

## Table of Contents

<b>1. Introduction.....</b>	<b>2</b>
<b>2. Login</b>	
<b>2.1. Login Page.....</b>	<b>3</b>
<b>2.2. Password Reset.....</b>	<b>6</b>
<b>2.3. Unlocking an Account.....</b>	<b>7</b>

## 1. Introduction

In an effort to enhance SEI's acquisition and organization of manager data, the IMU Manager Portal website has been completely redesigned. Improvements such as repopulating fields and multiple composite questionnaires on one page make the new site far easier and faster to use. There are various controls in place to ensure the user knows exactly what data is required for each form. The new Manager Portal will make the monthly and quarterly information gathering process more efficient and more secure. A new enhancement has also been added that enables the user to automatically reset their password using security questions.

This document will help IMU Manager Portal users become acquainted with the new site. Users of the previous site will find the fields and forms somewhat familiar, although the overall layout of the site is totally changed. There is a "Help" button at the bottom left of each Manager Portal page. Click on this button to refer to this help guide for any questions relating to the user functions in the Manager Portal Site. For any questions not covered in this help guide, click on the "Contact Us" button, also located at the bottom left of each page, and contact information for the site administrator will be displayed.

Thank you for taking the time to read this help document and we hope you like the new IMU Manager Portal.

## 2. Login

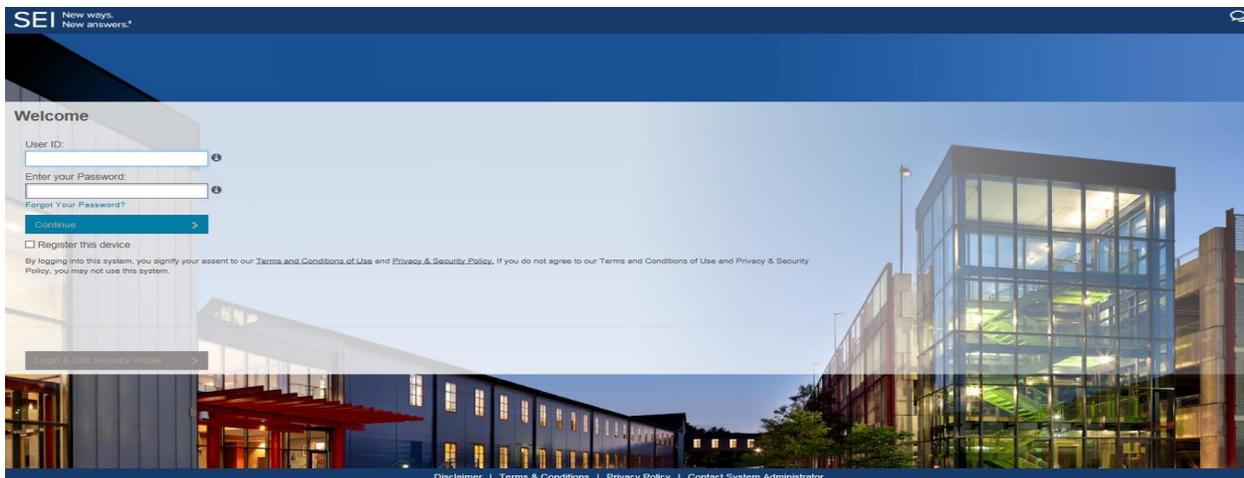
### 2.1. Login Page

The following screen is used to login to the Manager Portal. After the login screen, there is a menu on the left of the page from which the user can navigate through the site. The user can open this page by entering the site URL (<https://imuportal.seic.com>) into a browser. We recommend accessing the site via Google Chrome or Microsoft Internet Explorer.

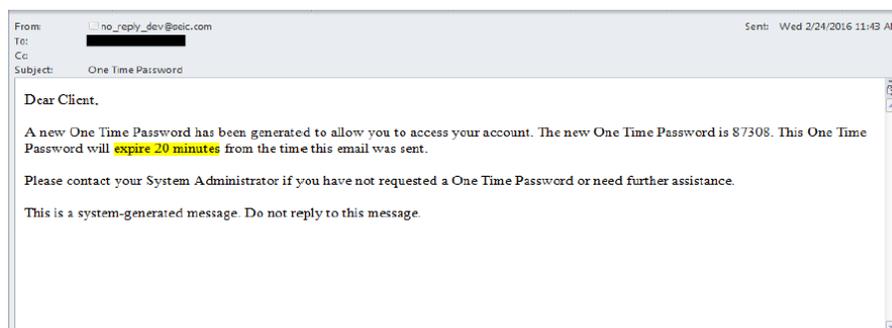
For first time users:

- › The administrator of the Manager Portal, the Investment Product Team, will provide a user ID and temporary password to new users
- › Input the username and password at the log in screen of the IMU Manager Portal (<https://imuportal.seic.com>). If the temporary password is entered incorrectly three times, the account will be locked and the user will need to e-mail [investmentproductteam@seic.com](mailto:investmentproductteam@seic.com) for the Investment Product Team to unlock the account.
- › Check off “Register this device”; this will ensure that the user does not have to go through the PIN process each time. Click “Continue.”

