

Create a Confidential Login

Last Modified on 02/10/2023 11:54 am EST

Overview

An Administrator must create a Confidential Portal Login before you can allow external and occasional stakeholders access to the **Confidential Portal**.

An Administrator must create a non-administrative user account for the login, and assign it to a [role](#) with access to the appropriate object type(s) and activity before they can create the Confidential Portal Login.

User Account Requirements

The user account you use to log into Resolver must have Administrator permissions.

Required Information/Setup

For more information on Confidential Portal Submissions, please refer to the Confidential Portal Submissions article.

- [Confidential Portal Submissions](#)

To Edit or Delete a Confidential Portal login, please refer to the Edit or Delete a Confidential Login article.

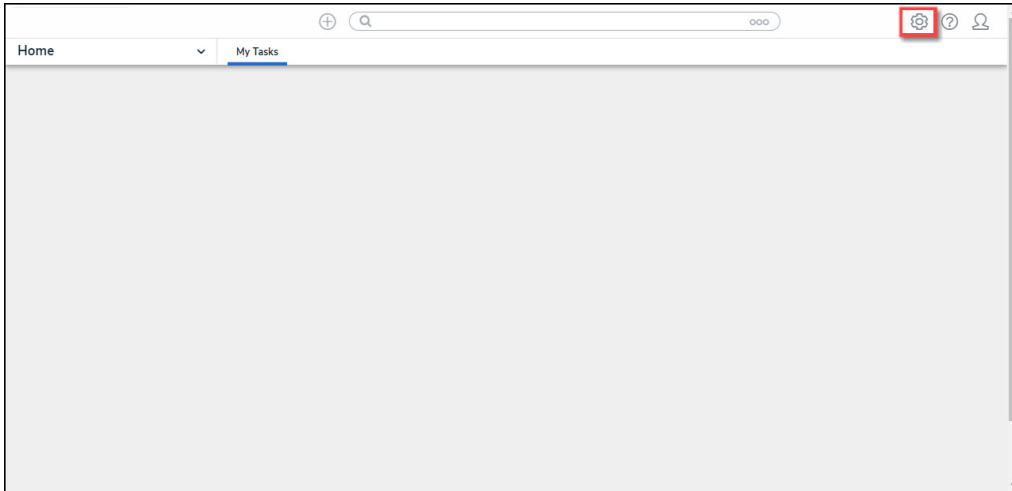
- [Edit or Delete a Confidential Login](#)

An Administrator must create a non-administrative login for use with the Confidential login, please refer to the Create a New User article.

- [Create a New User](#)
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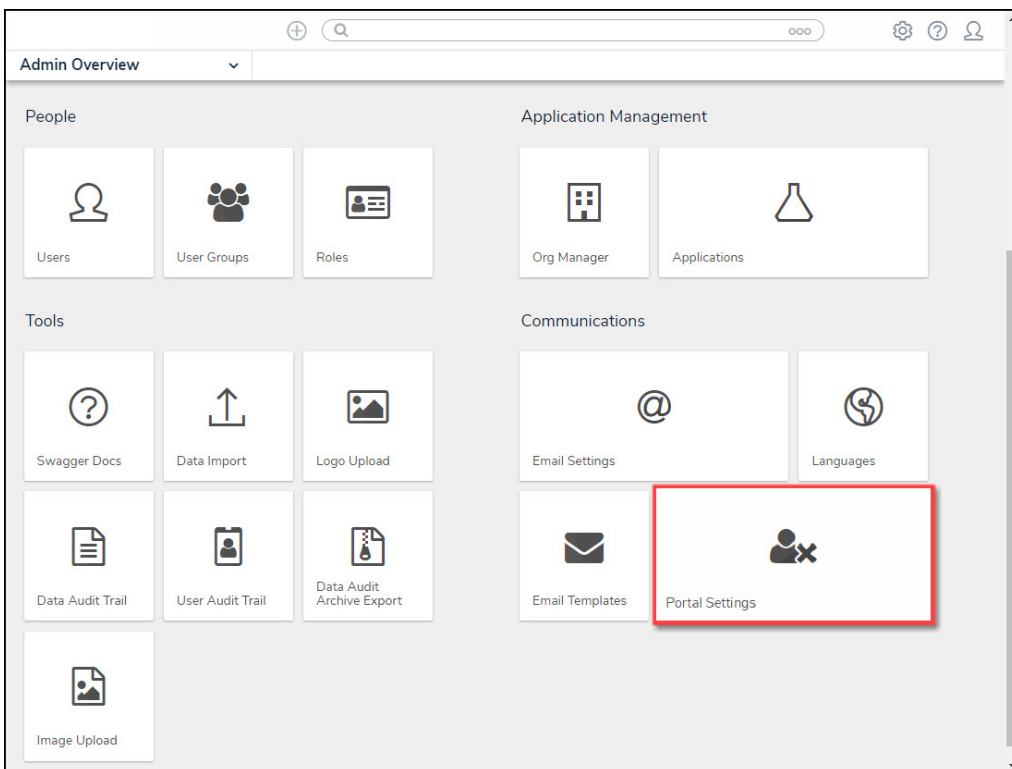
Navigation

