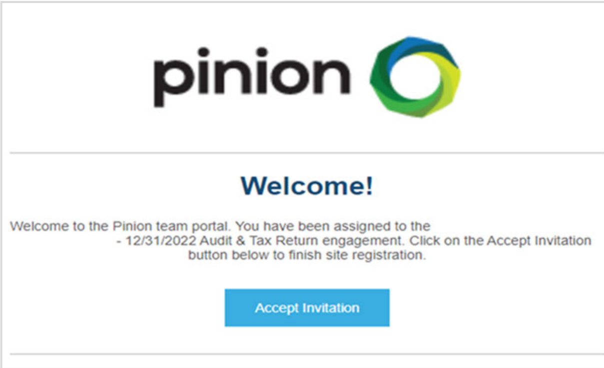
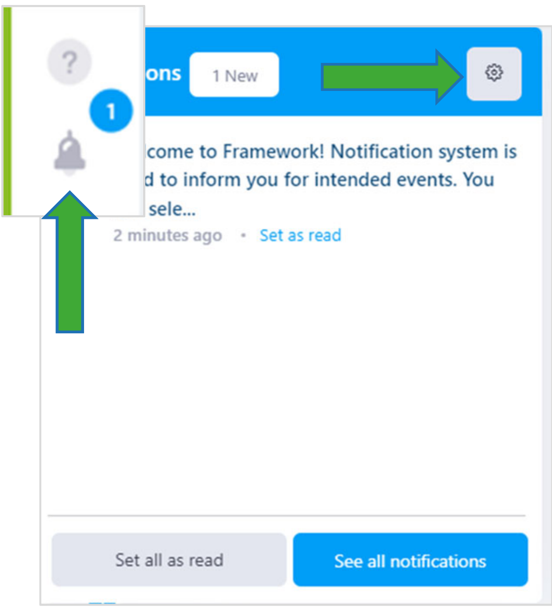
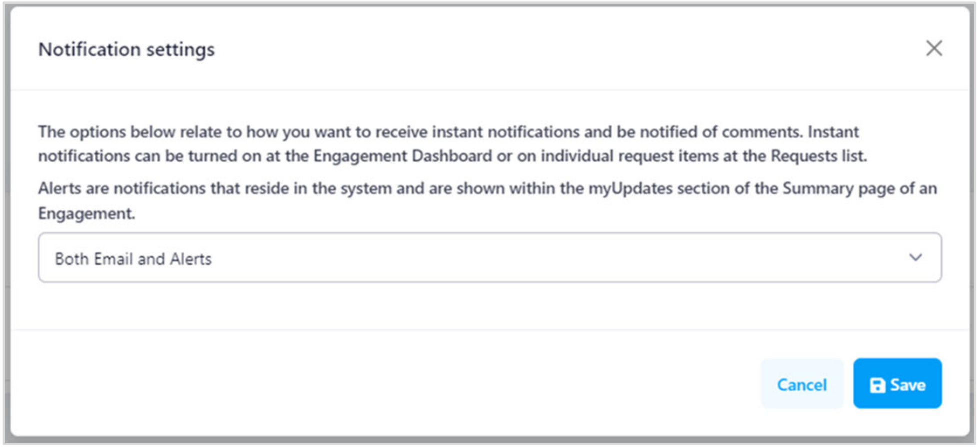
Getting Started With myPortal



Accept the invitation and set up your name and password. After the initial setup, your username is your email address. You may want to add the web address pinionglobal.myportal.team to your bookmarks. Emailed notifications will come from noreply@myportal.team and could be routed to your junk mail folder so it may be necessary to add this to your approved senders list.

After logging in, click on the settings (bottom left of the screen) to customize the type of alerts and notifications you will receive.





Alerts will only be seen on your feed when you are logged into the system. **Email** will send you an email when the specific item occurs, even if you are not logged into the system. We recommend selecting **Both Email and Alerts**. Make sure to save your settings.

