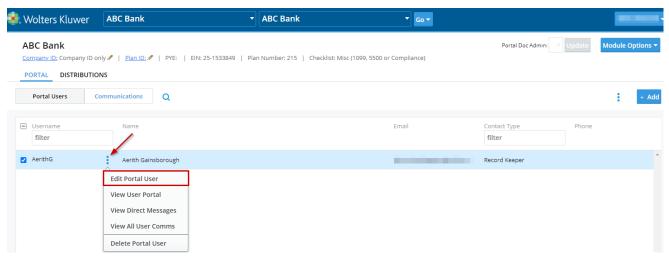
Add, Edit, or Remove Portal Users

09/25/2025 4:44 pm CDT

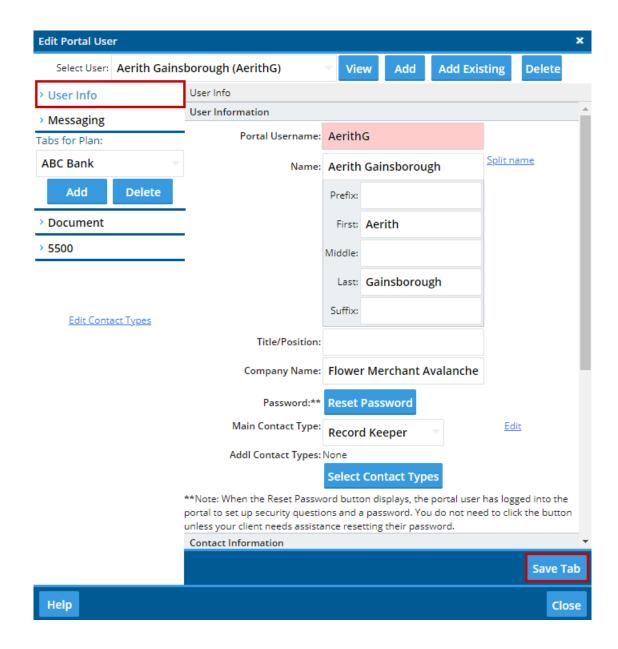
How to Alter a Portal User's Username

A User with permission to Edit the Portal module can update a portal username from the Edit Portal User screen.

- Navigate to the Portal Users Tab in the Portal module.
- Click the menu icon (three dots) next to the user whose username needs updating.



- Select Edit Portal User.
- In the User Info tab, enter the new username.
- Click the Save button to confirm the changes.

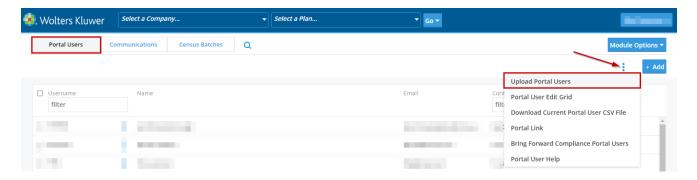


NOTE: The Portal user will need to log in with the new username. Any references to that user will update to the new username as well.

How to Upload Portal Users in Bulk

Portal Users may be added or updated in bulk through the 'Upload Portal Users' interface.

The Upload Portal User interface is accessible from the Global or Plan level Dashboards through the tricolon menu option on the Portal Users Tab.



This interface may also be accessed by selecting the Wolters Kluwer Logo>ftwPortalPro>Upload Portal Users.

Within this window are 2 files:

- 1. Download Current Portal User CSV File- This will be the file that needs to be uploaded.
- 2. Download CSV Schema- This file explains how the data should be entered within the 'Download Current Portal User CSV File'.

It is recommended the "Important Notes" be reviewed prior to entering data into the spreadsheet. The notes read as follows:

Important Notes:

- All data rows must contain the username and plan information (with the exception of rows for the Messaging module).* If you would like the Name column to be automatically parsed into first, middle, and last names you must remove the columns with those names from the header (the first row, of the uploaded file).
- Misspelled column names will be silently skipped unless they are required.
- Rows with bad data will be skipped.**
- Existing portal user records will be updated.
- If you do not specify passwords for new portal users in a "Password" column, they will automatically be assigned random passwords.***

Example. You want to add a portal user, Jane Doe, who will be given Messaging, 5500 and Document permissions. On the spreadsheet, you would list Jane Doe once for Messaging, once for Documents and twice for 5500s (for the 2020 and 2021 plan year). In all, Jane Doe will be listed four times on the spreadsheet.

Note: Plans need to already be established in the software to assign Document, 5500, and/or Admin permissions to those plans. If there is not a 5500 set up for a specified plan year that you are assigning a portal user, that plan year will be skipped.