1. From the **Home** screen, click on the **System** icon.



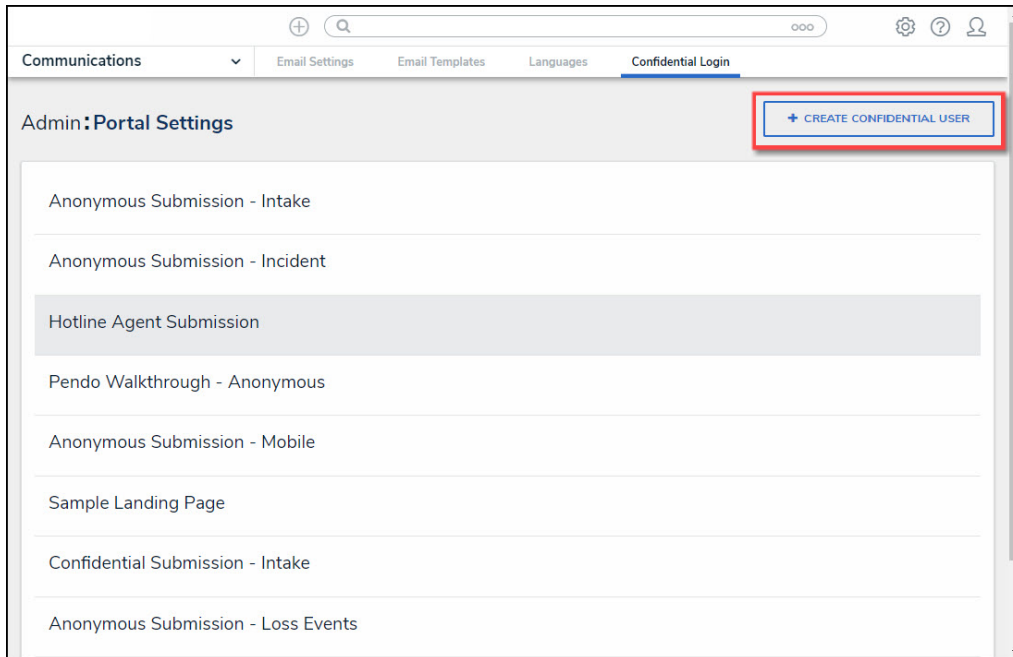
System Icon

2. From the **Admin Overview** screen, click the **Portal Settings** tile on the **Communications** section.



Portal Settings Tile

3. From the **Portal Settings** screen, click the **+ Create Confidential User** button.

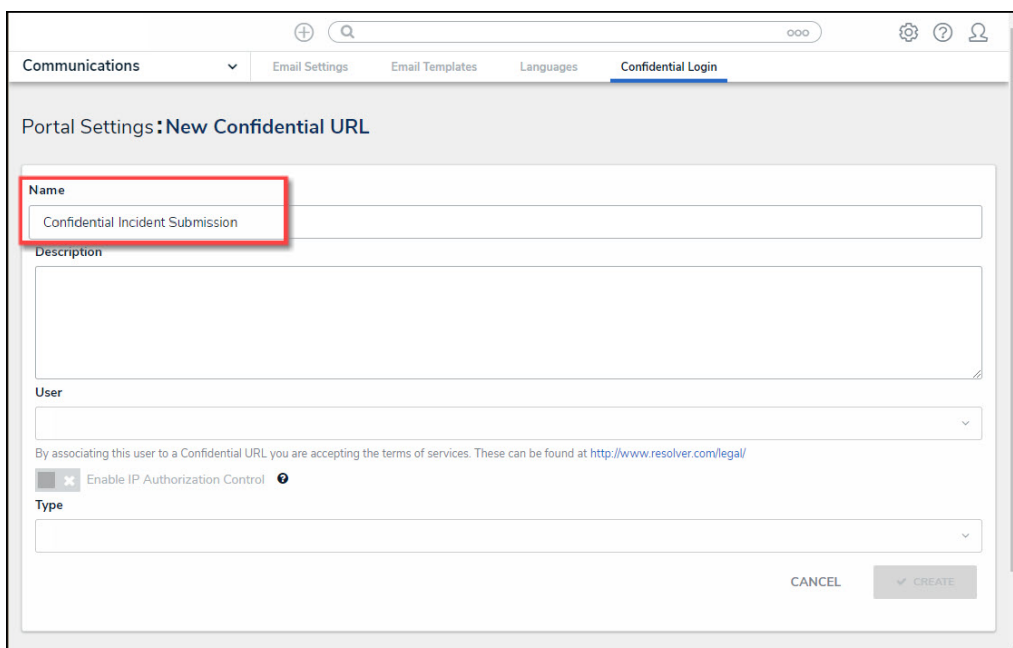


+ Create Confidential User Button

Create a Confidential Login