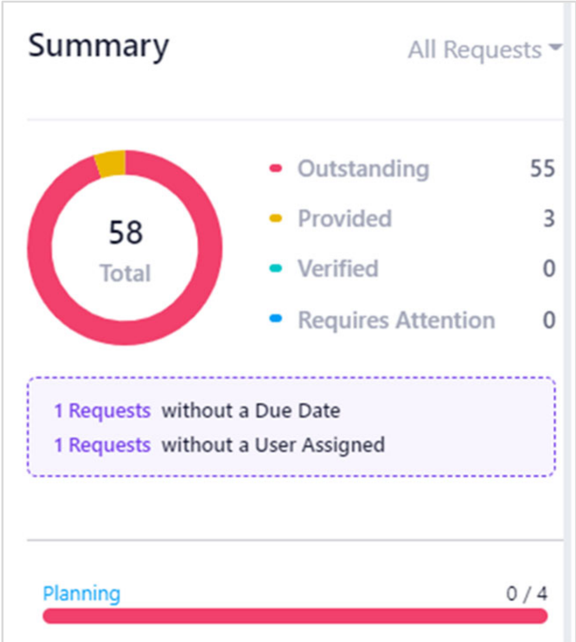
The **Summary** tab is a snapshot of where the project is at and a great tracking tool. The legend is as follows:

OUTSTANDING: The information is outstanding and Pinion is waiting to receive the information from you.

PROVIDED: You have uploaded the information and are waiting for Pinion to review the information.

VERIFIED: Pinion has downloaded the information and preliminarily verified that this is the requested information.

REQUIRES ATTENTION: Pinion has provided documents to be reviewed by you or has left comments that require your attention.



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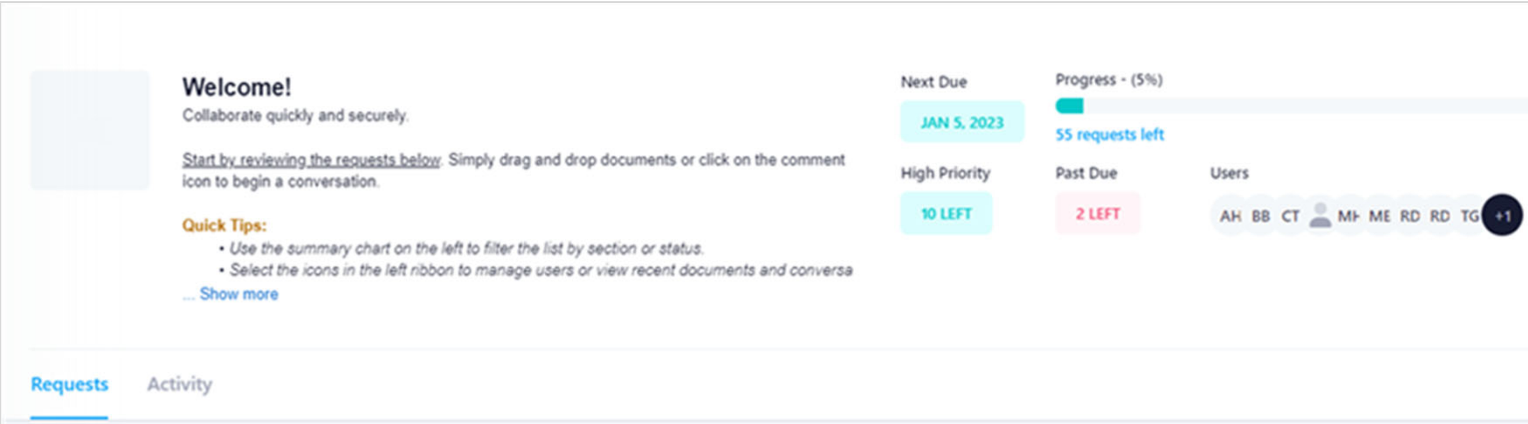
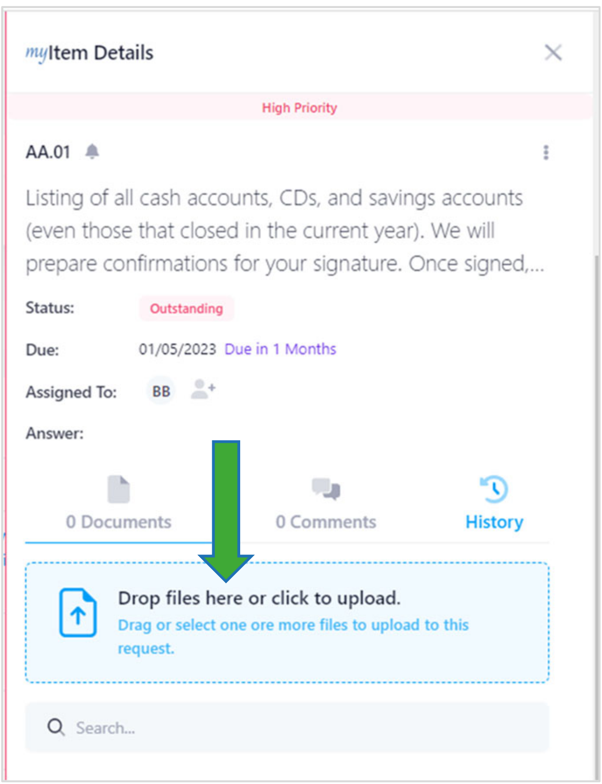
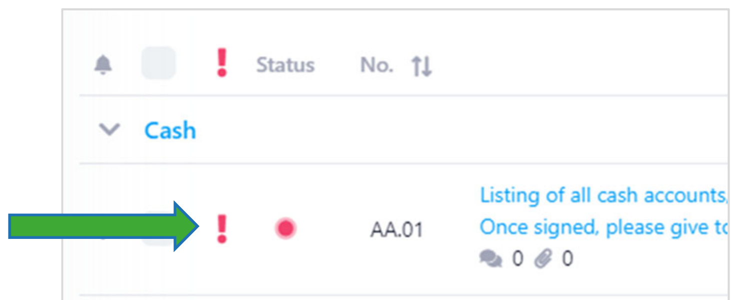
The **Dashboard** will note the task progress and any tasks that are past due.

