Frequently Asked Questions

08/01/2024 2:14 pm CDT

The following articles relate to commonly asked questions pertaining to the ftwPortal Pro Module.

Accessing and Reviewing the Download History Report

The Download History Report is a way to track what the portal users have downloaded in the portal. It contains dates the admin uploaded documents for the portal user to download; dates the portal user downloaded the documents; which admin uploaded the document; etc.

You may access the Download History link from four different locations.

1. The Global/Plan Level dashboard by selecting the Module Options button in the upper right-hand corner

Module Options -
Portal User Manager
Portal Document Batch
Download History
Client Portal Guide
Portal User Help
Admin Options

- 2. Within the Wolters Kluwer Menu by selecting ftwPortal Pro and clicking on Download History.
- 3. Under the ftwPortal Pro menu in the upper left-hand corner of the home page
- 4. Links to this feature are also available in the batch menu of the Annual Questionnaire and Portal Document Batches



How to Delete Folder Names Associated with Portal Communications

To delete document folders, you must be the Master Admin User or a Designated Admin. With these designations you may access the folder options through the following paths:

1. From the Global/Plan dashboard select the Module Options button in the upper right-hand corner. The 'Manage Folder' option is within the 'Admin Options' dropdown:

🔹. Wolters Kluwe	Select a Company	▼ Select a Plan	▼ Go ▼		
Portal Users	Communications Census Batches	Q			► Module Options ▼ Portal User Manager Portal Document Batch
Username filter	Name		Email	Contact Type Phon filter	Download History Client Portal Guide
				C Portal Branding Global Email Settings	Admin Options
	1.00		Tolever 1	Edit Document Classifications Manage Folders	
	1.00		the second second	Edit Module Admins	

2. From within a new communication (other than a Direct Message):

To: Plan Forms (1) Subject:		Edit F	ortal Users	
Send Email Invite Confirmation Email Recipient: <u>All Test (allison.baile</u>)		.bailey@wo	lterskluwer.com)	Expires (Optional): MM/DD/YYYY
Email Invite Portal Messag			Folder Name	Edit Folders
Default Upload Email		٥	FileName	E-Sign Add Signer

3. From within the Wolters Kluwer Menu, select Administrative Tasks> Portal/Workflow> Edit Folder List:

😫. Wolters Kluwer 👻	Select a Plan			
	Select a Plan From History			
🚰 Home				
🚨 Edit Profile	lan Search			
Company / Plan Batches Distribution Tracking ftwPortal Pro Reports Downloads	Company: Name or ID Plan: Name or ID			
🕼 Administrative Tasks 🔹 🕨	Portal / Workflow	Global Email Settings		
 Support TAG (Technical Answer Group) RTO Benefits Log Out 	Create Custom Checklist Edit Checks Global Document Filenames Global Document Print Settings SAR/AFN Print Settings Defaults Users View Online Usage Agreement	Edit Module Admins Portal Branding Portal Correspondence Edit Contact Types Edit Document Classifications Edit Folder List View Portal Data Usage		

After clicking on "Edit Folders" or "Edit Folder List", a list of folder names will appear in a pop-up. Select the check the box for the desired folders to delete and click on "Delete Folders". The pop-up box will update with the text "Changes Saved".*

Please Note- Once removed, a folder can not be restored, any documents within the folders will be moved to display as a loose documents within the Portal Users view.

Edit Fold	ler List	х
	Folder Name	
	Annual Notices	
	Compliance Information	
	DB Checklist Tests	
	EXPIRE	
	Plan Document	
	Plan Document/2021	
	Plan Document/2022	_
	Plan Documents	
	Required Documentation	_
	Trustee	
	WELFARE Tests	
	Delete Feldere	
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