

GRS Advantage™ Website

User Reference Guide

This document describes how to use the GRS Advantage™ Website.

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GRS Advantage is a trademark or registered name of Gabriel Roeder Smith & Company Holdings Inc. in the U.S.

GRS Advantage™ Website

Revised: July 25, 2017

This document describes how to use the [GRS Advantage™](https://advantage.gabrielroeder.com/) website.

Accessing the Website

The [GRS Advantage™](https://advantage.gabrielroeder.com/) website is available at the following URL:

<https://advantage.gabrielroeder.com/>

Requesting Access to the Website

The [GRS Advantage™](https://advantage.gabrielroeder.com/) website requires that all users sign in to use the website. If this is your first time visiting the website, you will need to request access.

Follow these simple steps to request access:

1. Under “Plan Sponsors” on the left side of the Home page, click the “Registration Page” link.

Let's Get Started

Useful links for the GRS Advantage™ Website:

[Participants](#) (Perform retirement estimates, view Plan documents, etc.)

- [Guide to Participant Registration and Login](#)
- [Registration Page](#)
- [Login Page](#)

[Plan Sponsors](#) (Access GRS research, securely transfer files, etc.)

- [GRS Advantage™ User Reference Guide](#)
- [Registration Page](#)
- [Login Page](#)

[GRS Associates](#) (Access GRS research, securely transfer files, etc.)

- [GRS Advantage™ User Reference Guide](#)
- [Registration Page](#)
- [Login Page](#)

Featured GRS Resources

GRS News Scan: July 22 —

Friday, July 22, 2016 [\[View Document\]](#)

Selected Headlines

- GRS Publishes Article on Priest Retirement
- Actuarial Standards Board Releases Pension Task Force Report
- CRR Reports on State and Local Pension Funding 2015-2020
- NIRS Releases Report on Retirement Income Security for Public Sector Employees
- NASBO Releases Spring 2016 Fiscal Survey of States

GRS Insight Newsletter: July 2016 +

GRS News Scan: June 3 +

GRS News Scan: May 5 +

GRS Insight Newsletter: May 2016 +

- Complete the registration form on the “Register Plan Sponsor” page and click “Request Access” to continue. Bold items that are preceded by “*” are required fields and must be provided.

[Home](#)

Register Plan Sponsor

To request access to the GRS Advantage Website™, please fill out the following questionnaire and use the "Request Access" button. You will be contacted via the email address provided below once your application has been processed.

All bold items preceded by "*" are required.

***First Name**

Middle
Name

***Last Name**

***Organization**

***Phone Number**

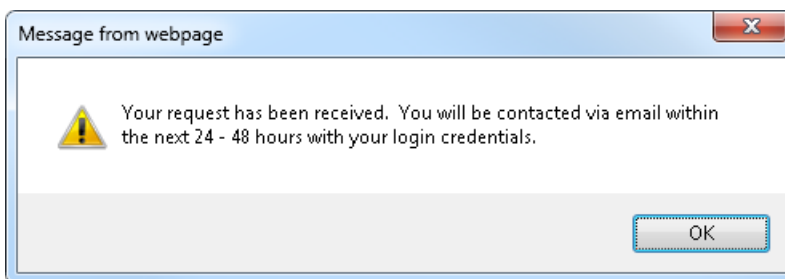
***E-Mail Address**

***Confirm E-Mail Address**

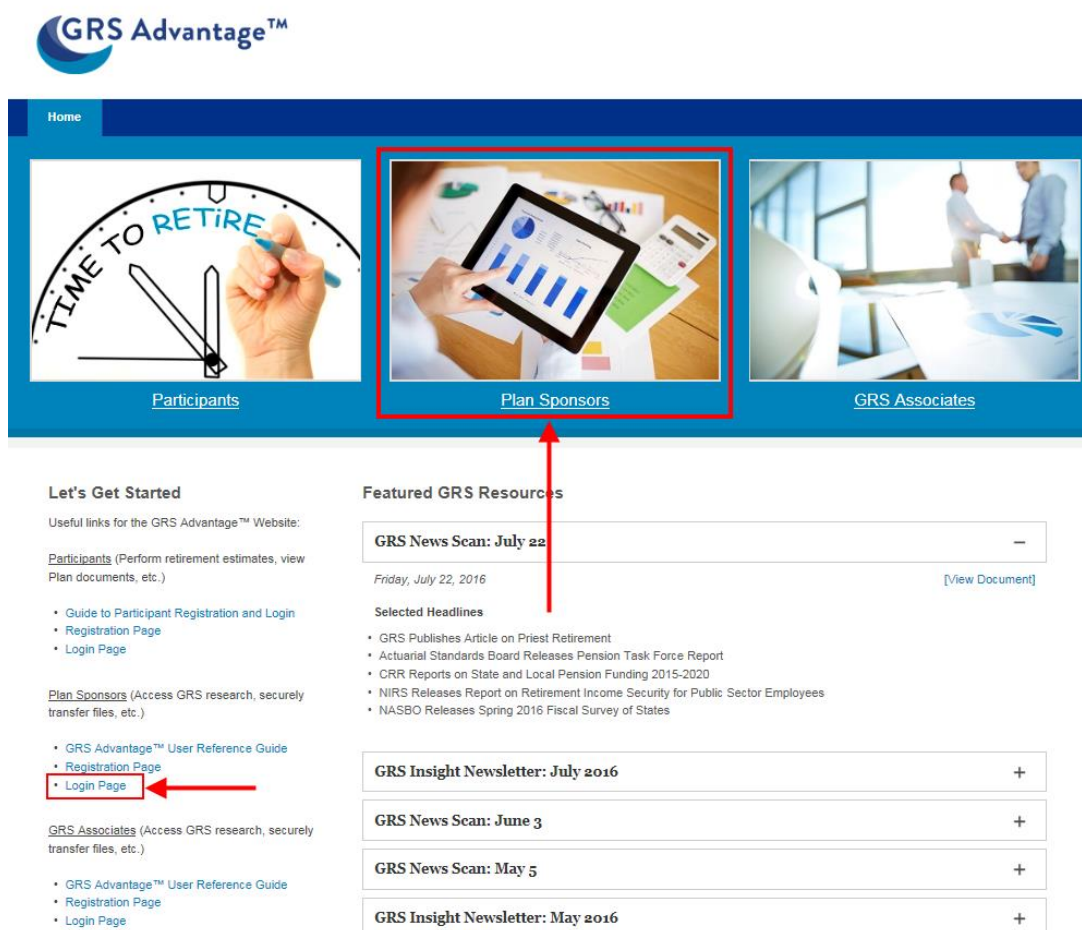
[Request Access](#)

