

# Table of Contents

|                                           |    |
|-------------------------------------------|----|
| <b>Global AlertLink User's Guide</b>      | 3  |
| <b>Administration</b>                     | 3  |
| <b>System Management</b>                  | 3  |
| <b>Organizations</b>                      | 3  |
| Organizational Structure Overview         | 3  |
| Add an Organization                       | 6  |
| Manage an Organization                    | 9  |
| Edit an Organization                      | 11 |
| Delete an Organization                    | 12 |
| Add a Folder                              | 13 |
| <b>Security Roles</b>                     | 15 |
| Security Roles Overview                   | 15 |
| Assign a Role to a User                   | 16 |
| Permissions                               | 18 |
| Security Role Privileges                  | 20 |
| Add a Security Role                       | 21 |
| Group a Security Role                     | 23 |
| Mask a Security Role                      | 24 |
| Delete a Security Role                    | 26 |
| <b>Lock Management</b>                    | 27 |
| Lock Management (Record Locking) Overview | 27 |
| Effective Locks                           | 29 |
| Lock a Record                             | 30 |
| Unlock a Record                           | 31 |
| <b>Referential Data</b>                   | 32 |
| Referential Data Overview                 | 32 |
| Configure Referential Data                | 33 |
| <b>Custom Fields</b>                      | 35 |
| Custom Fields Overview                    | 35 |
| Add a Custom Field                        | 36 |
| Add a Lookup Field                        | 41 |



## Organizational Structure Overview

To manage the organizational structure of your implementation, click the Administration menu and select System Management.

## System Management

### Structure

Corporate

Contacts

Documents

Events

Forms

Messages

News

Plans

Reports

Resources

Roles

8.0 Edge Division

8.0 IE Department

8.0 IE Location

8.0 Location

8.0 Release Department

8.0 Release Location

Backups

Business Group

DD

Enterprise Data

Enterprise DR Exercise

KW

NYDOH

SMS Testing

WF Sample

Ztesters

~~~~~

Browse

Filter - Results

Filter

Reset

### Organization Details

Title:

Type:

Parent:  ?

Status Changes:

Save

Cancel

### Security Details

Permissions:

|  | Name                                         | Read                             | Write                            | Admin                            | Delete                           |
|--|----------------------------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|
|  | <div><div></div> Admin Account (admin)</div> | <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> | <input checked="" type="radio"/> |
|  | <div><div></div></div>                       | <input checked="" type="radio"/> | <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> |
|  | <div><div></div></div>                       | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/>            | <input checked="" type="radio"/> |
|  | <div><div></div> Administrators</div>        | <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> | <input checked="" type="radio"/> |
|  | <div><div></div> Access Management</div>     | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/>            | <input checked="" type="radio"/> |

[Add New](#)

### Ownership Details

Owner:

[Choose Owner](#)

The architecture of the site is easily customized to match that of your organization. Each organizational unit defined in the hierarchy is a dedicated work area within the Global AlertLink application. You may assign permissions to the organizational unit, store data, plans, and incidents within the dedicated work area.

## Tips

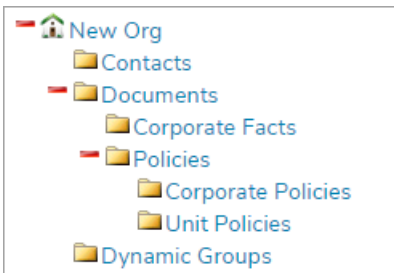
- Remember that when you create an organizational unit, you are creating a dedicated work area within Global AlertLink.
- You may assign permission to each organizational unit and functions and folders within each organizational unit.
- There are no limits on the number of organizational units or levels. We do recommend that you limit the number of levels for usability.
- Information may be shared, or cross linked, from one organizational unit to another.

In addition to the hierarchy of the organizational units, you may define a folder structure within each organizational unit and the respective data store component. The following items allow folders:

- Contacts
- Documents
- Dynamic Groups

- Events
- Forms
- Messages
- News
- Plans
- Reports
- Resources

The folder structure provides a framework for storing data or items within the application. There are no limits to the number of folders or levels of folders.



#### Tips

- You may define folder structures unique to each organizational unit.
- You may assign permission to folder structures.
- Each component within a work area allows for folders.
- There are no limits on the number of folders or levels.
- For contacts, folders may serve as groups for message distribution.
- A record may be shared in more than one folder.

You may create an unlimited number of security roles and use these roles to manage permissions within the application.

#### Tips

- Use security roles to define security for a specific role or use as a security group to define security for an entire set of users.
- Security may be inherited from parent organizations, so defining security at the parent can automatically flow down to all sub-units and folders.
- If you have multiple organizational units and users specific to those organizational units, you may consider creating security roles for each organization unit.
- Remember, any user assigned to the security role, automatically maintains that roles security permissions.

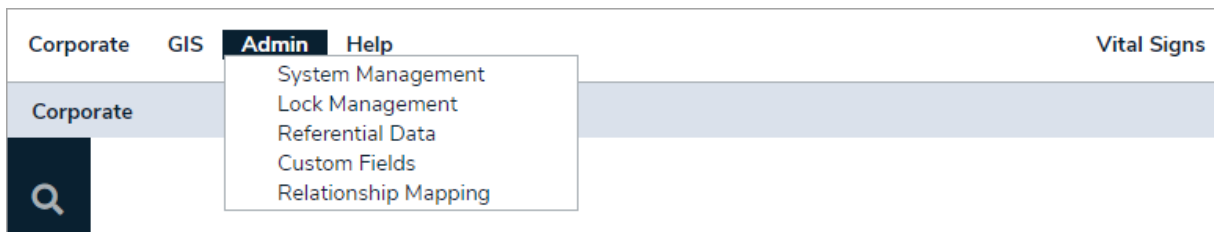
Note: The number of organizational units (hierarchy), the number of roles a user is assigned (permissions), how frequently this data changes, and how often a user accesses individual parts of the system can impact performance. GAL "calculates" a user's permissions to an object each time a user tries to access it, unless this permission has been previously calculated and is currently stored. Depending upon the variables mentioned above, the user's "security cache" is either current or needs to be rebuilt. Occasionally, if a user has not signed on for a while, and/or there has been a lot of changes to the hierarchy or their roles, the time to rebuild the cache may be excessive.

If you have any questions about this, contact us at [support@resolver.com](mailto:support@resolver.com).

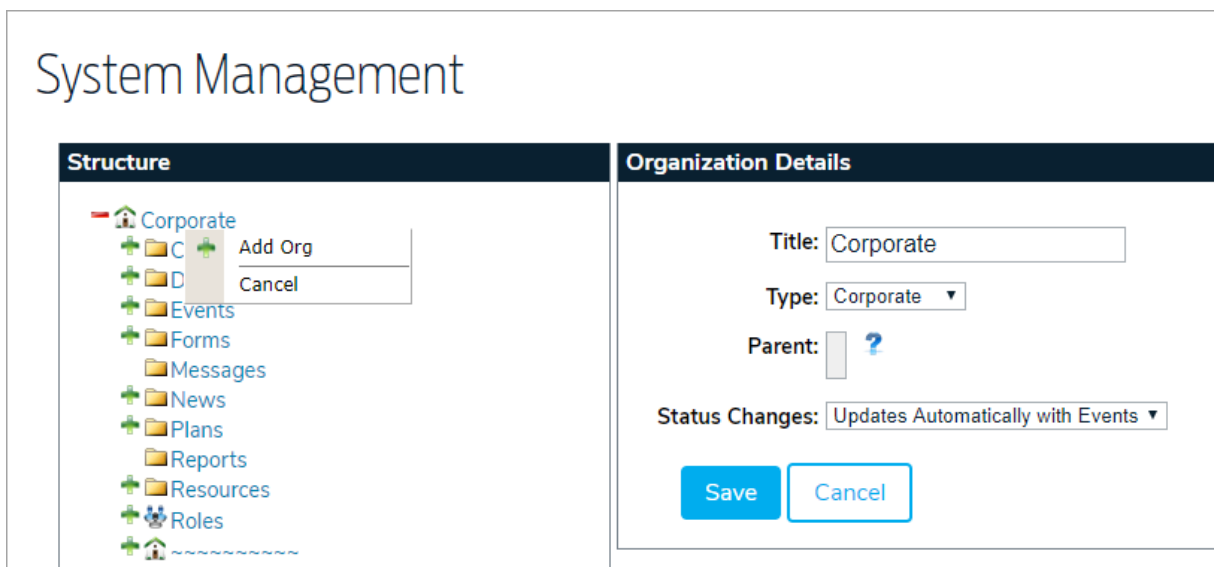


## Add an Organization

1. To add an organization, hover your cursor over Administration, then select System Management.



2. Select the parent organization from the Organizations box on the left portion of the screen. Right-click the parent organization's name and select Add Org. This will display the Organization Details to the right.



3. Enter the org's title in the Title field.
4. Select an organization type from the Type dropdown menu. These options are managed in the administrative settings.
5. **Optional:** Select a new parent organization for the sub-org.
6. Select an option from the Status Changes dropdown menu. Options include:
  - **Updates Automatically with Events:** Automatically sets the status of the organization based on the live event instances within it. The interruption level is based upon the most severe of its live events.
  - **Manually Set:** Interruption levels must be manually set.
7. Click Save to create the new org and display additional options.

**Organization Details**

Title:

Type:

Parent: 

[Choose Organization](#)

Status Changes:

Save

Delete

Cancel

**Security Details**

Security: ☒ Inherit Security From Parent

Permissions: No Permissions Defined

[Add New](#)

**Ownership Details**

Owner:

[Choose Owner](#)

8. Edit the org's Security Details as needed (see the [Permissions](#) article for more information).
9. Add an owner to the org, if needed. Note that when a user or role is assigned as an owner to an org, folder, or object, they are granted Write permissions to that object.

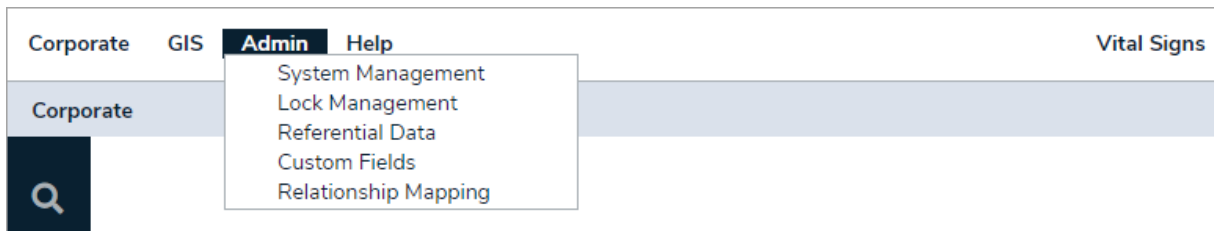
Once created, the org will appear in the **Structure** panel. Each new org is created with the following folders:

- Contacts
- Documents
- Dynamic Groups
- Events
- Forms
- Messages
- News
- Plans
- Reports
- Resources



## Manage an Organization

1. To manage any organization, folder, plan or event, hover your cursor over the Admin menu and select System Management.



2. Select the item from the Structure box on the left portion of the screen.
3. On the right side of the screen, you will notice three boxes: Folder Details, Security Details, and Ownership Details.

### System Management

**Structure**

- Corporate
  - Contacts
  - Documents
  - Events
  - Forms
  - Messages
  - News
  - Plans
  - Reports
  - Resources
  - Roles
  - 8.0 Edge Division
  - 8.0 IE Department
  - 8.0 IE Location
  - 8.0 Location
  - 8.0 Release Department
  - 8.0 Release Location
  - Backups
  - Business Group
  - DD
  - Enterprise Data
  - Enterprise DR Exercise
  - KW
  - NYDOH
  - SMS Testing
  - WF Sample
  - Ztesters

**Organization Details**

Title:

Type:

Parent:

Status Changes:

**Security Details**

Permissions:

| Name                  | Read                             | Write                            | Admin                            | Delete                           |
|-----------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|
| Admin Account (admin) | <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> | <input checked="" type="radio"/> |
| [Redacted]            | <input checked="" type="radio"/> | <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> |
| [Redacted]            | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/>            | <input checked="" type="radio"/> |
| Administrators        | <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> | <input checked="" type="radio"/> |
| Access Management     | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/>            | <input checked="" type="radio"/> |

[Add New](#)

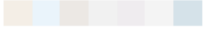
**Ownership Details**

Owner:

[Choose Owner](#)

Filter - Results

4. In the Folder Details, you can change the Title or Parent of the folder. Be sure to Save any changes.
5. The next box includes the Security Details. By default, all items are set to inherit security permissions from its parent. To customize security for this specific organization, uncheck "Inherit Security from Parent".
6. To change permissions for select groups, select Security Roles/Users that you wish to grant specific rights to. To add a new user, select "Add New" and choose the appropriate Role/User and choose one of three rights: Read, Write, or Admin. See the [Permissions](#) article for more information.

| Security Details                                                                                                                                                    |                                  |                                  |                                  |                                  |  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|--|
| Permissions:                                                                                                                                                        |                                  |                                  |                                  |                                  |  |
| Name                                                                                                                                                                | Read                             | Write                            | Admin                            | Delete                           |  |
|  Admin Account (admin)                                                             | <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> | <input checked="" type="radio"/> |  |
|   | <input checked="" type="radio"/> | <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> |  |
|   | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/>            | <input checked="" type="radio"/> |  |
|  Administrators                                                                    | <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> | <input checked="" type="radio"/> |  |
|  Access Management                                                                 | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/>            | <input checked="" type="radio"/> |  |
| <a href="#">Add New</a>                                                                                                                                             |                                  |                                  |                                  |                                  |  |

7. You can also select an owner in the Ownership Details box.

Select Owner

Corporate

Contacts

Events

Plans

Roles

Access Management

Administrators

Custom Form Designers

Everyone

Matt's role

PlanReview

Push Notification

Root Role Folder

Send Messages