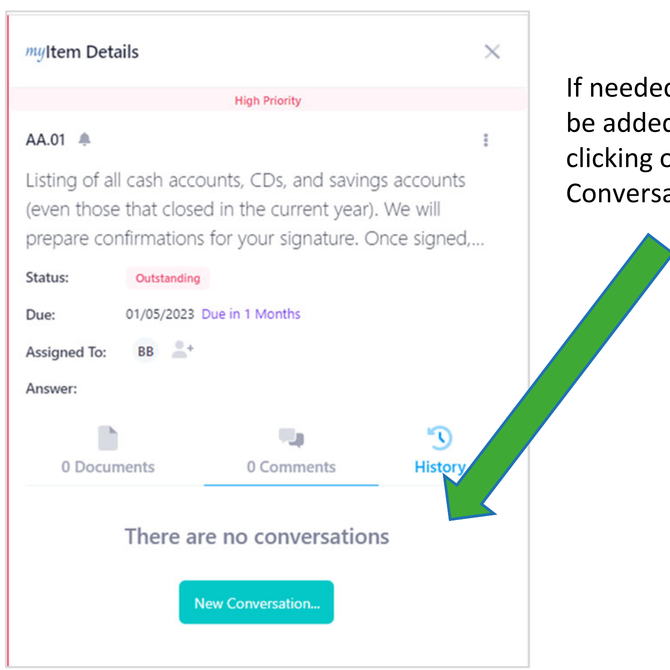


To upload documents, click on the task on your dashboard or from the list under the **Summary** tab. In the dialog box, there is a section that will allow you to drag and drop the files or click to upload.