### Screen Layout

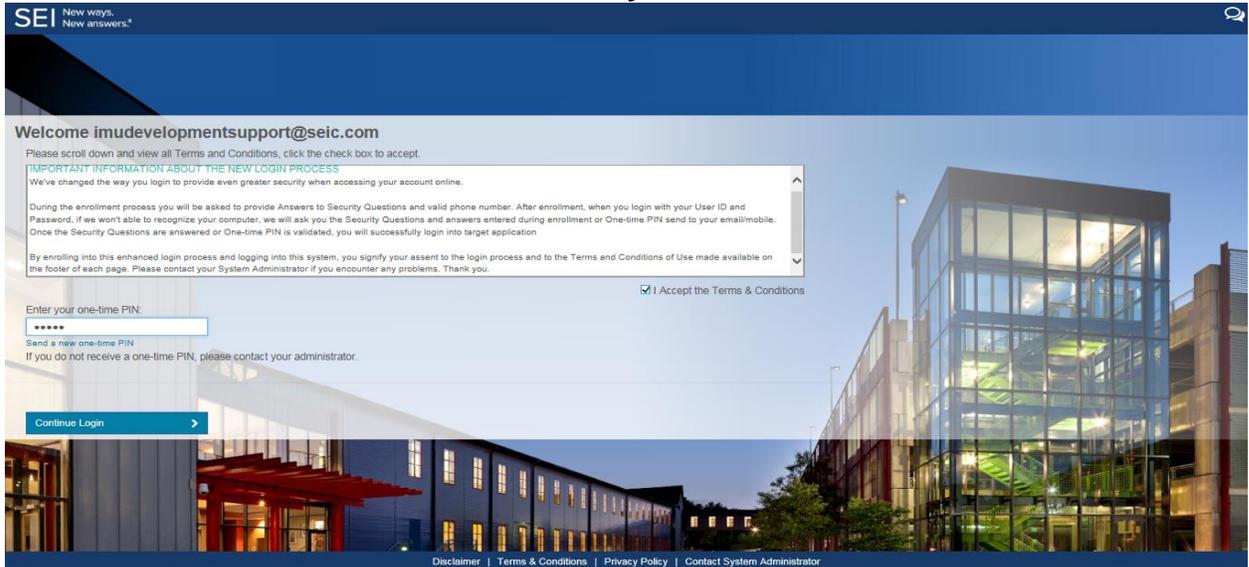


- › The user should receive a one-time PIN to use on the terms/conditions screen during the next step.



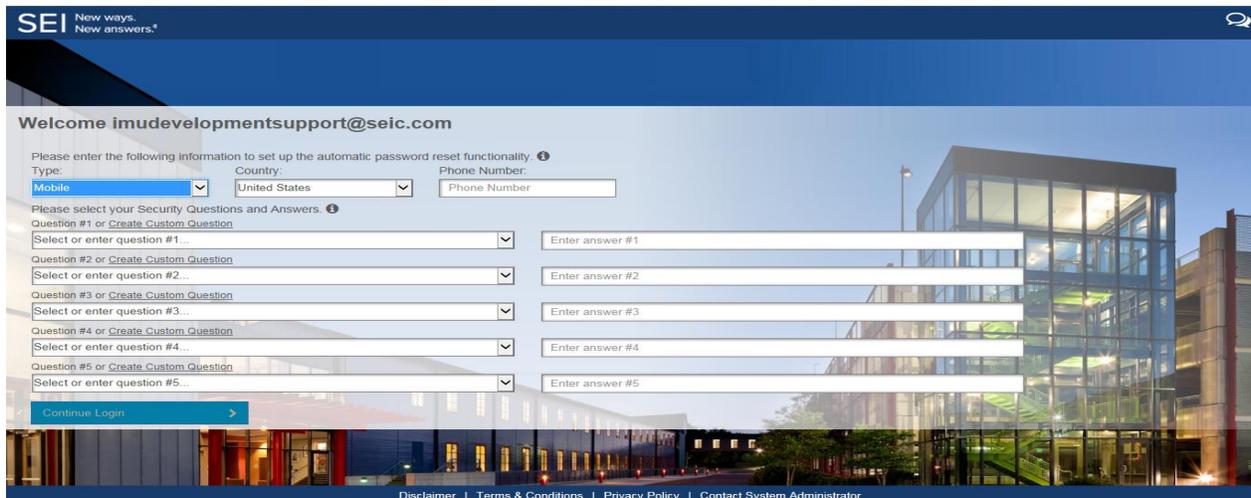
- › The user will be directed to the Terms and Conditions screen. Scroll through the information and then check off “I Accept the Terms & Conditions”. **(User will need to scroll through all of information in order check off “I Accept the Terms \* Conditions”)**
- › The user should enter the PIN that was received. If PIN was not received, user should click “Send a new one-time PIN.” Note that the one-time PIN expires after 20 minutes of issue. Click “Continue Login.”