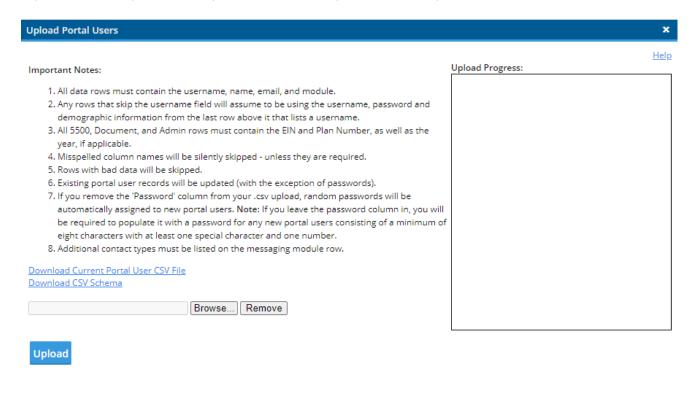


^{**} Note: The portal Username must be at least 4 characters, and cannot contain leading or trailing spaces, [%] [#] [+] [;] [&] [/] [?] ['] or [\].

^{***} Note: If you create passwords, they must be at least 8 characters, with at least one number, one letter, and one

special character. Passwords are case sensitive.

After the spreadsheet is completed return to the "Upload Portal User" screen. Select "Browse" select the file and click "Upload". Please be patient if the upload contains a lot of portal users; it may take a few moments.



When the file has completed the upload process, a status result will populate in the window to the right. Make note of any users that need alterations from the status box.

Close

For example, if a user has been assigned signing permissions that are assigned to another user on the plan, the following error will populate.

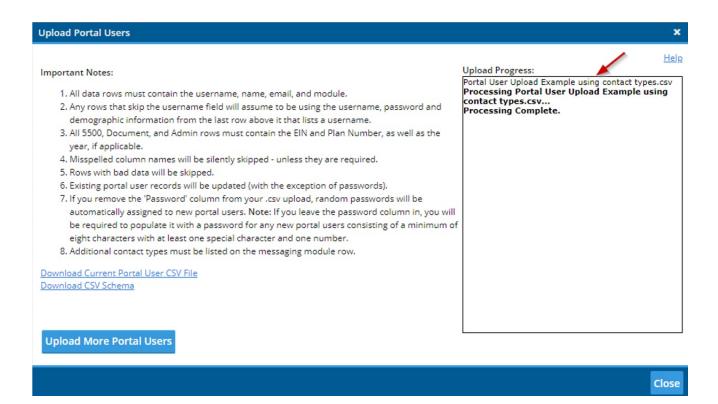
Upload Progress:

Portal User Upload Example.csv

Processing Portal User Upload Example.csv
unable to mark user as Signing As 'ADMIN:SPONS'
for user Ferb on row 2. 'hk5w' is already marked as
Signing As ADMIN:SPONS.

Processing Complete.

If the 'Upload Progress' window populates as shown in the screen shot below, the upload process has been successfully completed and the window may be closed.



Assigning Portal Users to a Plan

Users can be assigned to a plan in three ways:

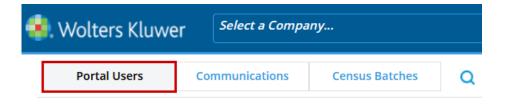
- From the Global Dashboard
- From the Plan-Level Dashboard
- During the Portal User Upload Process

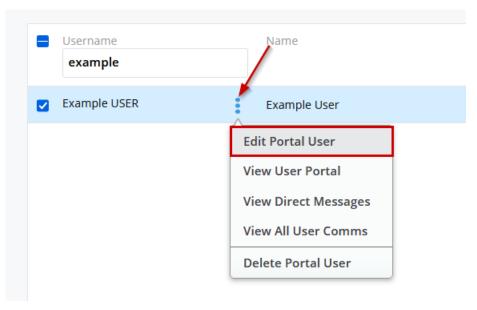
Global Dashboard

Wolters Kluwer Logo > ftwPortalPro > Global Dashboard

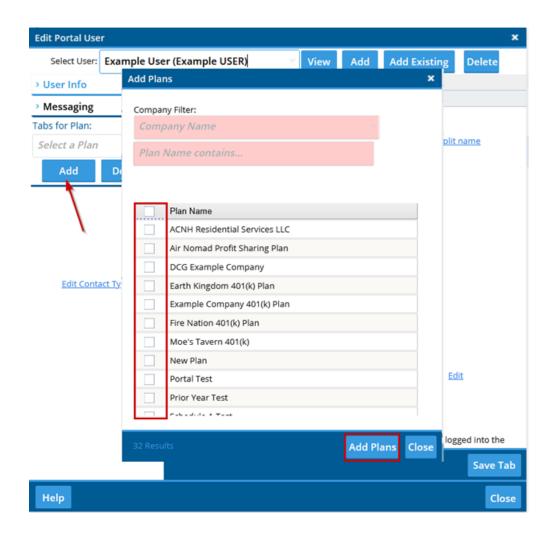
Steps:

- 1. Locate the Portal User in the list (must already be added or uploaded).
- 2. Select the menu icon (;) next to the Portal User's name.
- 3. Choose Edit Portal User.