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Report website problems to [GRS Software Support](#)

3. You will receive a confirmation message after you have requested access. Click "OK" to continue.



4. After your registration request has been processed by GRS, you will be contacted via email with your account credentials.
5. Return to the [GRS Advantage™](#) website and on the left side of the page click the “Login Page” link under the “Plan Sponsor” or click on the “Plan Sponsor” link located under the middle image



6. Enter the provided account credentials.



[Home](#)

Plan Sponsor Login

To login as a Participant [Click Here](#).

E-Mail Address

Password

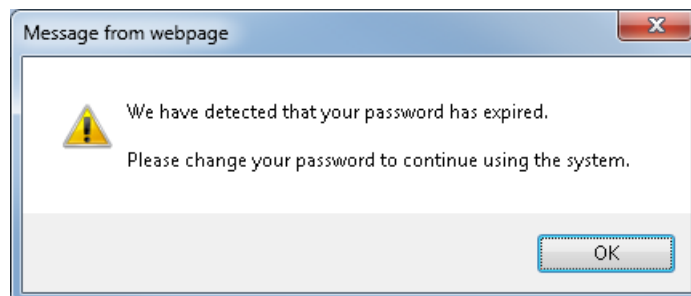
[Forgot your password?](#)

☐ Sign me in automatically

[Click here to request access.](#)

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Report website problems to [GRS Software Support](#)

7. A message will appear indicating that your password has expired. Click “OK” to continue.



8. The “Manage Profile” page can be used to update your account information. Enter a personalized password into the “New Password” and “Confirm Password” fields. Click

the “Update” button after you have reviewed your contact information and supplied your personalized password.



Welcome John, Sample Client
[Manage Profile](#) [Log Out](#)

[Home](#) [Plan Administration](#) [Resources](#) [Account Settings](#)

Manage Profile

To update your profile, please fill out the following questionnaire and press “Update” when you are finished.

All bold items preceded by “*” are required.

Contact Information

Prefix	*First Name	Middle Name	*Last Name	Suffix
<input type="text" value="Mr."/>	<input type="text" value="John"/>	<input type="text"/>	<input type="text" value="Demo"/>	<input type="text"/>
Title <input type="text"/>				
Name of Organization <input type="text"/>				
Address <input type="text"/>				
City	State		Zip	
<input type="text"/>	<input type="text" value="v"/>		<input type="text"/>	
*Business Phone Number		Business Fax		
<input type="text"/>		<input type="text"/>		
Cell Phone Number		Other Phone Number		
<input type="text"/>		<input type="text"/>		

Account Information

*Email Address

In order to change your password, you will need to provide your current password, as well as your new password and a confirmation of your new password.

Passwords must conform to the following requirements:

1. Password cannot be the same as current password.
2. Passwords must be a minimum of eight characters long.
3. Passwords must contain at least one capital letter.
4. Passwords must contain at least one lowercase letter.
5. Passwords must contain at least one number.

New Password	<input type="text"/>
Confirm Password	<input type="text"/>

9. Your account is now ready to use.

Resetting your Password

If at any time you forget your password, first click on the “Login Page” link on the left side of the web page under “Plan Sponsors” or click on the “Plan Sponsor” link located under the middle image.

The screenshot displays the GRS Advantage website interface. At the top, the GRS Advantage logo is visible. Below it, a navigation bar contains three main sections: "Participants", "Plan Sponsors", and "GRS Associates". The "Plan Sponsors" section is highlighted with a red box, and a red arrow points from it to the "Login Page" link in the "Let's Get Started" section. The "Let's Get Started" section provides useful links for the GRS Advantage website, including "Participants", "Plan Sponsors", and "GRS Associates". The "Plan Sponsors" section is further detailed with links to "GRS Advantage™ User Reference Guide", "Registration Page", and "Login Page". The "GRS Associates" section also provides links to "GRS Advantage™ User Reference Guide", "Registration Page", and "Login Page". The "Featured GRS Resources" section lists various documents and newsletters, including "GRS News Scan: July 22", "GRS News Scan: June 3", "GRS News Scan: May 5", "GRS Insight Newsletter: July 2016", and "GRS Insight Newsletter: May 2016".

GRS Advantage™

Home

Participants

Plan Sponsors

GRS Associates

Let's Get Started

Useful links for the GRS Advantage™ Website:

Participants (Perform retirement estimates, view Plan documents, etc.)

