ftwPortal Pro Webinar Q/A

Portal Users:

Q1: Will deleting the portal user remove any audit tracking information associated with them?

A1: If you remove a user from a plan or from the software, you will still be able to see the audit of a portal users' activity within the Edit Plan screen> Show History. However, if the user was the only one associated with that communication and classification type, the communications sent to that user will no longer populate on the portal dashboard.

If a user is inadvertently removed from a plan, when added back, the communications to them will repopulate on the dashboard.

Please Note: any manually deleted communications will not be restored.

Q2: How do I add Portal users in bulk?

A2: There is a very detailed section of our help guide that refers to the bulk upload process. A link to that section is included below:
Section1.3 *Uploading Portal Users*

Q3: Is there a way to filter on users not attached to plans?

A3: You can filter by Username and Contact Type on the global dashboard. There is not a specific designation for those not associated with plans. However, you could create a custom contact type to view only those that are added for messaging purposes, and that would populate on the grid. Below is a link to setting up contact types:

https://www.ftwilliam.com/djKIumIZlvmjgBE599Eo3NuoAelU5LAzbx2Xs/help/Instructions/PortalUserGuide/Content/Portal%20User%20Guide.htm#2.2

Once the contact type is added to the portal user, the grid could be filtered to populate as shown below for those with "Direct Message" permissions only:

Portal Users	Communications				
					Module Options ▾
					⋮ + Add
☐ Username	Name	Email	Contact Type	Phone	
filter			DM		
☐ Aang ⋮	Aang	allison.bailey@wolterskluw...	DM Only		
☐ AerithG ⋮	Aerith Gainsborough	Allison.bailey@wolterskluw...	DM Only	5555555555	

Communications:

Q4: How do you assign only one of the portal users to a communication? Sometimes you see more users than you need.

A4: Users are added to communications based on their classification permissions. To remove user from communications you would need to alter their permissions or add a custom classification type. Included is a link to our help guide for Classifications: Section2.0

Q5: When sending a communication from the plan level. You've selected the users to receive the message. How do you add a user not associated with that plan after you have selected send communication?

A5: When sending from the plan level, you are sending a communication associated specifically with that plan, however, if wish to send to multiple users not associated with the plan, you would set the classification as 'Direct Message'. Direct messages are not tied specifically to plans, so once posted it will not populate on the Plan level Dashboard. To view this communication later you would need to navigate to the Global Dashboard.

Q6: When sending the Email Invite, can you edit the default message in that window before clicking Post + Send?

A6: The specific email templates are not editable from within the communications window. However, you can create custom templates and include the placeholder !@!Message to include additional verbiage. This information would then be entered in the Portal Message section of the communication.

This customized Portal Message will populate in the email as well as within the user's portal once they have logged in and selected the communication/document in question.

Q7: How do you download history of individual sent /received messages to users

A7: If you wish to download a copy of all messages and communications sent to and from your portal users You can filter the global grid by the user, select the checkmark by their name, click on the 'Do with Selected' dropdown below the grid and 'Download Selected Communications'
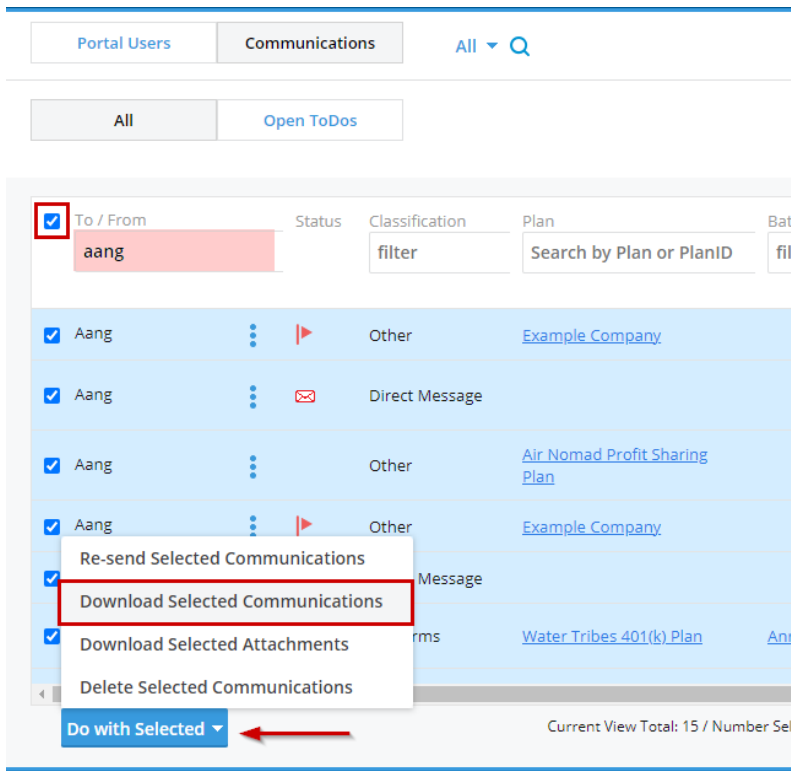
Since the webinar aired, we have updated the tricolon menu next to the portal users name on both the plan and global dashboards to allow for quick access to all Direct messages or ALL communication (anything sent either with a classification or a Direct Message) to/from the user.