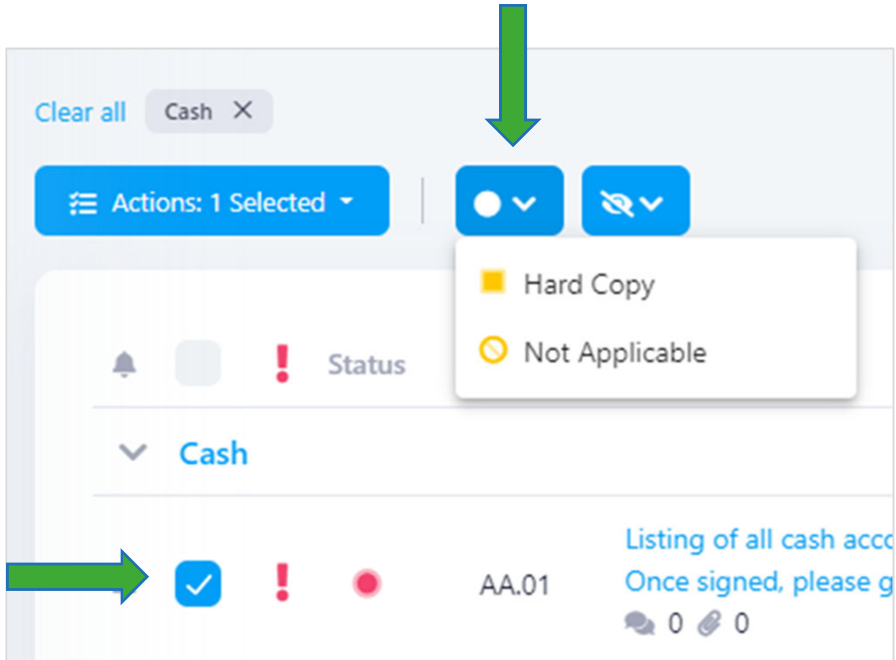
Once the documents are uploaded, the task status will update from **Outstanding** to **Provided**. Items marked with "!" indicate that the item is high priority; high priority items are needed before any work can begin.



