 'SUSTAINING FAMILY WEALTH', along with a copyright notice for 2013.

To drag and drop documents and folders from one file to the portal library, you can click on the **Upload Multiple Files** link.

From here it is easy to drag and drop files quickly into the portal folder that you have chosen.



When you have finished, click **OK**.

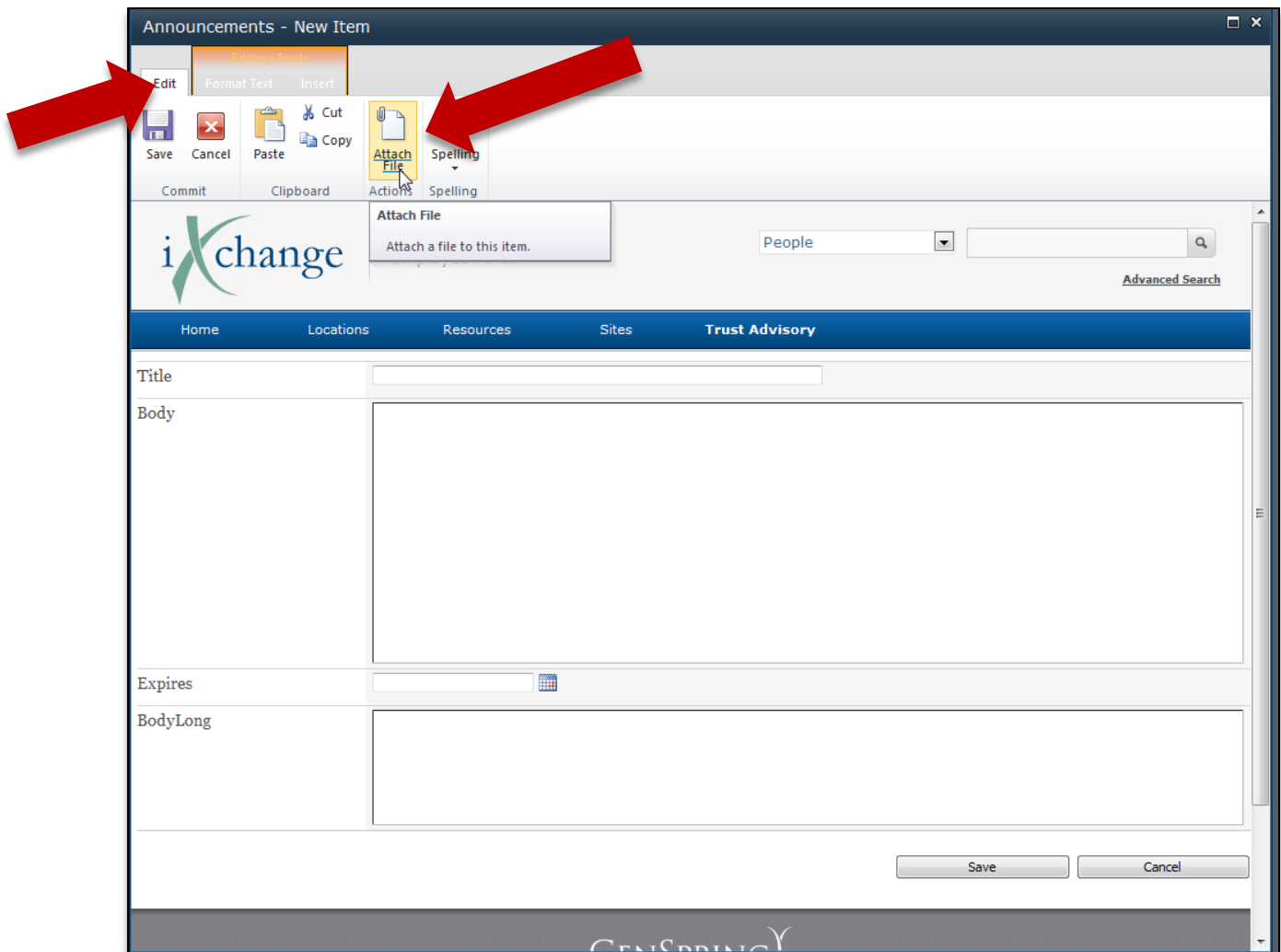
You have now uploaded documents and/or folders to the TAS Library files.

### 3. ADDING ANNOUNCEMENTS

To add an announcement to the front page of the portal, click on **Add new announcement** under the announcements section.



Once the announcement text box opens up, double click somewhere inside the box. The **Editing Tools** tabs will appear. To attach a file to your announcement, click on the **Edit** tab and then **Attach File**.



