

Edit or Delete a Portal URL

Last Modified on 02/14/2025 3:53 pm EST

Overview

Users can edit or delete Portal URLs from their Orgs.

User Requirements

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

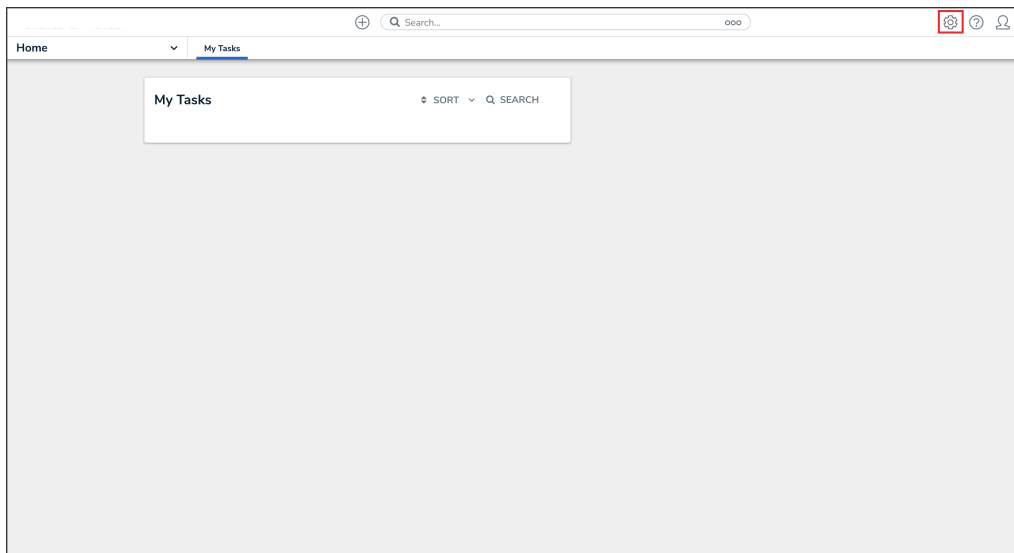
Required Information/Setup

Please refer to the [Portal URL Overview article](#) to learn more about using a Portal URL.

Please refer to the [Creating a Portal URL article](#) for more information on creating a new Portal URL.