An Administrator must create a non-administrative user account for the login, and assign it to a [role](#) with access to the appropriate object type(s) and activity before they can create the Confidential Portal Login. For more information, please refer to the [Create a New User](#) article.

1. From the **New Confidential URL** screen, enter a login name in the **Name** field.

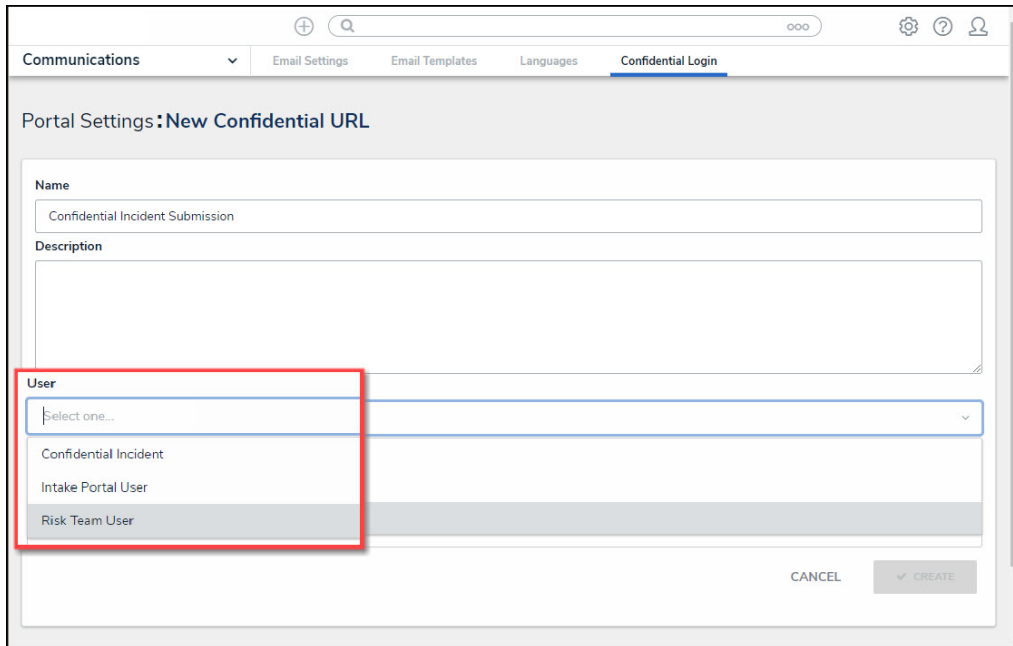


Name Field

2. **(Optional)** Enter a login description in the **Description** field. This description will appear

below the login's name on the **Confidential Login** screen.