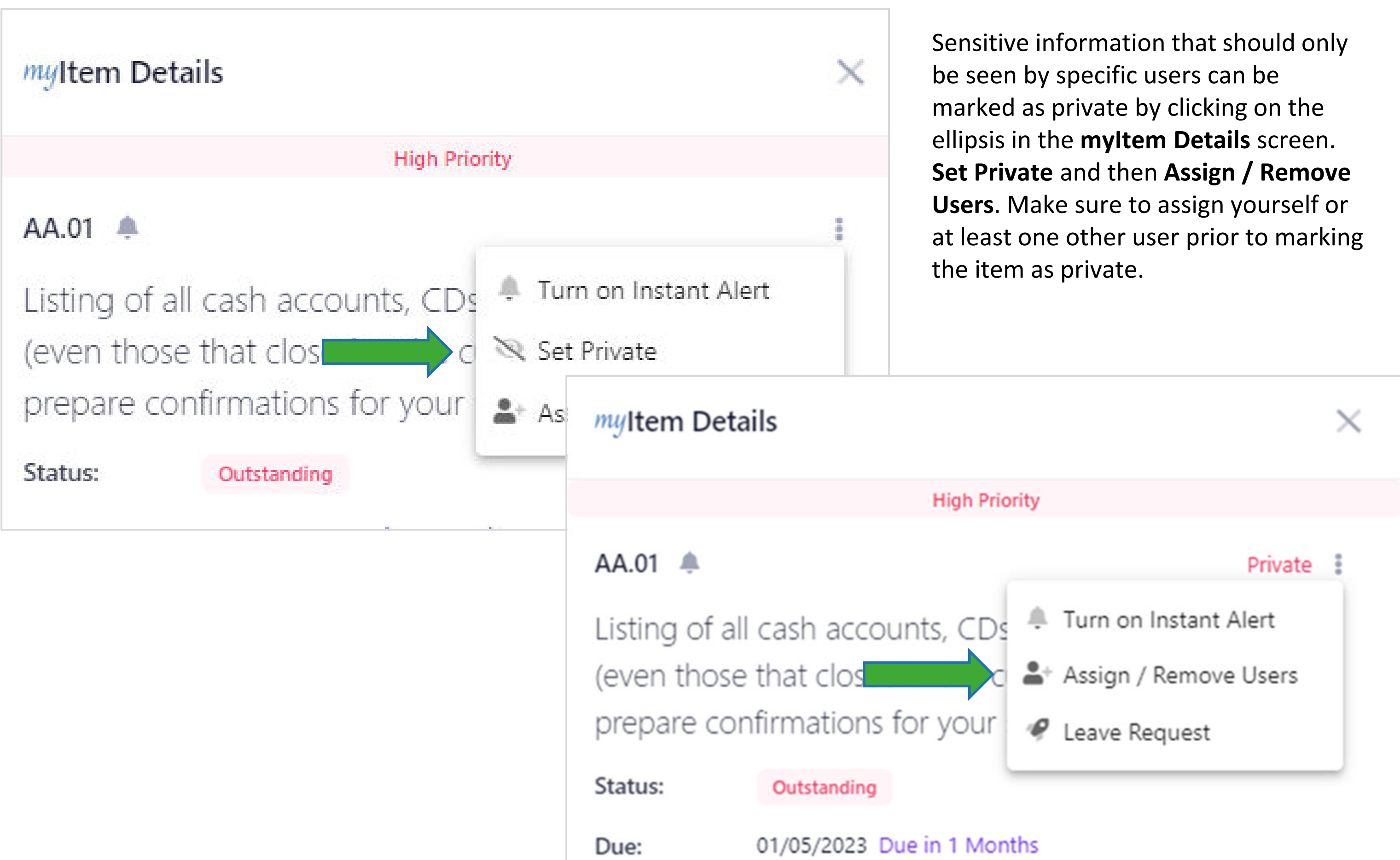


If needed, comments can be added to any item by clicking on "New Conversation"

For items that are only available in print (hard copy) or not applicable, select the item and update as needed; multiple items can be selected at the same time.



Sensitive information that should only be seen by specific users can be marked as private by clicking on the ellipsis in the **myItem Details** screen. **Set Private** and then **Assign / Remove Users**. Make sure to assign yourself or at least one other user prior to marking the item as private.



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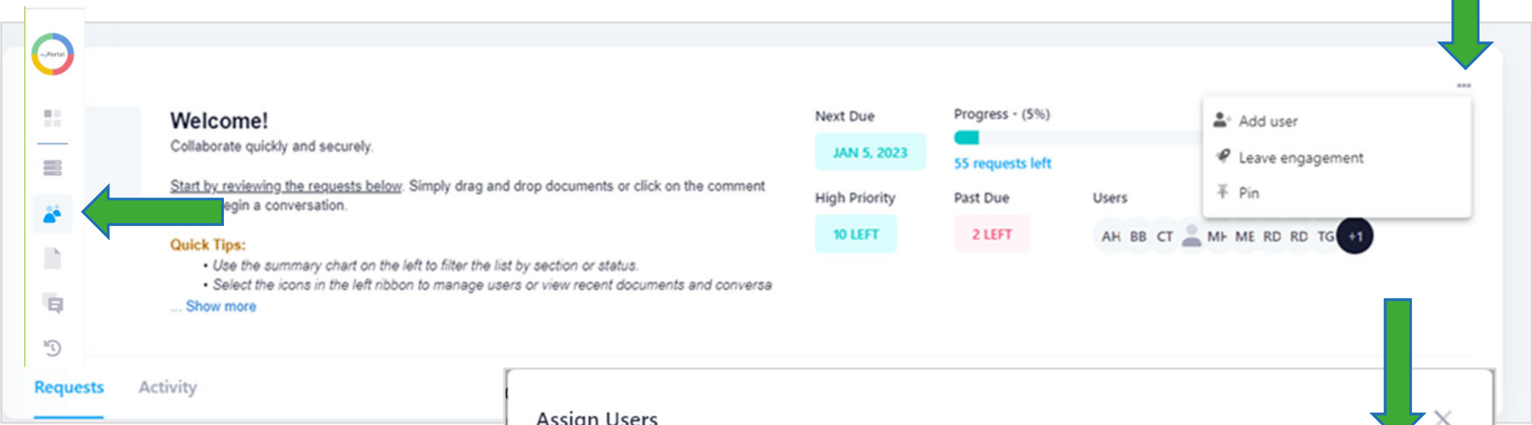
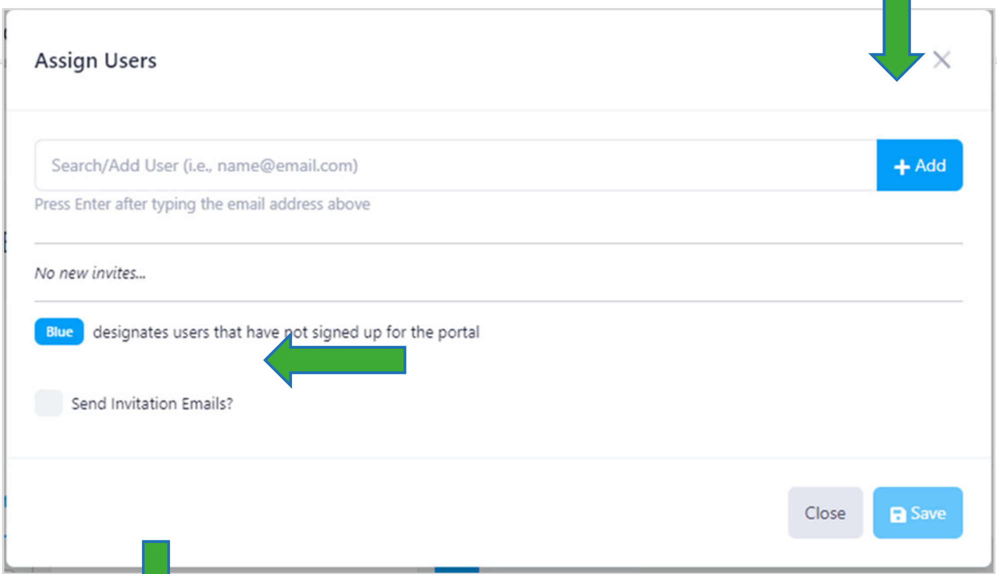
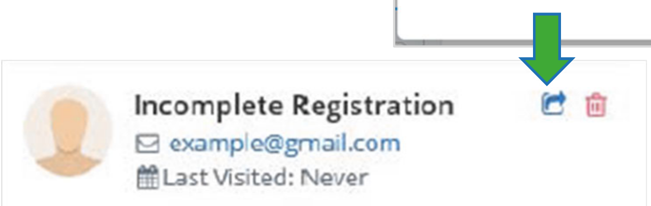
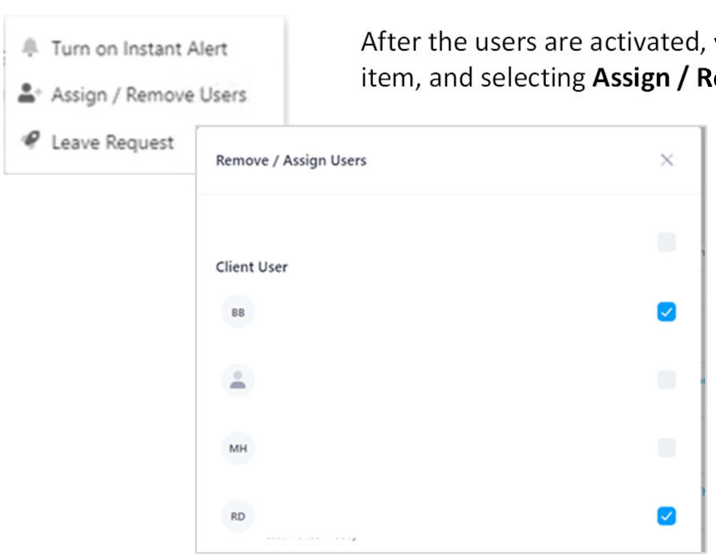
Users can be added from the **Dashboard** by clicking on the ellipsis and selecting **Add user**.