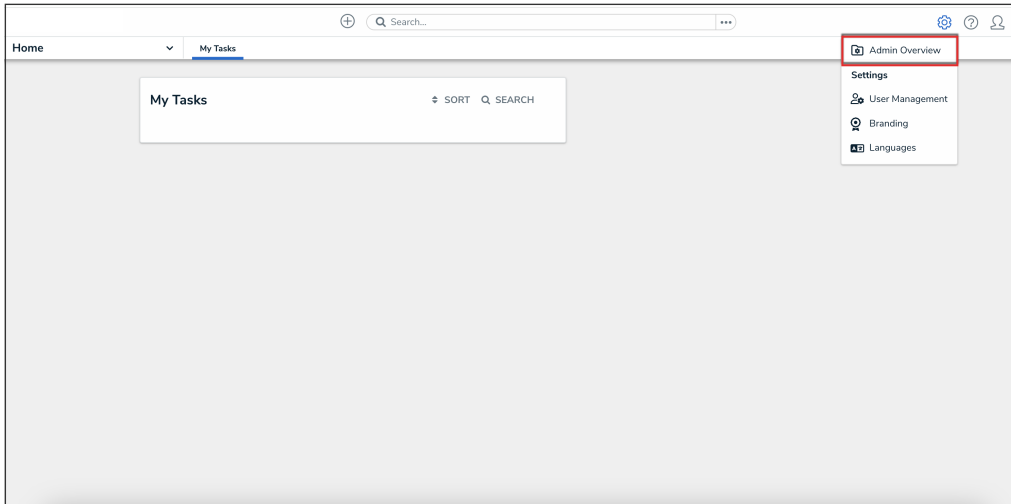
Navigation

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



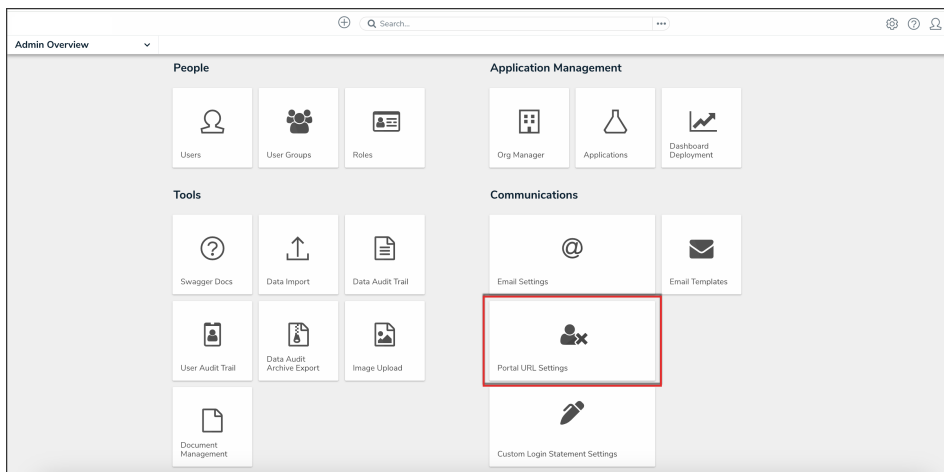
Administration Icon

2. From the **Administrator Settings** menu, click **Admin Overview**.



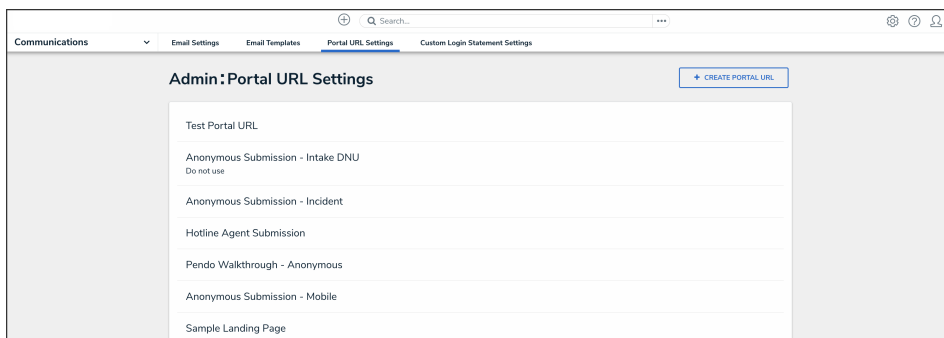
Administrator Settings Menu

- From the **Admin Overview** screen, click the **Portal URL Settings** tile under the **Communications** section.



Portal URL Settings Tile

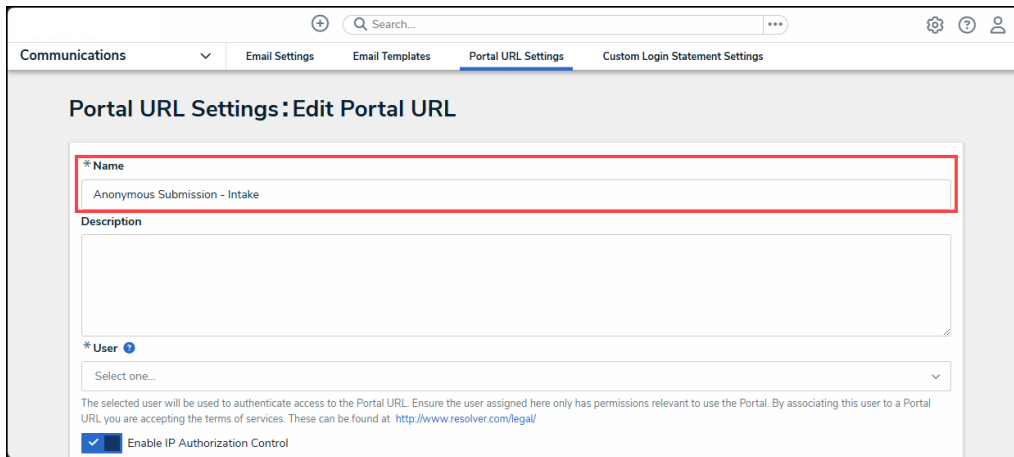
- From the list on the **Portal URL Settings** screen, click the name of the Portal URL that you want to edit or delete.