- Guide to Participant Registration and Login
- Registration Page
- Login Page

Plan Sponsors (Access GRS research, securely transfer files, etc.)

- GRS Advantage™ User Reference Guide
- Registration Page
- Login Page

GRS Associates (Access GRS research, securely transfer files, etc.)

- GRS Advantage™ User Reference Guide
- Registration Page
- Login Page

Featured GRS Resources

GRS News Scan: July 22 —

Friday, July 22, 2016 [View Document]

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- NASBO Releases Spring 2016 Fiscal Survey of States

GRS Insight Newsletter: July 2016 +

GRS News Scan: June 3 +

GRS News Scan: May 5 +

GRS Insight Newsletter: May 2016 +

Next, enter your email address and click on the “Forgot your password?” link.

GRS Advantage™

Home

Plan Sponsor Login

To login as a Participant [Click Here.](#)

E-Mail Address

Password

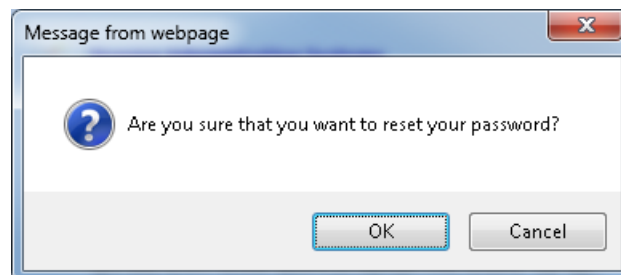
[Forgot your password?](#)

☐ Sign me in automatically

[Click here to request access.](#)

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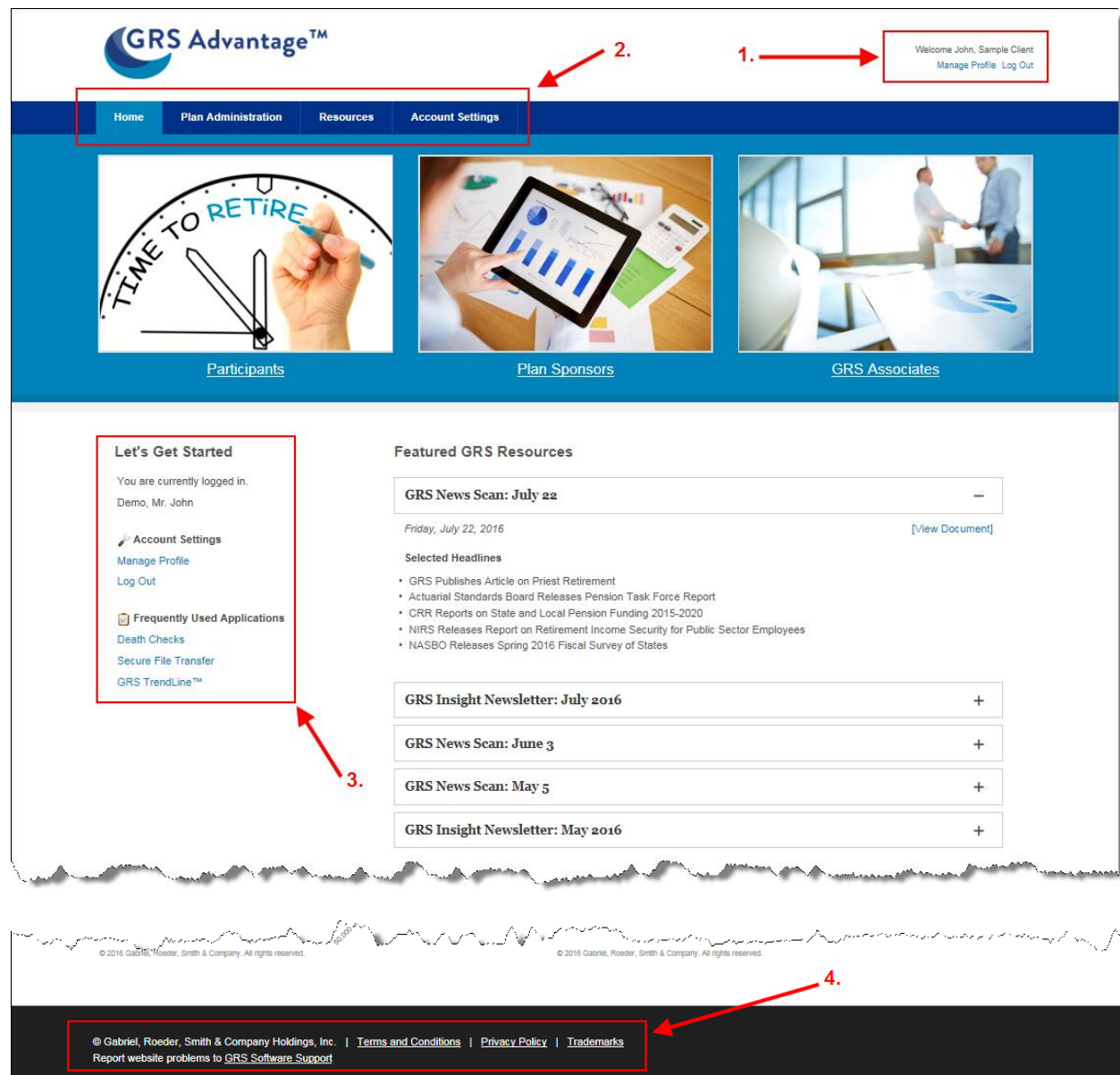
Click “OK” on the confirmation request from the website.



