

Creating a Portal URL

Last Modified on 07/30/2024 11:22 am EDT

Overview

An Administrator must create a URL Portal 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 a Portal URL.

User Account Requirements

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

Required Information/Setup

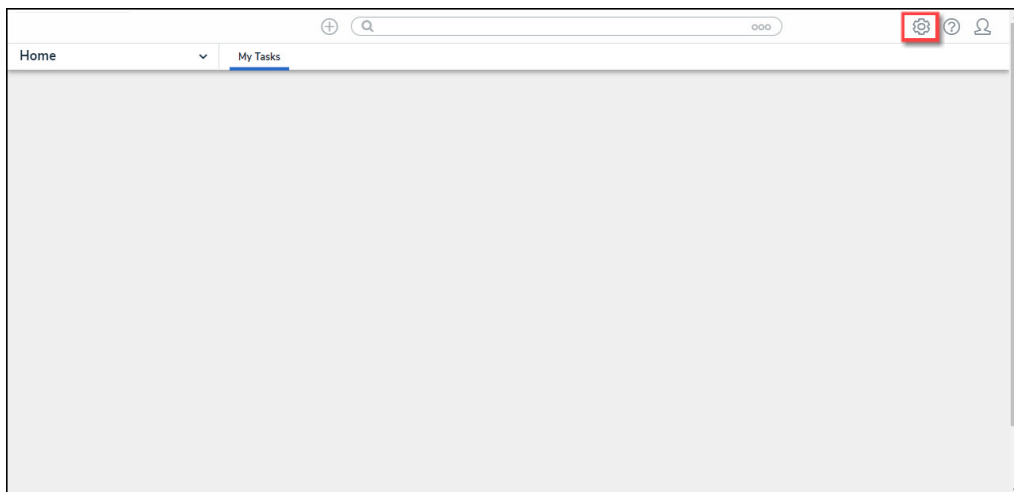
For more information on using a Portal URL, please refer to the [Portal URL Overview](#) article.

To edit or delete a Portal URL, please refer to the [Edit or Delete a Portal URL](#) article.

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

Navigation

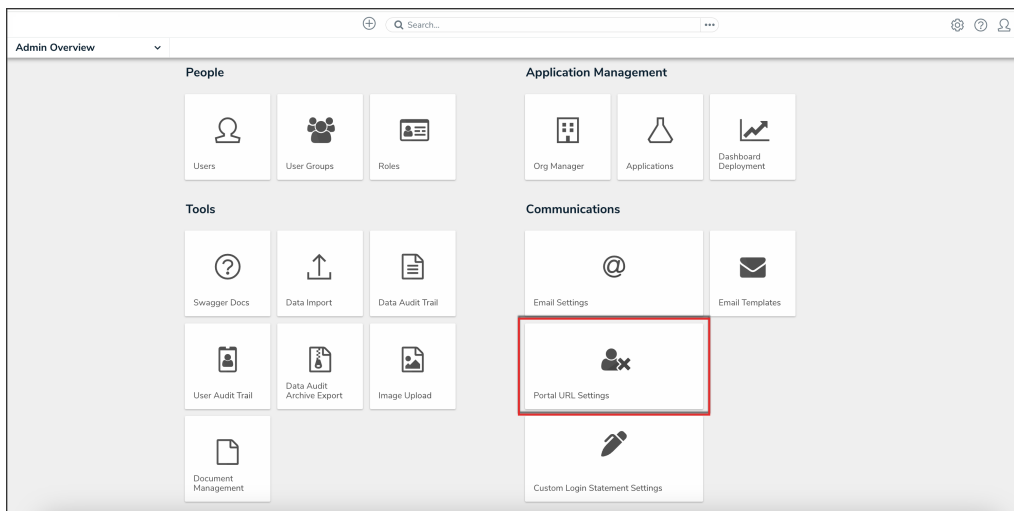
1. From the **Home** screen, click on the **Administration** icon.