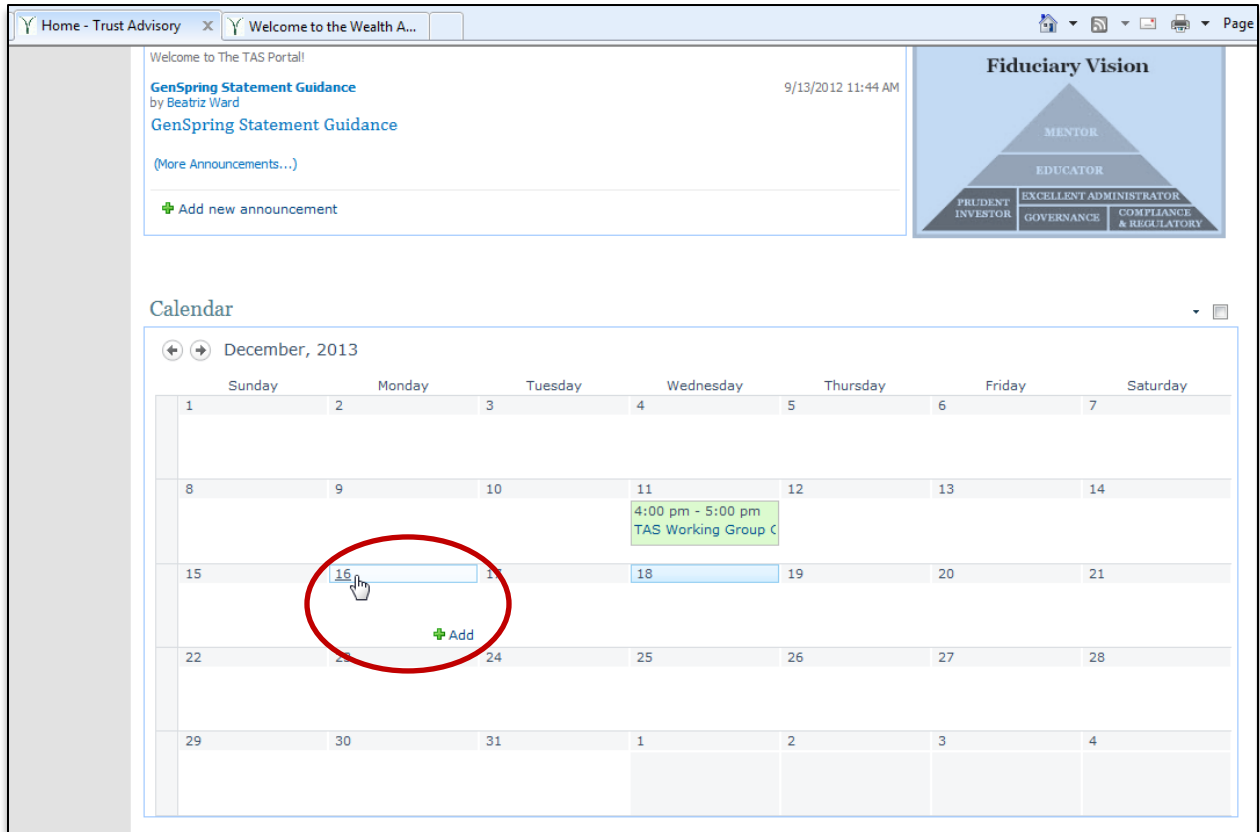
Make sure your text is formatted consistently; click on the **Format Text** tab and select the proper text features for your announcement. Type a summary of the announcement in the **Body** section—this will appear on the home page. The full announcement can be typed into the **Body: Long** section. Click **save** when you are done.

The screenshot shows the 'Announcements - New Item' form within the iXchange Employee Portal. The form has a ribbon at the top with 'Editing Tools' and 'Insert' tabs. The 'Format Text' tab is selected, and a red arrow points to it. The ribbon contains various formatting options like Bold, Italic, Underline, Font color, Background color, Paragraph, Styles, Spelling, Markup Styles, and HTML. Below the ribbon, there is a search bar with 'People' and an 'Advanced Search' link. The form fields include 'Title', 'Body', 'Expires', and 'BodyLong'. The 'Body' field is a large text area. The 'Expires' field has a date picker. The 'BodyLong' field is another large text area. At the bottom right, there are 'Save' and 'Cancel' buttons. The 'Save' button is circled in red.

You have now added an announcement to the TAS Portal home page.

## 4. ADDING CALENDAR EVENTS

To add a meeting or event to the TAS Portal Calendar, hover your mouse over the date of the event. The word **Add** will appear in the bottom right corner of that date section. Click **Add** and a **Calendar- New Item** box will pop up.



Fill in the event or meeting information in the appropriate fields. This cannot be used to invite attendees; the event will only appear on the TAS main page calendar.

The screenshot shows a web application window titled "Calendar - New Item". The header includes the "iXchange" logo, "Employee Portal", a "People" dropdown, and an "Advanced Search" link. A navigation bar contains links for "Home", "Locations", "Resources", "Sites", and "Trust Advisory". The form fields are as follows:

- Title:** A text input field.
- Start Time \*:** A date and time selector showing 12/16/2013 at 4 PM.
- End Time \*:** A date and time selector showing 12/16/2013 at 5 PM.
- Description:** A rich text editor with a toolbar and a text area.
- All Day Event:** A checkbox with the text "Make this an all-day activity that doesn't start or end at a specific hour."
- Recurrence:** A checkbox with the text "Make this a repeating event."
- Workspace:** A checkbox with the text "Use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event."

At the bottom right of the form, there are two buttons: "Save" and "Cancel". The "Save" button is circled in red. Below the form is a footer for "GENSPRING FAMILY OFFICES" with the tagline "SUSTAINING FAMILY WEALTH" and a copyright notice for 2013.

When you have completed your entry, click **save**.

You have now added an event to the TAS Portal calendar.

*If you have any questions, issues or comments regarding the TAS Portal, please contact Ben Barber or Missy Van Epps in the WAC.*