A temporary password will be emailed to you. Complete steps five through seven of the previous section to set your personalized password.

Using the GRS Advantage™ Website

The following image identifies the important features of the [GRS Advantage™](#) website.



1. User Account and Active Client Information

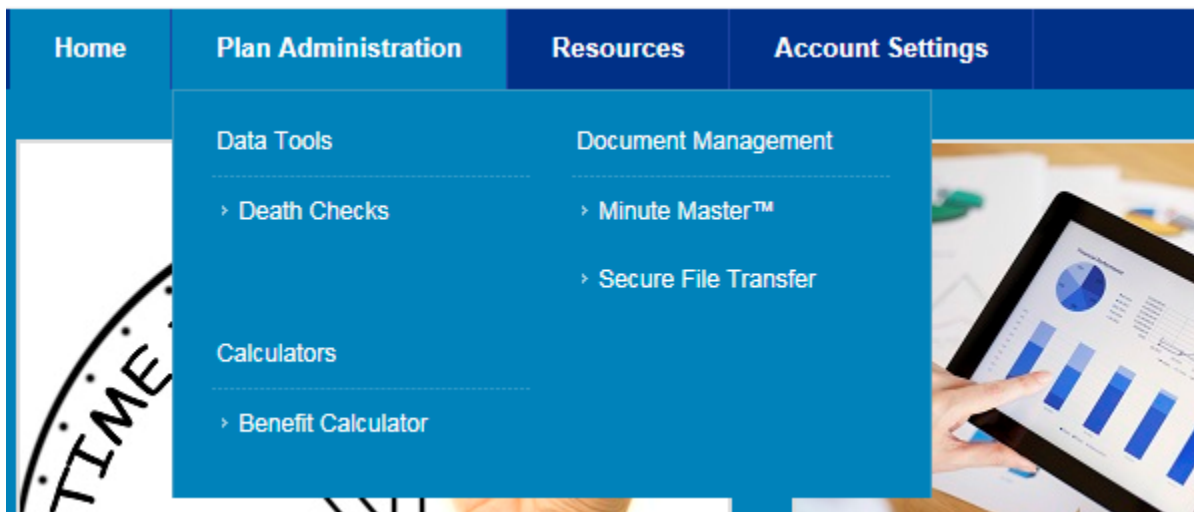
This section displays the current user information. It can be used to edit your profile, log out or select a new active client.

If you have multiple client relationships with GRS, then you will be able to choose an active client. Use the "Change" link in the upper right corner of the screen to switch your active client. Your active client selection will affect the available navigation items and client specific screens will be personalized to reflect your active client.

2. Navigation Bar

The navigation bar is the quickest way to move around the website. The navigation bar will be populated with items after you log in and select an active client.

You can expand the main items by holding your mouse over the navigation bar to reveal a sub menu of choices.



3. Quick Links

This area will contain links for frequently used tasks. Frequently used tasks would include managing your profile, logging out or running applications.

4. Notifying GRS of Potential Website Issues

If you experience any issues with a page on the [GRS Advantage™](#) website, then you can quickly notify GRS by clicking the “GRS Software Support” link located at the bottom of each page.

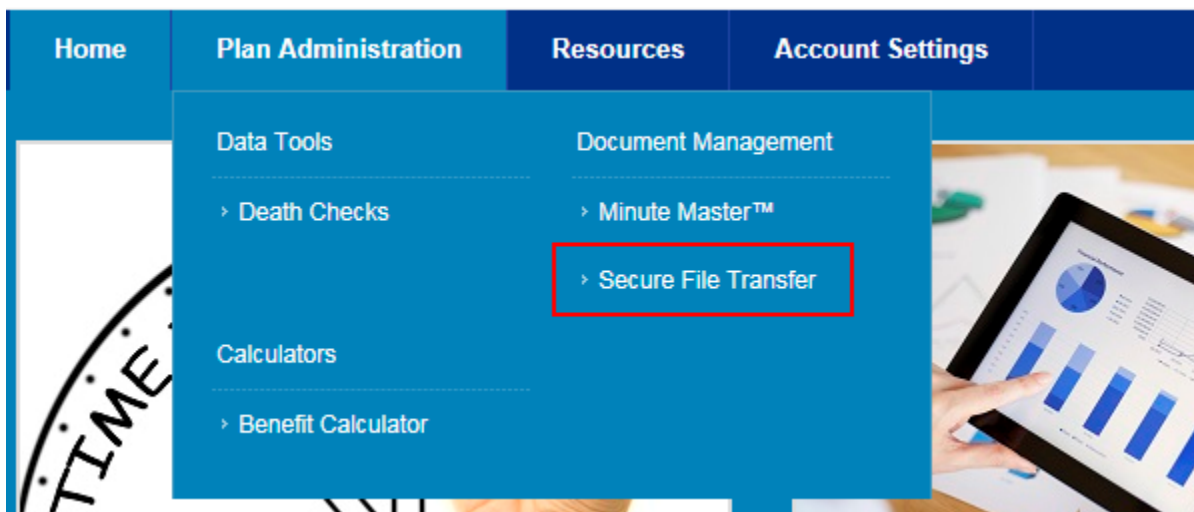
Secure File Transfer

Revised: July 25, 2017

The Secure File Transfer utility can be accessed on the [GRS Advantage™](#) website.

Accessing the Secure File Transfer Web Application

The Secure File Transfer application will appear for all registered users under the “Plan Administration” navigation menu. Hold your mouse pointer over the “Plan Administration” category to reveal the sub menu choices. Click on the “Secure File Transfer” link to be transferred to the Secure File Transfer page.



