Secure Client Portal Manual

February 2020
Version 8.x

Contents

Portal Set-Up for Administrators

IMPORTANT NOTE: Only Professional and Enterprise Edition accounts will have access to the Portal and will see Portal Settings in the Settings tab of their Vitrium account.

Vitrium's Secure Client Portal allows you to distribute protected content to users in a secure, central web portal. Your user will be able to log into one place (at one URL) to access all the content that you have assigned them permissions for. The portal can be customized with your logo and brand colors.

Enabling the Portal

In your Vitrium account, Go to Settings > Portal Settings, then click the 'Enabled' checkbox.
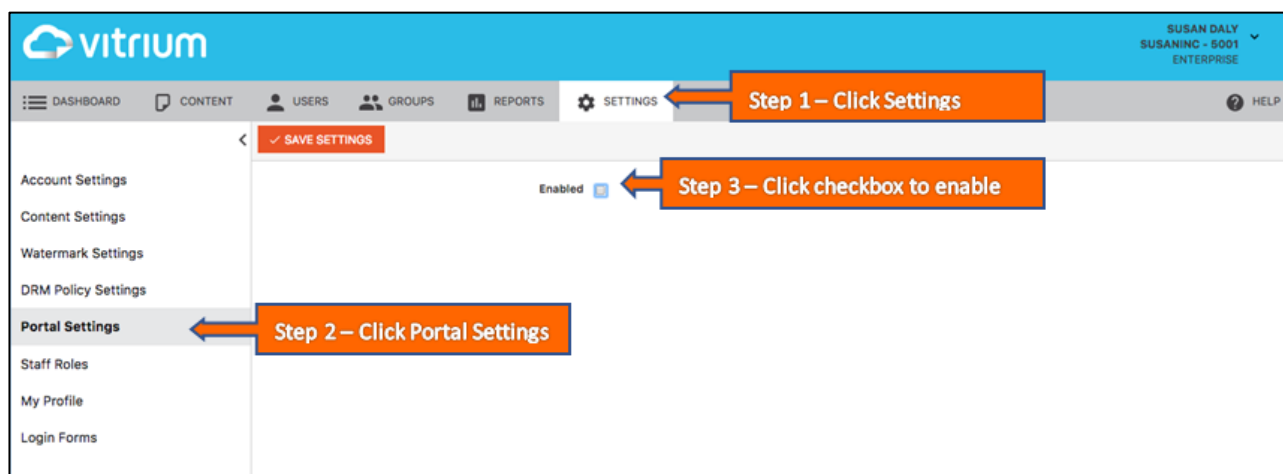
Once you checked 'Enabled', the portal fields will appear below.

Active Portal Alias

This is the URL that your users will log into to access all the protected content they have been assigned permission to. **Nothing will show here until you have submitted a portal alias in the next field Requested Portal Alias.**

Requested Portal Alias

This is the personalized part of the portal URL. We recommend you enter a company name or something unique to your organization. If you enter something generic like "test", the name will be rejected.

Ex: https://view.protectedpdf.com/portal/**company-name**

IMPORTANT NOTE: Your Portal Alias will be activated once Vitrium approves the name and you receive the approval email. Until then, the system will issue you a temporary URL.

Account Name

This is the name of your portal account which will appear at the top right-hand side of the user portal screen when users log in.

Allow User Sign Up

Select this option if you wish to have new people self-register or sign up as a 'User' with access to your portal. To learn more about the user self-registration process, review the User Self-Registration Process below.

IMPORTANT NOTE: Once a new user has been verified (via the email that's sent to them), someone from your organization will need to assign that person permission to content unless you have already assigned "All Active Users" with permission.

Allow Password Recovery

Select this option if you wish to allow users to reset or change their password. This option is recommended to reduce the support calls you would receive when users forget their password.

Color

Select your brand color for the portal. This color will appear in the top banner and login button in your portal.