~~~~~

8.0 Edge Division

8.0 IE Department

8.0 IE Location

8.0 Location

8.0 Release Department

8.0 Release Location

Backups

Browse

Filter - Results

Filter

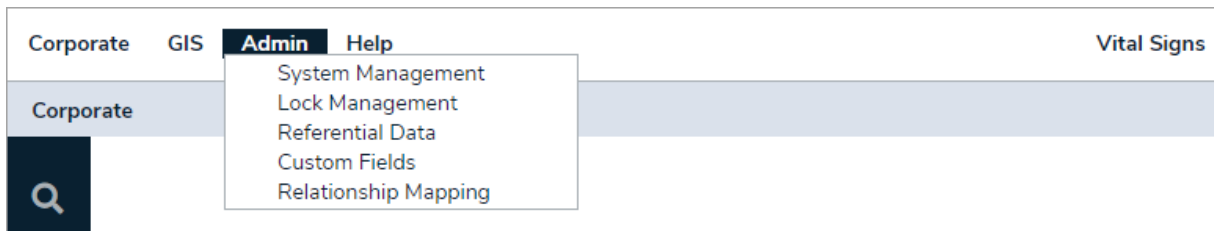
Reset

Advanced Filter

Note: When an Owner is assigned to an organization, folder or Global AlertLink object (News, Documents, Contacts, Plans, Resources, Reports-see Properties tab), they are granted Write permission to that object.

## Edit an Organization

1. To Edit an organization's details, hover your cursor over the Administration menu, then click System Management.



2. Click the organization's name from Structure panel to the left to display the available options.

### System Management

#### Structure

- 8.0 Edge Division
- 8.0 IE Department
- 8.0 IE Location
- 8.0 Location
- 8.0 Release Department
- 8.0 Release Location
- Backups
- Business Group
- Duane's Domain
- Enterprise Data
- Enterprise DR Exercise
- Kevin World
- New Org**
  - Contacts
  - Documents
  - Dynamic Groups
  - Events
  - Forms
  - Messages
  - News
  - Plans
  - Reports
  - Resources
  - Roles
- NYDOH
- SMS Testing
- WF Sample
- Ztesters

Browse Filter - Results

#### Organization Details

Title:

Type:

Parent:  [Choose Organization](#)

Status Changes:

#### Security Details

Security: ☒ Inherit Security From Parent

Permissions: No Permissions Defined

[Add New](#)

#### Ownership Details

Owner:

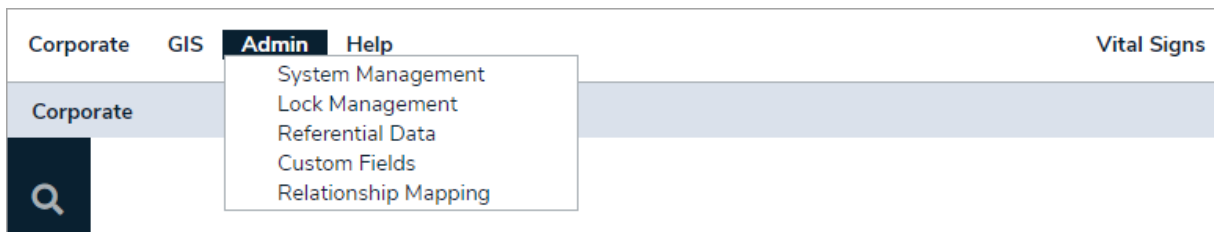
[Choose Owner](#)

3. Make the appropriate changes as needed.

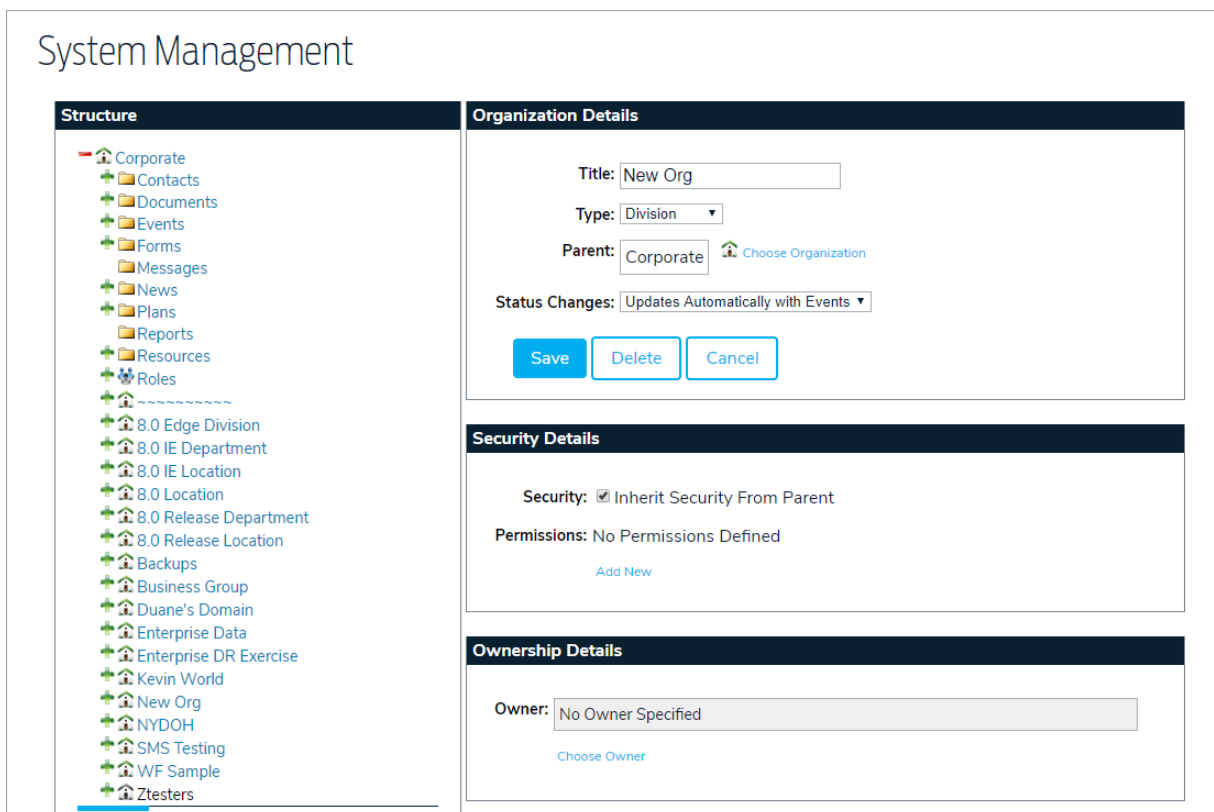
## Delete an Organization

**IMPORTANT NOTE:** Deleting an org will also delete any data associated with it.

1. To Delete an Organization, hover your cursor over Administration, then click System Management.



2. Click organization's name in the Structure panel to the left.

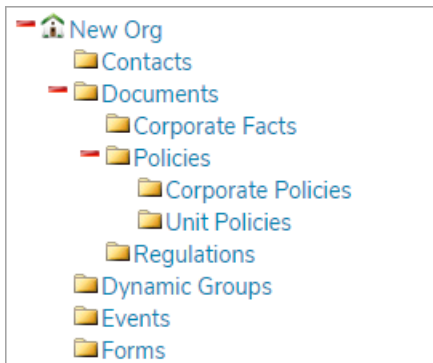


3. Click Delete in the Organization Delete or right-click the org in the Structure panel, then click Delete.

## Add a Folder

Folders allow you to alter, share, and delete entries at a macro level. This allows users and administrators the ability to organize entries and automatically alter, share, and delete entries that are placed in the folder without altering individual entries. You must be an Administrator or a Global Administrator to add a folder.