When you select the tricolon next to the portal users name from the Portal Users tab on either the Global or Plan level dashboard you can now select to view all communications associated with that user, prefiltered without having to navigate and search the global dashboard.

Simply select one of the new options to either view only the Direct Messages or All communications.

- Direct Messages- This will take you to a filtered dashboard for all Direct Message communications sent to and from your portal user.
- All Communications- This will take you to all communications sent to your user from all plans as well as any direct messages sent or received by your user.

Selecting one of these features will direct you to the prefiltered global dashboard for this user.
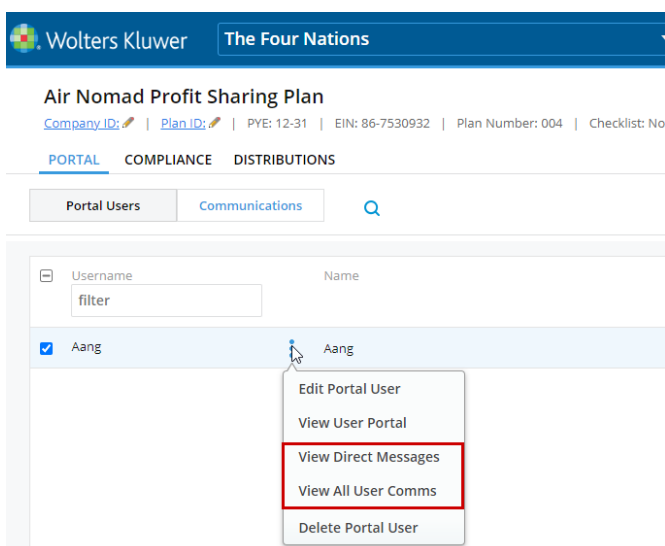
Q8: Is there a benefit to using Direct Link rather than just sending them a regular email?

A8: When using Direct link, you have control over how long a user has access to the information provided through the link. You can set an expiration date on Direct link messages that will be disabled access to the document through the link once the expiration date has passed:
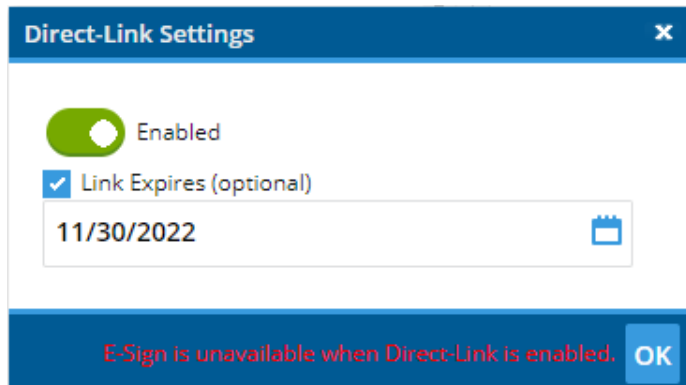
Though the link will no longer be active, the users will still be able to log into their portal to review the documents later.

**When using Direct Link, you will want to make sure that your template includes the placeholder !@!loginlink. The system utilizes this link as a way for users to access the attachments. If direct link is not used, the placeholder will just direct the portal user to the login screen of the portal.