Portal URL Name

Editing a Portal URL

1. From the **Edit Portal URL** screen, click the **Name** field to edit the Portal URL name.



Portal URL Settings : Edit Portal URL

* Name
Anonymous Submission - Intake

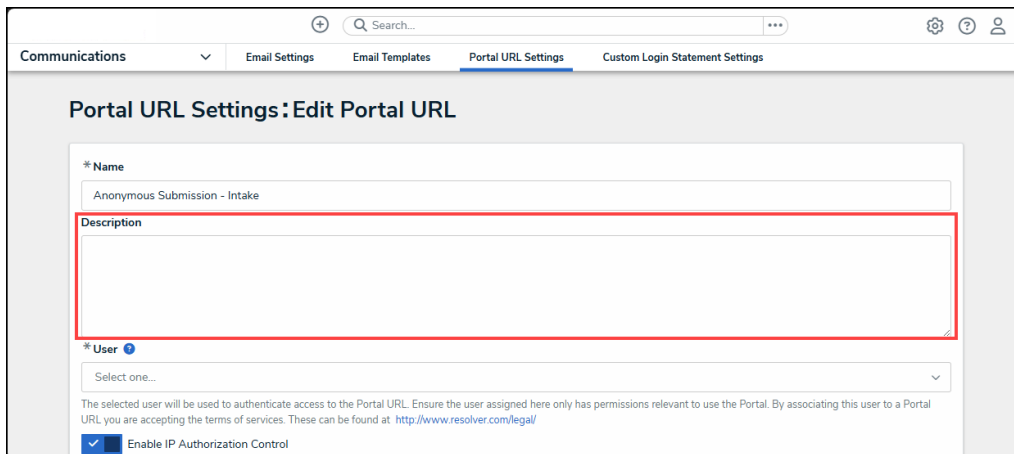
Description

* User
Select one...

Enable IP Authorization Control

Name Field

2. Click the **Description** field and enter a new description.



Portal URL Settings : Edit Portal URL

* Name
Anonymous Submission - Intake

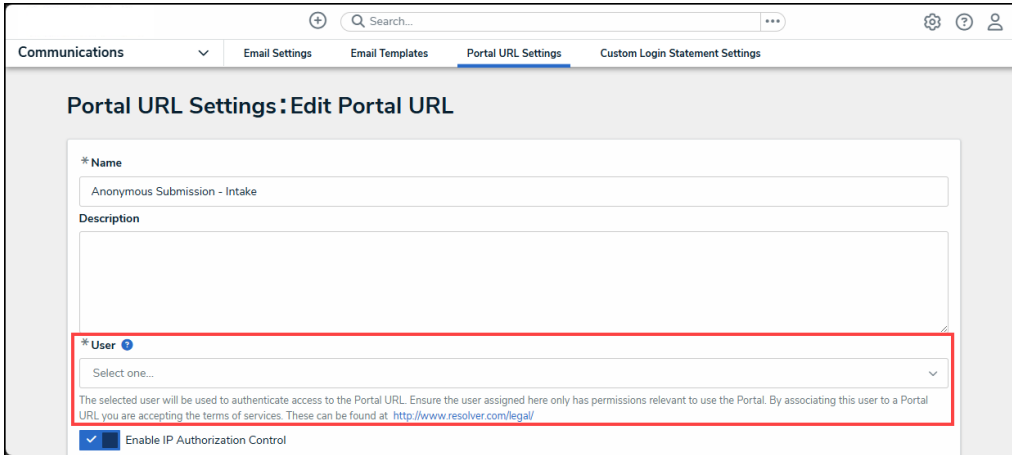
Description

* User
Select one...