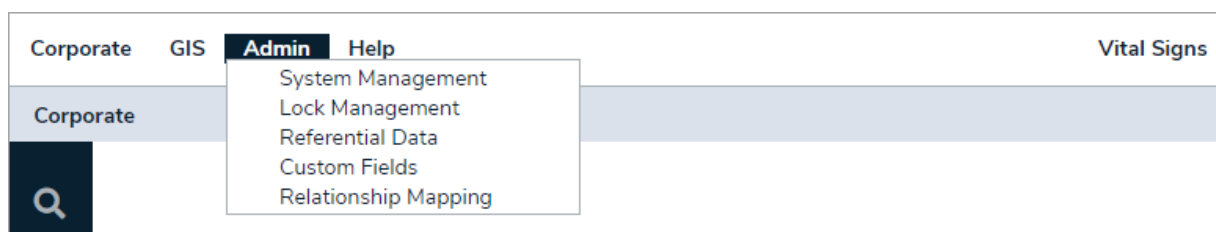
The folder structure provides a framework for storing data or items within the application. There are no limits to the number of folders or levels of folders.



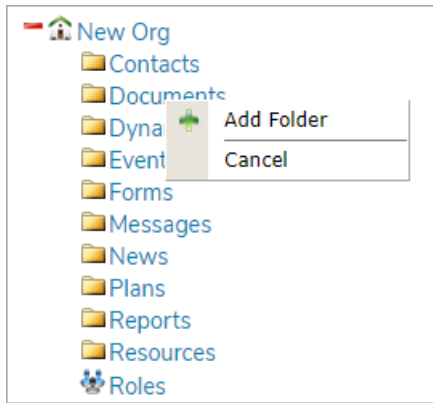
### Tips

- You may define folder structures unique to each organizational unit.
- You may assign permission to folder structures.
- Each component within a work area allows for folders.
- There are no limits on the number of folders or levels.
- For contacts, folders may serve as groups for message distribution.
- A record may be shared in more than one folder.
- Contact Resolver for assistance.

1. To add a folder, hover your cursor over Admin, then click System Management.



2. Navigate to the directory where you wish the folder to be placed.
3. Right-click the parent folder, then click Add folder.



4. Enter the folder following details:

- **Folder Title:** The name of the folder.
- **Folder Parent:** The folder where the sub-folder will be saved.
- **Latitude/Longitude:** Enter coordinates for the folder (Contacts and Resources only).

5. Click Save.

## Security Roles Overview

Roles are supported throughout the Global AlertLink system, including:

- **Sending a message:** When sending a message, you may elect to send the message to a contact(s), role(s), or folder(s). Sending a message to a role automatically includes everyone in the role at the time the message is sent.
- **Ownership:** To indicate that multiple people own a particular item, you may specify the owner as a role. This allows all members of the role to own the item.
- **Reviews:** When creating a review, for an item that is owned by a role, all members of the role will be notified during the review cycle.
- **Action Steps Assignments:** Assigning an action step to a role automatically assigns the action step to all members of the role. Action steps that are assigned to a role will appear in the My Task list for all members of the role. Additionally, notifications of action step assignments will be sent to all members if enabled.
- **Permissions:** When granting permission, you may choose a user or a role. Granting permissions to a role allows the permissions to automatically be assigned to everyone in the role.

## Assign a Role to a User

1. To assign a role to a user, click the Contact icon, then click the pencil icon beside the record to edit it.

Corporate GIS Admin Help Vital Signs My Tasks My Forms Organizational Dashboards EL

Corporate

Contacts

Filter Add Share

| First Name | Last Name ↑ | Title | Actions                                                                             |
|------------|-------------|-------|-------------------------------------------------------------------------------------|
| John       | Doe         |       |  |
|            |             |       |  |
|            |             |       |  |
|            |             |       |  |
|            |             | IE    |  |

2. Click the Account tab.
3. Locate the Role Membership section, then click Add.

**Role Membership**

User's Current Roles: User does not belong to any roles

- Add -

4. Select the role you wish to attach to the contact from the Select Roles window, then click Add & Edit or Add & Continue to save your changes.