Hover Color

This is the color that will show when you hover over or click on certain buttons.
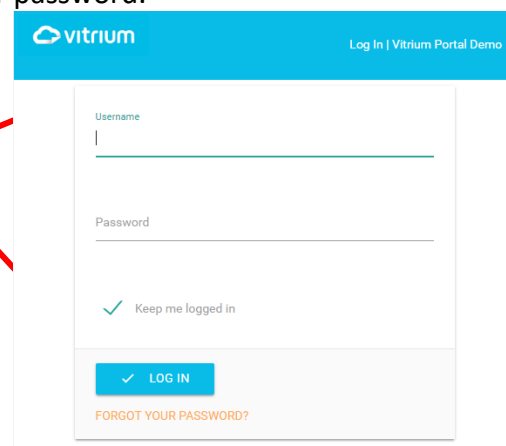
Logo

Upload your company logo here. The specs for the logo should be:

- JPG or PNG
- Transparent (since the logo will be placed against a solid color banner)
- Aspect ratio of 5:1 (width:height)

Favicon

Upload your favicon which is a small image that appears in the left-hand side of a website tab. The specs for the favicon should be:

- ICO
- 16x16 or 32x32 pixels
- 8-bit or 24-bit colors

Disable Downloading Document

Select this box if you do NOT want your users to access the downloadable protected PDF version of your content (only applicable to documents and images). If this box is selected, users will only be able to access the secured web version of your content.

Show Folders in Portal

Select this box if you wish to show folders in your portal. The folders that you have created in the Content tab of Vitrium will then appear in the portal as long as the user has been assigned permissions to access content within those folders.

Save Settings & Next Steps for Portal Alias Creation

Once you have entered all your settings, including entering a name in the Requested Portal Alias field, click **SAVE SETTINGS** and this will then kick off the process for Vitrium to set up your portal URL.

Until your portal alias is approved, you will see a **temporary URL** that you can use to verify how all your setting appear.

https://view.protectedpdf.com/portal/wEagWc

Once Vitrium reviews your requested portal alias, you will receive one of two emails:

- **An approval email** with the new portal URL link that you can then send to users. You will also see this new URL in your Portal Settings in Vitrium.
  - OR –

- **A rejection email** which will require you to go back to your Portal Settings and enter a different alias name and save your settings again.

Approval Email

Your portal alias vitrium-portal-demo for the Vitrium Content Portal has been approved.

The full portal URL that you can share with users to access their content will be: https://view.protectedpdf.com/portal/uofgranville

You can also access this in your Vitrium account in the Portal Settings section.

Thank you,
The Vitrium Team

Rejection Email

Your portal alias vitrium for the Vitrium Content Portal has been declined.
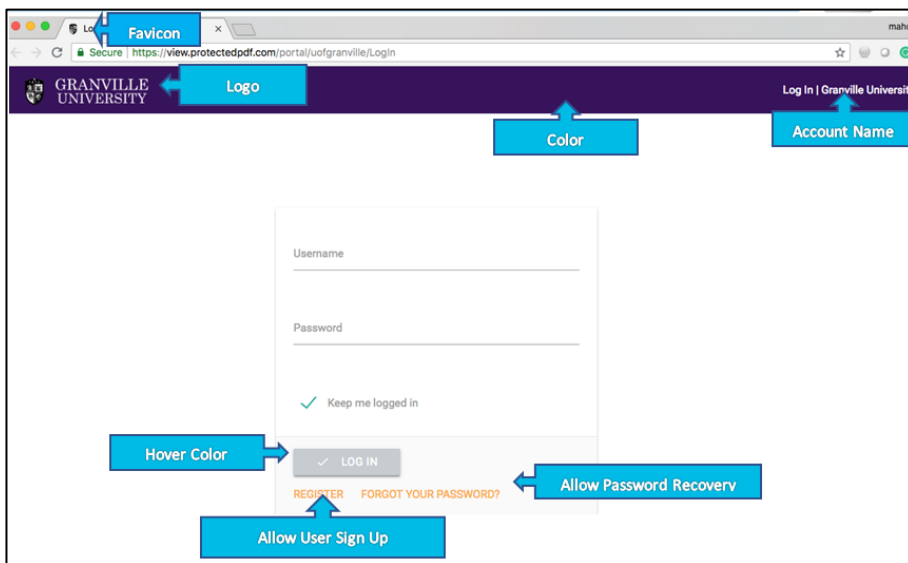
Please ensure you do not include any spaces or http:// or www. in your alias name. We recommend using short, simple names such as these:

