

Confidential Submissions Visibility Rules

Last Modified on 06/13/2024 11:39 am EDT

Overview

The Confidential Portal allows Confidential users to submit sensitive information without revealing any Personal Identifiable Information (PII). After enabling the Submitter Property, Admins can configure Form sections to show or hide based on the user's input in the **Remain Confidential** section on the Confidential Submission Form by selecting either the **Yes (Confidential)** or **No (Not Confidential)** toggle switches.

User Account Requirements

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

Required Information/Setup

You must set up email settings to enable the Submitter property on a Form. Please refer to the [Create an Email Setting](#) article.

- [Create an Email Setting](#)

For more information on Confidential Portal Submissions, please refer to the [Confidential Portal Submissions](#) article.

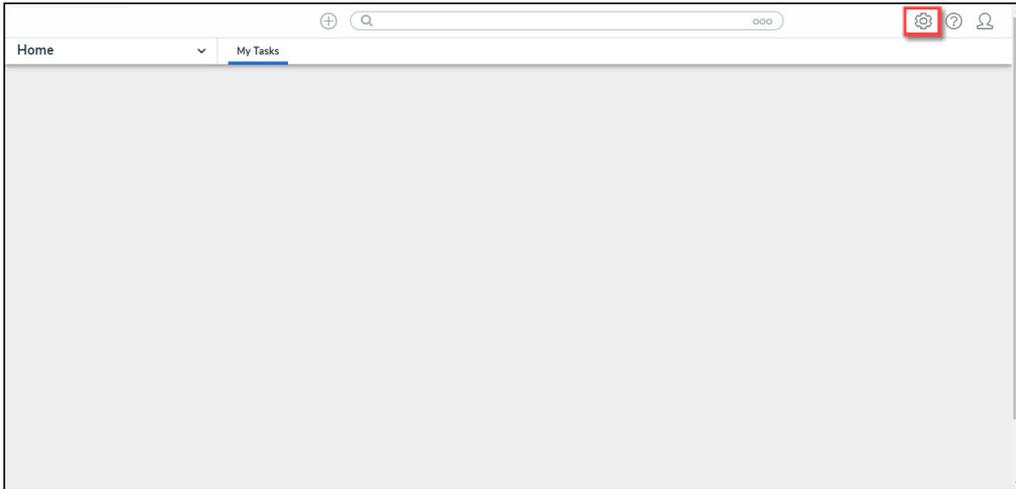
- [Confidential Portal Submissions](#)

After enabling the Submitter Property, Admins can configure Form sections to show or hide based on the user's input in the **Remain Confidential** section on the Confidential Submissions Form. Please refer to the [Enable the Confidential Submitter Property](#) article for more information.

- [Enable the Confidential Submitter Property](#)
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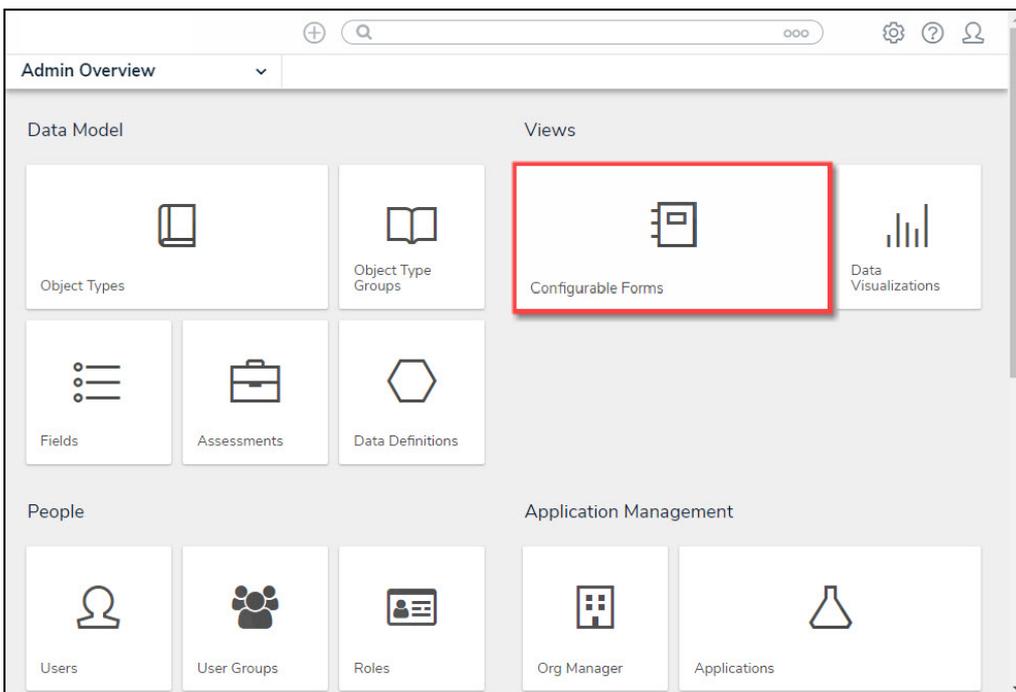
Navigation