Select Roles

Corporate

Events

Plans

Roles

Access Management

Administrators

Custom Form Designers

Everyone

Matt's role

PlanReview

Push Notification

Root Role Folder

Send Messages

~~~~~

8.0 Edge Division

8.0 IE Department

8.0 IE Location

8.0 Location

8.0 Release Department

8.0 Release Location

Backups

Business Group

Browse

Filter - Results

Filter

Reset

17

## Permissions

Permissions allow users to do, or not do, specific tasks relating to orgs and folders. Some specific permissions are required on certain folders, depending on the needs of the user.

### Contacts

| Action          | User/Role Org Permissions | User/Role Folder Permissions           |
|-----------------|---------------------------|----------------------------------------|
| Add a contact   | Read authority on the org | Write authority on the Contacts folder |
| Share a contact | Read authority on the org | Write authority on the Contacts folder |

### Forms

Custom Form designer privileges are also required for these actions.

| Action          | User/Role Org Permissions | User/Role Folder Permissions        |
|-----------------|---------------------------|-------------------------------------|
| Share a form    | Read authority on the org | Write authority on the Forms folder |
| Add a form      | Read authority on the org | Write authority on the Forms folder |
| Edit a form     | Read authority on the org | Write authority on the Forms folder |
| Complete a form | Read authority on the org | Write authority on the Forms folder |

### Incident Submission Forms

| Action                               | User/Role Org Permissions | User/Role Folder Permissions                                                                   |
|--------------------------------------|---------------------------|------------------------------------------------------------------------------------------------|
| Activate an incident submission form | Read authority on the org | Read authority on the Incident Submission Forms folder and Admin authority on the Plans folder |

### Messages

Send Message privileges are also required for these actions.

| Action         | User/Role Org Permissions | User/Role Folder Permissions           |
|----------------|---------------------------|----------------------------------------|
| Send a message | Read authority on the org | Write authority on the Messages folder |

### Plans

| Action | User/Role Org Permissions (Minimum) | User/Role Folder Permissions (Minimum) |
|--------|-------------------------------------|----------------------------------------|
|--------|-------------------------------------|----------------------------------------|

|                 |                            |                                     |
|-----------------|----------------------------|-------------------------------------|
| Activate a plan | Read authority on the org  | Admin authority on the Plans folder |
| Copy a plan     | Write authority on the org | Read authority on the Plans folder  |
| Add a plan      | Read authority on the org  | Write authority on the Plans folder |

## Resources

| Action           | User/Role Org<br>Permissions (Minimum) | User/Role Folder Permissions<br>(Minimum)  |
|------------------|----------------------------------------|--------------------------------------------|
| Add a resource   | Read authority on the org              | Write authority on the Resources<br>folder |
| Share a resource | Read authority on the org              | Write authority on the folder              |

## Security Role Privileges

Privileges allow you to assign additional rights (or privileges) to roles. Privileges are a way of protecting sensitive data within the system by masking Global AlertLink fields and custom fields and assigning additional functionality to the system by granting users in those roles the ability to be a Global Administrator, Send Messages, or Design Custom Forms.

By default, all privileges are available to every role except:

- Global Administrator
- Send Message
- View Support Passphrase
- Custom Form Designer

## System Management

| Structure                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Role Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                  |                                       |                                           |                                          |                                              |                                         |                                           |                                         |                                    |                                          |                                     |                                            |                                              |                                              |                                    |                                     |                                       |                                       |                                     |                                                |                                                 |                                                    |                                              |                                                  |                                               |                                             |                                           |                                       |                                          |                                         |                                                |                                         |                                           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|---------------------------------------|-------------------------------------------|------------------------------------------|----------------------------------------------|-----------------------------------------|-------------------------------------------|-----------------------------------------|------------------------------------|------------------------------------------|-------------------------------------|--------------------------------------------|----------------------------------------------|----------------------------------------------|------------------------------------|-------------------------------------|---------------------------------------|---------------------------------------|-------------------------------------|------------------------------------------------|-------------------------------------------------|----------------------------------------------------|----------------------------------------------|--------------------------------------------------|-----------------------------------------------|---------------------------------------------|-------------------------------------------|---------------------------------------|------------------------------------------|-----------------------------------------|------------------------------------------------|-----------------------------------------|-------------------------------------------|
| <div> Corporate<ul style="list-style-type: none"><li> Contacts</li><li> Documents</li><li> Events</li><li> Forms</li><li> Messages</li><li> News</li><li> Plans</li><li> Reports</li><li> Resources</li><li> Roles</li><li>~~~~~</li><li> 8.0 Edge Division</li><li> 8.0 IE Department</li><li> 8.0 IE Location</li><li> 8.0 Location</li><li> 8.0 Release Department</li><li> 8.0 Release Location</li><li> Backups</li><li> Business Group</li><li> Duane's Domain</li><li> Enterprise Data</li><li> Enterprise DR Exercise</li><li> Kevin World</li><li> New Org</li><li> NYDOH</li><li> SMS Testing</li><li> WF Sample</li><li> Ztesters</li></ul></div> <div><b>Browse</b>   Filter - Results</div> | <div>Title: <input type="text" value="Roles"/></div> <div>Parent: <input type="text" value="Corporate"/> ?</div> <div>Privileges:</div> <table><tbody><tr><td><input type="checkbox"/> Global Administrator</td><td><input type="checkbox"/> Send Message</td><td><input type="checkbox"/> View Prefix Name</td></tr><tr><td><input type="checkbox"/> View First Name</td><td><input type="checkbox"/> View Middle Initial</td><td><input type="checkbox"/> View Last Name</td></tr><tr><td><input type="checkbox"/> View Suffix Name</td><td><input type="checkbox"/> View Full Name</td><td><input type="checkbox"/> View Site</td></tr><tr><td><input type="checkbox"/> View Department</td><td><input type="checkbox"/> View Title</td><td><input type="checkbox"/> View Organization</td></tr><tr><td><input type="checkbox"/> View Address Line 1</td><td><input type="checkbox"/> View Address Line 2</td><td><input type="checkbox"/> View City</td></tr><tr><td><input type="checkbox"/> View State</td><td><input type="checkbox"/> View Zipcode</td><td><input type="checkbox"/> View Country</td></tr><tr><td><input type="checkbox"/> View Notes</td><td><input type="checkbox"/> View Alt-Contact Name</td><td><input type="checkbox"/> View Alt-Contact Phone</td></tr><tr><td><input type="checkbox"/> View Alt-Contact Relation</td><td><input type="checkbox"/> View Contact Method</td><td><input type="checkbox"/> View Support Passphrase</td></tr><tr><td><input type="checkbox"/> Custom Form Designer</td><td><input type="checkbox"/> Latitude/Longitude</td><td><input type="checkbox"/> View Customer ID</td></tr><tr><td><input type="checkbox"/> View Dept ID</td><td><input type="checkbox"/> View Reports To</td><td><input type="checkbox"/> View Time Zone</td></tr><tr><td><input type="checkbox"/> View Business Unit ID</td><td><input type="checkbox"/> Edit GIS Layer</td><td><input type="checkbox"/> Delete GIS Layer</td></tr></tbody></table> | <input type="checkbox"/> Global Administrator    | <input type="checkbox"/> Send Message | <input type="checkbox"/> View Prefix Name | <input type="checkbox"/> View First Name | <input type="checkbox"/> View Middle Initial | <input type="checkbox"/> View Last Name | <input type="checkbox"/> View Suffix Name | <input type="checkbox"/> View Full Name | <input type="checkbox"/> View Site | <input type="checkbox"/> View Department | <input type="checkbox"/> View Title | <input type="checkbox"/> View Organization | <input type="checkbox"/> View Address Line 1 | <input type="checkbox"/> View Address Line 2 | <input type="checkbox"/> View City | <input type="checkbox"/> View State | <input type="checkbox"/> View Zipcode | <input type="checkbox"/> View Country | <input type="checkbox"/> View Notes | <input type="checkbox"/> View Alt-Contact Name | <input type="checkbox"/> View Alt-Contact Phone | <input type="checkbox"/> View Alt-Contact Relation | <input type="checkbox"/> View Contact Method | <input type="checkbox"/> View Support Passphrase | <input type="checkbox"/> Custom Form Designer | <input type="checkbox"/> Latitude/Longitude | <input type="checkbox"/> View Customer ID | <input type="checkbox"/> View Dept ID | <input type="checkbox"/> View Reports To | <input type="checkbox"/> View Time Zone | <input type="checkbox"/> View Business Unit ID | <input type="checkbox"/> Edit GIS Layer | <input type="checkbox"/> Delete GIS Layer |
| <input type="checkbox"/> Global Administrator                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <input type="checkbox"/> Send Message                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <input type="checkbox"/> View Prefix Name        |                                       |                                           |                                          |                                              |                                         |                                           |                                         |                                    |                                          |                                     |                                            |                                              |                                              |                                    |                                     |                                       |                                       |                                     |                                                |                                                 |                                                    |                                              |                                                  |                                               |                                             |                                           |                                       |                                          |                                         |                                                |                                         |                                           |
| <input type="checkbox"/> View First Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <input type="checkbox"/> View Middle Initial                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <input type="checkbox"/> View Last Name          |                                       |                                           |                                          |                                              |                                         |                                           |                                         |                                    |                                          |                                     |                                            |                                              |                                              |                                    |                                     |                                       |                                       |                                     |                                                |                                                 |                                                    |                                              |                                                  |                                               |                                             |                                           |                                       |                                          |                                         |                                                |                                         |                                           |
| <input type="checkbox"/> View Suffix Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <input type="checkbox"/> View Full Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <input type="checkbox"/> View Site               |                                       |                                           |                                          |                                              |                                         |                                           |                                         |                                    |                                          |                                     |                                            |                                              |                                              |                                    |                                     |                                       |                                       |                                     |                                                |                                                 |                                                    |                                              |                                                  |                                               |                                             |                                           |                                       |                                          |                                         |                                                |                                         |                                           |
