

Creating a Secure Access Portal

Last Modified on 07/25/2025 12:59 pm EDT

Overview



Note:

Please contact your Customer Success Manager if you're interested in enabling the **Secure Access Portal** on your Org.

Portal URLs with the **Secure Access** toggle enabled allow submitters to access their submissions at any time to add additional details to their reports, and communicate with the Resolver user reviewing their report.

User Account Requirements

The user account you use to log into Resolver must have Administrator permissions to create a **Secure Access Portal**.

Related Information/Setup

For further information on using a **Secure Access Portal** login URL, please refer to the Using the Secure Access Portal article.

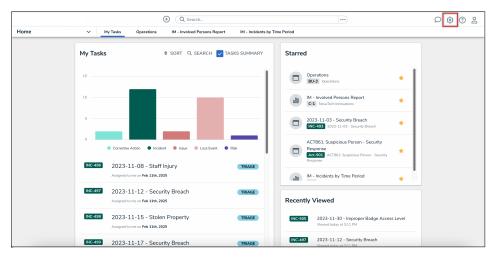
For further information on accessing a **Secure Access Portal** report, please refer to the Accessing a Secure Access Portal Report article.

For further information on responding to a **Secure Access Portal** message in Resolver, please refer to the Secure Access Portal Communications article.

Navigation

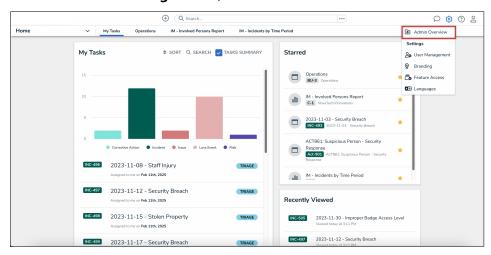
1. From the *Home* screen, click the **Administration** icon.





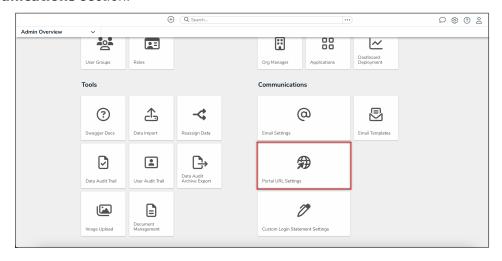
Administration Icon

2. From the **Administrator settings** menu, click the **Admin Overview** link.



Admin Overview Link

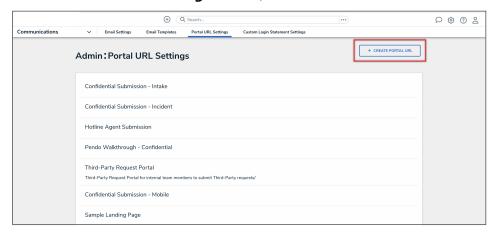
3. From the *Admin Overview* screen, click the **Portal URL Settings** tile under the **Communications** section.



Portal URL Settings Tile



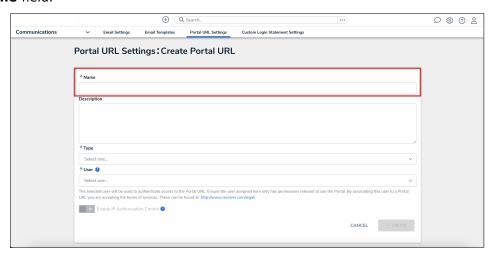
4. From the *Admin: Portal URL Settings* screen, click the **Create Portal URL** button.



Create Portal URL Button

Creating a Secure Access Portal

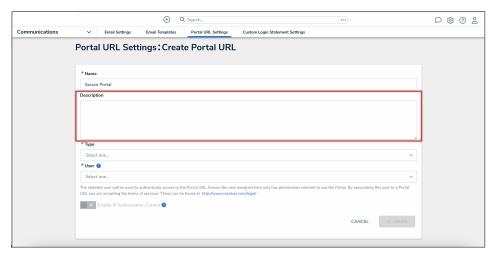
 From the *Portal URL Settings: Create Portal URL* screen, enter a name for the Portal in the Name field.



Name Field

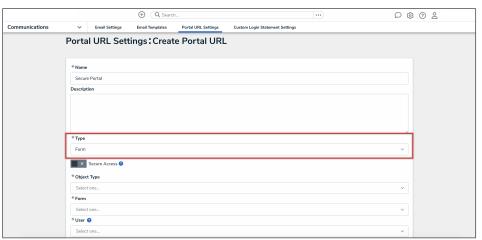
2. **(Optional):** Enter a Portal description in the **Description** field. This description will appear below the Portal's name on the **Secure Access Portal** URL screen.