- companyname
- company-name

Log back into your Vitrium account and enter a new portal alias name.

Thank you,
The Vitrium Team

Portal Login Page

A sample of Portal login page

End User Experience with the Portal

End users can login to the portal in one of two ways:

1. Via the direct portal link and they will have immediate access upon login if they have already been added to your Vitrium account in the Users tab, OR

2. Via the self-registration process (or link) and they will need to wait to gain access after you confirm their registration (activate the user) and assign them permission to the content in the portal

Self-Registration Process

If you selected "**Allow User Sign Up**" in your Portal Settings, then people will be able to self-register for your portal. Once the user submits their registration, they will need to verify their email address and you will need to log into Vitrium to activate the user and assign them permissions to your content.

Here are the steps that will occur:

1. Person clicks the REGISTER link on your user portal login page
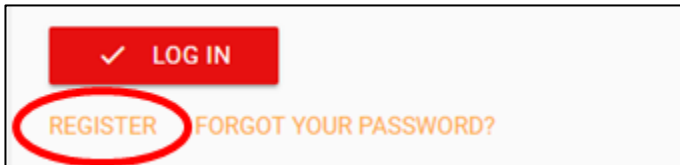
2. The user will then need to enter their email address, a password, confirm their password, then click REGISTER.

3. A verification email will be sent to the users and they will need to click to activate their account for the portal.

Thank you for your registration.

Thank you for registering for access to ABC Company's content portal.

To activate your account, please click on this link:

https://view.protectedpdf.com/portal/abc-company/TokenVerification?
type=EMAIL&token=NzI1M2E4OGItODk2My00NTJkLWE1N2EtZDA1MzcxMWQ1ZTg3fC01NjAzNzg5Mjc4ODEyMzkyMTcz

Before they verify their email, they will be added to the users list but as an inactive user.

| ☐ ✎ demo@vitrium.com | 9/13/2018 | 👥 | ↻ | 🔑 | ✕ | ⅲ |

4. The user clicks on the link to activate their account and you will then see them added as an active User in Vitrium.

| ☐ ✎ demo@vitrium.com | 9/13/2018 | 👥 | ↻ | 🔑 | ✓ | ⅲ |

5. You will then need to assign that user with permissions to access your content before they can see anything in the portal

Viewing Content Through the Portal

Using the portal link, login to the portal with a test user and, once logged in, you will be able to access any files or content that the user has been assigned permissions to:

Sort Options

This button allows the user to sort the content by Title (File Name) or the Created Date, and in Ascending or Descending order.