| <input type="checkbox"/> View Department                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <input type="checkbox"/> View Title                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <input type="checkbox"/> View Organization       |                                       |                                           |                                          |                                              |                                         |                                           |                                         |                                    |                                          |                                     |                                            |                                              |                                              |                                    |                                     |                                       |                                       |                                     |                                                |                                                 |                                                    |                                              |                                                  |                                               |                                             |                                           |                                       |                                          |                                         |                                                |                                         |                                           |
| <input type="checkbox"/> View Address Line 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <input type="checkbox"/> View Address Line 2                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <input type="checkbox"/> View City               |                                       |                                           |                                          |                                              |                                         |                                           |                                         |                                    |                                          |                                     |                                            |                                              |                                              |                                    |                                     |                                       |                                       |                                     |                                                |                                                 |                                                    |                                              |                                                  |                                               |                                             |                                           |                                       |                                          |                                         |                                                |                                         |                                           |
| <input type="checkbox"/> View State                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <input type="checkbox"/> View Zipcode                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <input type="checkbox"/> View Country            |                                       |                                           |                                          |                                              |                                         |                                           |                                         |                                    |                                          |                                     |                                            |                                              |                                              |                                    |                                     |                                       |                                       |                                     |                                                |                                                 |                                                    |                                              |                                                  |                                               |                                             |                                           |                                       |                                          |                                         |                                                |                                         |                                           |
| <input type="checkbox"/> View Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <input type="checkbox"/> View Alt-Contact Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <input type="checkbox"/> View Alt-Contact Phone  |                                       |                                           |                                          |                                              |                                         |                                           |                                         |                                    |                                          |                                     |                                            |                                              |                                              |                                    |                                     |                                       |                                       |                                     |                                                |                                                 |                                                    |                                              |                                                  |                                               |                                             |                                           |                                       |                                          |                                         |                                                |                                         |                                           |
| <input type="checkbox"/> View Alt-Contact Relation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <input type="checkbox"/> View Contact Method                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <input type="checkbox"/> View Support Passphrase |                                       |                                           |                                          |                                              |                                         |                                           |                                         |                                    |                                          |                                     |                                            |                                              |                                              |                                    |                                     |                                       |                                       |                                     |                                                |                                                 |                                                    |                                              |                                                  |                                               |                                             |                                           |                                       |                                          |                                         |                                                |                                         |                                           |
| <input type="checkbox"/> Custom Form Designer                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <input type="checkbox"/> Latitude/Longitude                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <input type="checkbox"/> View Customer ID        |                                       |                                           |                                          |                                              |                                         |                                           |                                         |                                    |                                          |                                     |                                            |                                              |                                              |                                    |                                     |                                       |                                       |                                     |                                                |                                                 |                                                    |                                              |                                                  |                                               |                                             |                                           |                                       |                                          |                                         |                                                |                                         |                                           |
| <input type="checkbox"/> View Dept ID                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <input type="checkbox"/> View Reports To                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <input type="checkbox"/> View Time Zone          |                                       |                                           |                                          |                                              |                                         |                                           |                                         |                                    |                                          |                                     |                                            |                                              |                                              |                                    |                                     |                                       |                                       |                                     |                                                |                                                 |                                                    |                                              |                                                  |                                               |                                             |                                           |                                       |                                          |                                         |                                                |                                         |                                           |
| <input type="checkbox"/> View Business Unit ID                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <input type="checkbox"/> Edit GIS Layer                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <input type="checkbox"/> Delete GIS Layer        |                                       |                                           |                                          |                                              |                                         |                                           |                                         |                                    |                                          |                                     |                                            |                                              |                                              |                                    |                                     |                                       |                                       |                                     |                                                |                                                 |                                                    |                                              |                                                  |                                               |                                             |                                           |                                       |                                          |                                         |                                                |                                         |                                           |

Privileges are different than permissions. Privileges determine which fields you can view in a report or form and if you can send messages or design a form. Permissions determine which organizations and folders you have access to and what you can do to the Global AlertLink objects in those folders.

By default, no privileges are available to a new role.

By contrast, the system-supplied Everyone role has all privileges except Global Administrator, Send Message, View Support Passphrase, Custom Form Designer, View Latitude/Longitude and View any system-wide custom fields.

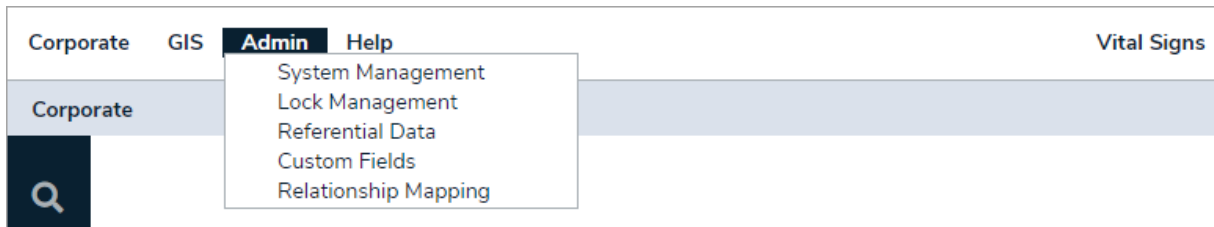
## Add a Security Role

Roles allow you to assign rights and privileges to a group of users. This allows users and administrators the ability to manage Global AlertLink at a macro level by applying rights and privileges once for an entire group of users by assigning each of them to a role.

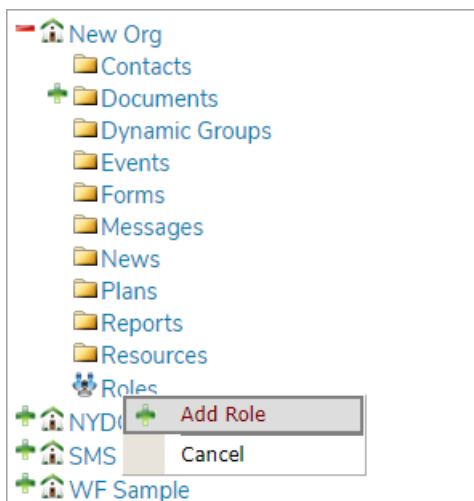
It is important to note that users may be assigned to multiple roles depending upon what access to organization units, information and Global AlertLink functionality you want the user to have.

You must be an Administrator or a Global Administrator to add a role. Roles can be created for each organization.

1. To add a role to the system, hover and select System Management.



