OUR CLIENT PORTAL SITE CONTENT IS RESTRICTED TO INSIGHT INVESTMENT CLIENTS AND AFFILIATES NOT TO BE REPRODUCED WITHOUT PRIOR WRITTEN APPROVAL

MAY 2025



INSIGHT CLIENT PORTAL: A GUIDE TO THE DOCUMENTS PAGE

INTRODUCTION

THIS USER GUIDE PROVIDES AN OVERVIEW OF THE FUNCTIONS AVAILABLE ON THE CLIENT PORTAL DOCUMENTS PAGE.

NAVIGATE TO THE DOCUMENTS PAGE

The Documents page is normally the default page after login, however, it can always been reached by clicking on the **Documents** option in the menu bar at the top of the screen:

	1 DOCUMENTS ACCOUNT ACTIONS ~ PROFILE	
	Portal Documents	
	Your accounts FSG NOVATIONS V GET DATA Search Documents Q	
	> Documents	
The document	s page will open:	Logovt United Kingdom ~
	Portal Documents	
	Your accounted FSG NOVATIONS V GET DATA	
3	> Documents Recent Bookmarks	
Book ants		Type 💠 Last 🕶
Published Zient Documents ESG NOV# DONS TEST(short)	1 1	PDF 08/10/2024
Authoris- d Signatory List	115710920199080.adf	PDF 18/06/2024
Client Ex cuted Agreements	Recently Viewed	
investme it Reports	R Nors ©	Type ⊕ Last ▼
Yaluation Incubation		Folder 05/06/2024

The image above shows the Documents Page for a sample user.

There are 5 features available on this screen:

- 1. Your accounts: This drop-down list will contain a list of all the Client Agreements that you have access to. If you have access to multiple Client Agreements, then you will be able to select one from the drop-down list and click Get Data to retrieve the list of users who have access to the selected Agreement.
- 2. Search Documents: Enter a search term and click the magnifying glass icon to search through all documents.
- 3. Home page and Bookmarks page shortcuts: Click on the home page icon to navigate back to this page view. Click on the Bookmarks shortcut to see a list of files that you have bookmarked.
- 4. **Recent Bookmarks and Recently viewed documents area**: Displays a list of the recently created bookmarks and recently viewed documents. Clicking on any of these will initiate the download of the document.
- 5. **Agreement folder navigation**: Documents are organised within folders according to the client agreements held. Click on the agreement folder to navigate to the subfolders and documents within.

YOUR ACCOUNTS

If you have access to more than one account (e.g. you are a consultant with relationships to more than one Insight Investment client account), you will see these client accounts listed in this drop-down box.

- 1. Click on the drop-down box and select the client account to view.
- 2. Click on the 'Get Data' button
- 3. The documents home page will refresh with a view of the selected agreements in the left hand navigation and the recently viewed documents and bookmarks for the chosen client account.

SEARCH DOCUMENTS

To search all documents in the selected client account;

- 1. Click into the Search term entry field (1)
- 2. Enter your search term
- 3. Click the magnifying glass icon to the right of the search term entry field' (2)

The results be displayed in the Search results view (3)



HOMEPAGE AND BOOKMARKS NAVIGATION

Clicking the homepage icon in the navigation bar will always return the user to the Recent bookmarks and recently viewed documents area.

Clicking on the Bookmarks icon in the navigation bar will bring the user to the bookmarks page below where the user can browse the bookmarks and select one.

	Insight without DOCUMENTS ACCOUNT ACTIONS - PROFILE					
Portal Documents						
		Your accounts FSG NOVATIONS V GCT DATA Search Documents Q				
	> Bookmarks Bookmarks					
Bookmarks	R	Nore &	Туре 💠	Last modified 🔻		
Published Client Documents ESG NOVATIONS TEST(short)	R	ESSAS 54281022140827.add	PDF	08/10/2024		
Authorised Signatory List	R	ESTID-201558.adf CS HOVATORS [C3](bardiosetherd Begots]	PDF	18/06/2024		

RECENT BOOKMARKS AND RECENTLY VIEWED DOCUMENTS AREA

Clicking the homepage icon in the navigation bar will always return the user to the Recent bookmarks and recently viewed documents area.