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



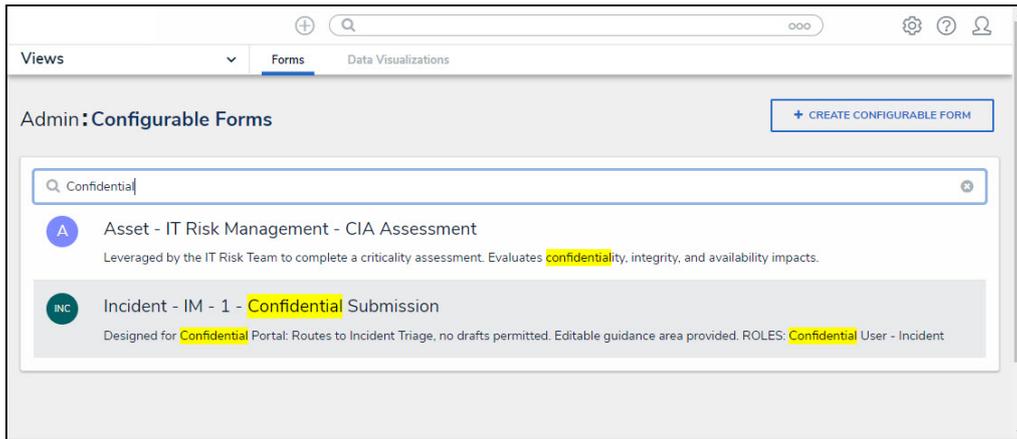
Administration Icon

- From the **Admin Overview** screen, click the **Configurable Forms** tile on the **Views** section.



Object Types Tile

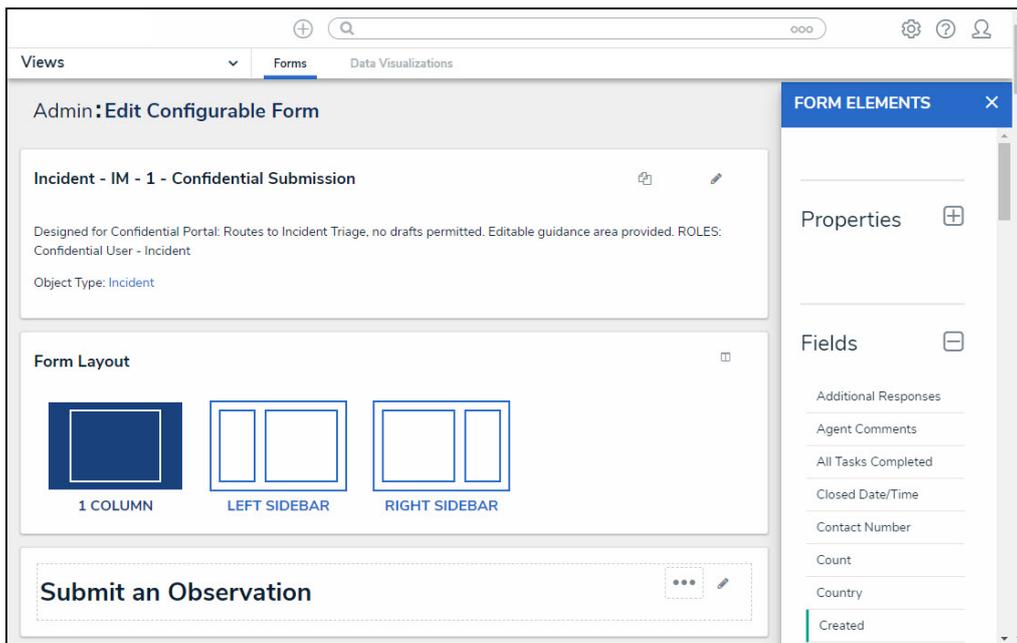
- From the **Admin Configurable Forms** screen, enter a keyword in the **Search** field to narrow the Forms list and select a **Form Name**.