3. Select a non-administrative account from the **User** dropdown menu.

The image shows a web browser window with the 'Confidential Login' page. The page title is 'Portal Settings: New Confidential URL'. There are three input fields: 'Name' (containing 'Confidential Incident Submission'), 'Description' (empty), and 'User'. The 'User' dropdown menu is open, showing three options: 'Confidential Incident', 'Intake Portal User', and 'Risk Team User'. The 'Risk Team User' option is highlighted. At the bottom right, there are 'CANCEL' and 'CREATE' buttons.

User Dropdown Menu

4. **(Optional)** Click the Enable IP Authorization Control toggle switch to restrict who can access this URL (based on the entries in the IP allow list). The toggle switch will be greyed out if IP authorization control is not enabled for the Org. For more information, please refer to the [IP Authorization Control](#) article.
5. Select one of the following **Type** options from the dropdown menu:
 - **Form:** The **Form** type displays a configurable form only.
 - **Object Type:** Select an **Object Type** from the **Object Type** dropdown list. The **Object Type** dictates which Forms will be available to select on the **Forms** dropdown menu.
 - **Form:** Select a **Form** from the **Form** dropdown menu. The **Form** selected will appear when access the Confidential Portal.

Communications | Email Settings | Email Templates | Languages | Confidential Login

Portal Settings: New Confidential URL

Name
Confidential Incident Submission

Description

User
Confidential Incident

By associating this user to a Confidential URL you are accepting the terms of services. These can be found at <http://www.resolver.com/legal/>

Enable IP Authorization Control

Type
Form

ObjectType
Please select an ObjectType

Form
Please select a Form

CANCEL CREATE

Form Additional Fields

- **Activity:** The **Activity** type displays the actions and views within an activity.
 - **Application:** Select an **Application** (e.g., IT Risk Management) from the **Application** dropdown list. The **Application** dictates which Activities will be available to select on the **Activity** dropdown menu.
 - **Activity:** Select a **Activity** from the **Activity** dropdown menu. An Activity is the part of an application where users can create, edit, and view data. The **Activity** selected will appear when access the Confidential Portal.
 - **(Optional) Pendo® Guide:**

Communications | Email Settings | Email Templates | Languages | **Confidential Login**

Portal Settings: **New Confidential URL**

Name
Confidential Incident Submission

Description

User
Confidential Incident

By associating this user to a Confidential URL you are accepting the terms of services. These can be found at <http://www.resolver.com/legal/>