Enable IP Authorization Control

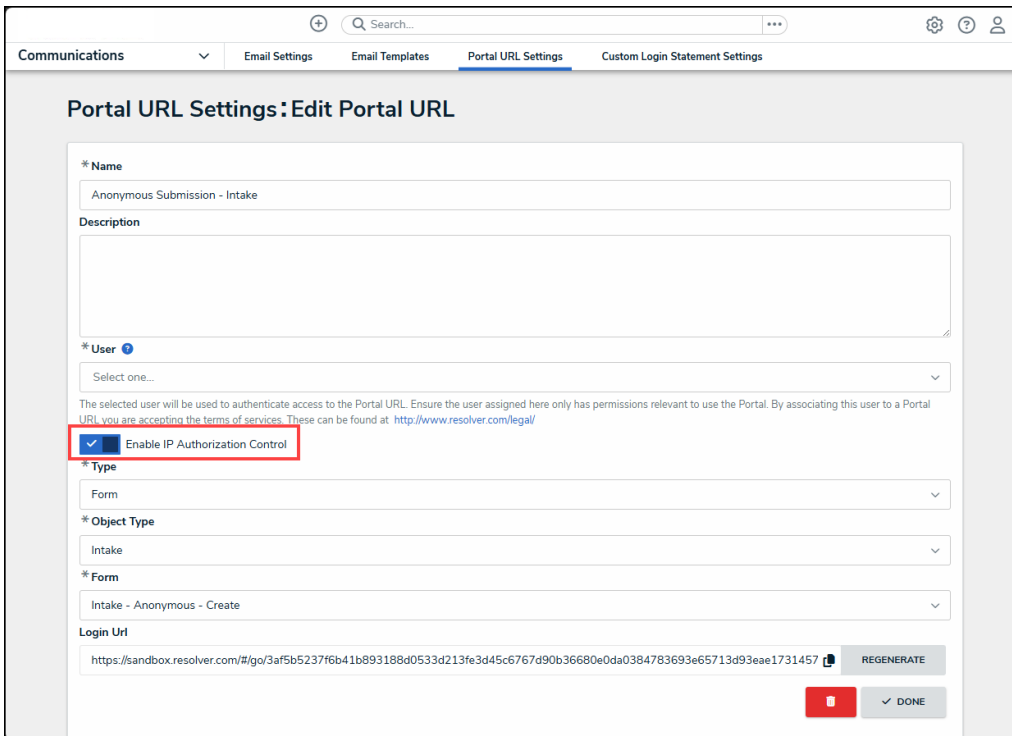
Description Field

3. Click the **User** field and select a user from the dropdown menu. This list will only show users with the **Portal URL User** option selected on the **User Type** field on the **User Management: Edit User** screen.



User Field

4. Click the **Enable IP Authorization Control** toggle switch to restrict who can access this URL (based on the entries in the IP allow list).



Enable IP Authorization Control Toggle Switch

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 accessing the Confidential Portal.

The screenshot shows the 'Portal URL Settings: Edit Portal URL' form in the Resolver application. The form is titled 'Portal URL Settings: Edit Portal URL' and is located under the 'Portal URL Settings' tab. The form contains the following fields and options:

- * Name:** Anonymous Submission - Intake
- Description:** (Empty text area)
- * User:** Select one... (Dropdown menu)
- Enable IP Authorization Control:** (Checked)
- * Type:** Form (Dropdown menu, highlighted with a red box)
- * Object Type:** Intake (Dropdown menu)
- * Form:** Intake - Anonymous - Create (Dropdown menu)
- Login Url:** <https://sandbox.resolver.com/#/go/3af5b5237f6b41b893188d0533d213fe3d45c6767d90b36680e0da0384783693e65713d93eae1731457> (REGENERATE button)

At the bottom right of the form, there is a red 'STOP' button and a 'DONE' button.