2. Navigate to the organization, then expand the Roles folder (if applicable) in the Structure panel to the left.
3. Right-click the appropriate roles group, then click Add Role.



4. Enter the title, parent, and any privileges for the role.

## Role Details

Title:

Parent:   [Choose Role](#)

### Privileges:

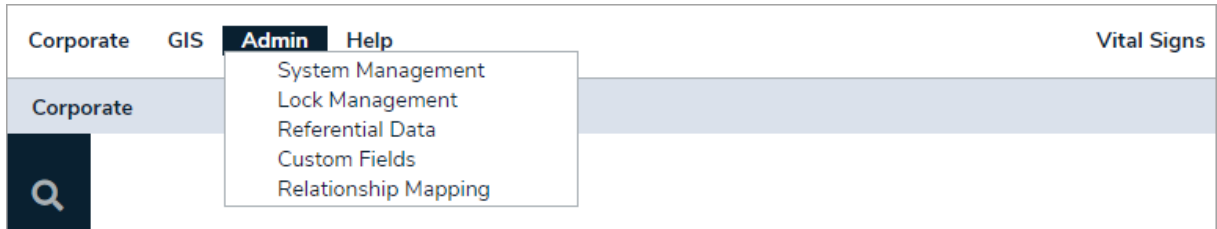
- |                                                    |                                                |                                                  |
|----------------------------------------------------|------------------------------------------------|--------------------------------------------------|
| <input type="checkbox"/> Global Administrator      | <input type="checkbox"/> Send Message          | <input type="checkbox"/> View Prefix Name        |
| <input type="checkbox"/> View First Name           | <input type="checkbox"/> View Middle Initial   | <input type="checkbox"/> View Last Name          |
| <input type="checkbox"/> View Suffix Name          | <input type="checkbox"/> View Full Name        | <input type="checkbox"/> View Site               |
| <input type="checkbox"/> View Department           | <input type="checkbox"/> View Title            | <input type="checkbox"/> View Organization       |
| <input type="checkbox"/> View Address Line 1       | <input type="checkbox"/> View Address Line 2   | <input type="checkbox"/> View City               |
| <input type="checkbox"/> View State                | <input type="checkbox"/> View Zipcode          | <input type="checkbox"/> View Country            |
| <input type="checkbox"/> View Notes                | <input type="checkbox"/> View Alt-Contact Name | <input type="checkbox"/> View Alt-Contact Phone  |
| <input type="checkbox"/> View Alt-Contact Relation | <input type="checkbox"/> View Contact Method   | <input type="checkbox"/> View Support Passphrase |
| <input type="checkbox"/> Custom Form Designer      | <input type="checkbox"/> Latitude/Longitude    | <input type="checkbox"/> View Customer ID        |
| <input type="checkbox"/> View Dept ID              | <input type="checkbox"/> View Reports To       | <input type="checkbox"/> View Time Zone          |
| <input type="checkbox"/> View Business Unit ID     | <input type="checkbox"/> Edit GIS Layer        | <input type="checkbox"/> Delete GIS Layer        |

5. Click Save to create the role.

## Group a Security Role

Grouping allows you to organize and sort the system's roles. This allows users and administrators to view the roles in a hierarchy fashion. It is important to note that rights and privileges do not extend to parent or child roles.

1. To group a set of roles, hover your cursor over Administration, then click System Management.



2. Navigate to the applicable org, then click the role to display its Role Details.
3. Click Choose Role, then select a new parent role.

A screenshot of a 'Role Details' form. The form has a dark header with the text 'Role Details'. Below the header, there are three sections: 'Title', 'Parent', and 'Privileges'. The 'Title' section has a text input field containing the word 'Administrators'. The 'Parent' section has a dropdown menu with 'Roles' selected and a blue link with a person icon and the text 'Choose Role'. The 'Privileges' section has two checkboxes, both of which are checked. The first checkbox is labeled 'Global Administrator' and the second is labeled 'Send Message'.

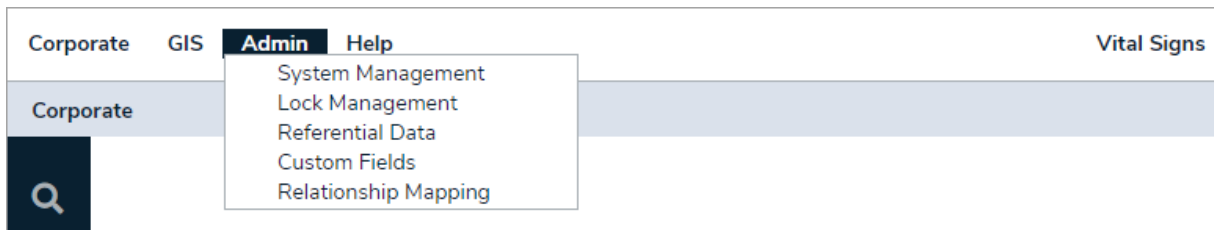
4. Click Save.

## Mask a Security Role

Masking a role refers to determining which fields users can see on Contact records to protect personally identifiable information. If a privilege checkbox is not selected, the data in the associated field will appear encrypted to the user (i.e. \*\*\*\*\*).

By default, every user account is placed in the Everyone role. You must alter the Everyone role to set the minimum-security level for all users.

1. To manage masking, hover your cursor over Administration, then click System Management.



2. Navigate to the Everyone role in the Structure panel to the left, then click on the role to show the Role Details.

**Role Details**

**Title:**

**Parent:**  ?

**Privileges:**

|                                                               |                                                           |                                                            |
|---------------------------------------------------------------|-----------------------------------------------------------|------------------------------------------------------------|
| <input type="checkbox"/> Global Administrator                 | <input type="checkbox"/> Send Message                     | <input checked="" type="checkbox"/> View Prefix Name       |
| <input checked="" type="checkbox"/> View First Name           | <input checked="" type="checkbox"/> View Middle Initial   | <input checked="" type="checkbox"/> View Last Name         |
| <input checked="" type="checkbox"/> View Suffix Name          | <input checked="" type="checkbox"/> View Full Name        | <input checked="" type="checkbox"/> View Site              |
| <input checked="" type="checkbox"/> View Department           | <input checked="" type="checkbox"/> View Title            | <input checked="" type="checkbox"/> View Organization      |
| <input checked="" type="checkbox"/> View Address Line 1       | <input checked="" type="checkbox"/> View Address Line 2   | <input checked="" type="checkbox"/> View City              |
| <input checked="" type="checkbox"/> View State                | <input checked="" type="checkbox"/> View Zipcode          | <input checked="" type="checkbox"/> View Country           |
| <input checked="" type="checkbox"/> View Notes                | <input checked="" type="checkbox"/> View Alt-Contact Name | <input checked="" type="checkbox"/> View Alt-Contact Phone |
| <input checked="" type="checkbox"/> View Alt-Contact Relation | <input checked="" type="checkbox"/> View Contact Method   | <input type="checkbox"/> View Support Passphrase           |
| <input type="checkbox"/> Custom Form Designer                 | <input type="checkbox"/> Latitude/Longitude               | <input checked="" type="checkbox"/> View Customer ID       |
| <input checked="" type="checkbox"/> View Dept ID              | <input checked="" type="checkbox"/> View Reports To       | <input checked="" type="checkbox"/> View Time Zone         |
| <input checked="" type="checkbox"/> View Business Unit ID     | <input type="checkbox"/> Edit GIS Layer                   | <input type="checkbox"/> Delete GIS Layer                  |

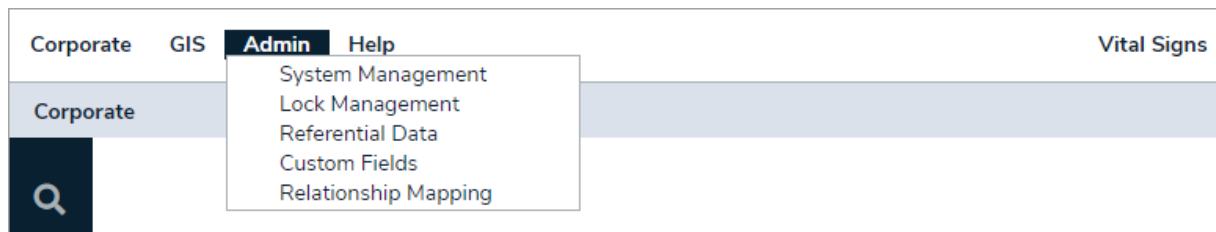
3. Configure the role's privileges as needed, then click Save.
4. Open another role or add a new role that you wish to apply masks to.
5. Click the privilege checkboxes to choose what users in the role can access.

| Structure                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Role Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                             |                                                  |                                                      |                                                     |                                                         |                                                    |                                                      |                                                    |                                               |                                                     |                                                |                                                       |                                                         |                                                         |                                               |                                                |                                                  |                                                  |                                     |                                                           |                                                            |                                                    |                                                         |                                                             |                                      |                          |                               |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|--------------------------------------------------|------------------------------------------------------|-----------------------------------------------------|---------------------------------------------------------|----------------------------------------------------|------------------------------------------------------|----------------------------------------------------|-----------------------------------------------|-----------------------------------------------------|------------------------------------------------|-------------------------------------------------------|---------------------------------------------------------|---------------------------------------------------------|-----------------------------------------------|------------------------------------------------|--------------------------------------------------|--------------------------------------------------|-------------------------------------|-----------------------------------------------------------|------------------------------------------------------------|----------------------------------------------------|---------------------------------------------------------|-------------------------------------------------------------|--------------------------------------|--------------------------|-------------------------------|
| <ul style="list-style-type: none"> <li>8.0 Edge Division</li> <li>8.0 IE Department</li> <li>8.0 IE Location</li> <li>8.0 Location</li> <li>8.0 Release Department</li> <li>8.0 Release Location</li> <li>Backups</li> <li>Business Group</li> <li>DD</li> <li>Enterprise Data</li> <li>Enterprise DR Exercise</li> <li>KW</li> <li>New Org <ul style="list-style-type: none"> <li>Contacts</li> <li>Documents</li> <li>Dynamic Groups</li> <li>Events</li> <li>Forms</li> <li>Messages</li> <li>News</li> <li>Plans</li> <li>Reports</li> <li>Resources</li> </ul> </li> <li>Roles <ul style="list-style-type: none"> <li>Manager</li> </ul> </li> <li>NYDOH</li> <li>SMS Testing</li> <li>WF Sample</li> <li>Ztesters</li> </ul> | <p>Title: <input type="text" value="Manager"/></p> <p>Parent: <input type="text" value="Roles"/> <a href="#">Choose Role</a></p> <p>Privileges:</p> <table border="0"> <tr> <td><input checked="" type="checkbox"/> Global Administrator</td> <td><input checked="" type="checkbox"/> Send Message</td> <td><input checked="" type="checkbox"/> View Prefix Name</td> </tr> <tr> <td><input checked="" type="checkbox"/> View First Name</td> <td><input checked="" type="checkbox"/> View Middle Initial</td> <td><input checked="" type="checkbox"/> View Last Name</td> </tr> <tr> <td><input checked="" type="checkbox"/> View Suffix Name</td> <td><input checked="" type="checkbox"/> View Full Name</td> <td><input checked="" type="checkbox"/> View Site</td> </tr> <tr> <td><input checked="" type="checkbox"/> View Department</td> <td><input checked="" type="checkbox"/> View Title</td> <td><input checked="" type="checkbox"/> View Organization</td> </tr> <tr> <td><input checked="" type="checkbox"/> View Address Line 1</td> <td><input checked="" type="checkbox"/> View Address Line 2</td> <td><input checked="" type="checkbox"/> View City</td> </tr> <tr> <td><input checked="" type="checkbox"/> View State</td> <td><input checked="" type="checkbox"/> View Zipcode</td> <td><input checked="" type="checkbox"/> View Country</td> </tr> <tr> <td><input type="checkbox"/> View Notes</td> <td><input checked="" type="checkbox"/> View Alt-Contact Name</td> <td><input checked="" type="checkbox"/> View Alt-Contact Phone</td> </tr> <tr> <td><input type="checkbox"/> View Alt-Contact Relation</td> <td><input checked="" type="checkbox"/> View Contact Method</td> <td><input checked="" type="checkbox"/> View Support Passphrase</td> </tr> <tr> <td><input type="checkbox"/> Custom Form</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/> View</td> </tr> </table> | <input checked="" type="checkbox"/> Global Administrator    | <input checked="" type="checkbox"/> Send Message | <input checked="" type="checkbox"/> View Prefix Name | <input checked="" type="checkbox"/> View First Name | <input checked="" type="checkbox"/> View Middle Initial | <input checked="" type="checkbox"/> View Last Name | <input checked="" type="checkbox"/> View Suffix Name | <input checked="" type="checkbox"/> View Full Name | <input checked="" type="checkbox"/> View Site | <input checked="" type="checkbox"/> View Department | <input checked="" type="checkbox"/> View Title | <input checked="" type="checkbox"/> View Organization | <input checked="" type="checkbox"/> View Address Line 1 | <input checked="" type="checkbox"/> View Address Line 2 | <input checked="" type="checkbox"/> View City | <input checked="" type="checkbox"/> View State | <input checked="" type="checkbox"/> View Zipcode | <input checked="" type="checkbox"/> View Country | <input type="checkbox"/> View Notes | <input checked="" type="checkbox"/> View Alt-Contact Name | <input checked="" type="checkbox"/> View Alt-Contact Phone | <input type="checkbox"/> View Alt-Contact Relation | <input checked="" type="checkbox"/> View Contact Method | <input checked="" type="checkbox"/> View Support Passphrase | <input type="checkbox"/> Custom Form | <input type="checkbox"/> | <input type="checkbox"/> View |
| <input checked="" type="checkbox"/> Global Administrator                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <input checked="" type="checkbox"/> Send Message                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <input checked="" type="checkbox"/> View Prefix Name        |                                                  |                                                      |                                                     |                                                         |                                                    |                                                      |                                                    |                                               |                                                     |                                                |                                                       |                                                         |                                                         |                                               |                                                |                                                  |                                                  |                                     |                                                           |                                                            |                                                    |                                                         |                                                             |                                      |                          |                               |
