Permissions, Contact Types, and Document Classifications

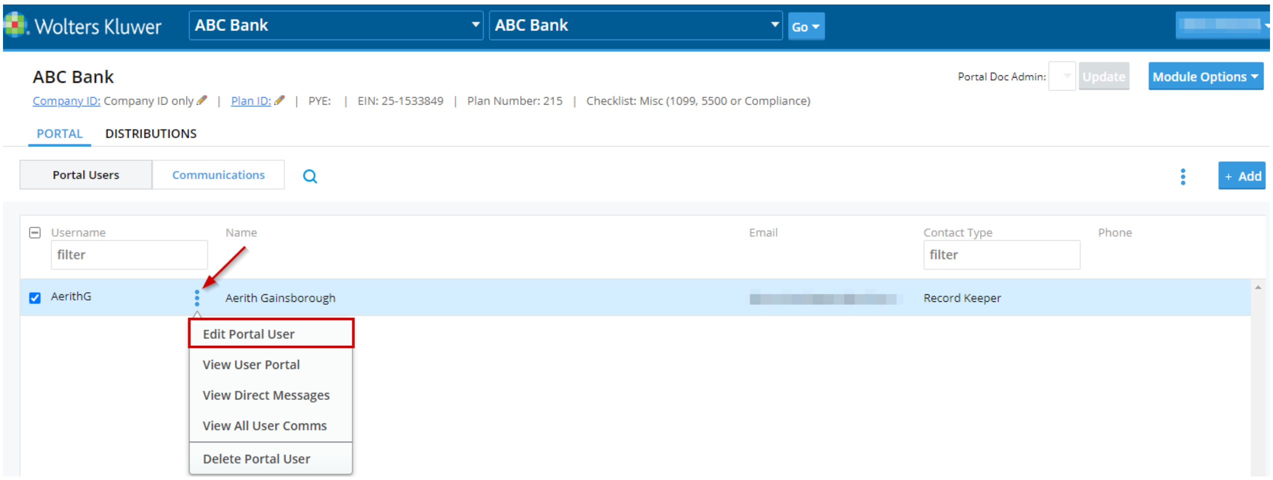
07/30/2024 12:03 pm CDT

How to Add Module Permissions to Portal Users

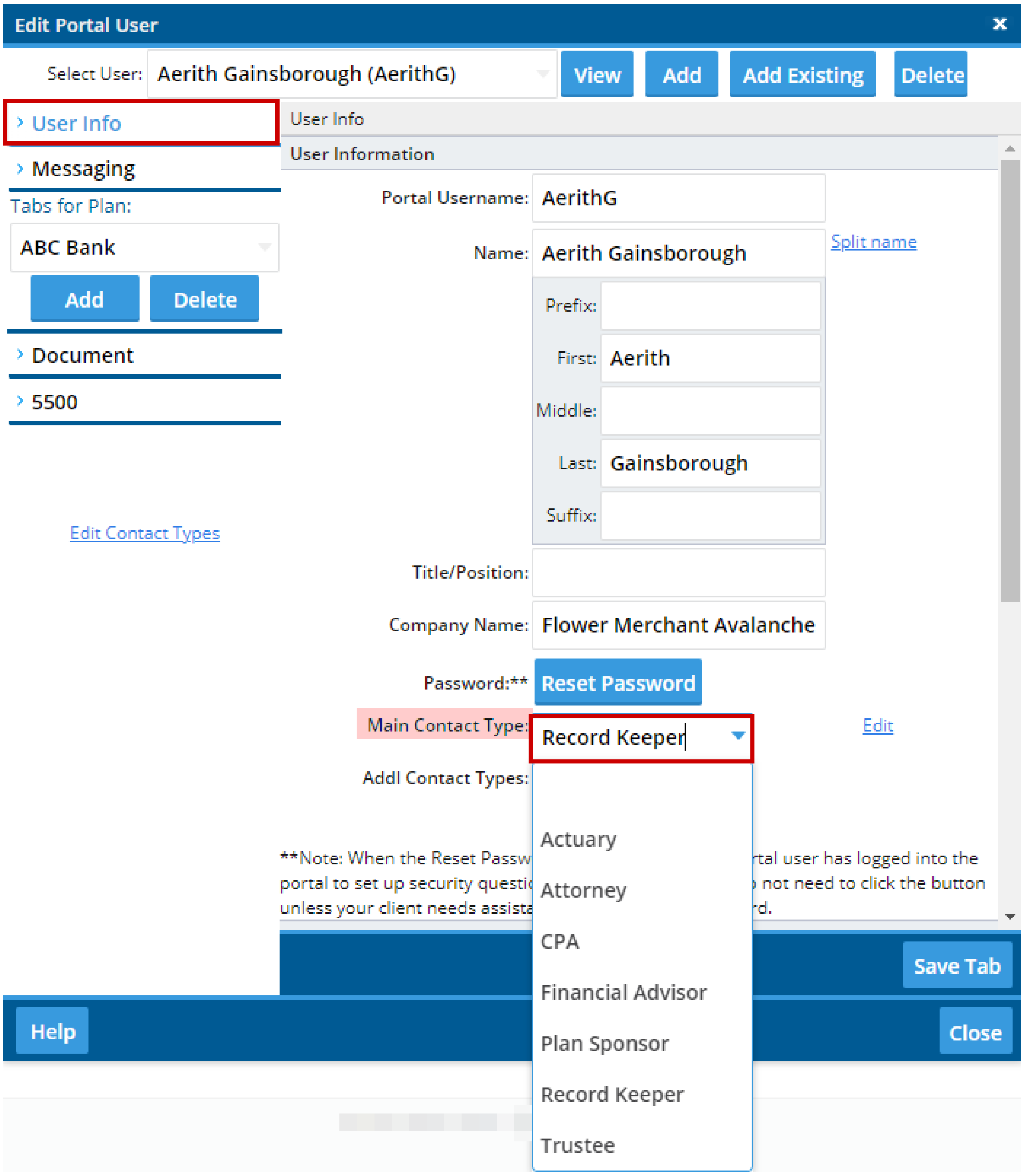
After a Portal User has been assigned to a plan module permissions are enabled. Standard Users with permissions to 'Edit' the Portal module may update Module permissions from the “Edit Portal User” screen.