Enable IP Authorization Control

Type
Activity

Application
Please select an Application

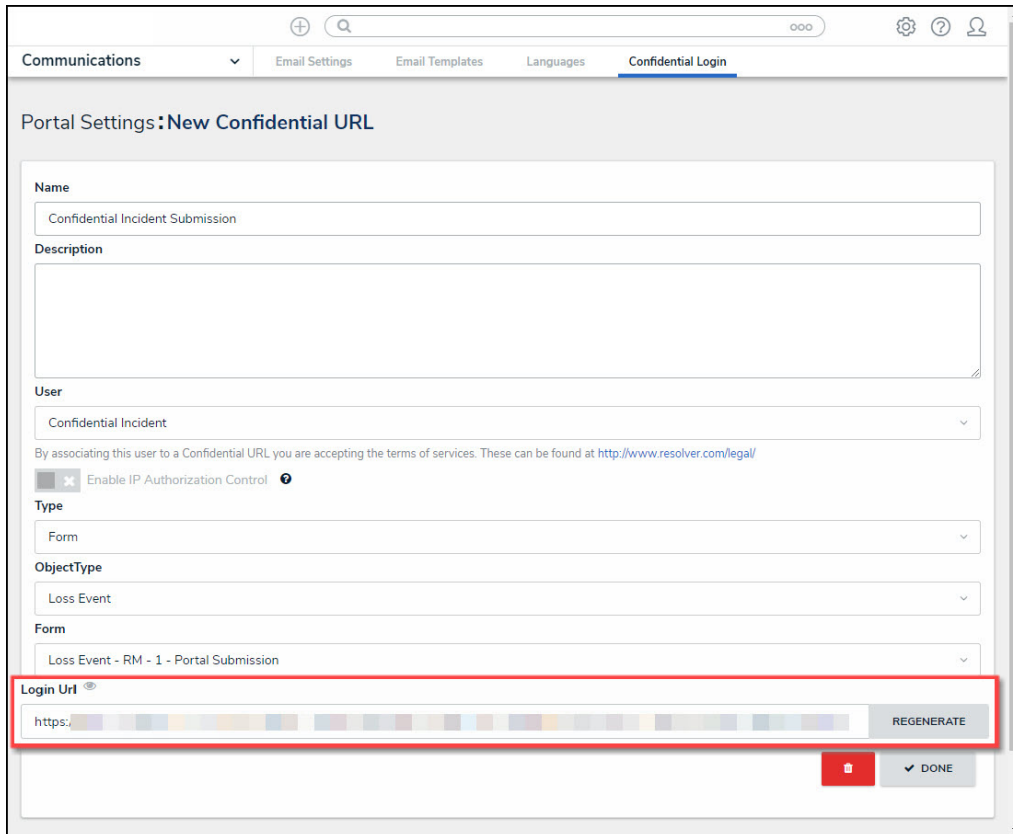
Activity
Please select an Activity

Pendo Guide

CANCEL CREATE

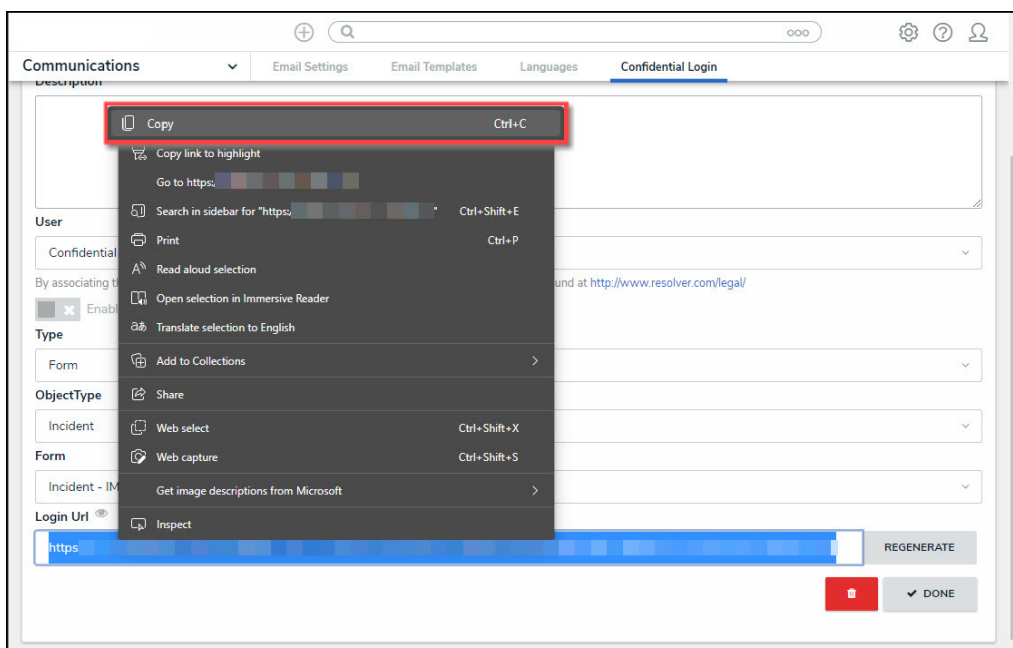
Activity Addition Fields

6. Click the **Create** button to save your changes, the New Confidential URL screen will refresh and the system will generate the confidential **Login URL**. The **Login URL** field is a read-only field.



Login URL Field

7. **(Optional)** Click the **Regenerate** button to create a new Login URL if you have edited any of the field on the **New Confidential URL** screen, or for security reasons.
8. Using your cursor, highlight the **Login URL** and press the **Right** mouse button to select the **Copy** option from the **Context Menu**.



Context Menu

9. Paste the **Login URL** in an email or document to send to a Submitter.