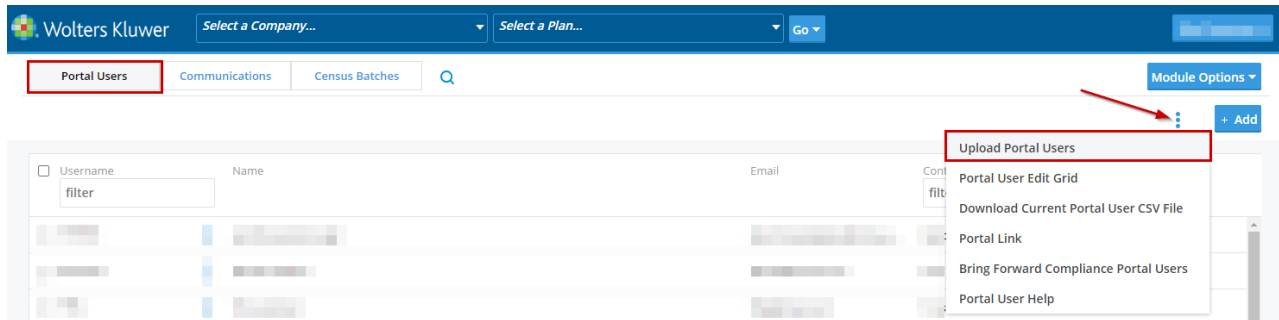# How to Upload Portal Users in Bulk

07/26/2024 10:04 am CDT

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.

	A	B	C	D	F	G	Q	R	T	U	V	Y	Z	AA
1	Username	Name	Prefix	First	Last	Suffix	Email	Contact Type	EIN	Plan Number	Plan Name	Signing As	Module	Year
2	Jdoe22	Jane Doe	Mrs.	Jane	Doe		Jdoe@123co.com	CPA					Messaging	
3	Jdoe22	Jane Doe	Mrs.	Jane	Doe		Jdoe@123co.com	CPA	86-7530932	1	123 Demo 401(k) Plan	ADMIN:SPONS	5500	2020
4	Jdoe22	Jane Doe	Mrs.	Jane	Doe		Jdoe@123co.com	CPA	86-7530932	1	123 Demo 401(k) Plan	ADMIN:SPONS	5500	2021
5	Jdoe22	Jane Doe	Mrs.	Jane	Doe		Jdoe@123co.com	CPA	86-7530932	1	123 Demo 401(k) Plan		Document	

** 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.

Upload Portal Users ✕

Help

Important Notes:

Upload Progress:

1. All data rows must contain the username, name, email, and module.
2. Any rows that skip the username field will assume to be using the username, password and demographic information from the last row above it that lists a username.
3. All 5500, Document, and Admin rows must contain the EIN and Plan Number, as well as the year, if applicable.
4. Misspelled column names will be silently skipped - unless they are required.
5. Rows with bad data will be skipped.
6. Existing portal user records will be updated (with the exception of passwords).
7. If you remove the 'Password' column from your .csv upload, random passwords will be automatically assigned to new portal users. **Note:** If you leave the password column in, you will be required to populate it with a password for any new portal users consisting of a minimum of eight characters with at least one special character and one number.
8. Additional contact types must be listed on the messaging module row.

Download Current Portal User CSV File
Download CSV Schema

[ ] Browse... Remove

Upload

Close

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.