**Q9: Is Direct Link be secure for sending or receiving employee information?**

A9: We do not recommend using direct link when sending secure or sensitive information as the link can be forwarded to others and accessible until the link expires *(if an expiration was set).* This is specifically used for sharing general information that wouldn't require a password to view.

**Q10: How do we delete a document that has been signed from the Portal?**

A10: The system has a failsafe in place to avoid users inadvertently removing signed documents. If you find that you have a communication that contains a document marked for signature that you no longer wish to be in the portal, you will need to open the communication, by selecting the tricolon to the right of the communication and select 'Open Communication':
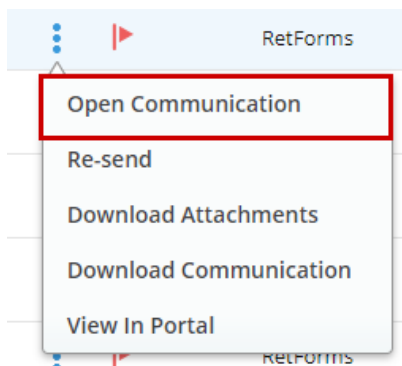
From here, select the tricolon at the bottom of the communication and select Delete Communication:
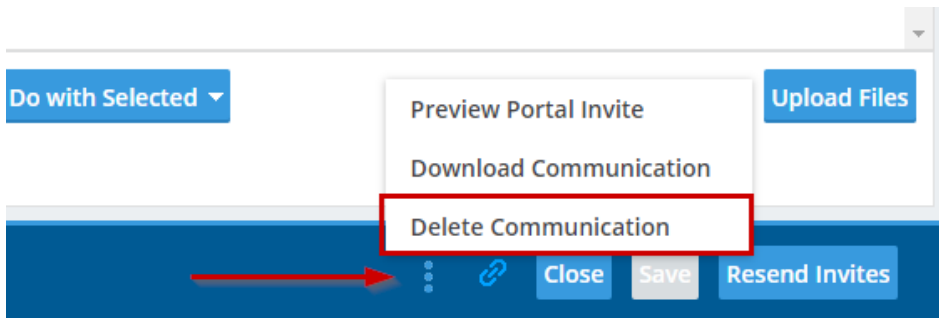
You will then be asked to confirm you wish to remove the communication, once you select 'OK' the communication will be removed from the portal.
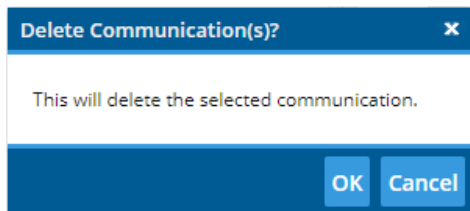
Please note removal of signed documents is permanent and cannot be restored once deleted.

Q11 How do we delete items that are not marked for signature from the portal?

A11: If you have items posted to the portal (that were not posted from a batch or with a signature required) that you would like to remove, there are two ways to remove them.

1. You can remove them as outlined in Q8(a) from within the communication.
2. You can remove communications in bulk by selecting the communication check box and clicking on the do with selected below the grid and 'Delete Selected Communications'

Q12: When resending a message that was sent to multiple recipients, will it send to all, or just the single user selected?

A12: The message will resend to all users associated with a communication whenever Specify a Server is your sending method. If you utilize Preparer's Email Program, the system will create links to each e-mail, but you are able to select to whom you resend the information.

Designated Admins can confirm e-mail settings by navigate to the Wolters Kluwer Logo> Administrative Tasks> Portal/Workflow> Global Email settings and reviewing the entries on the different Modules Tabs.

Plan/Global Dashboard Filtering

Q13: We only see +1 instead of the name in the to/from column.