## Screen Layout



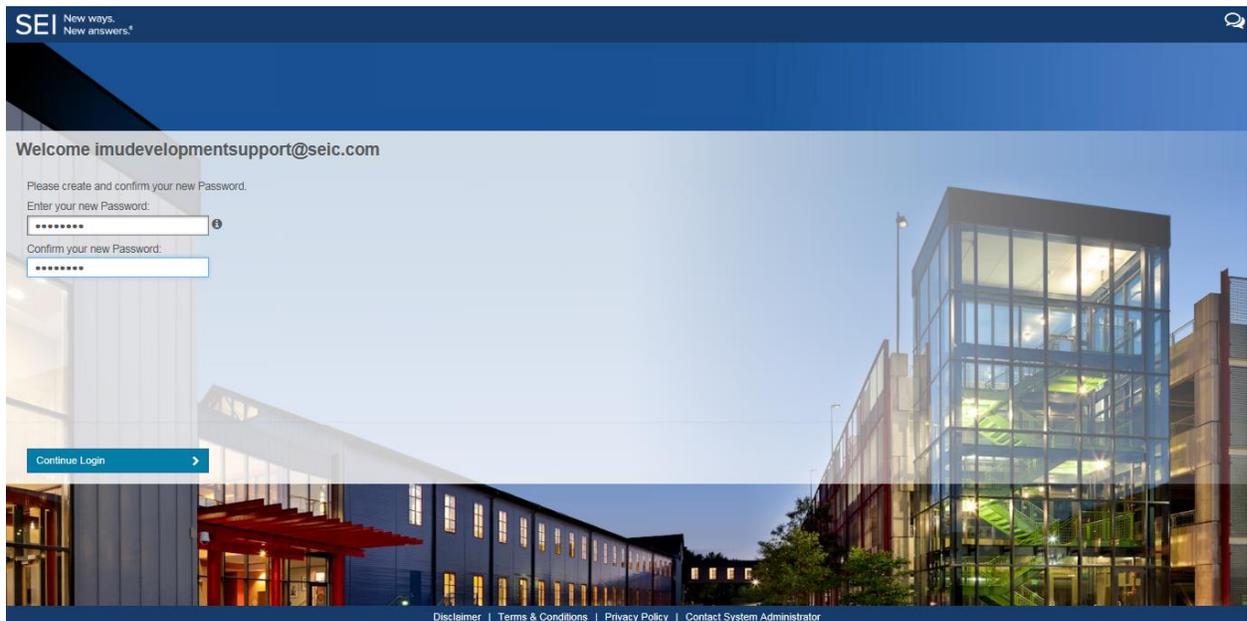
- › The user will be asked to select a type of phone number, country and to enter a phone number.
- › The user will choose five different security questions and will enter answers on the right side of the screen. User can provide a custom question by clicking on “Create Custom Question.” The custom question must be a minimum of two words in length. Responses should follow the below rules:
  - Answers must be between 2 and 20 characters. No special characters may be used
  - No two answers may be the same
  - Questions and answers cannot have matching words
- › Save these responses to reset your password in the future. Click “Continue Login”

## Screen Layout



- › Once the user completes the security questions and answers, he/she will be directed to create and confirm a new password. The following rules apply to passwords:
  - Between 8 and 20 characters
  - Contain at least one number; one upper-case character; and one lower-case character
  - No more than two repeating characters
  - Not match any of the user's last five passwords

## Screen Layout



- › Click “Continue Login.” A confirmation e-mail will be sent to the user's registered e-mail address confirming that the set-up process is complete.
- › The user will be directed to the home page of the IMU Manager Portal. There is a menu on the left of the page from which the user can navigate through the site.