Admin Configurable Forms screen

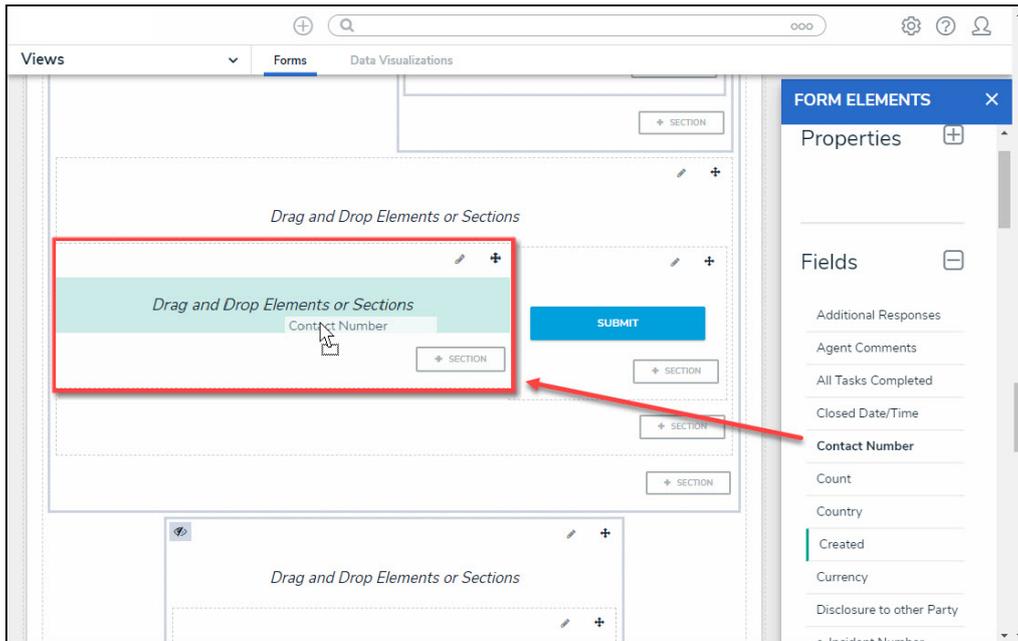
Adjust Confidential Submission Visibility Conditions