A13: As there is a significant amount of data on this grid, the "To/From" fields will enter a number in the event the names are longer than the given area. If there are multiple users, some may show with one of the to/from names and a number as shown below:

If you wish to see all users in this field, you can expand the grid by hovering between the "To/From" and "Status" columns until you see the column expander icon:

Expand your column out to the right and then click into the "To/From" field and hit 'Enter' on your keyboard. This will refresh the grid to display the names:
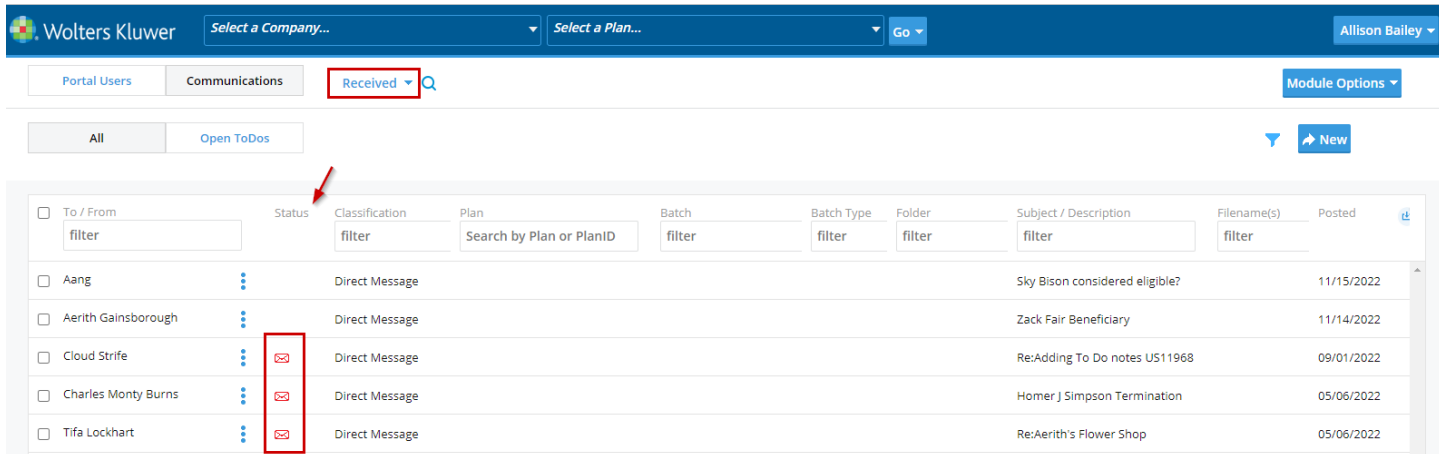
It will stay in this view until you navigate away from the page.

Please note: Each browser will display a little differently which is outside of ftwilliam.com's control. Typically, Chrome is more lenient with how the fields load and FireFox is more restrictive, meaning you will likely see more names listed in Chrome than you will Firefox when unaltered.
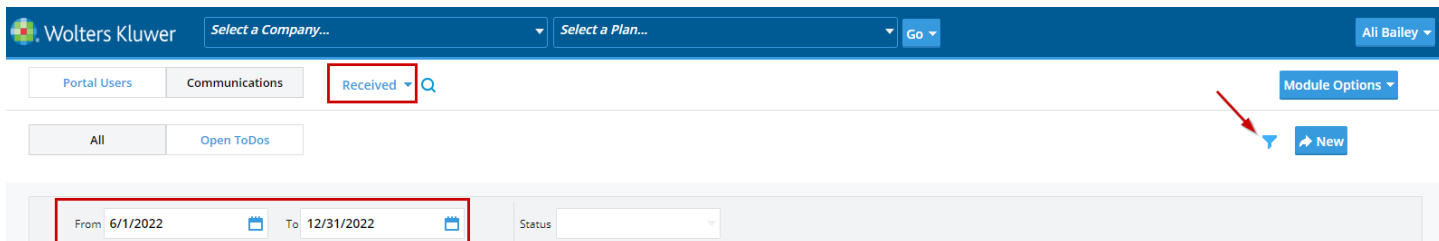
Q14: Can you filter by UNREAD?

A14: The unread messages from your portal users will come in as Direct Messages on the global dashboard with a red envelope. You can filter by 'Received' at the top of the global dashboard as well as sort by status to move all unread items to the top:

Q15: Currently, it says 'Too Many Messages' and we cannot choose the unread status until we filter by something else.