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:**

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

Portal URL Settings: Edit Portal URL

* Name
Anonymous Submission - Intake

Description

* User
Select one...

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
Activity

* Application
Select one...

* Activity
Select one...

Pendo Guide

Login Url
<https://sandbox.resolver.com/#/go/3af5b5237f6b41b893188d0533d213fe3d45c6767d90b36680e0da0384783693e65713d93eae1731457> **REGENERATE**

Activity Additional Fields

6. Click the **Regenerate** button from the **Login URL** field to create a new Login URL.

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

Portal URL Settings: Edit Portal URL

* Name
Anonymous Submission - Intake

Description

* User
Select one...

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
Intake

* Form
Intake - Anonymous - Create

Login Url
<https://sandbox.resolver.com/#/go/3af5b5237f6b41b893188d0533d213fe3d45c6767d90b36680e0da0384783693e65713d93eae1731457> **REGENERATE**

Regenerate Button

7. Click the **Done** button. Applied changes will be reflected next time the Portal URL is accessed.

The screenshot shows the 'Portal URL Settings: Edit Portal URL' form. The form contains the following fields and options:

- * Name:** Anonymous Submission - Intake
- Description:** (Empty text area)
- * User:** Select one... (Dropdown menu)
- Enable IP Authorization Control:**
- * Type:** Form (Dropdown menu)
- * Object Type:** Intake (Dropdown menu)
- * Form:** Intake - Anonymous - Create (Dropdown menu)
- Login Url:** <https://sandbox.resolver.com/#/go/3af5b5237f6b41b893188d0533d213fe3d45c6767d90b36680e0da0384783693e65713d93eae1731457> (with a 'REGENERATE' button)

At the bottom right, there are two buttons: a red 'Delete' icon and a 'DONE' button.

Done Button

Deleting a Portal URL

1. From the **Edit Portal URL** screen, click the **Delete** icon.

The screenshot shows the 'Portal URL Settings: Edit Portal URL' form. The form contains the following fields and options:

- * Name:** Test Portal URL
- Description:** This is a description
- * User:** Intake Portal User (Dropdown menu)
- Enable IP Authorization Control:**
- * Type:** Form (Dropdown menu)
- * Object Type:** Incident (Dropdown menu)
- * Form:** Incident - IM - 1 - Confidential Submission (Dropdown menu)
- Login Url:** <https://alpha-staging.resolver.com/#/go/1b69f1b84e59a30649077520965483ca026449c10078e53f66443d0701e3d0b09572b3d7e5171> (with a 'REGENERATE' button)

At the bottom right, there are two buttons: a red 'Delete' icon and a 'DONE' button.

Delete Icon

2. Click the **Delete** button to confirm.

The screenshot shows the 'Portal URL Settings' page in the Resolver application. The page has a navigation bar with 'Communications', 'Email Settings', 'Email Templates', 'Portal URL Settings', and 'Custom Login Statement Settings'. The main form contains the following fields:

- * Name:** Test Portal URL1
- Description:** (Empty text area)
- * User:** Intake Portal User
- Enable IP Authorization Control:** (Checked)
- * Type:** Form
- * Object Type:** Incident
- * Form:** Incident - IM - 1 - Confidential Submission
- Login Uri:** https://alpha.staging.resolver.com/#/go/ce6d4455ed6eab07cd5acf18a9a54628a793ef92f...

A red-bordered dialog box titled 'Delete portal URL?' is overlaid on the form. It contains the text: 'This will delete the selected portal URL and make the portal no longer accessible.' Below the text are three buttons: 'CANCEL', 'DELETE', and 'REGENERATE'. The 'DELETE' button is highlighted in red. At the bottom right of the main form, there is a 'DONE' button.

Delete Button