	Insight weistratur	DOCUMENTS ACCOUNT ACTIONS - PROFILE	Logout U	nited Kingdom 🛩
		Portal Documents		
	Your accounts FSG NOVATIONS V GET DATA	Search Documents Q		
	> Documents Recent Bookmarks			
Bookmarks	■ Num 0		Туре ф	Last modified ¥
Published Client Documents ESG NOVATIONS TEST(short)	FSGAS_5-320241002-140687.edf FSG_NOVATIONS_TESTIeberGi/Authorised.Symatterv_List./		PDF	08/10/2024
Authorised Signatory List	ESCINOVATIONS TESTINArdiumestment Reports /		PDF	18/06/2024
Client Executed Agreements	Recently Viewed			
Investment Reports	📮 Xame 0		Туре ф	Last modified *
Yaluations Incubation Strategies	Authorised Separtury List		Folder	05/06/2024

AGREEMENT FOLDER NAVIGATION

Clicking on a folder in the navigation bar will open the folder in the main documents view

The main documents view has the following features on this screen:

- 1. Bookmark a file or folder: Quickly add a bookmark to a file or folder.
- 2. Filter or sort file list by name: Filter the list of documents by using a phrase or sort in ascending or descending alphabetical order.
- 3. Filter or sort file list by document type: Filter the list of documents by choosing a type or sort in ascending or descending alphabetical order.
- 4. Filter or sort file list by date: Filter by month and/or year or sort in ascending or descending order.

AVVESTMENT							
			DOCUMENTS	ACCOUNT ACTIONS ~	PROFILE		
Documents	FSG N	OVATIONS TEST(short)					4
Bookmarks Published Client Documents		2 Name V			3	Туре 🗸	Last modified
ESG NOVATIONS TEST(short)		Client Executed Agreements FSG NOVATIONS TEST(short) /				Folder	05/08/2024
Authorised Signatory List		Elient Cash Instructions ESG NOVATIONS TEST(short)/				Folder	05/08/202
Client Executed Agreements		Valuations ESG NOVATIONS TEST(short)/				Folder	05/06/202
Valuations		ESG NOVATIONS TEST(short)/				Folder	05/06/202
Authorised Signatory List		Authorised Signatory List FSG NOVATIONS TEST(short) /			5	Folder	05/06/202



Logout United Kingdom 🗸

BOOKMARK A FILE OR FOLDER

Clicking on the grey bookmark icon next to a file or folder will add a bookmark. That a file or folder is bookmarked is signified by the bookmark icon being dark grey instead of light grey.

The bookmarked file or folder will then appear in the Recent bookmarks view on the documents homepage and will also be added to the bookmarks page.

FILTER OR SORT LIST BY NAME

Clicking on the (1) 'Name' Column header will drop the filter and sort selection box.

By typing a search term in the (2) Filter by name entry box and clicking the apply button it is possible to filter the list of documents shown in the view to contain only those files where the file name contains the search term entered.

Selecting one of the (3) Alphabetical sort check boxes will order the list of documents alphabetically.



FILTER LIST BY TYPE

Clicking on the File type column header will display the Filter List by type dialog.

You may select one or more file types shown in the list (1) of file types which will remove all other types of files from the list displayed in the main view.

Selecting the (2) alphabetical sort of your choice will sort files by the alphabetical order of the file type



FILTER LIST BY DATE

Clicking on the 'Last modified' column header will display the Filter List by date dialog.

You may select either a month or a year or both month and year from the drop down selection lists in (1)

Selecting the (2) date sort of your choice will sort files in either descending or ascending order of the last modified date associated with the files in the list.