Note: If portal user were uploaded in bulk, are added with default settings, or the contact types have been updated, permissions may already apply.

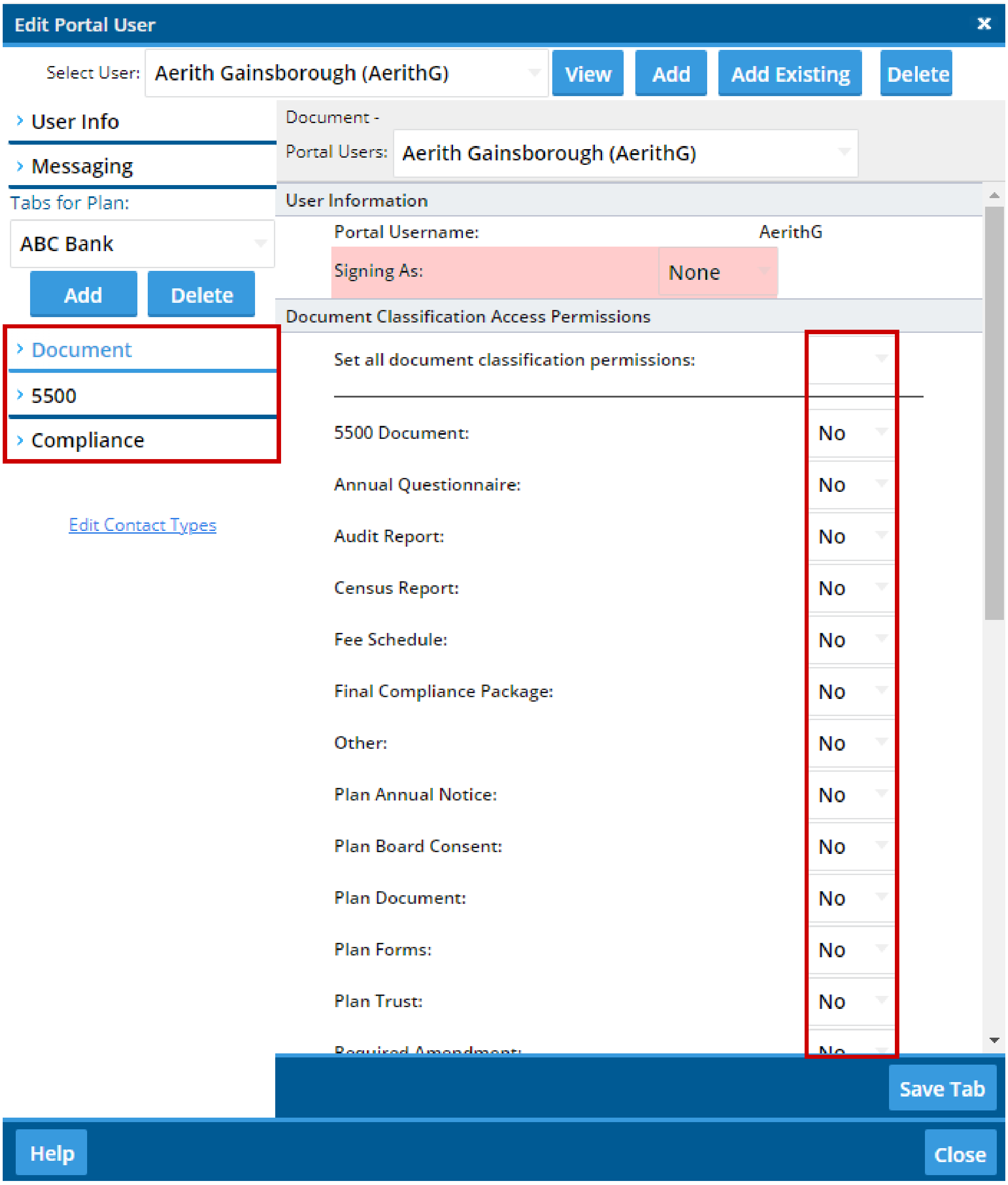
To allow module permissions, or to update permissions, select the portal user from either the Global or Plan level dashboards and selecting ‘Edit Portal User’:



Once the Portal User is selected, permissions may be set by either selecting a contact type from within the 'User Info' tab:



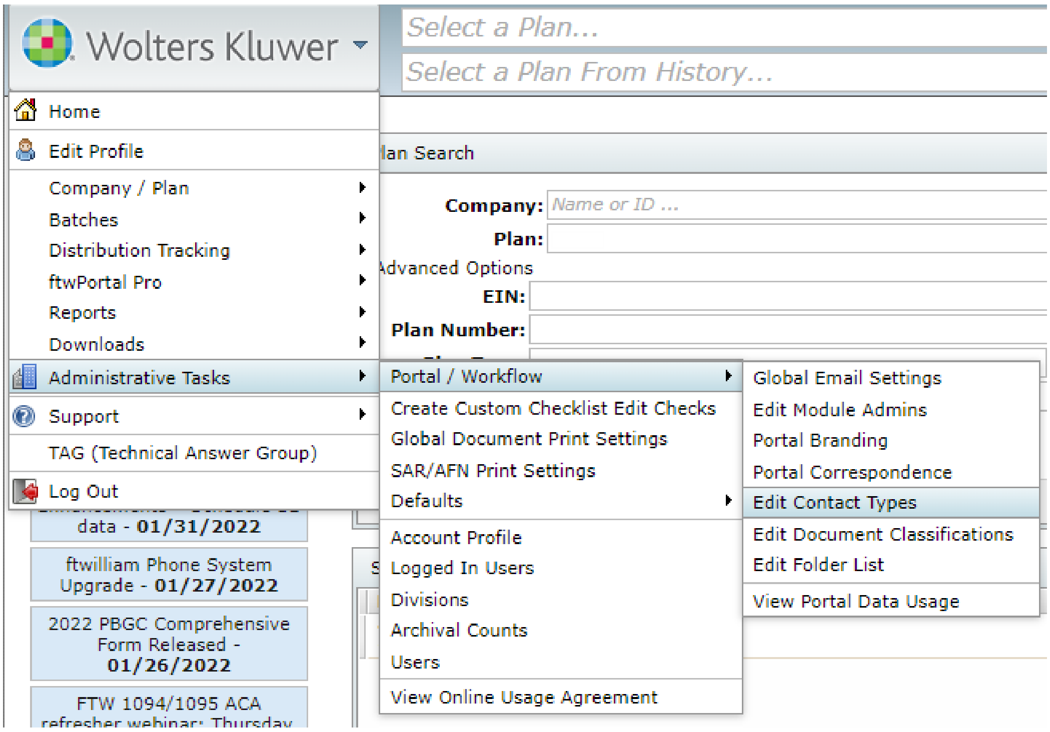
Alternatively, permissions may be edited by module. This view may vary based on the a firms module subscription:



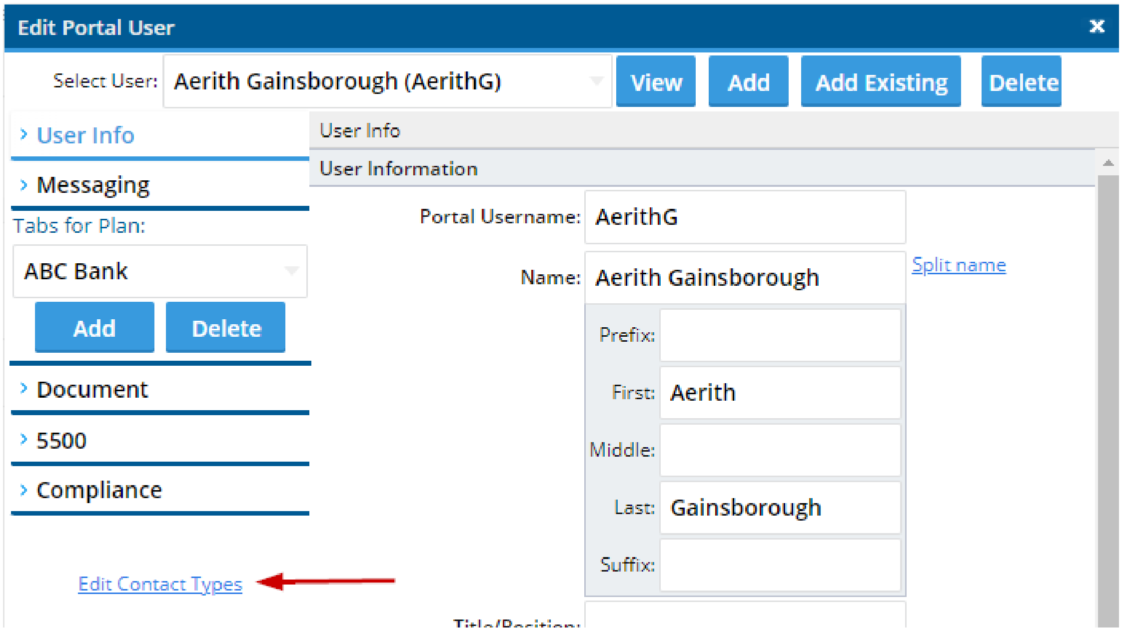
How to Add Contact Types with ftwPortal Pro

To Edit/Add Contact Types, you do have to be the Master Admin User or a Designated Admin. The “Edit Contact Type” window may be accessed two different ways.

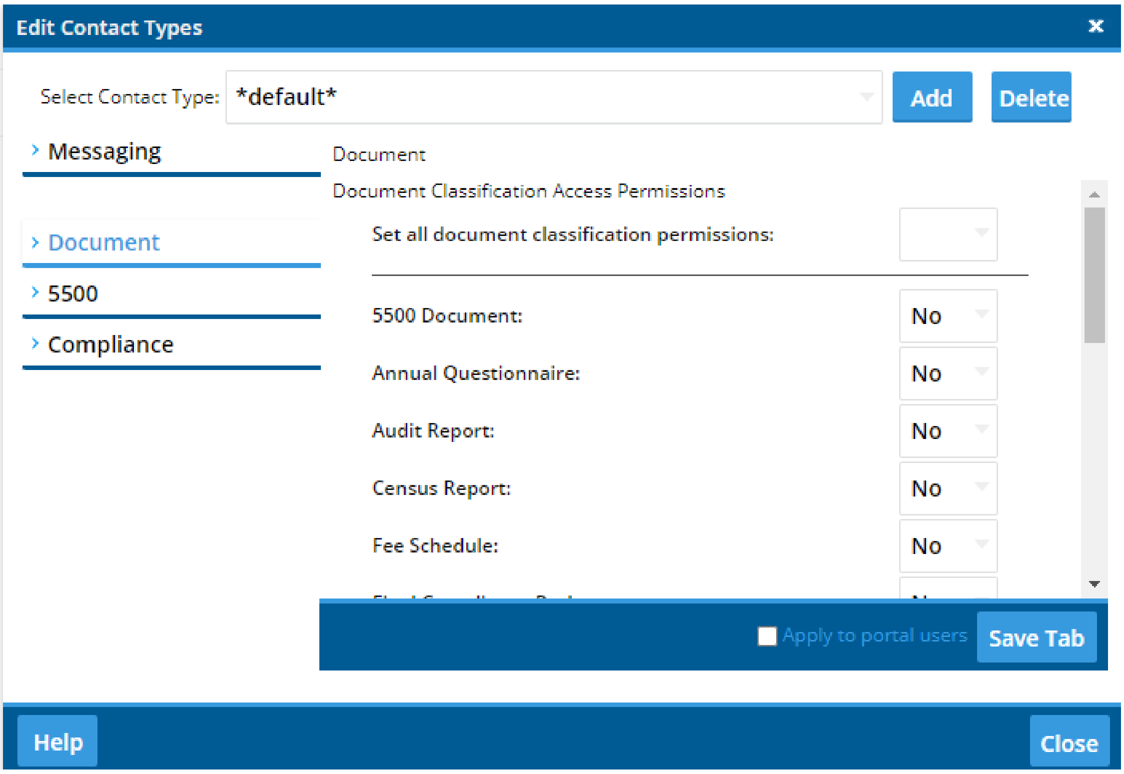
1. Select the Wolters Kluwer Logo>Administrative Tasks>Portal/Workflow>Edit Contact types:



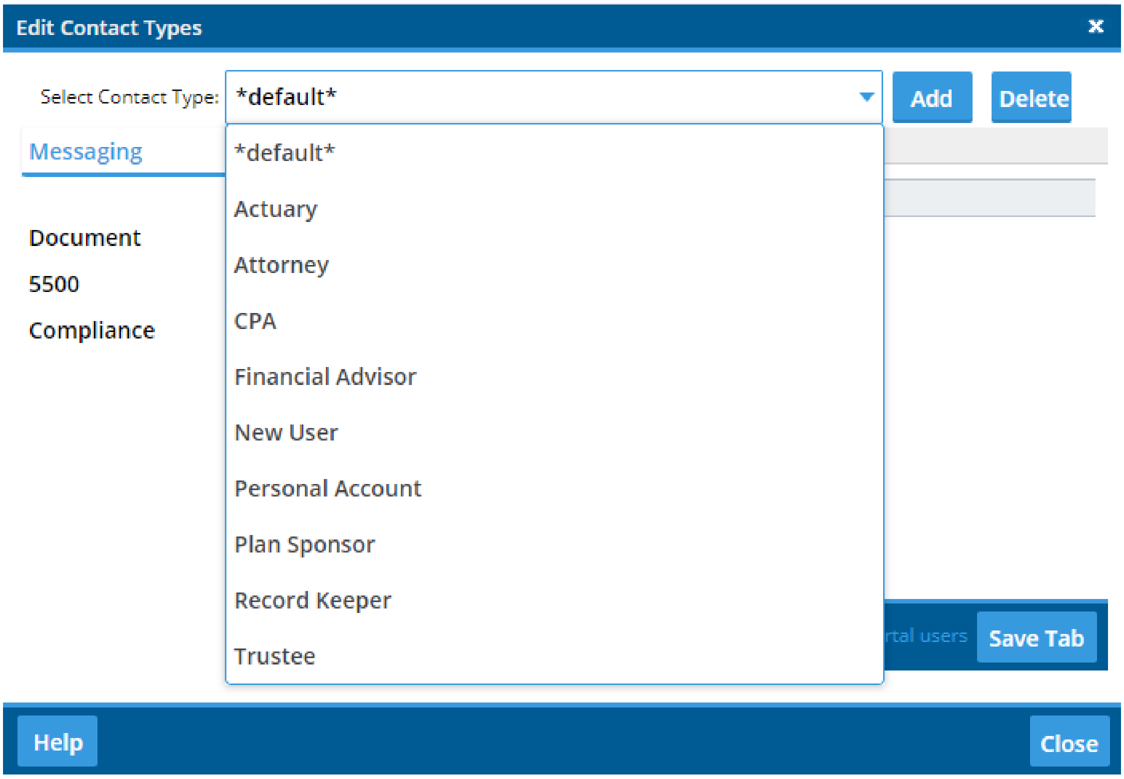
2. Select the link from within the ‘Edit Portal User’ Screen:



The “Edit Contact Types” link will open to the ‘*default*’ contact type. On the left-hand side of the screen, are the modules the account subscribes to. *For example, if the account does not have the Compliance software, the 'Compliance' tab will not populate.* The ‘*default*’ permissions are those that each portal user is added with if a contact type is not specified.