For example, if a user has been assigned signing permissions that are assigned to another user on the plan, the following error will populate.
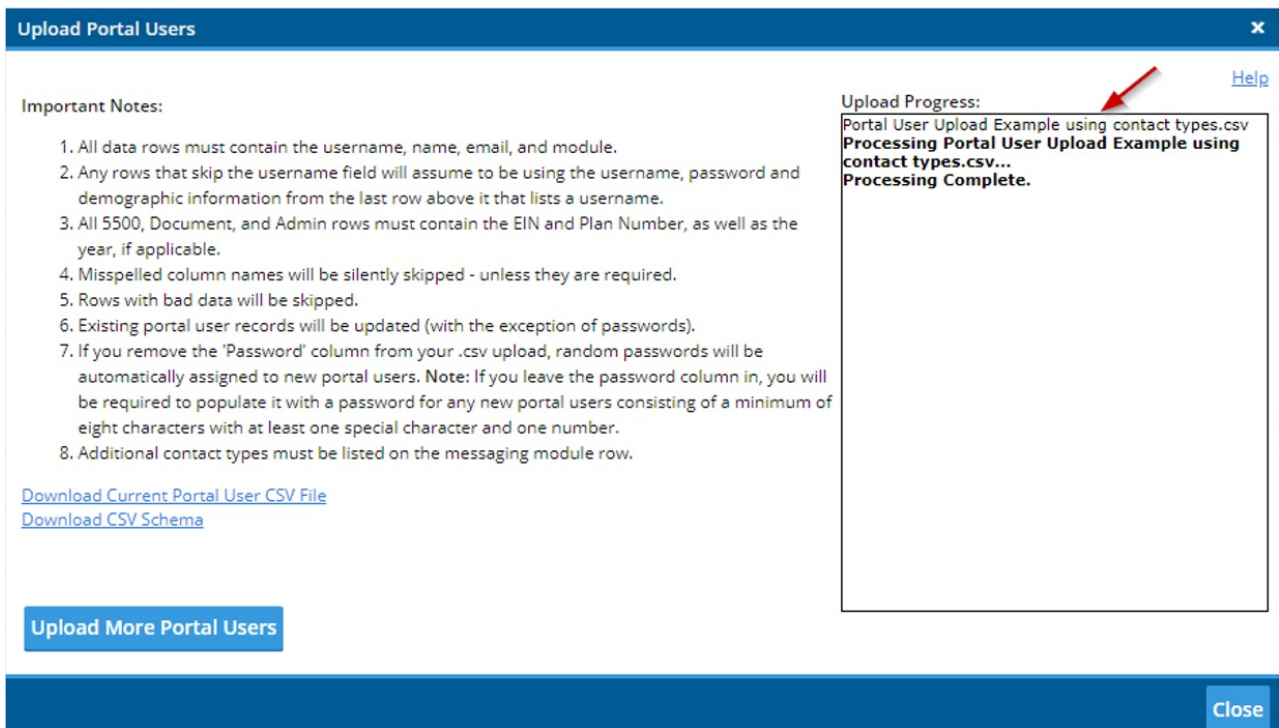
Upload Progress:
Portal User Upload Example.csv
Processing Portal User Upload Example.csv
unable to mark user as Signing As 'ADMIN:SPONS' for user Ferb on row 2. 'hk5w' is already marked as Signing As ADMIN:SPONS.
Processing Complete.

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.

Upload Portal Users   ✕

Help

Important Notes: Upload Progress:

Portal User Upload Example using contact types.csv
1. All data rows must contain the username, name, email, and module.   **Processing Portal User Upload Example using**
2. Any rows that skip the username field will assume to be using the username, password and   **contact types.csv...**
   demographic information from the last row above it that lists a username.   **Processing Complete.**
3. All 5500, Document, and Admin rows must contain the EIN and Plan Number, as well as the
   year, if applicable.
4. Misspelled column names will be silently skipped - unless they are required.
5. Rows with bad data will be skipped.
6. Existing portal user records will be updated (with the exception of passwords).
7. If you remove the 'Password' column from your .csv upload, random passwords will be
   automatically assigned to new portal users. **Note:** If you leave the password column in, you will
   be required to populate it with a password for any new portal users consisting of a minimum of
   eight characters with at least one special character and one number.
8. Additional contact types must be listed on the messaging module row.

Download Current Portal User CSV File
Download CSV Schema

Upload More Portal Users

Close