A15: The Global dashboard will load up to 4,000 communications, if you have more than this number of communications on the software, it will automatically display with the "Too many" results notation. To view the 'unread' messages, first filter by the 'Received' option above the grid. If there are over 4k results, the system will ask you to filter once more. It is suggested in that situation that you filter by a date span by selecting the funnel to the right of dashboard and entering in your date range:

Branding/ Organization/ Misc.:

Q16: Do we need to update the portal branding from the existing setup?

A16: When legacy was removed it only altered the interface for your firms, it did not impact the branding or view for customers. All branding carried to the newer version of the Portal, so you do not need to make alterations just for the shift.

Q17: How did you have a different portal look for a different user?

A17: The Portal branding can be customized by division. If the Master user on the account has set up divisions for your company code, you are able to alter the portal experience for clients based on their specific divisions.

Below is a link to our user guide on portal branding options. ***Please note***: *if a portal user is associated with companies in multiple divisions, the branding will default to the first company/plan listed in their plan associations.*

Section5.1 How do I brand the portal with our company's logo- *this will discuss the branding options not just logo upload* Section5.2 How do I brand Divisions for the Portal using different logos - *discusses setting divisional selections*

Q18: Can we add multiple users to receive confirmation emails?

A18: Confirmation emails are based on a series of inputs. If the Global Email Settings allow for confirmation emails to go to Admins, when sending a communication on the plan level, confirmation emails will be sent to the admin associated with the plan.

Also dependent upon the selections in the Global email settings, users can enter in additional confirmation emails in the Edit Portal User screen under the desired modules. I am including a link to the instructions for the Global Email settings and confirmation emails: Section4.0 Confirmation, Notification, and Reminder Emails

**Q19: Can you change classification type after document is signed?**

A19. Though the system will allow you to make some changes to the communications after they have posted, such as swapping folder information, certain items are locked down. Classifications are what set viewing privileges for users. As this setting is what impacts who can be associated with and view a communication, the system does lock the classification in place once the item is posted. Any changes that would need to be made would require you to remove and repost the classification.

Q20: If you rename the folder to an existing folder name will it merge the two together?

A20. If you attempt to rename a folder to an existing folder name, you will be provided with a warning that there is already a folder by that name. If you wish to move items from one folder to another, you can do so at any time from within the communication by selecting a different folder name from the dropdown and selecting save after the change is made.

Q21. How do we copy and paste the name of the file into the subject line when we are uploading to the portal? Control C does not work?

A21. You can copy the names of the files by holding down ALT key while left clicking and dragging over the name of the file:
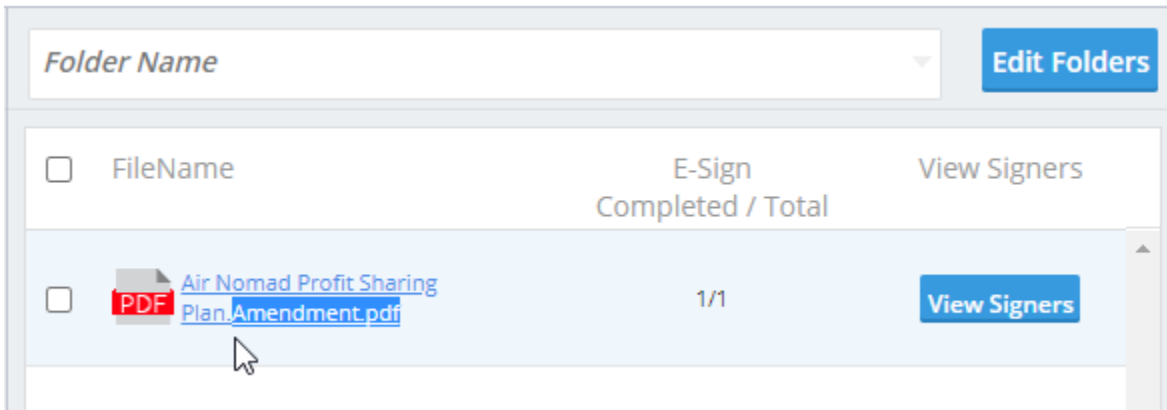
Once Highlighted you can either right click and select copy, or CTRL+C is the short cut for copy. You can then click into the Subject line and either right click and Paste or CTRL+P is the short cut for paste.