



## **WEB PORTAL USER GUIDE**



## Web Portal for Safe and Secure File Transfer

The following guide will walk you through the steps needed to send and receive files securely between your company and Trinity Pension Consultants.

### Logging in:

#### Step 1:

In your web browser type in the following (or click on the link) - <https://portal.trinitypension.com>.

You may also access the web portal by visiting our website at [www.trinitypension.com](http://www.trinitypension.com) and clicking the Plan Sponsor Resource Center tab.

#### Step 2:

Enter your username and password at the login screen and click **Log In**.

NOTE: You will be asked to change your password the first time you log in. Choose a password you can easily remember and store it in a safe place. You will need this information each time you send files to or receive files from Trinity Pension Consultants.

## Sending files to and receiving files from Trinity Pension:

There are 3 main components to the Trinity Web Portal once you are logged in:

1. *New Documents from Trinity Pension*
2. *Documents to Trinity Pension*
3. *Recently Downloaded Documents*



1 *New Documents from Trinity Pension*

File Name	Upload Date
<a href="#">2009 DC Info Request.xls</a>	10/12/2010 11:30

2 *Documents to Trinity Pension*

Browse Document to Send

### How to download the blank census spreadsheet:

1. Click on the file you want to download.



*New Documents from Trinity Pension*

File Name	Upload Date
<a href="#">2009 DC Info Request.xls</a>	10/12/2010 11:30

2. When prompted, select "Open With Microsoft Office Excel."
3. Once the file opens, you will need to save it to your computer. Go to File, Save As, and save the file to your desktop.
4. Enter all census information into the spreadsheet. Also, be sure to complete the Questionnaire tab of the spreadsheet. Be sure to save as you go. Once you have entered all census information onto the spreadsheet, you are ready to send the file back to Trinity Pension.

### How to send your file to Trinity Pension:

1. In the section titled *Documents to Trinity Pension* click on the button that says **Browse**.



*Documents to Trinity Pension*

Browse Document to Send

2. Find the census file you just created on your desktop and click **Open**.
3. Next click on the **Send Document** button to the right of the browse button.
4. Your file will be transmitted to Trinity and will appear under "Documents Queued for Trinity".
  - a. In this section you will be able to see what files you have sent to Trinity and when they were sent.

Documents Queued for Trinity

File Name	Upload Date
<a href="#">2009 DC Info Request.xls</a>	10/12/2010 11:36



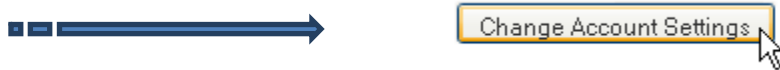
## Password Administration:

### Forgot your password?

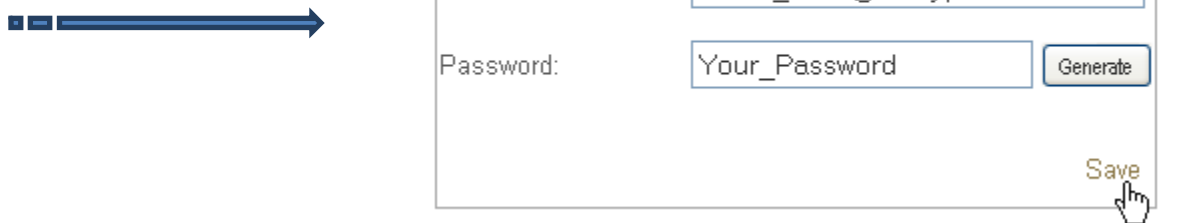
Contact your relationship manager at Trinity Pension Consultants at 330.668.3747 to have it reset.

### Changing Your Password:

1. In the lower right hand corner click on "Change Account Settings"



2. Type in a new password and click "Save"

A blue arrow with a small square at its tail points from the left towards a form. The form is titled "Change Account Settings" in a rounded rectangle at the top right. It contains two input fields: "Email:" with the value "Portal\_User@trinitypension.com" and "Password:" with the value "Your\_Password". To the right of the password field is a "Generate" button. At the bottom right of the form is a "Save" button, with a mouse cursor pointing at it.