Enter the email address and click **+Add**. Check the box by **Send Invitation Emails?** and save changes. This option can also be accessed from the **Summary** tab. The invitation will only be active for 24 hours but can be resent by selecting the arrow next to the user's name.



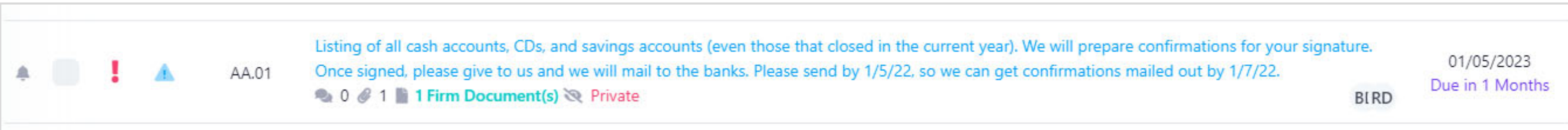




After the users are activated, you can assigning items as needed by clicking the ellipsis under the item, and selecting **Assign / Remove Users**.

The assignments will roll from year to year and will only change when updates are needed.

There may be certain items that Pinion provides a template for you to complete, or provides other information. **Firm Documents** will be attached and available for download. Once the completed template is uploaded, the status will be marked as **Provided**.



The **Dashboard** items can be filtered as needed, .i.e. by status, assignments, due dates, etc.