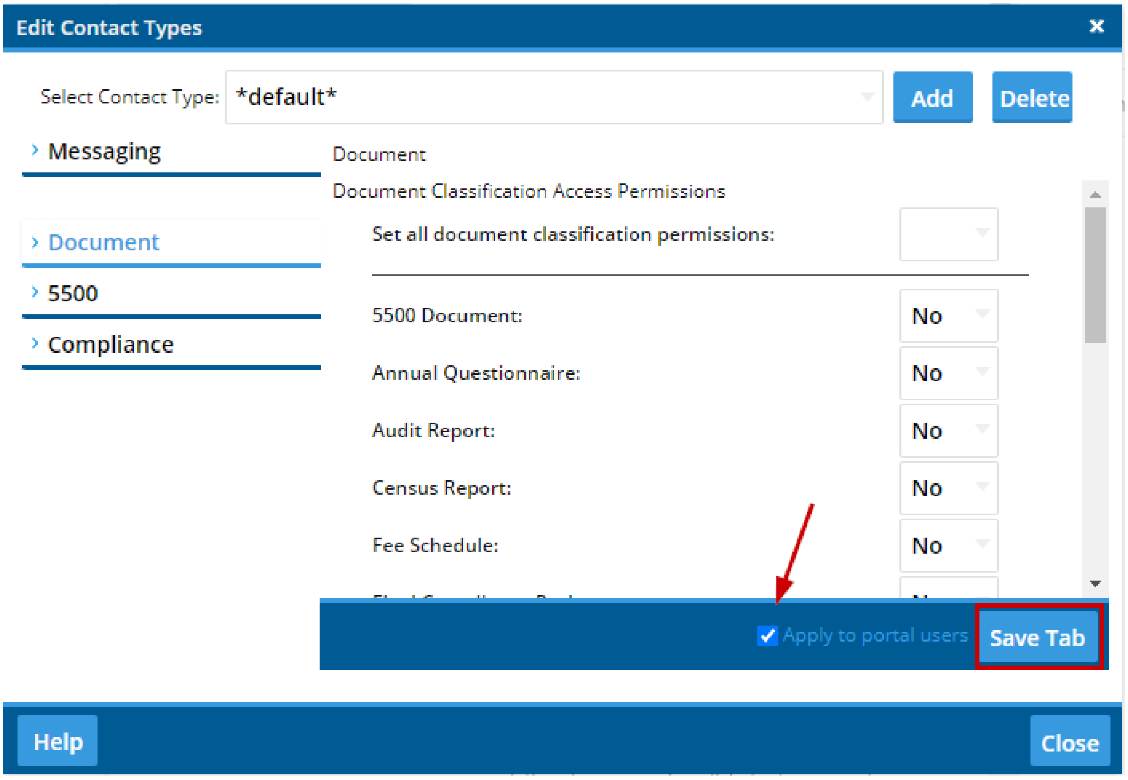


Additional contact types will appear if the drop down is selected. The existing contact types may be edited or a custom contact type may be created.



Updated permissions to existing contact types may be applied to existing portal users that currently have that contact type listed on the Edit Portal User Screen.

To apply the changes to current portal users in the system, check the "Apply to portal users" box before clicking on "Save Tab". A window will pop up to select all portal users of that specified type, or select specific users to update.



Contact Types may also be added or deleted by selecting the applicable button to the right of the drop-down list. If deleting a contact type, be sure to select the specific contact type from the drop down prior to selecting the 'Delete' button.