| <input checked="" type="checkbox"/> View First Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <input checked="" type="checkbox"/> View Middle Initial                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <input checked="" type="checkbox"/> View Last Name          |                                                  |                                                      |                                                     |                                                         |                                                    |                                                      |                                                    |                                               |                                                     |                                                |                                                       |                                                         |                                                         |                                               |                                                |                                                  |                                                  |                                     |                                                           |                                                            |                                                    |                                                         |                                                             |                                      |                          |                               |
| <input checked="" type="checkbox"/> View Suffix Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <input checked="" type="checkbox"/> View Full Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <input checked="" type="checkbox"/> View Site               |                                                  |                                                      |                                                     |                                                         |                                                    |                                                      |                                                    |                                               |                                                     |                                                |                                                       |                                                         |                                                         |                                               |                                                |                                                  |                                                  |                                     |                                                           |                                                            |                                                    |                                                         |                                                             |                                      |                          |                               |
| <input checked="" type="checkbox"/> View Department                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <input checked="" type="checkbox"/> View Title                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <input checked="" type="checkbox"/> View Organization       |                                                  |                                                      |                                                     |                                                         |                                                    |                                                      |                                                    |                                               |                                                     |                                                |                                                       |                                                         |                                                         |                                               |                                                |                                                  |                                                  |                                     |                                                           |                                                            |                                                    |                                                         |                                                             |                                      |                          |                               |
| <input checked="" type="checkbox"/> View Address Line 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <input checked="" type="checkbox"/> View Address Line 2                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <input checked="" type="checkbox"/> View City               |                                                  |                                                      |                                                     |                                                         |                                                    |                                                      |                                                    |                                               |                                                     |                                                |                                                       |                                                         |                                                         |                                               |                                                |                                                  |                                                  |                                     |                                                           |                                                            |                                                    |                                                         |                                                             |                                      |                          |                               |
| <input checked="" type="checkbox"/> View State                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <input checked="" type="checkbox"/> View Zipcode                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <input checked="" type="checkbox"/> View Country            |                                                  |                                                      |                                                     |                                                         |                                                    |                                                      |                                                    |                                               |                                                     |                                                |                                                       |                                                         |                                                         |                                               |                                                |                                                  |                                                  |                                     |                                                           |                                                            |                                                    |                                                         |                                                             |                                      |                          |                               |
| <input type="checkbox"/> View Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <input checked="" type="checkbox"/> View Alt-Contact Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <input checked="" type="checkbox"/> View Alt-Contact Phone  |                                                  |                                                      |                                                     |                                                         |                                                    |                                                      |                                                    |                                               |                                                     |                                                |                                                       |                                                         |                                                         |                                               |                                                |                                                  |                                                  |                                     |                                                           |                                                            |                                                    |                                                         |                                                             |                                      |                          |                               |
| <input type="checkbox"/> View Alt-Contact Relation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <input checked="" type="checkbox"/> View Contact Method                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <input checked="" type="checkbox"/> View Support Passphrase |                                                  |                                                      |                                                     |                                                         |                                                    |                                                      |                                                    |                                               |                                                     |                                                |                                                       |                                                         |                                                         |                                               |                                                |                                                  |                                                  |                                     |                                                           |                                                            |                                                    |                                                         |                                                             |                                      |                          |                               |
| <input type="checkbox"/> Custom Form                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <input type="checkbox"/> View                               |                                                  |                                                      |                                                     |                                                         |                                                    |                                                      |                                                    |                                               |                                                     |                                                |                                                       |                                                         |                                                         |                                               |                                                |                                                  |                                                  |                                     |                                                           |                                                            |                                                    |                                                         |                                                             |                                      |                          |                               |

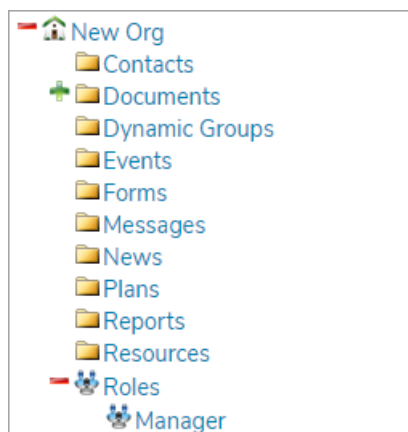
6. Click Save when finished.

## Delete a Security Role

1. To delete a role, hover your cursor over Administration, then click System Management.



2. Navigate to the applicable org, then click the role you wish to delete.



3. In the Role Details section, verify that you have selected the correct role, then click Delete.
4. Click Confirm to confirm you wish to delete the role and its configurations.

## Lock Management (Record Locking) Overview

Record locking allows an administrative user to place a “lock” on a record through the Admin settings.

### Lock Management

#### Structure

- 8.0 Release Location
- Backups
- Business Group
- DD
- Enterprise Data
- Enterprise DR Exercise
- KW
- New Org
  - Contacts
  - Documents
    - Corporate Facts
    - Policies
    - Regulations
  - Dynamic Groups
  - Events
  - Forms
  - Messages
  - News
  - Plans
  - Reports

Browse

Filter - Results

Filter

Reset

Advanced Filter

#### Lock Details

Title: Corporate Facts

LockType Lock Effective Lock

Delete Lock ? ☐ ☐

Meta Delete Lock ? ☐ ☐

Save

#### Affecting Locks

No affecting locks exist.

#### All Locks

| Title | LockedBy | Lock Type          | Locked Date | Actions |
|-------|----------|--------------------|-------------|---------|
|       | admin    | Record Deletion    | 01/20/2016  |         |
|       | admin    | Meta Data Deletion | 01/20/2016  |         |

The Lock Management settings includes four sections:

- **Structure:** Allows you to select the record that you want to view, or apply a lock to.
- **Lock Details:** Allows you to apply locks to an object and see the current lock state of the record.
- **Affecting Locks:** Displays a list of locks that are affecting the currently selected record.
- **All Locks:** Displays a list of all locks in the system.

## Record Lock Types

There are two types of record locks in Global AlertLink: Delete Lock and Meta Delete Lock.

Delete Lock specifies that an entire record cannot be deleted from the system (either by user actions or automatic system actions). Meta Delete Lock prevents meta data for a record from being removed from the system. Metadata is auxiliary information about a record or the usage of a record. Two examples of metadata include shares and permissions.



## Effective Locks

Record locks can have effects on other records in the system. Records that are affected by locks on other objects are said to be “Effectively Locked”. You can review a record’s lock state by selecting the record in the Structure section then reviewing the Effective Locks in the Lock Details section. Effective Locks are illustrated using disabled checkboxes, which are read-only.

**Lock Details**

Title: Documents

