

Creating a Secure Access Portal

Last Modified on 09/17/2025 9:28 am 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

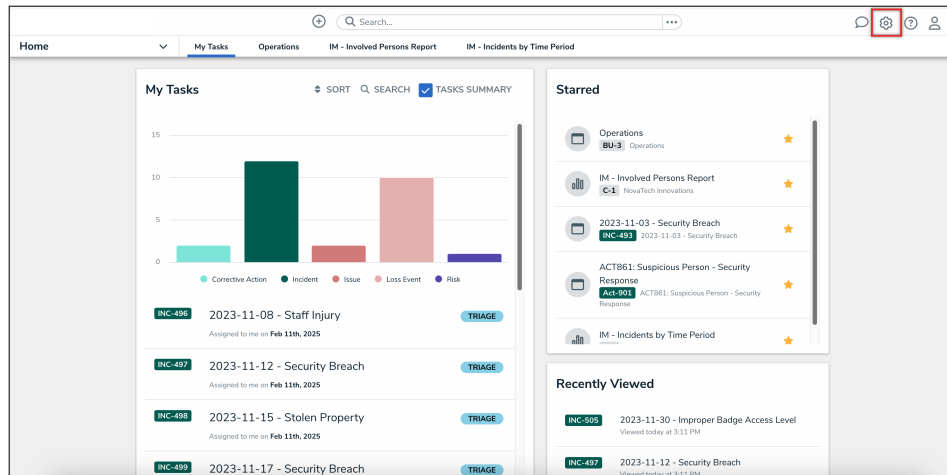
For further information on using a **Secure Access Portal** login URL, please refer to the [Using the Secure Access Portal](#) article.

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.