Identifying Your Active Client

Messages are linked to a single client, which is determined by your active client. Your active client description appears in the upper right corner of the screen and on the main Secure File Transfer page. If you have multiple client relationships with GRS, then you will need to verify that your active client is the intended client for the transfer.



Welcome John, Sample Client
[Manage Profile](#) [Log Out](#)



Displaying all available documents for Sample Client.

[Upload File\(s\) to GRS](#) Search Results - 0 documents found.

[Refresh](#)

Note: Messages will only be visible for 90 days.

Upload Documents to GRS

New messages can be created by using the following instructions:

1. Confirm your active client as described in the [Identifying Your Active Client](#) help topic.
2. Click on the “Upload File(s) to GRS” button to open the “Create New Transfer” page.



Welcome John, Sample Client
[Manage Profile](#) [Log Out](#)



Displaying all available documents for Sample Client.

[Upload File\(s\) to GRS](#) Search Results - 0 documents found.

[Refresh](#)

Note: Messages will only be visible for 90 days.

3. The “Create New Transfer” screen will collect all of the information that will be transferred to GRS. Follow these steps to build the message and send it to GRS.

The screenshot shows a web form for sending a secure file transfer. At the top, it displays 'From: demo@gabrielroeder.com' and 'To: C9995@gabrielroeder.com'. Below this is a 'Subject:' field with a dropdown arrow and a 'Delete' button. The 'Attachments:' section includes a 'Browse...' button and an 'Attach File' button. A large empty rectangular box is provided for the message body. At the bottom left is a 'Send to GRS' button. Red arrows with labels A, B, C, and D point to the Subject field, Attach File button, message body box, and Send to GRS button respectively.

From: demo@gabrielroeder.com
To: C9995@gabrielroeder.com

Subject:

Attachments:

Note: It may take several minutes to attach and send large files.

- A. Provide a Subject
The subject field will be used as a label to describe the transfer. Try to provide a descriptive subject to help distinguish between various file transfers.
 - B. Provide the File Attachments
You can attach files to the message by using the “Browse” button followed by the “Attach File” button. Attached files will appear in the “Attachments” list and can be removed by pushing the “Delete” button.
 - C. Provide the Message Body
The message body can be used to provide more information about the transfer.
 - D. Click on the Send to GRS Button
Click on the “Send to GRS” button to finalize the message and transmit the information to GRS.
4. Confirm that the message now appears in your list of available messages.
 5. Send a regular e-mail message to the intended GRS recipients, notifying them that the transfer is available online.

Downloading Documents from GRS

You can follow these instructions to open an existing message:

1. Confirm your active client as described in the [Identifying Your Active Client](#) help topic.
2. Click on the magnifying glass icon of the message to see more information.



Welcome John, Sample Client
[Manage Profile](#) [Log Out](#)



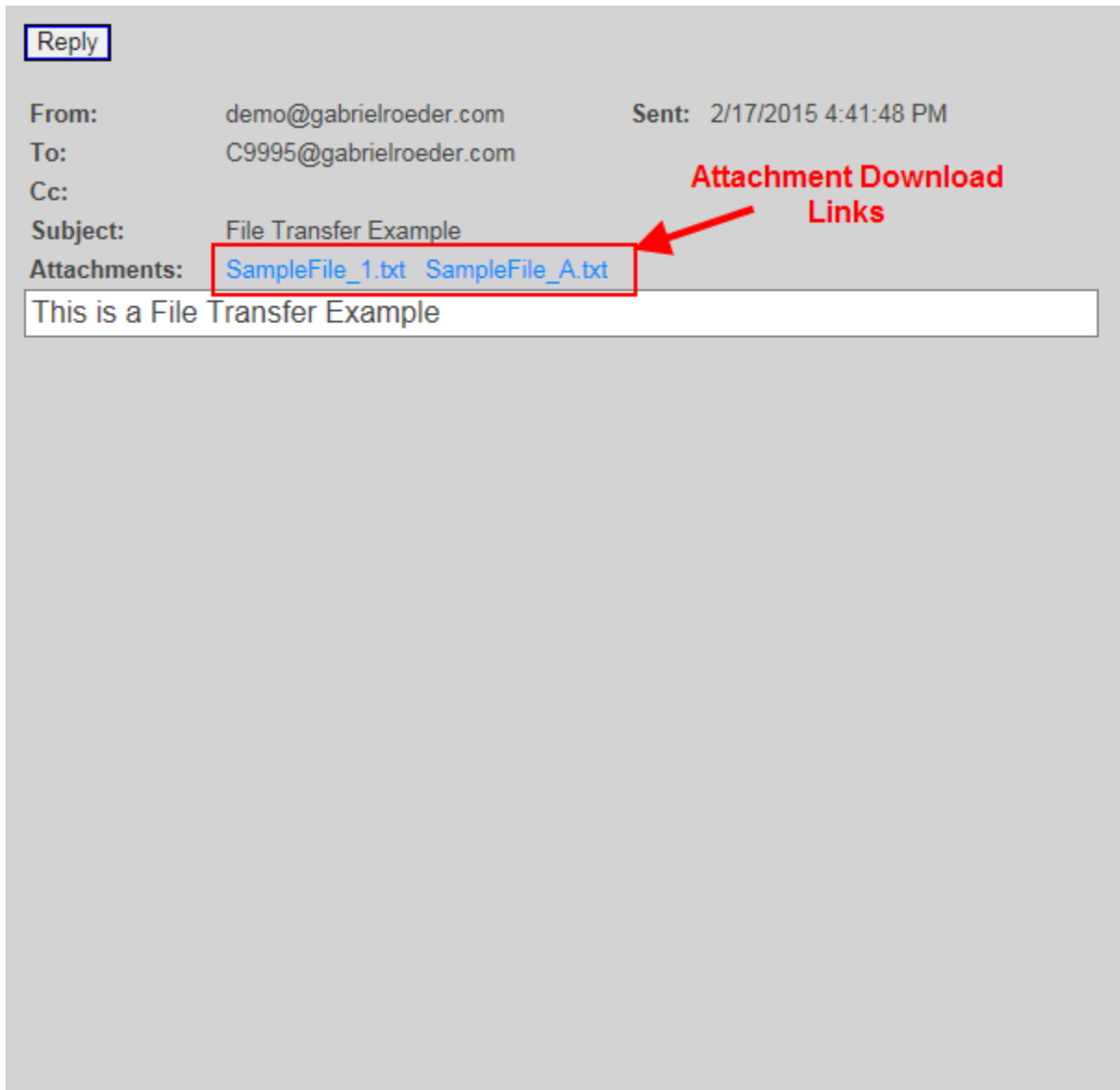
Displaying all available documents for Sample Client.