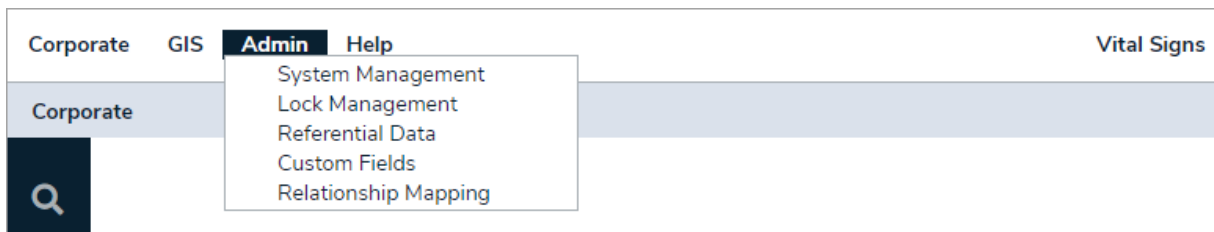
| LockType           | Lock                                | Effective Lock                      |
|--------------------|-------------------------------------|-------------------------------------|
| Delete Lock ?      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Meta Delete Lock ? | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Save

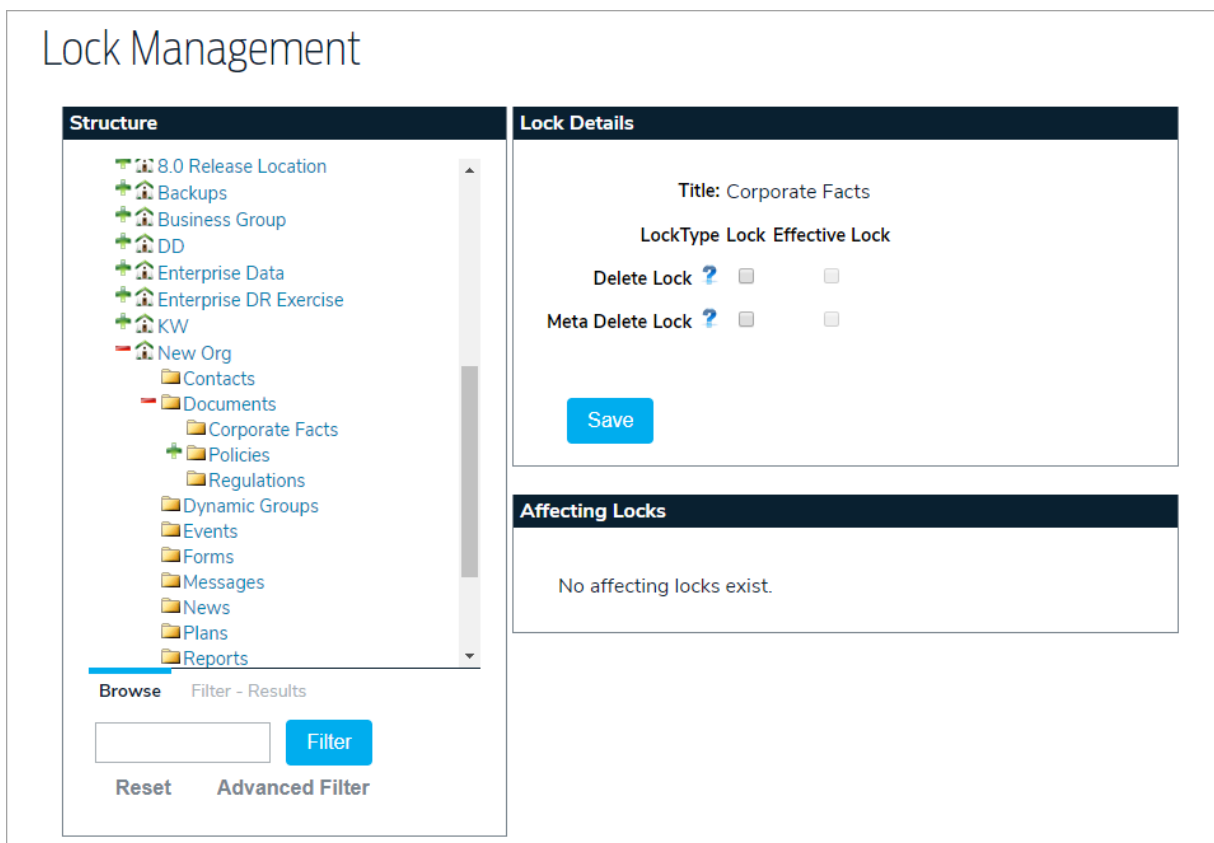
Some lock types have effects on other lock types. Meta Delete locks implicitly activate Delete Locks. In other words, applying the Meta Delete Lock will automatically activate the Delete Lock.

## Lock a Record

1. To lock a record, hover your cursor over Admin, then select Lock Management.



2. Navigate and click on the record you wish to lock in the Structure panel to the left.



3. In the Lock Details section, select the checkboxes besides the appropriate lock type(s).
4. Click Save.

## Unlock a Record

Records can be unlocked by navigating to the Lock Management settings, opening the Lock Details for the record, deselecting the checkbox(es) by the lock type, then clicking Save.

**Lock Details**

Title: Corporate Facts

| LockType           | Lock                                | Effective Lock           |
|--------------------|-------------------------------------|--------------------------|
| Delete Lock ?      | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Meta Delete Lock ? | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Save

Locks can also be deleted from a record in the All Locks section by clicking the delete icon in the Actions column.

| All Locks                                                                           |          |                    |             |                                                                                       |
|-------------------------------------------------------------------------------------|----------|--------------------|-------------|---------------------------------------------------------------------------------------|
| Title                                                                               | LockedBy | Lock Type          | Locked Date | Actions                                                                               |
|  | admin    | Record Deletion    | 01/20/2016  |  |
|  | admin    | Meta Data Deletion | 01/20/2016  |  |

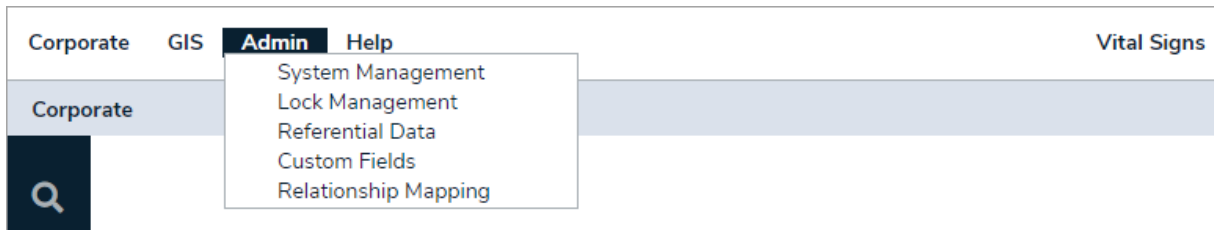
## Referential Data Overview

Referential Data allows you to maintain a number of data elements for use throughout the system. These include:

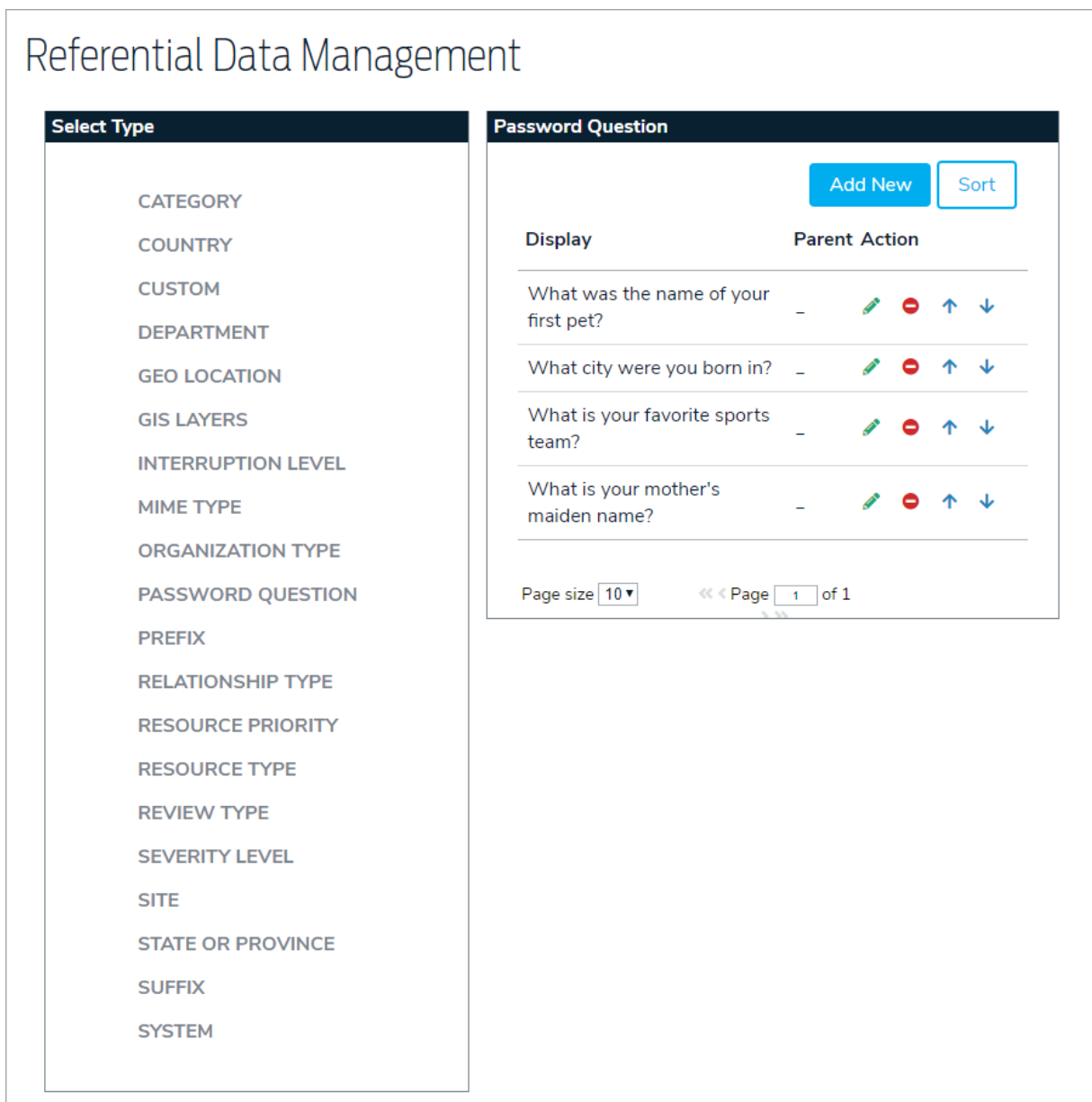
- **Interruption Level:** Defines the status of an organizational unit. You may assign any number of interruption levels. Both plans and events use interruption levels for classification. The interruption level is directly linked to the vital signs dashboard. Interruption level is a global setting.
- **Severity Level:** A classification used for plans and events. You may define any number of severity levels. Severity level is a global setting.
- **Countries:** You may define and order the countries listed in the contact section of the system. Countries are a global setting.
- **States or Provinces:** You may define and order the states and/or provinces listed in the contact section of the system. States or provinces are a global setting.
- **Prefixes:** You may define and order the prefixes listed in the contact section of the system. Prefixes are a global setting.
- **Suffixes:** You may define and order the suffixes listed in the contact section of the system. Suffixes are a global setting.
- **Organization Types:** A type of classification for further defining the organizational units created in the system architecture. Organization type is a global setting.
- **Resource Types:** A classification for further defining the resources in each organizational unit. Resource type is a global setting.
- **Resource Priorities:** Used for classifying the recovery priority of a resource in each organizational unit. Resource priority is a global setting.
- **Document Categories:** Provides additional categorization and searching for documents stored in each organizational unit. Document category is a global setting.
- **Password Question:** Allows you to define the possible password confirmation questions used when users request their password from the system.
- **System Name:** Allows you to define the company name and introduction information located on the login screen.

## Configure Referential Data

1. To access the referential data, hover your cursor over Admin, then click Referential Data.



2. Select a data type from the Select Type panel to the left to display its details.



3. To add a referential data entry, click Add New, enter a display name, and select the entry's parent(s), if needed. Click Save & Continue.

Password Question

Sort

Add New

Display:

Select Parents:

☐ What is your favorite sports team?  
☐ What city were you born in?  
☐ What is your mother's maiden name?  
☐ What was the name of your first pet?

Save & Continue

Cancel

4. To manually sort the referential data entries, click the arrow buttons to move the entry up or down in the list. button located at the top of the Referential Data screen. This will sort the list of referential data entries alphabetically.
5. To sort the entries alphabetically, click Sort.
6. To delete an entry click the  button beside the entry.

## Custom Fields Overview

Custom fields allow users to create organization-specific data fields related to News, Plans, Contacts, Events, Documents, or Resources. Custom fields can be populated when your organization's data is imported into Global AlertLink.

| Custom Field Management                   |         |               |                        |        | Search By Custom Field name <input type="text"/> | <input type="button" value="Add New"/> |
|-------------------------------------------|---------|---------------|------------------------|--------|--------------------------------------------------|----------------------------------------|
| Name                                      | Used On | Type          | Added Date             | Action |                                                  |                                        |
| Test Dropdown                             |         | DropDown List | 06/06/2017 11:49:21 AM |        |                                                  |                                        |
| Business Unit ID                          |         | TextBox       | 08/17/2015 05:11:38 PM |        |                                                  |                                        |
| CustomContactScoped                       |         | TextBox       | 03/30/2016 03:38:38 PM |        |                                                  |                                        |
| Time Zone                                 |         | TextBox       | 08/17/2015 05:10:59 PM |        |                                                  |                                        |
| Name1                                     |         | Label         | 01/08/2016 09:59:39 AM |        |                                                  |                                        |
| Dept ID                                   |         | TextBox       | 08/17/2015 04:49:14 PM |        |                                                  |                                        |
| Reports To                                |         | TextBox       | 08/17/2015 04:49:39 PM |        |                                                  |                                        |
| Yes/No                                    |         | DropDown List | 12/11/2015 10:15:07 AM |        |                                                  |                                        |
| Issue Type                                |         | DropDown List | 12/11/2015 10:17:08 AM |        |                                                  |                                        |
| 8.0 Label                                 |         | Label         | 06/21/2018 01:08:07 PM |        |                                                  |                                        |
| Page size <input type="text" value="10"/> |         |               |                        |        | <<<Page 10 of 11>>>                              |                                        |
|                                           |         |               |                        |        | Displaying 91 - 100 of 102                       |                                        |

## Add a Custom Field

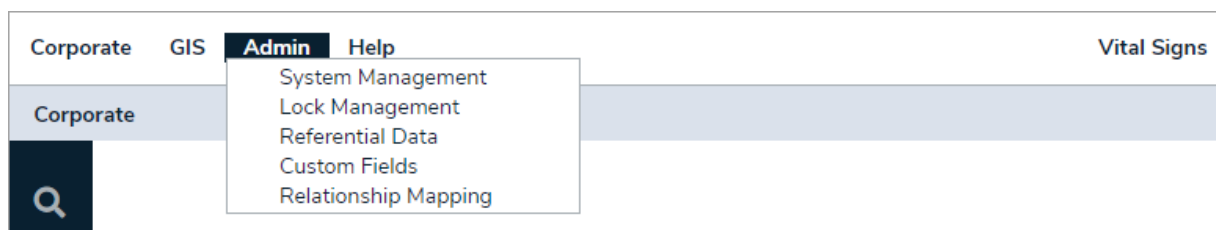
Custom fields are accessed in the administrative settings. From here, you can search by field name or narrow down which fields are displayed by clicking the magnifying glass icon in the Used On or Type column headers.

| Used On | Type                                         |
|---------|----------------------------------------------|
|         | <input checked="" type="checkbox"/> Contact  |
|         | <input checked="" type="checkbox"/> Document |
|         | <input checked="" type="checkbox"/> Event    |
|         | <input checked="" type="checkbox"/> News     |
|         | <input checked="" type="checkbox"/> Plan     |
|         | <input checked="" type="checkbox"/> Resource |
|         | TextBox                                      |
|         | Label                                        |

| Used On | Type                                              | Added Date |
|---------|---------------------------------------------------|------------|
|         | <input checked="" type="checkbox"/> Label         |            |
|         | <input checked="" type="checkbox"/> TextBox       | /2017      |
|         | <input checked="" type="checkbox"/> DropDown List |            |
|         | <input checked="" type="checkbox"/> Checkbox      | /2015      |
|         | <input checked="" type="checkbox"/> Lookup Field  | /2016      |
|         | TextBox                                           | 08/17/2015 |
|         | Label                                             | 01/08/2016 |

Note: Custom fields can contain any type of data format, alpha, numeric, alphanumeric. However, if you use these characters <> in a field, you may encounter problems loading the form or dashboard. By default, these are blocked during page redirects and other actions to prevent any kind of scripting attacks. It's a very common attack to inject html, JavaScript or similar scripting languages, and even SQL code into text boxes to try and force a bad response from a website to potentially gain access to data or even corrupt entire systems.

1. To create a custom field, hover your cursor over Admin, then click Custom Fields.



2. Click Add New.
3. Select Label, TextBox, DropDown List, Checkbox, or Lookup Field from the dropdown menu.

# Custom Fields

## Custom Fields

Back

Forward

Define

Scope

Sorting

Finish

What Type of field do you want to create? Select Type

Back

Forward

4. If you selected Label, enter a text value for the field.

What Type of field do you want to create? Label

Define the properties for this field:

Text Value:  ?

5. If you selected TextBox, specify the size of the box in pixels and a tooltip to the user that describes how the field is used.

What Type of field do you want to create? TextBox

Define the properties for this field:

Width:  ?

Height:  ?

Tooltip:  ?

6. If you selected DropDown List, enter the width and height of the list in pixels, a tooltip that describes to the user how the field is used, and the referential data or custom key associated with the field.

What Type of field do you want to create? DropDown List ▼

Define the properties for this field:

Width:  ?

Height:  ?

Tooltip:  ?

Referential Key: Select ▼ ?

Custom Key: Select ▼ ?

7. If you selected Checkbox, enter a tooltip that describes to the user how the field is used, then enter a text value.

What Type of field do you want to create? Checkbox ▼

Define the properties for this field:

Tooltip:  ?

Text Value:  ?

8. If you selected Lookup Field, enter the width and height of the field in pixels, a tooltip that describes to the user how the field is used, and an object type key.

What Type of field do you want to create? Lookup Field ▼

Define the properties for this field:

Width:  ?

Height:  ?

Tooltip:  ?

Object Type Key: Select ▼ ?

9. Click Forward to choose the scope of the field. The custom field can be associated with all GAL objects or specific objects within your organizational structure.

Back

Forward

Define

Scope

Sorting

Finish

Include on:

☐ All News
 ☐ All Contacts
 ☐ All Documents

☐ All Plans
 ☐ All Events
 ☐ All Resources

Include Options

+ Corporate

Include

Exclude

Included Selections

Excluded Selections

- Click Forward, then select where the custom field will be inserted in your organization's list of custom fields.

Back

Forward

Define

Scope

Sorting

Finish

Please select a custom field. The new custom field will be inserted below your selection.

Select Custom Field ▼

Back

Forward

- Click Forward, then enter the name of the custom field.

Back Forward

Define Scope Sorting **Finish**

Custom Field Name:

Add and Exit Cancel

Back Forward

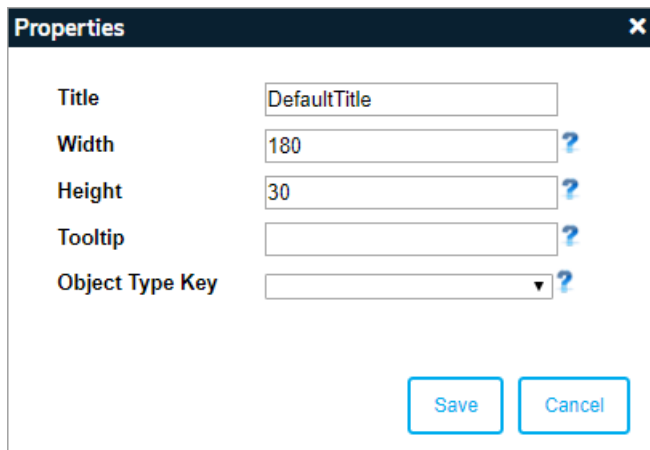
12. Click Add & Exit. The custom field will appear in the Additional Information section for the Global AlertLink objects you selected in the Scope.

## Add a Lookup Field

In Global AlertLink Release 7.10.00, Lookup fields were added as a type of custom field on objects and forms. Lookup fields allow the user to search for a specific object type, select the object, and place it into the Custom or Form Field.

1. To create a lookup field as a custom field type, select Add on the Custom Field screen.
2. Select Lookup Field as the type of field you want to create. You must also designate what type of object you want the lookup field to search for when the user enters the data into the field. A lookup field can only be linked to one object type.
3. Scope and sort the field to finish and save your changes.

Lookup fields can also be added to forms with the new Lookup Field toolbox on the designer. Like textbox fields on forms, lookup fields can be given a title, size and tooltip, but the additional Object Type Key field, just like in the Custom Field example, that indicates what object the user will search for to find the data that will be placed in the field



The screenshot shows a 'Properties' dialog box with a dark header bar containing the title 'Properties' and a close button 'X'. The dialog contains five labeled input fields: 'Title' with the text 'DefaultTitle', 'Width' with the value '180', 'Height' with the value '30', 'Tooltip' which is empty, and 'Object Type Key' which is a dropdown menu. Each of the last four fields has a blue question mark icon to its right. At the bottom right of the dialog are two buttons: 'Save' and 'Cancel'.



If the lookup field is keyed to search for Contacts or Resources, the user is presented with the Advanced button that will allow them to narrow their search for a Contact or Resource by filtering on Names, Custom Fields, etc.



If a lookup field references a deleted item, that item will appear as red strikethrough text.

