

# Configuring the Dynamic Two-way Email Pop-up

Last Modified on 02/03/2023 4:54 pm EST

# Overview

The *Two-way Email* pop-up appears when a **Submitter** submits an Incident Submission Form. A **Submitter** can bypass the *Two-way Email* pop-up depending on your configuration settings.

### **User Account Requirements**

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

### **Required Information/Setup**

Before Configuring the Two-way Email pop-up, you must add a Submitter property to a Form. For more information on adding a Submitter property to a Form, please refer to the Enable the Confidential Submitter Property article.

• Enable the Confidential Submitter Property

If you would like to utilize Two-Way Email with the Submitter property, you must set up email settings. For more information, see the following articles.

- Email Settings Overview
- Create an Email Setting
- Enable Two-way Email

## Navigation

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



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Home ~	My Tasks		_	
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System Icon

From the *Admin Overview* screen, click on the **Configurable Forms** tile under the *Applications Management* section.

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Admin Overview	~				_
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Configurable Forms Tile

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



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A	A Asset - IT Risk Management - CIA Assessment Leveraged by the IT Risk Team to complete a criticality assessment. Evaluates confidentiality, integrity, and availability impacts.															
Incident - IM - 1 - Confidential Submission Designed for Confidential Portal: Routes to Incident Triage, no drafts permitted. Editable guidance area provided. ROLES: Confidential User - Incident																

Form Name

4. From the *Edit Configurable Forms* screen, scroll and find the **Submitter** property on the **Form**.

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	NO YES	Additional Responses
RESOLVER	Ø) / +	Agent Comments
	Observed Contact Info	All Tasks Completed
		Closed Date/Time
Welcome to the Confidential Incident		Contact Number
Submission web-portal. This avenue offers	+ SECTION	Count
our teams regarding incidents or	/ 4	• Country
compliments.	Observation	Created
Please attempt to be as descriptive as possible when describing the incident,		Currency
including information such as: location, involved parties, timelines and any other		Disclosure to other Party

Submitter Property

5. Hover your cursor over the **Submitter** property and click the **Edit** icon that appears.



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	Observed Contact Info	All Tasks Completed
		Closed Date/Time
Welcome to the Confidential Incident	+ SECTION	Contact Number
Submission web-portal. This avenue offers you the ability to provide vital information to		Count
our teams regarding incidents or	× +	Country
compliments.	Observation	Created
Please attempt to be as descriptive as possible when describing the incident,		Currency
including information such as: location, involved parties, timelines and any other		Disclosure to other Party

Edit Icon

#### **Configuring the Dynamic Two-way Email Pop-up**

- × Edit Component Display Description Accepts Confidential Submission ~ Allow users to submit form confidentially Default to Confidential . . Enable Required Fields for Non Confidential Submission Submitter Name is Required Submitter Email is Required × Enable Email Communication Enable Email Communication Email Addresses **Q** Incident Submission CLOSE
- 1. The *Edit Component Display* pop-up will appear.



2. There are two ways to bypass the *Two-way Email* pop-up:



- Email is Required:
  - Enable the Submitter Email is Required toggle switch and Two-way Email.
     Users will automatically be enrolled in the Two-way email feature if the Submit
     Email is Required toggle switch is enabled.

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Drag and Drop Elements or Sections		
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Accepts Confidential Submission	ields d	
Allow users to submit form confidentially	Additional Responses	
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relevant details. Q Incident Submission	Currency	
If there is an immedi		
others, weapons pre suicide contemplatio		
others, or any scena	e-incident Number	
assistance by calling 911	End Date	

Submitter Email is Required Toggle Switch

• The **Submitter** is required to enter their email address on the Confidential Submissions Form.

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Submit an Observation			
	🖞 Confidential Submission		
RESOLVER	Remain Confidential		
	NO	YES	
	Name		
Welcome to the Confidential Incident Submission web-			
information to our teams regarding incidents or compliments.	Email Address		*
Please attempt to be as descriptive as possible when	L		
describing the incident, including information such as: location, involved parties, timelines and any other relevant details.	Observed Contact Info		
If there is an immediate threat to self or others, weapons	Observation 0		
self or others, or any scenario that requires immediate			
response seek immediate assistance by calling 911.			