Upload File(s) to GRS		Search Results - 1 document found.		Refresh
	Document Name	From	Date	
	File Transfer Demo	Demo, Mr. John	9/1/2016 9:52:40 AM	

Note: Messages will only be visible for 90 days.

[View File Transfer](#)

3. This page displays all of the message information and includes links to the attachments. Click on the links in the “Attachments:” section to download the files. The “Reply” button can be used to send a follow up message to the sender.



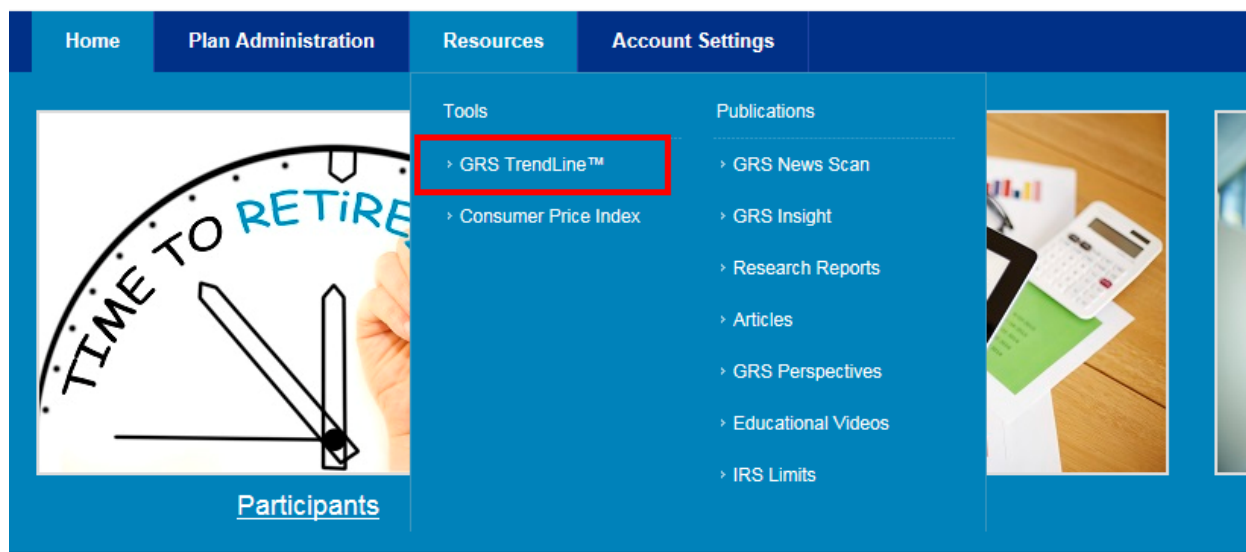
GRS TrendLine™

Revised: July 25, 2017

The GRS TrendLine™ application can be accessed on the [GRS Advantage™](#) website.

Accessing the GRS TrendLine™ Web Application

The GRS TrendLine™ application will appear for all registered users with an active pension relationship with GRS under the “Resources” navigation menu. Hold your mouse pointer over the “Resources” category to reveal the sub menu choices. Click on the “GRS TrendLine™” link to be transferred to the GRS TrendLine™ page.



Navigating Around the GRS TrendLine™ Page

The main page is split into four functional areas:

- A. A series of buttons that allow you to either update the current filter settings or to export all of the available exhibits to a PDF report.
- B. Radio buttons that allow you to switch the category or type of exhibits to show. Currently, you can view various exhibits from the following categories:
 - a. Actuarial Assumptions
 - b. Assets
 - c. Benefits
 - d. Contributions
 - e. Demographic
 - f. Funding
- C. Checkboxes to filter what data is visible in your exhibit.
- D. The exhibits that reflect the type of data you want to display and the available data matching your filter criteria.

The screenshot displays the GRS TrendLine™ web application interface. At the top, the GRS Advantage™ logo is on the left, and a user welcome message "Welcome John, Sample Client" with links for "Change", "Manage Profile", and "Log Out" is on the right. Below this is a navigation bar with tabs: Home, Plan Administration, Resources, and Account Settings. The main header is "GRS TrendLine™".