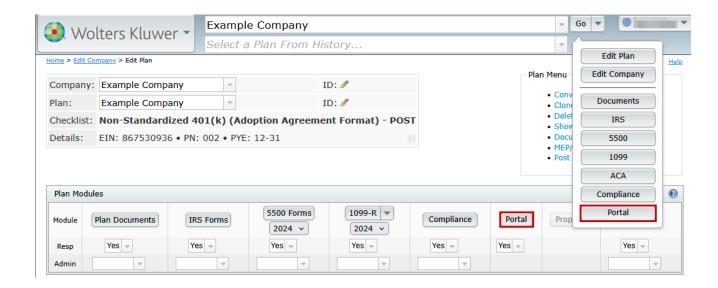
- 4. In the Edit screen, select the Add button on the left.
- 5. Filter by Company Name, Plan Name, or scroll through the list of available plans.
- 6. Check the box next to the desired plan.
- 7. Select Add Plans to complete the assignment.



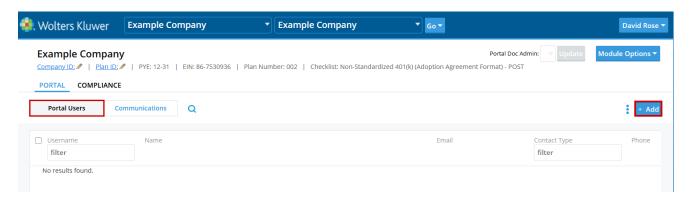
Plan-Level Dashboard

Steps:

- 1. Select the desired plan.
- 2. Navigate to the Portal via the GO menu or the Portal button on the Edit Plan screen.



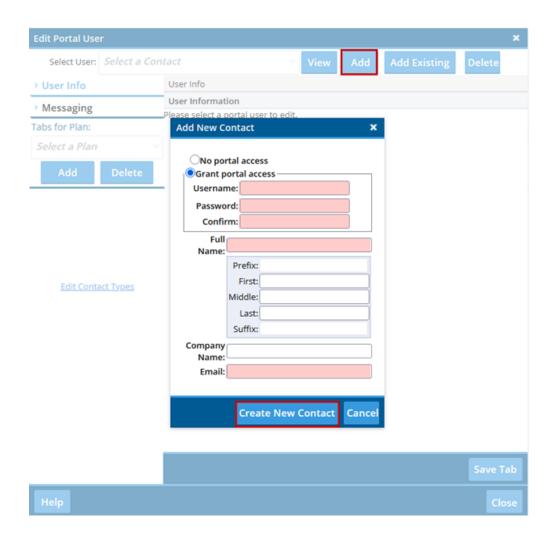
3. In the **Portal Users** screen, select the **Add** button above the user grid.



4. In the **Edit Portal User** screen, choose one of the following options:

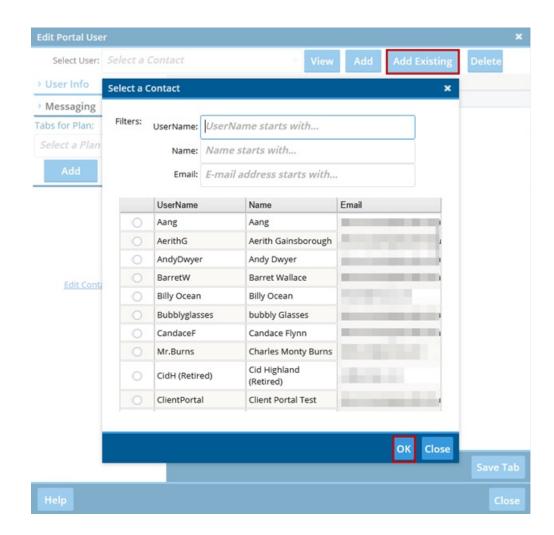
Add

- Use to create a new Portal User.
- Enter a username and password (minimum 8 characters, including at least one letter, one number, and one special character).
- Provide the first and last name, email address, and optionally, the associated company.



Add Existing

- Use when the Portal User <u>has already been added</u> to another plan or exists in the Global Dashboard.
- Filter by username, name, or email.
- Select the user and confirm with **OK**.



Upload Portal Users

Portal Users can also be assigned to plans during the upload process.

Refer to the article: How to Upload Portal Users in Bulk for detailed instructions.