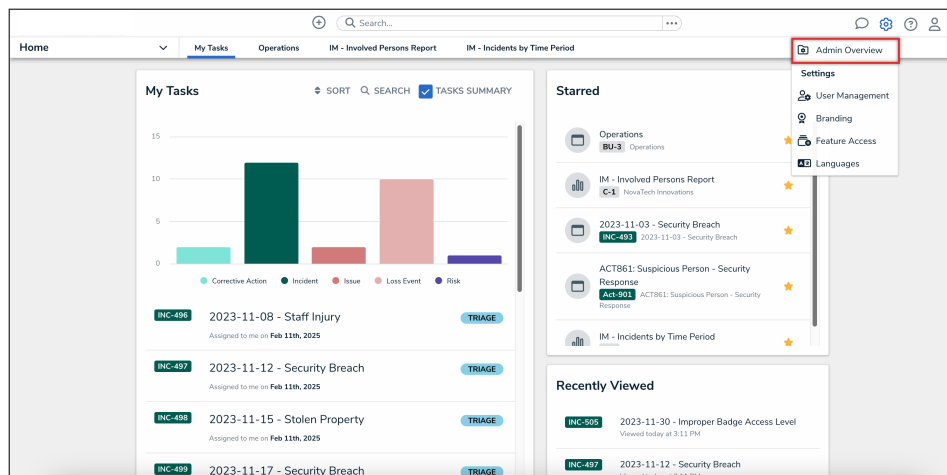
Navigation

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



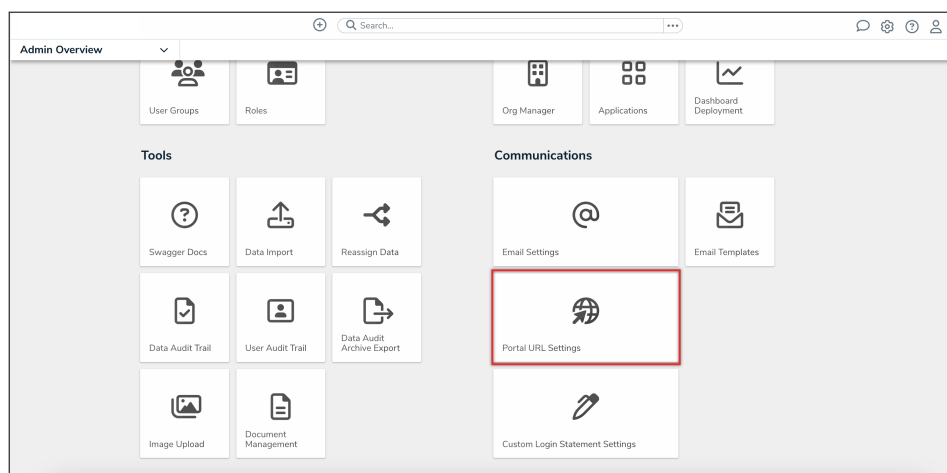
Administration Icon

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



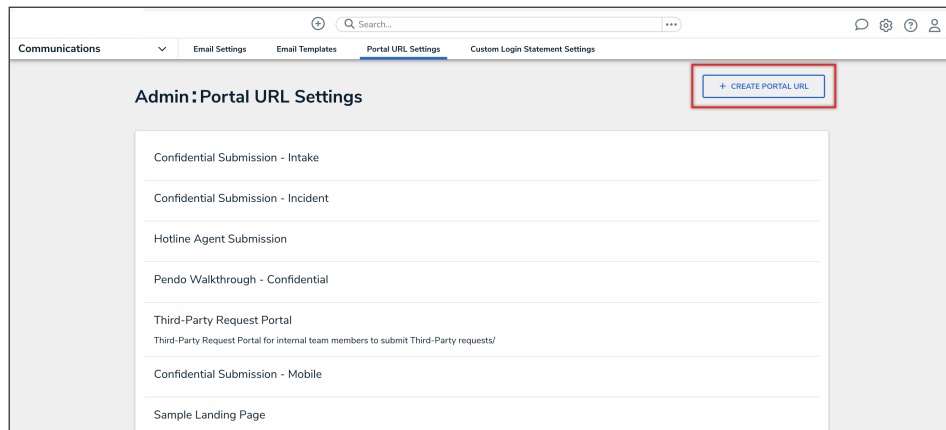
Admin Overview Link

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



Portal URL Settings Tile

- 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.

The screenshot shows the 'Portal URL Settings: Create Portal URL' form. The title 'Portal URL Settings: Create Portal URL' is at the top. The form contains several fields: a text field for 'Name' (highlighted with a red box), a text area for 'Description', a dropdown for 'Type' (labeled '* Type'), and a dropdown for 'User' (labeled '* User'). Below these fields, there is a small text block stating: '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>'. At the bottom, there is a checkbox for 'Enable IP Authorization Control' and two buttons: 'CANCEL' and 'CREATE'.

Name Field

- (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.

The screenshot shows the 'Portal URL Settings: Create Portal URL' form. The 'Name' field is set to 'Secure Portal'. The 'Description' field is a large text area, currently empty, and is highlighted with a red rectangle. Below the 'Description' field, there are dropdown menus for 'Type' (set to 'Select one...') and 'User' (set to 'Select one...'). At the bottom, there is a toggle switch for 'Secure Access' (currently off) and a 'CREATE' button.

Description Field

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

The screenshot shows the 'Portal URL Settings: Create Portal URL' form. The 'Type' dropdown menu is highlighted with a red rectangle, and 'Form' is selected. Below the 'Type' dropdown, there is a toggle switch for 'Secure Access' (currently off). Further down, there are dropdown menus for 'Object Type' (set to 'Select one...'), 'Form' (set to 'Select one...'), and 'User' (set to 'Select one...').

Type Dropdown Menu

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

The screenshot shows the 'Portal URL Settings: Create Portal URL' form. The 'Secure Access' toggle switch is highlighted with a red rectangle, and it is now turned on (indicated by a blue dot). The 'Type' dropdown menu is still set to 'Form'. Below the 'Secure Access' toggle, there are dropdown menus for 'Object Type' (set to 'Select one...'), 'Form' (set to 'Select one...'), and 'User' (set to 'Select one...').