Administration Icon

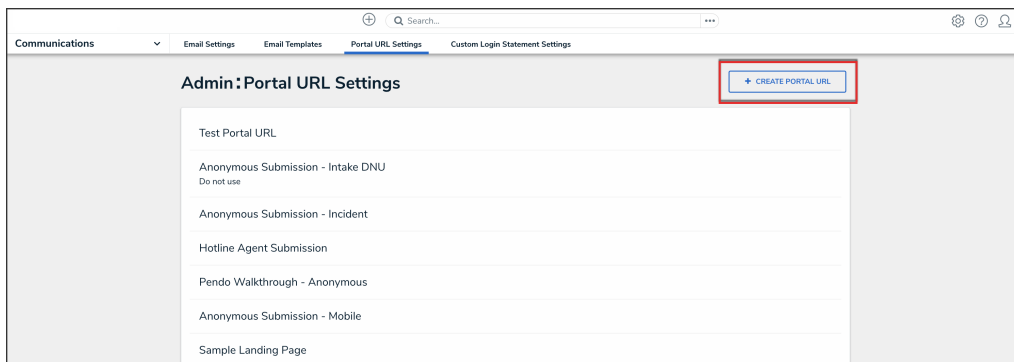
2. From the **Admin Overview** screen, click the **Portal URL Settings** tile under the

Communications section.



Portal URL Settings Tile

3. From the **Portal URL Settings** screen, click the **Create Portal URL** button.



Create Portal URL Button

Create a Portal URL

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 **Create Portal URL** screen, enter a name in the **Name** field.

The screenshot shows the 'Portal URL Settings: Create Portal URL' form. The 'Name' field is highlighted with a red border. Below it is the 'Description' field. Further down are the 'User' dropdown menu, a checkbox for 'Enable IP Authorization Control', and the 'Type' dropdown menu. At the bottom right are 'CANCEL' and 'CREATE' buttons.

Name Field

2. **(Optional):** Enter a login description in the **Description** field. This description will appear below the login's name on the Portal URL screen.

The screenshot shows the 'Portal URL Settings: Create Portal URL' form. The 'Description' field is highlighted with a red border. The 'Name' field is now empty. The 'User' dropdown menu, 'Enable IP Authorization Control' checkbox, and 'Type' dropdown menu are visible below. At the bottom right are 'CANCEL' and 'CREATE' buttons.

Description Field

3. Select a Portal user from the **User** dropdown menu.



Note:

This list will only show users with the **Portal URL Access** toggle switched on in their user settings.

The screenshot shows the 'Portal URL Settings: Create Portal URL' form. The 'User' dropdown menu is highlighted with a red box. Below the dropdown, there is a toggle switch for 'Enable IP Authorization Control'.

User Dropdown Menu

- (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.

The screenshot shows the 'Portal URL Settings: Create Portal URL' form. The 'Enable IP Authorization Control' toggle switch is highlighted with a red box.

Enable IP Authorization Control Toggle Switch

- 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 accessing the Confidential Portal.

The screenshot shows the 'Portal URL Settings: Edit Portal URL' form. The fields are as follows:

- * Name:** Text input containing 'Test Portal URL'.
- Description:** Text area containing 'This is a description'.
- * User:** Dropdown menu with 'Intake Portal User' selected.
- * Type:** Dropdown menu with 'Form' selected. This field is highlighted with a red border.
- * Object Type:** Dropdown menu with 'Select one...'.
- * Form:** Dropdown menu with 'Select one...'.

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 an **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 accessing the Confidential Portal.
 - **(Optional) Pendo® Guide:**

The screenshot shows the 'Portal URL Settings: Edit Portal URL' form. The fields are as follows:

- * Name:** Text input containing 'Test Portal URL'.
- Description:** Text area containing 'This is a description'.
- * User:** Dropdown menu with 'Intake Portal User' selected.
- * Type:** Dropdown menu with 'Activity' selected. This field is highlighted with a red border.
- * Application:** Dropdown menu with 'Select one...'.
- * Activity:** Dropdown menu with 'Select one...'.
- Pendo Guide:** Text input field.

Activity Additional Fields

6. Click the **Create** button.

Communications | Email Settings | Email Templates | **Portal URL Settings** | Custom Login Statement Settings

Portal URL Settings: Create Portal URL

Name
Test Portal URL

Description

User
Intake Portal User

The selected user will be used to authenticate access to the Portal URL. Ensure the user assigned here only has permissions relevant to use the Portal. By associating this user to a Portal URL, you are accepting the terms of services. These can be found at <http://www.resolver.com/legal/>

Enable IP Authorization Control

Type
Form

Object Type
Incident

Form
Incident - IM - 1 - Confidential Submission

CANCEL **CREATE**

Create Button