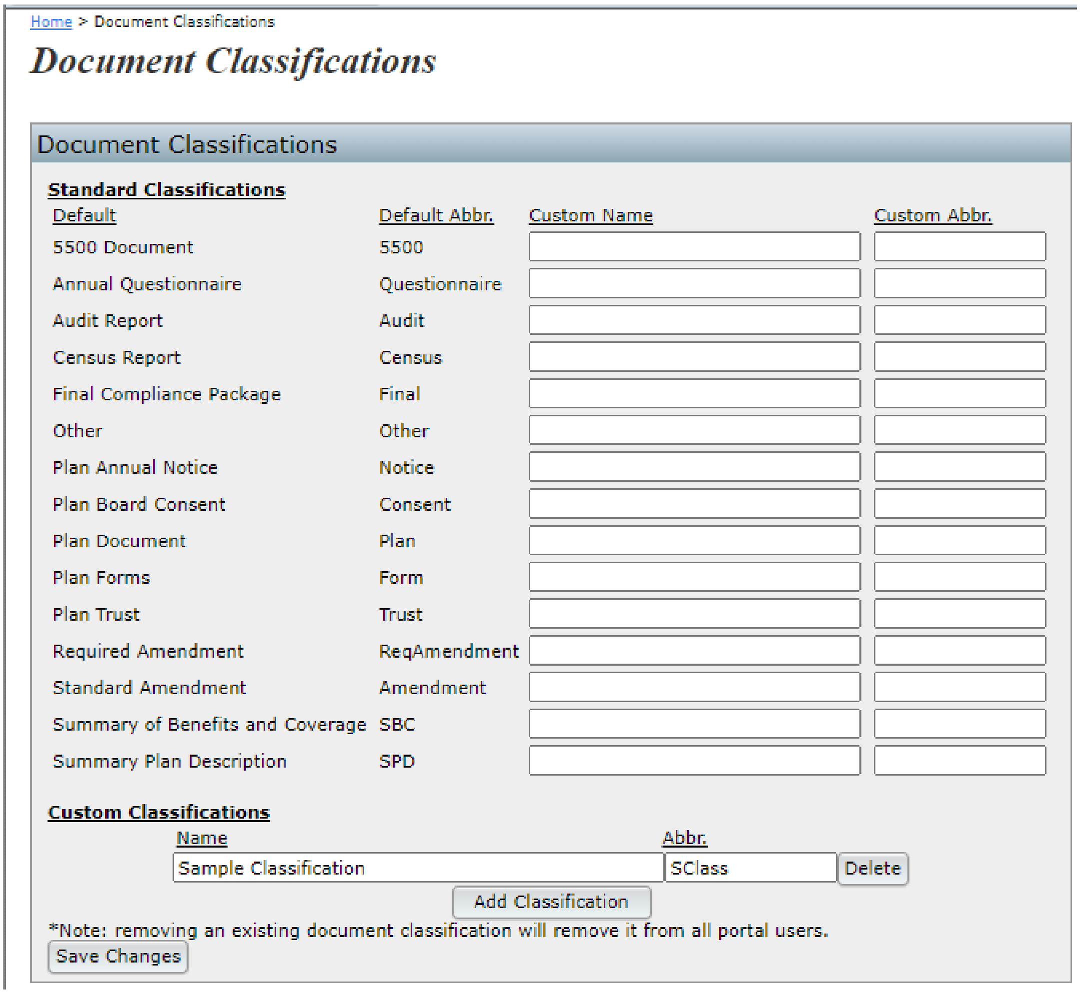
How To Edit Document Classifications

Document Classifications allows portal user permissions to access documents based on their classification; if a portal user has access to a document classification, they will be able to view all documents with that classification.

To Edit Document Classifications, you have to be the Master Admin User or a Designated Admin. To access the classifications, select the Wolters Kluwer logo, from the drop-down menu, select Administrative Tasks, then Portal/Workflow, then Edit Document Classifications.

Once on the 'Document Classification' screen, Admin users can override the names given to 'Standard Classifications' that are provided with ftwPortal Pro.

Admin users can also add additional custom classifications at the bottom of this screen and provide classification abbreviations for quicker reference. After updating classifications, you must click Save Changes before you exit the screen for changes to take effect.


Home > Document Classifications
Document Classifications
Document Classifications
Standard Classifications
Default
Default Abbr.
Custom Name
Custom Abbr.
5500 Document
5500
Annual Questionnaire
Questionnaire
Audit Report
Audit
Census Report
Census
Final Compliance Package
Final
Other
Other
Plan Annual Notice
Notice
Plan Board Consent
Consent
Plan Document
Plan
Plan Forms
Form
Plan Trust
Trust
Required Amendment
ReqAmendment
Standard Amendment
Amendment
Summary of Benefits and Coverage
SBC
Summary Plan Description
SPD
Custom Classifications
Name
Abbr.
Sample Classification
SClass
Delete
Add Classification
*Note: removing an existing document classification will remove it from all portal users.
Save Changes

Admin