On the left side, there are two main sections:

- Category of Exhibit:** A list of radio buttons for "Actuarial Assumptions", "Assets", "Benefits", "Contributions", "Demographic", and "Funding". A red arrow labeled "B." points to the "Actuarial Assumptions" radio button.
- Filter Your Results [apply]:** A section with checkboxes for "Valuation Date" and "Level of Government".
 - Valuation Date:** Includes "All (393)", "12/31/2014 (14)", "06/30/2015 (102)", "09/30/2015 (112)", "12/31/2015 (129)", "06/30/2016 (35)", and "09/30/2016 (1)". A red arrow labeled "C." points to the "12/31/2015 (129)" checkbox.
 - Level of Government:** Includes "All (393)" and "State (78)".

At the top left of the main content area, there are two buttons: "Apply Filters" and "Export All Charts". A red arrow labeled "A." points to the "Export All Charts" button.

The main content area displays four charts under the heading "Available Exhibits for Actuarial Assumptions:":

- Distribution of Actuarial Cost Methods [details]:** A bar chart showing the distribution of cost methods. A red arrow labeled "D." points to this chart.
- Average Assumed Investment Returns [details]:** A bar chart showing average investment returns. A red arrow labeled "D." points to this chart.
- Distribution of Assumed Investment Returns [details]:** A bar chart showing the distribution of assumed investment returns.
- Average Assumed Wage Growth [details]:** A bar chart showing average wage growth.

Each chart has a "Display Size" dropdown menu set to "Small".

Adjusting the Data Filter

The GRS TrendLine™ application allows the user to drill down through our database to find the precise dataset of most interest to you.

We currently provide the ability to filter data by:

1. Valuation Date
2. Level of Government (i.e. State, County, City, Other)
3. Type of Employees (General, Public Safety, Teachers, Legislative/Judicial, Other)
4. Amount of Assets
5. Number of Members (Active and Retired)
6. Group Status (Open Plans, Closed Plans)

Check the boxes for the data that you want to display and click on one of the following:

1. The “Apply Filters” button located at the top of the screen.



2. The “[apply]” link located next to the “Filter Your Results” header.

Filter Your Results [\[apply\]](#)

Valuation Date

☒ All (393)

☒ 12/31/2014 (14)

☒ 06/30/2015 (102)

☒ 09/30/2015 (112)

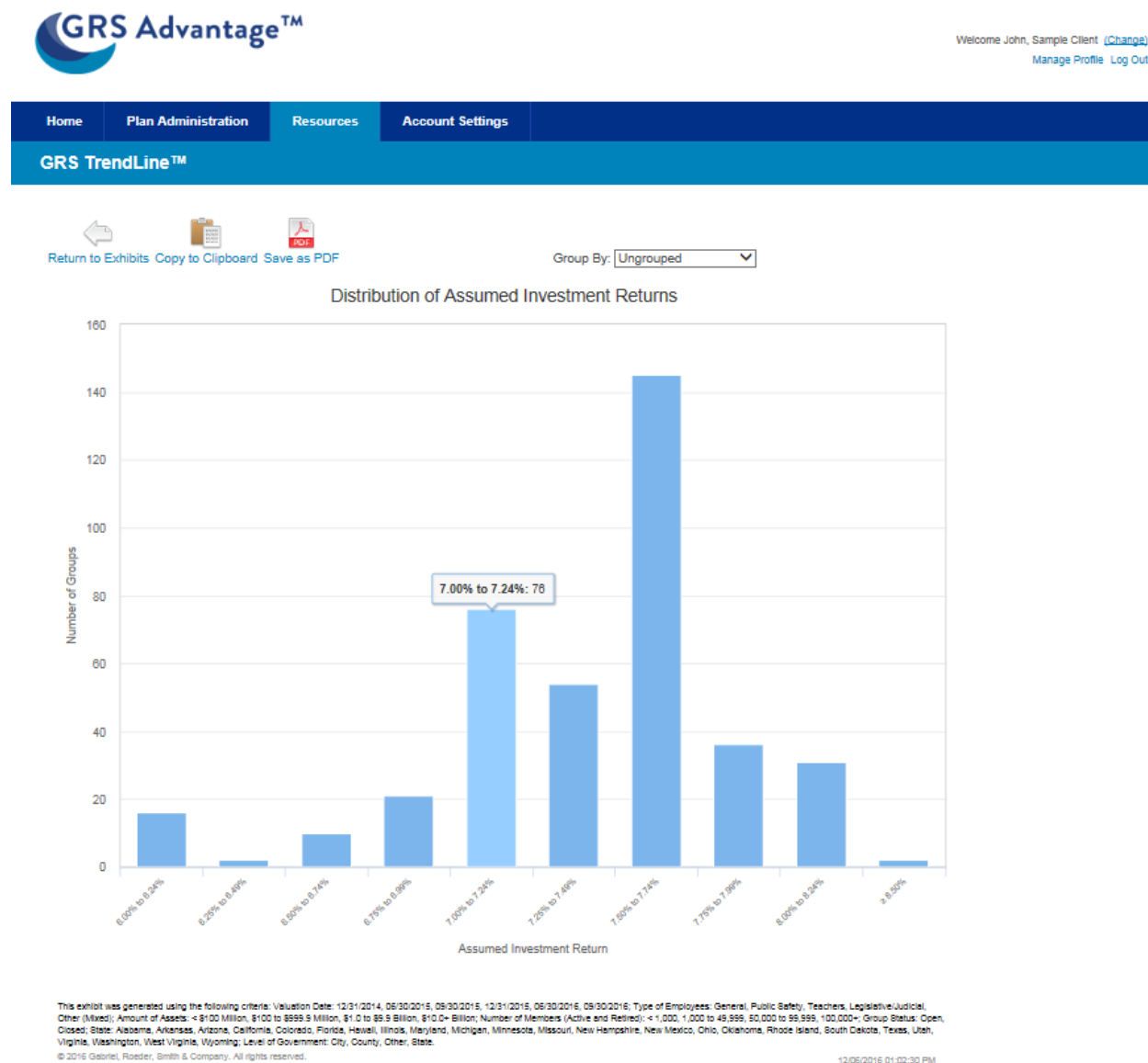


Your dataset is now updated and available to view.