## Screen Layout

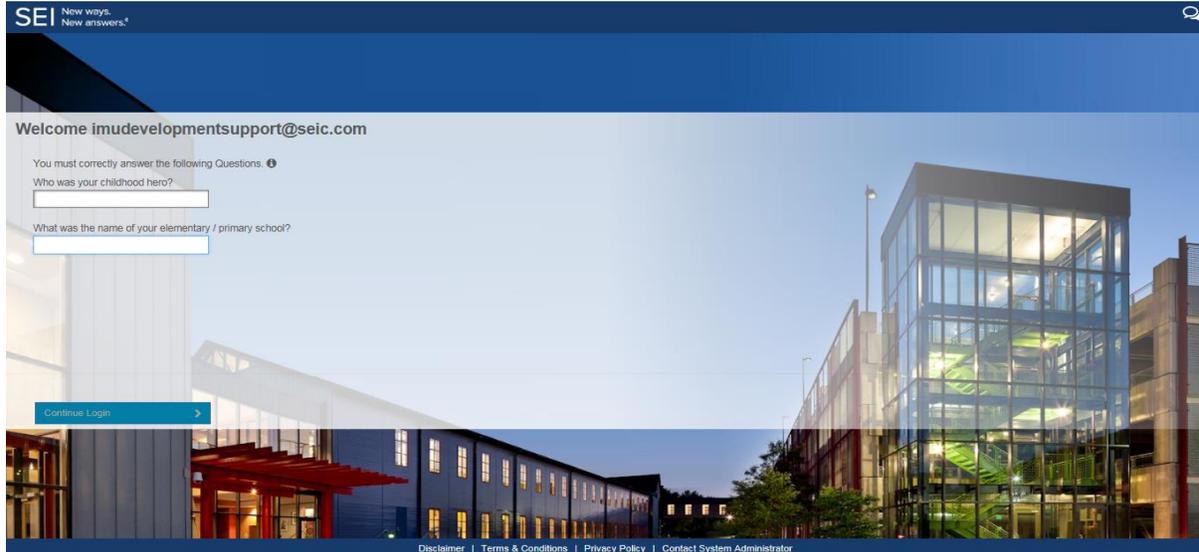


## 2.2. Password Reset

The user can reset their password at any point. User will be required to reset their password after three unsuccessful login attempts or 120 days of inactive use per the SEI Security Policy. The user should follow the steps below in the event that their password needs to be reset.

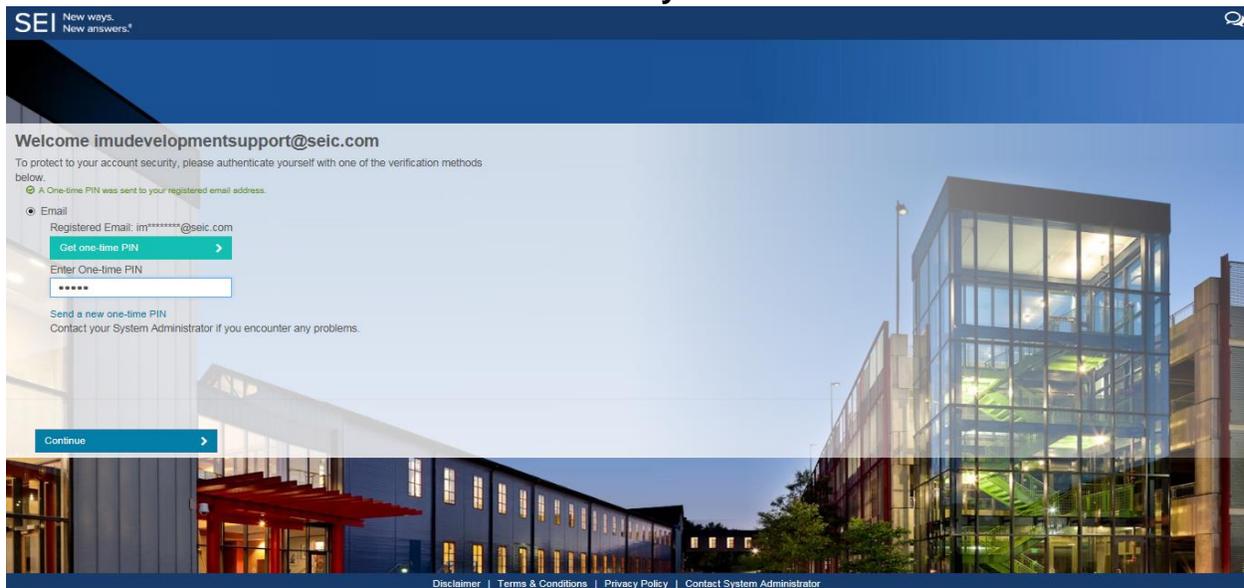
- › At the log-in screen, the user should click “Forgot Your Password?”
- › The user will be prompted to answer two of the five security questions.

### Screen Layout



- › The user should click “Get one-time PIN”
- › Once the user receives the PIN, they should enter it and click “Continue”

### Screen Layout



- › The user will be prompted to create a new password

### 2.3. Unlocking an Account

A user's account will be locked after 200 days of inactivity. In the event that an account is locked, the user will need to reach out to [investmentproductteam@seic.com](mailto:investmentproductteam@seic.com) so that the site administrator can unlock the account.

- › Users should contact the Investment Product team ([investmentproductteam@seic.com](mailto:investmentproductteam@seic.com)) if they are unable to unlock their account or reset their password using the automated process above.