

PORTAL INSTRUCTION GUIDE

Your Sholley Insights is your go-to online resource. Access thousands of resources, from HR and risk management to health and wellness; everything you could want is at your fingertips.

INTRODUCTION

This guide is designed to introduce you to your new portal. With Sholley Insights, you will find all the resources you need to support your business and work more efficiently. Locate resources for compliance help, educational resources, employee communications and more.

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COMPUTER SETUP

SUPPORTED PLATFORMS

To use your client portal, your system must have the following minimum requirements:

- Windows XP, Windows Vista, or Windows 7
- Microsoft Internet Explorer 8.x or higher
- Microsoft Office XP or higher
- Broadband Internet connection. We recommend a dedicated T1 Internet connection with a speed of 3.0 Mbps
NOTE: The speed of your Internet connection will directly impact the performance of your application.
- Monitor resolution set to 1024 x 768 (recommended).
NOTE: We do not support our products on Macintosh computers.

EMAIL APPLICATION FILTER SETTINGS

To receive emails that contain login information and content posting notifications, adjust your filter settings to allow emails from the following domains:

- @instantbusinessresources.com
- @zywavemail.com

NOTE: It is common to have email filters set up on a firewall or server level. This usually is maintained by IT. If this applies, talk to this individual to ensure he or she allows the addresses mentioned or contact your Sholley Agency, Inc. representative.

ADDING THE PORTAL TO YOUR LIST OF TRUSTED SITES

To avoid various warning messages you might otherwise receive from Internet Explorer, you will have to set your portal and Zywave as trusted sites:

1. From Internet Explorer, go to **Tools > Internet options > Security** tab.
2. Click **Trusted Sites**. In the **Trusted sites** section, click **Sites**.
3. Clear the **Require server verification (https:) for all sites in this zone** check box.
4. In the **Add this website to the zone** text field enter:
 - *.zywave.com > click **Add**.
 - *.https://sholleyagency.secureclient.net > click **Add**.
5. Click **Close**.
6. In the **Security level for this zone section** of the **Security** tab, click **Custom level**.
7. In the **Security Settings—Trusted Sites Zone** list, scroll to the **Downloads** section. In the **Automatic prompting for file downloads** section, select **Enable**.
8. In the **Reset custom settings** section, select **Medium** from the **Reset to** list.
9. Click **OK**.

ADDING THE PORTAL TO YOUR POP-UP BLOCKER ALLOWED LIST

To dismiss notifications from your pop-up blocker when accessing your portal, add your portal and related sites to the allowed list in your web browser.

1. In Internet Explorer, go to **Tools > Internet options**.
2. Click the **Privacy** tab.
3. In the **Pop-up Blocker** section, click **Settings**.
4. In the **Address of website to allow** text field, type your portal URL (<https://sholleyagency.secureclient.net>), and then click **Add**. Then enter www.zywave.com, and then click **Add**.
5. Click **Close**, and then click **OK**.

PORTAL SETTINGS

Take control of your login credentials and build a bridge between your portals for easier navigation.

LOGGING IN TO YOUR PORTAL

When you first receive access to your portal you can expect an email from Sholley Agency, Inc. that includes your user name, as well as links you to your new portal and the login information page. From here, you are able to change your password. To login for the first time:

1. Click the link near the bottom of your email to open your login information page.
2. Enter your new password, and then type it once more to confirm.
3. Enter the text shown in the security image.
4. From your email, open the portal web address.
5. Log in with your new user name and password.

Tip: Click **Remember Password** to save your user name and password on this computer so you don't have to enter it again.

Why aren't my user name and password in the same email?

Your user name and password are delivered in separate emails as a security measure. By keeping these two items separate, it greatly decreases the likelihood that another individual could access any sensitive information on your portal by intercepting your login credentials.

UPDATING YOUR PORTAL SETTINGS

Update your user credentials that are applied to the site, modify your demographic information, or determine your linked credentials using **My Settings** within your portal.

Updating your user credentials

Don't like your system-generated user name? Would you like to change your current password? Has your email address changed? Want to turn off the system-generated emails you get when someone posts content?

1. Click **My Settings**.
2. Choose the site setting you would like to edit.
 - **Change my user name:** Type the new user name that you want and your current password.
 - **Change my password:** Enter the password you are currently using, and then type the new one you want to use.
 - **Update my email address:** Type the new address you will be using.
 - **Update my email preference:** For the **Receive distribution emails?** option, select **No** to stop receiving these messages.

Updating your demographic information

Demographic information—industry, role, state, etc.—is captured in the **My Settings** section of the client portal to ensure content is targeted based on your needs. This customizes your experience in the portal as it will indirectly dictate the content that is posted to your portal.