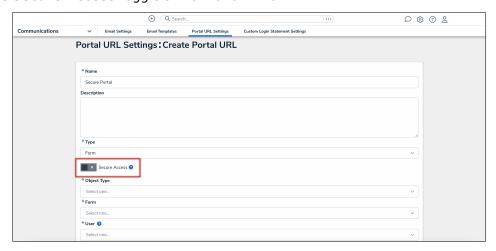
Description Field

3. From the **Type** dropdown menu, select **Form**.



Type Dropdown Menu

4. Click the **Secure Access** toggle switch to turn it on.

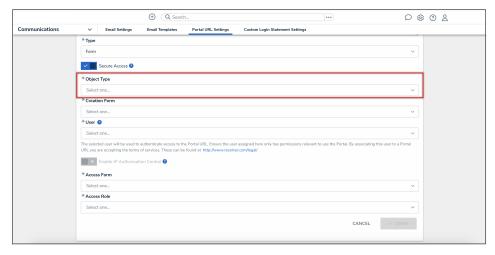


Secure Access Toggle Switch

5. From the **Object Type** dropdown menu, select an object type. The selected object type dictates which forms will be available to select from the **Creation Form** and **Access**

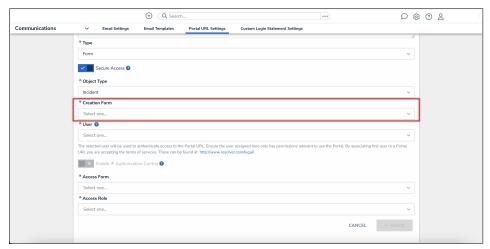


Form dropdown menus.



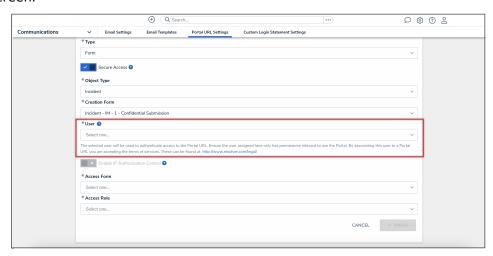
Object Type Dropdown Menu

6. From the **Creation Form** dropdown menu, select the form to use to create a submission.



Creation Form Dropdown Menu

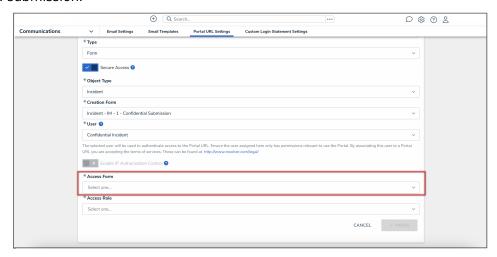
7. From the **User** dropdown menu, select a Portal user. This list will only show users with the **Portal URL User** option selected on the **User Type** field on the **User Management: Edit User** screen.





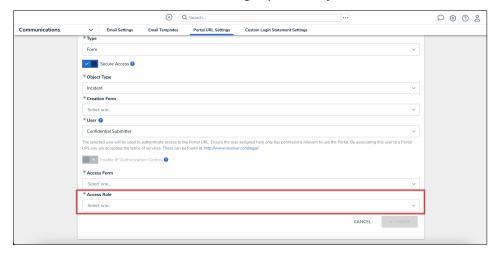
User Dropdown Menu

8. From the **Access Form** dropdown menu, select the form to use to access a previously created submission.



Access Form Dropdown Menu

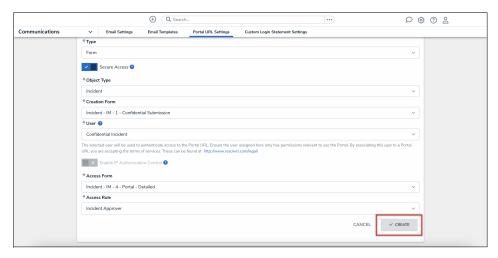
9. From the **Access Role** dropdown menu, select a role to use to define the role permissions for the **Secure Access Portal** user accessing a previously created submission.



Access Role Dropdown Menu

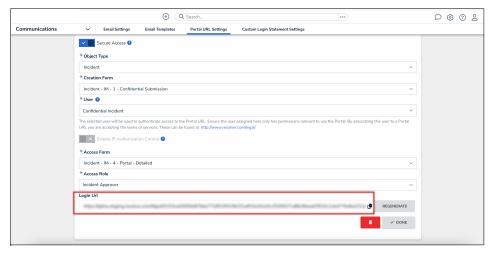
10. Click the **Create** button.





Create Button

11. The **Login URL** field will appear with the **Secure Access Portal** login URL. Click the **Copy** icon to copy the login URL.



Login URL Field