Viewing an Exhibit

To view a single exhibit in greater detail, click on it or the “[details]” link located next to the name of the exhibit.

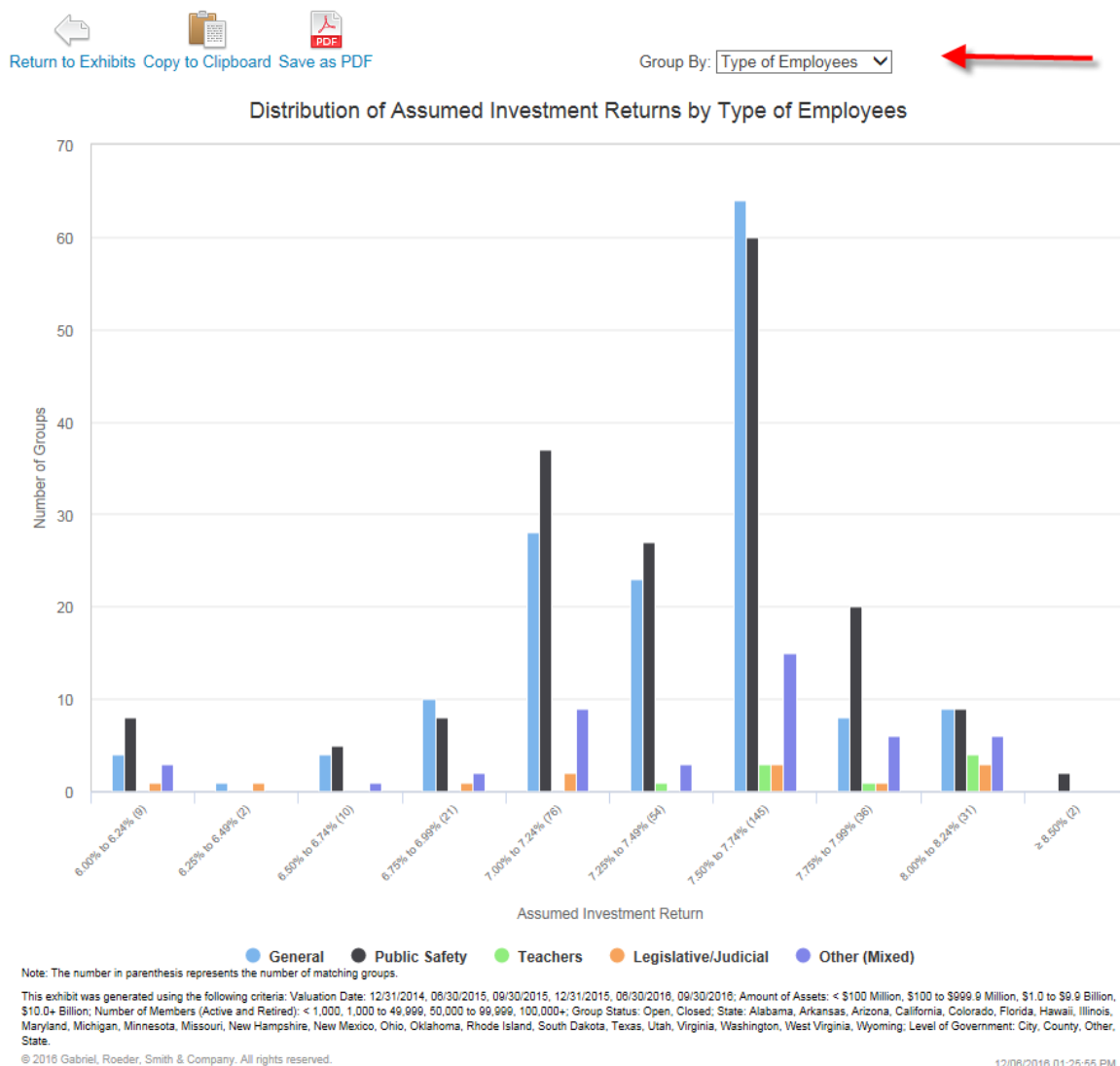
This view displays the exhibit in greater detail.



Holding the pointer over any of the bars displayed will cause a tooltip to display providing more details about the data charted. Holding the pointer over one of the bars, we can now see that in the exhibit above there are 76 groups in our data set with an Assumed Investment Return between 7.00% and 7.24%.

The bottom of the chart displays information about the dataset included in the exhibit. Any changes made to the data filter on the main screen will be noted in the disclaimer.

For some of the exhibits, we provide the ability to group your data by different metrics. This can be accomplished by changing the selected value of the “Group By:” drop down. In the following example, the data is now grouped by the type of employees in our dataset.



Software Support

Revised: July 25, 2017

Available Software Support

For all questions related to the [GRS Advantage™](#) website, contact the GRS Software Support team by clicking on the “GRS Software Support” link located at the bottom of each page, via software.support@gabrielroeder.com or 248.799.9000. All other questions should be directed to a GRS consultant or analyst assigned to your account.