Secure Access Toggle Switch

- 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.

The screenshot shows the 'Portal URL Settings' form in the Resolver application. The form includes several dropdown menus: 'Type' (set to 'Form'), 'Object Type' (highlighted with a red box), 'Creation Form', 'User', 'Access Form', and 'Access Role'. The 'Secure Access' checkbox is checked. A red box highlights the 'Object Type' dropdown menu, which currently shows 'Select one...'. Below the form, there are 'CANCEL' and 'CREATE' buttons.

Object Type Dropdown Menu

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

The screenshot shows the 'Portal URL Settings' form. The 'Object Type' dropdown is now set to 'Incident'. The 'Creation Form' dropdown is highlighted with a red box and shows 'Select one...'. The 'User' dropdown is also visible. The 'Secure Access' checkbox remains checked. The 'CANCEL' and 'CREATE' buttons are at the bottom right.

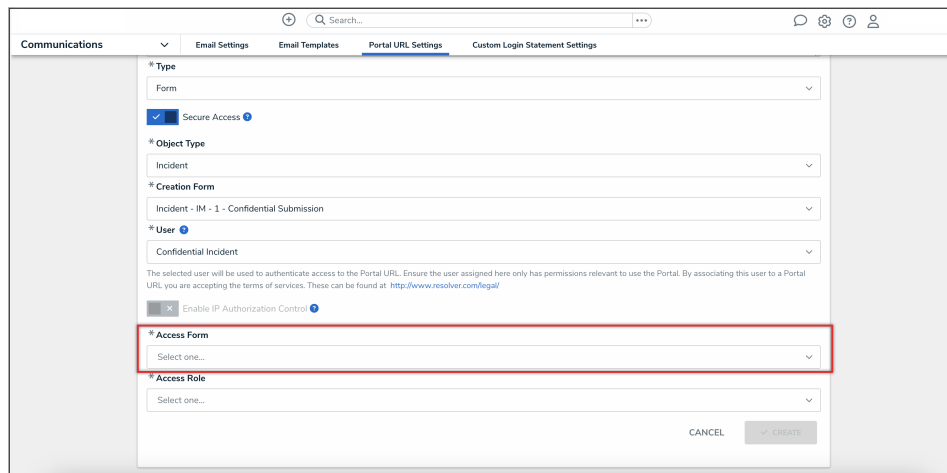
Creation Form Dropdown Menu

- 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.

The screenshot shows the 'Portal URL Settings' form. The 'Creation Form' dropdown is now set to 'Incident - IM - 1 - Confidential Submission'. The 'User' dropdown is highlighted with a red box and shows 'Select one...'. The 'Secure Access' checkbox remains checked. The 'CANCEL' and 'CREATE' buttons are at the bottom right.

User Dropdown Menu

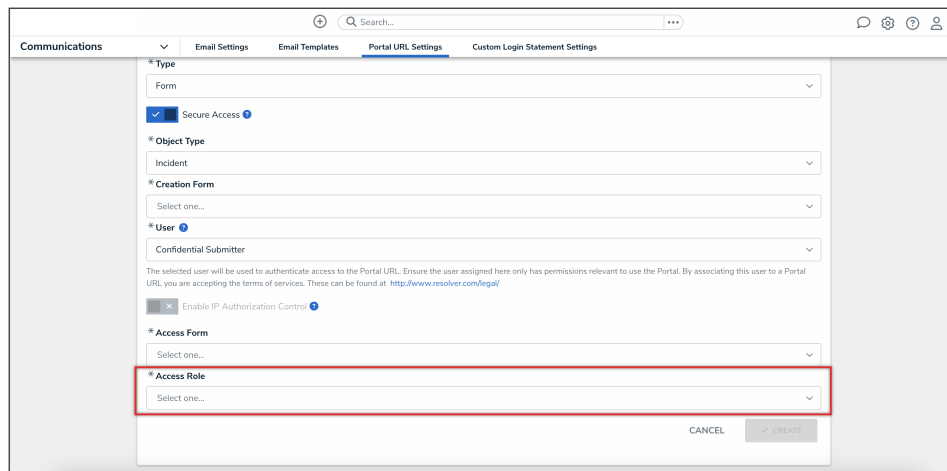
- From the **Access Form** dropdown menu, select the form to use to access a previously created submission.