1. The **Edit Configurable Forms** screen will appear.



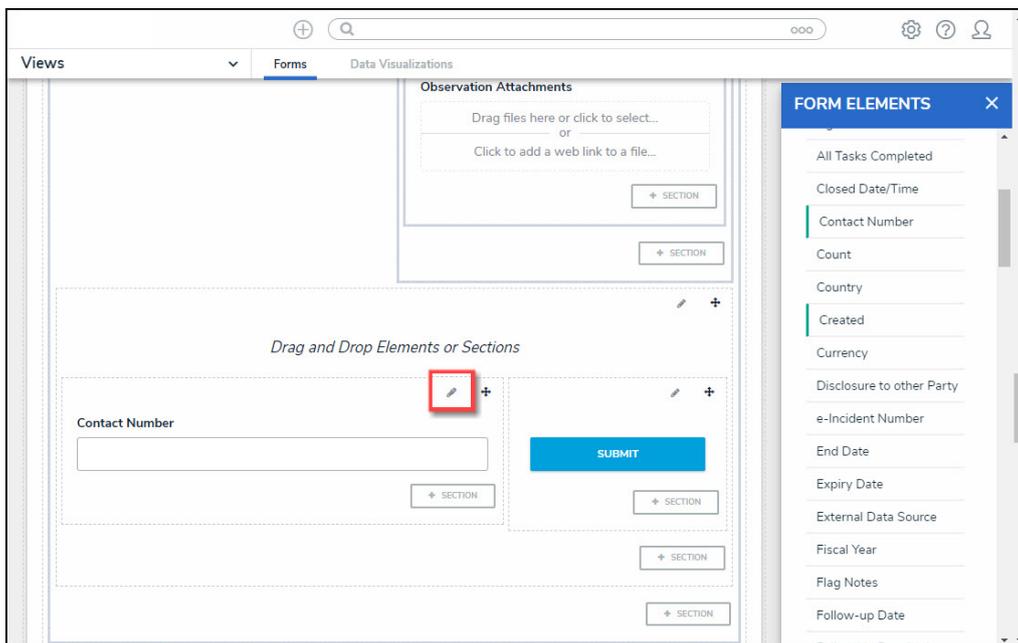
Form Element Section

2. Select a **Field** from the **Fields** section on the **Form Element** pop-up, and drag and drop a **Field** onto the Form.