Email Address Field

• After submitting the Form, the *Two-way Email* pop-up will be bypassed.



- Email is not Required w/ Email:
  - Disable, the **Submitter Email is Required** toggle switch.

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Submitter Email is Required Toggle Switch

- Enable the **Two-way Email** feature.
- The **Submitter** selects the **No** toggle switch on the **Remain Confidential** section on the Form.





#### Remain Confidential Section

• The **Submitter** enters their email address in the **Email Address** field on the Form.

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Applica	tions ~		
Applica	tions  Submit an Observation  RESOLVER  Welcome to the Confidential Incident Submission web- portal. This avenue offers you the ability to provide vital information to our teams regarding incidents or compliments.	Confidential Submission Remain Confidential NO YES Name Email Address User@sample.com	
	Please attempt to be as descriptive as possible when describing the incident, including information such as: location, involved parties, timelines and any other relevant details. If there is an immediate threat to self or others, weapons present, indications of suicide contemplation, injuries to self or others, or any scenario that requires immediate response seek immediate assistance by calling 911.	Observed Contact Info  Observation	Ţ

Email Address Field

- After submitting the Form, the *Two-way Email* pop-up will be bypassed.
- 3. There are two ways to display the *Two-way Email* pop-up:
  - Email is not Required w/o Email:
    - Disable, the **Submitter Email is Required** toggle switch.



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Name			State
Name	Enable Email Communication		
Email Addre	Email Addresses		
	Q Incident Submission	~	nt Dimension
		CLOSE	

Submitter Email is Required Toggle Switch

• The **Submitter** selects the **No** toggle switch on the **Remain Confidential** section on the form.

Applications ~	<u>ව</u>
Submit an Observation	
	🕑 Confidential Submission
:RESOLVER	Remain Confidential NO YES
Welcome to the Confidential Incident Submission web- portal. This avenue offers you the ability to provide vital information to our teams regarding incidents or compliments.	Email Address
Please attempt to be as descriptive as possible when describing the incident, including information such as: location, involved parties, timelines and any other relevant details.	Observed Contact Info
If there is an immediate threat to self or others, weapons present, indications of suicide contemplation, injuries to self or others, or any scenario that requires immediate response <b>seek immediate assistance by calling 911</b> .	Observation •



• The **Submitter** leaves the **Email Address** field on the Form blank.



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Applica	tions ~			
	Submit an Observation			
		Confidential Submission		
	:RESOLVER	Remain Confidential		
		NO	YES	
		Name		
	Welcome to the Confidential Incident Submission web- portal. This avenue offers you the ability to provide vital information to our teams regarding incidents or compliments.	Email Address		1
	Please attempt to be as descriptive as possible when describing the incident, including information such as: location, involved parties, timelines and any other relevant details.	Observed Contact Info		1
	If there is an immediate threat to self or others, weapons present, indications of suicide contemplation, injuries to self or others, or any scenario that requires immediate response seek immediate assistance by calling 911.	Observation 0		
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Email Address Field

• After submitting the Form, the **Two-way Email** pop-up will appear with alternate title text (e.g., the word Confidential is removed).

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		Do our team follow up n choose to receive and respond to updates via email. Resolver relays communications between string and u can reply to messages directly from your email inbox and only the message body and attachments will red with string.		
		Yes, I consent to receive communications		
		CONTINUE WITHOUT EMAIL		
		Observation Attachments		
		Drag files here or click to select_		

Two-way Email Pop-up

#### • Confidential Submitter:

• The **Submitter** selects **Yes** on the **Remain Confidential** section on the Form.



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Applications v	
Submit an Observation	
RESOLVER	Confidential Submission Remain Confidential NO YES
Welcome to the Confidential Incident Submission web portal. This avenue offers you the ability to provide vita information to our teams regarding incidents or compliments.	Observation •
Please attempt to be as descriptive as possible when describing the incident, including information such as: location, involved parties, timelines and any other relevant details.	Observed Date/Time
If there is an immediate threat to self or others, weapo present, indications of suicide contemplation, injuries t self or others, or any scenario that requires immediate response seek immediate assistance by calling all.	o Voiservation Type
	v .

Remain Confidential Section

• After submitting the Form, the *Two-way Email* pop-up will be displayed.



Two-way Email Pop-up