The screenshot shows the 'Portal URL Settings' form. The 'Access Form' dropdown menu is highlighted with a red box. The form includes fields for Type, Object Type, Creation Form, User, Access Form, and Access Role. The 'Access Form' field is currently set to 'Select one...'. The 'Access Role' field is also set to 'Select one...'. The 'Create' button is visible at the bottom right.

Access Form Dropdown Menu

- 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.



The screenshot shows the 'Portal URL Settings' form. The 'Access Role' dropdown menu is highlighted with a red box. The form includes fields for Type, Object Type, Creation Form, User, Access Form, and Access Role. The 'Access Form' field is currently set to 'Select one...'. The 'Access Role' field is also set to 'Select one...'. The 'Create' button is visible at the bottom right.

Access Role Dropdown Menu

- Click the **Create** button.

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

* Type: Form

☒ Secure Access

* Object Type: Incident

* Creation Form: Incident - IM - 1 - Confidential Submission

* User: Confidential Incident

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

* Access Form: Incident - IM - 4 - Portal - Detailed

* Access Role: Incident Approver

CANCEL **CREATE**

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.

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

☒ Secure Access

* Object Type: Incident

* Creation Form: Incident - IM - 1 - Confidential Submission

* User: Confidential Incident

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

* Access Form: Incident - IM - 4 - Portal - Detailed

* Access Role: Incident Approver

Login Url

[Long alphanumeric string]  REGENERATE

DONE

Login URL Field

Configuring the Secure Access Portal Landing Page

From the **Configure Landing Page** section, you have the option to customize the text that appears on the **Secure Access Portal** landing page.

1. In the **Header** field, enter a custom header for the **Secure Access Portal** landing page.

Communications

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

https://alpha.staging.resolver.com/#go/8e3eb7b23ab9614e337e59ab213819b232d50272a6572996f23fb16398121e3e7852ae124772a7f REGENERATE

Configure Landing Page

Use this selection to customize the text that appears on your portal's landing page.

*** Header**
Ethics & Compliance Whistleblower portal
Max 145 characters.

*** Creation Subtitle**
Create a New Report
Max 30 characters.

*** Creation Description**
Welcome to the whistleblower web-portal. This avenue offers you the ability to provide vital information to our teams regarding your concerns.
Max 350 characters.

*** Access Subtitle**
Access an Existing Report
Max 30 characters.

*** Access Description**
You can communicate with the organization, provide additional information and review the details of your report. You are encouraged to check back regularly for updates.
Max 350 characters.

✖ ✓ DONE

Header Field

2. In the **Creation Subtitle** field, enter the title text for the creating a report workflow.

Communications

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

https://alpha.staging.resolver.com/#go/8e3eb7b23ab9614e337e59ab213819b232d50272a6572996f23fb16398121e3e7852ae124772a7f REGENERATE

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Max 350 characters.

✖ ✓ DONE

Creation Subtitle Field

3. In the **Creation Description** field, enter the description text for the creating a report workflow.

Communications

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

https://alpha.staging.resolver.com/#go/8e3eb7b23ab9614e337e59ab213819b232d50272a6572996f23fb16398121e3e7852ae124772a7f REGENERATE

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Max 350 characters.

✖ ✓ DONE

Creation Description Field

- In the **Access Subtitle** field, enter the title text for the accessing a report workflow.

Access Subtitle Field

- In the **Access Description** field, enter the description text for the accessing a report workflow.

Access Description Field



Note:

All changes made to the **Secure Access Portal** landing page are applied instantly and reflected in real time.