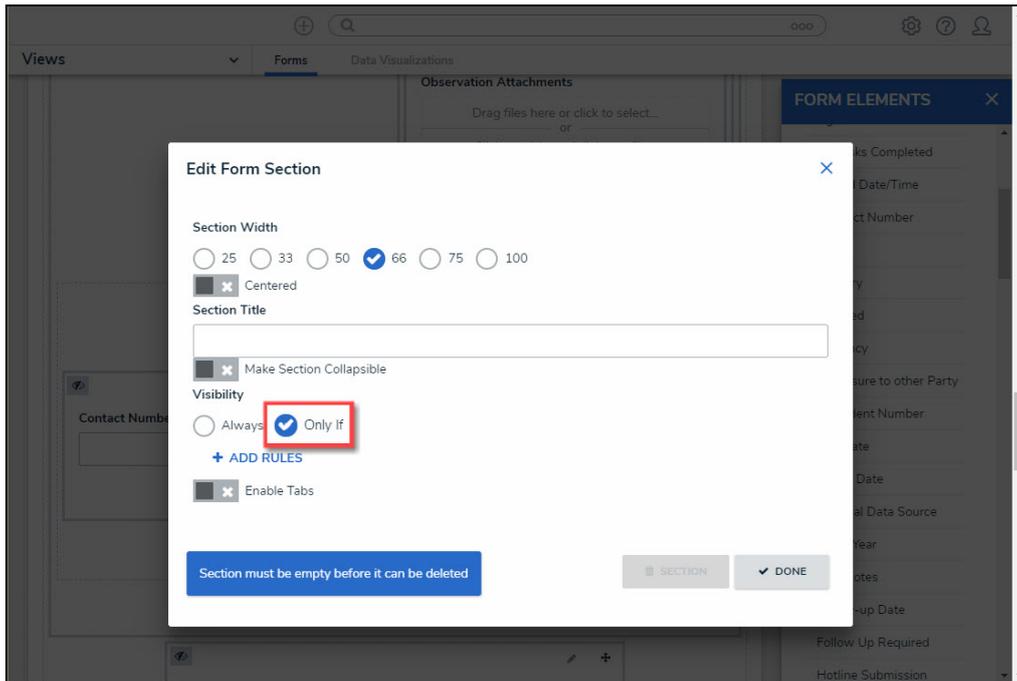
Drag and Drop the Field onto Form

3. Click the **Edit** icon on the **Forms Section**, just above the **Field** you added to the Form in step 2.



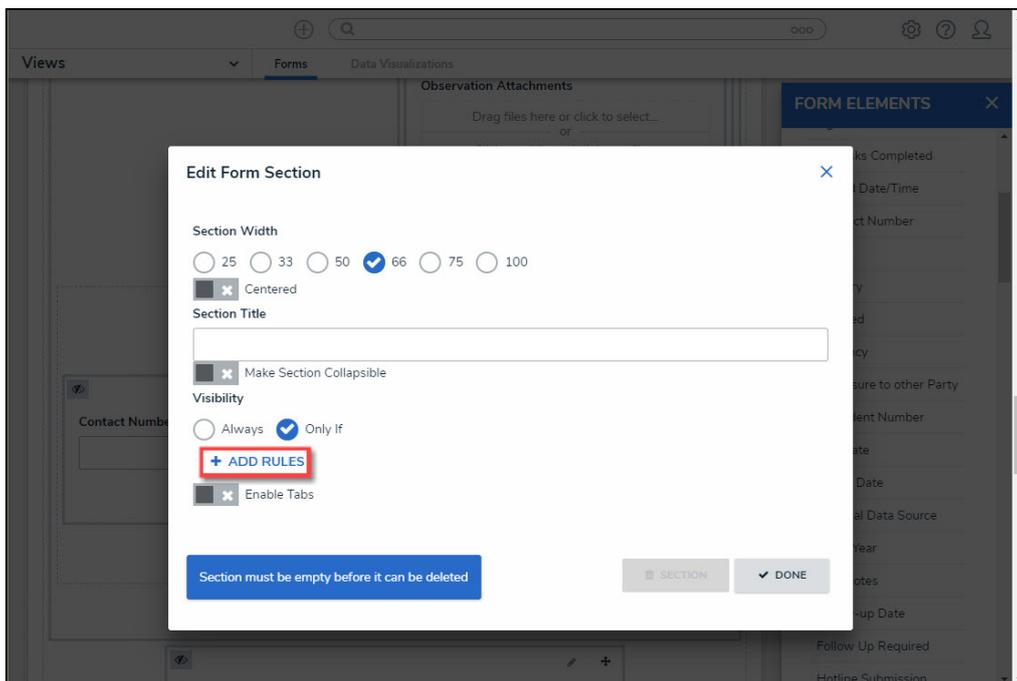
Forms Section

4. From the **Edit Form Section** pop-up, click the **Only If** radio button under the **Visibility** section.



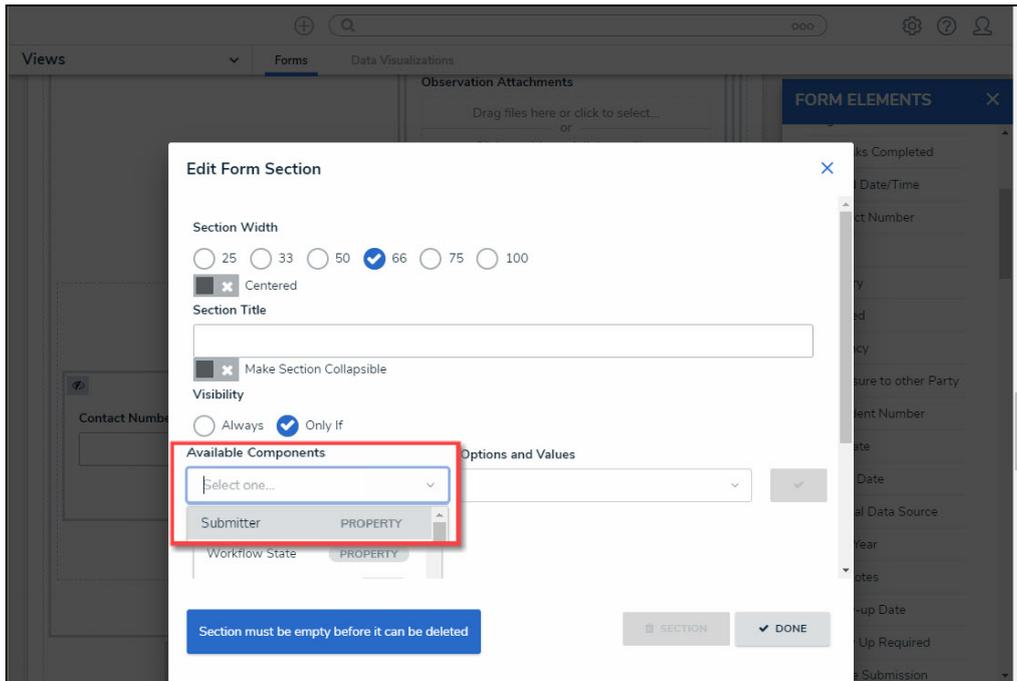
Only If Radio Button

5. Click the **+ Add Rules** link.



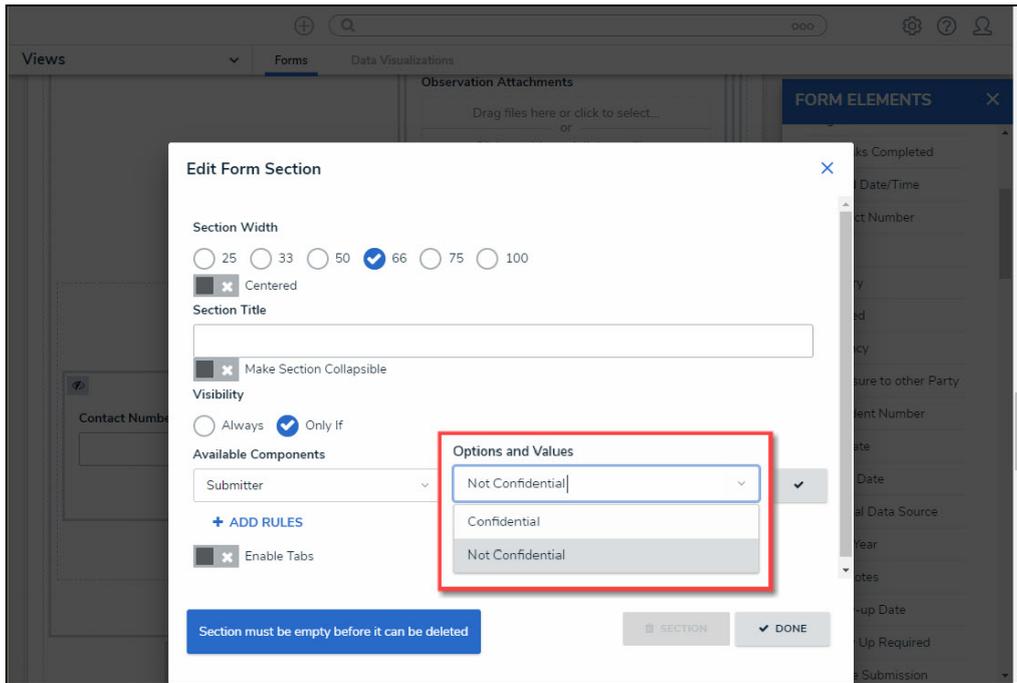
+ Add Rules Link

6. Click the **Available Components** field and select the **Submitter** property from the dropdown menu.



Available Components Dropdown Menu

7. Click the **Options and Values** field and select one of the following options from the dropdown menu. The **Only If** radio button works as an operator together with the **Available Components** and **Options and Values** fields to create a condition. The Condition must be met for the corresponding field and information to show on the Form.
 - **Confidential:** Selecting **Confidential** will create the condition where the corresponding Field (Contact Number) will appear if the Submitter = Confidential (Yes).
 - **Non Confidential:** Selecting **Non Confidential** will create the condition where the corresponding Field (Contact Number) will appear if the Submitter = Non Confidential (No).

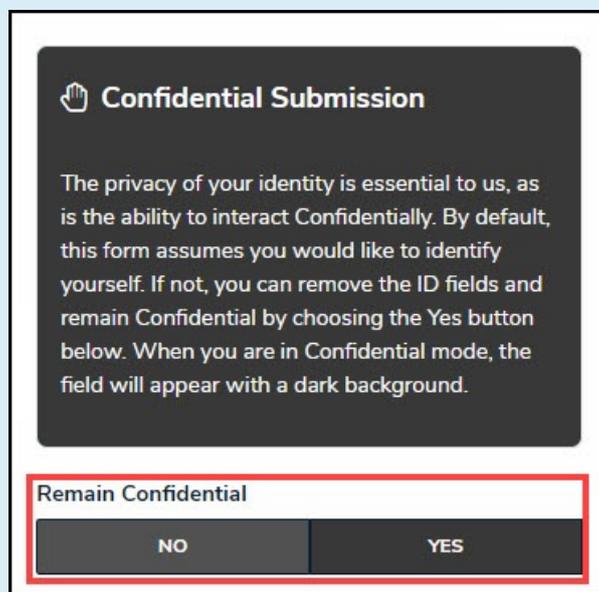


Options and Values Dropdown Menu



Note:

The Submitter value (Confidential or Non Confidential) is based on the **Remain Confidential** section (Yes or No) when filling out the Form.



Remain Confidential Section

8. Click the **Done** button to save your changes.