○	Title
●	Created Date
○	Ascending
●	Descending

Tags Filter

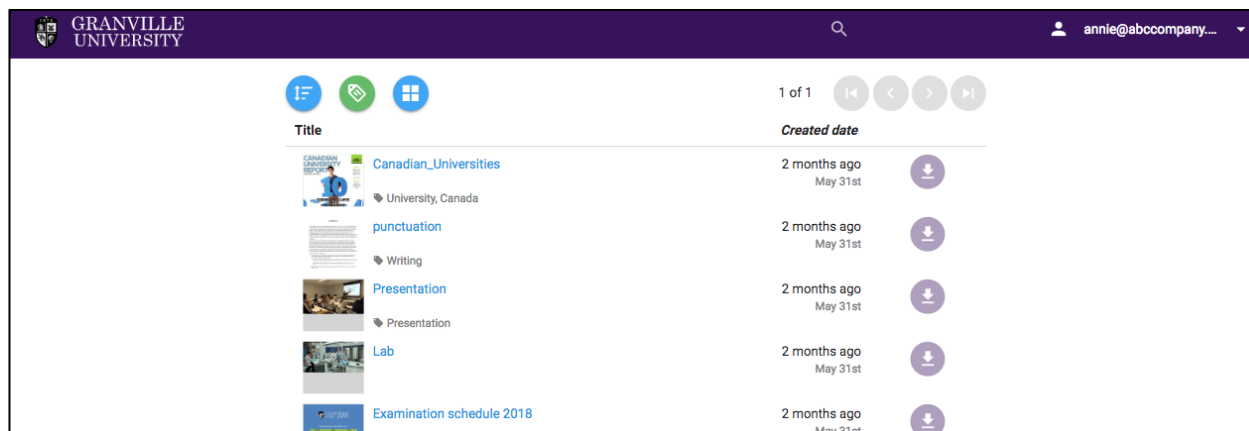This button allows the user to filter the content by tags that were added to the file upon upload.
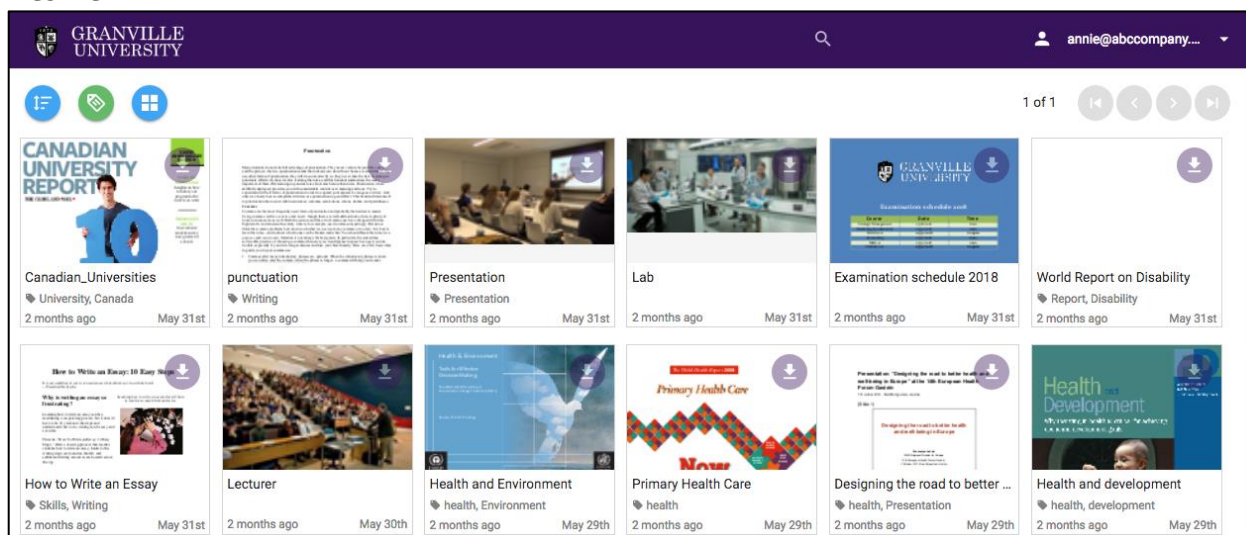
View Options

This button allows the user to change from a thumbnail (tiles) view to a list view; the thumbnail (tiles) view is the default.

List View:

Tiles view:

Secure PDF

If the user clicks on the faded download icon, it will downloaded the protected PDF format of the content which will need to be opened in Adobe Reader or Acrobat or FoxIt Reader.

Web Version

If the user clicks anywhere on the thumbnail it will open the web version of the content.

Tags

The user can also see the associated tags on each content by the grayed out text just below the file name.

Search

The user can search for the content file name.

Change Password/ Logout

The user can click on their username at the top right hand side of the screen to select "Change Password" or "Logout".