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Contacts Overview

The Contacts feature provides a robust contact management area for each business unit within the system. Both contacts and users are managed from the same location for ease of use. This area also allows you to maintain the contact methods for each contact for broadcast emergency notification.

Contacts		Filter	Add	Share	
First Name	Last Name ↑	Title		Actions	
John	Doe			 	
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Create a Contact Record

Once a contact record is created, it can be used to create a new user account. See the [Account](#) article for more information on creating a new user from the contact record.

1. To add a new user, click the Contacts  icon in the navigation bar.

Contacts

FilterAddShare

First Name	Last Name ↑	Title	Actions
John	Doe		 

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2. Click Add.
3. Enter a first and last name in the First Name and Last Name fields.

Contacts

General

Salutation: Select a prefix ▾

First Name:

Mid. Initial:

Last Name:

Suffix: Select a suffix ▾

Folder:  [Choose Folder](#)

Site: Select a site ▾

Department: Select a department ▾

Title:

Company:

Notes:

Alternate Contact Name:

Alternate Contact Phone:

Alternate Contact Relationship:

4. Complete any custom fields as needed.
5. Click Add & Continue to save the record and display additional options.

View, Filter & Sort Contacts

To view an existing contact, click the Contacts icon in the navigation bar, then click the  in the Actions column. To edit the record, click the  icon.

Contacts

Filter

Add

Share



First Name	Last Name ↑	Title	Actions
John	Doe		 
Jane	Doe		 

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 of 1 > >>

Displaying 1 - 2 of 2

To filter the records by folder, click Filter, then select a folder.

Filter By Folder

 New Org

 ☒ Contacts

 ☒ Contacts

Filter

To sort the records, click the First Name, Last Name, or Title headers.

Contact Methods

1. To enter and manage contact methods for a specific record, open the record, then click the Contact-Methods tab.

Contacts

General **Contact-Methods** Account Photo Relationships Shares Forms

Add a New Contact Method for Jane Doe

Select Device Type: ---- ▼

Select Method Type: ---- ▼

Display: ?

Add

This Contact does not have any Methods

Subscription Category Preferences

No Subscription Category Preferences

Add

2. Select a device type, method, then enter the email address, phone number, etc. in the text field. The options available may vary depending on your implementation.

*Note: If you selected the Phone device type, telephone extensions entered in the Extension field are **not** used when this contact method is selected in an ad hoc message or broadcast. This field is used for data collection purposes only. See the [Phone Number Validation & Requirements](#) article for more information.*

Select Device Type: Phone ▼

Select Method Type: Work Phone ▼

Phone: ?

Extension:

Add

3. Click Add.

Phone Number Validation & Requirements

During the data import process, GAL validates phone numbers used as a contact method.

If the number starts with 1 and has no plus sign (+), the system assumes it's a domestic number and attempts to validate it as a US number. For example, since a number with 1 with no + would typically represent the US country code, the extra 1 is removed (e.g. 1123456789 would become 123456789). In the case of this particular number, removing the first 1 results in the number being one digit too short for an international number and it fails the first rule (that the first character should be a number 2-9) for a domestic number.

Requirements

If the first character is a 1, do a substring to remove the leading one, then validate as a domestic number (validateDomesticPhoneNumber)

Else If the first character is a +, validate as international (validateInternationalPhoneNumber)

Else Attempt to validate as domestic. If that works stop. If that domestic validation fails, append a + and attempt to validate as international

Domestic:

expects '(' zero or one times

expects the first or second character to be 2-9

expects the following two characters to be 0-9

expects ')' zero or one times

allows any whitespace, period, or hyphen (' ', '.', '-')

expects the following three characters to be 0-9

allows any whitespace, period, or hyphen (' ', '.', '-')

expects the following four characters to be 0-9

allow 0-9 between 1-200 times

ex: (234)-333-5555, 5555555555, 555.555.555, 555 555 555, 1(555 555.5555 are all valid numbers in a data feed for contact methods.

International:

expects '+'

expects the first character to be 1-9

expects the following n characters to be 0-9

allows '('

expects the following n characters to be 0-9

allows ')'

allows '-'

expects the following n characters to be 0-9

allows '-'

expects the following n characters to be 0-9

allows .

expects the following n characters to be 0-9

allows .

allows any whitespace character

expects the following n characters to be 0-9

allows any whitespace character

allow 0

allow 1-9 followed by any number 0-9 or \ or -

allow 0-9 between 1-200 times

Note: International numbers vary greatly in length and format. The standard format is a maximum length of 15 characters. International phone number validation is difficult. Please consult various reference documents that are available to determine the correct format for your land line, mobile phone and SMS device. If you have any questions, contact support@resolver.com for assistance.

Contact Account

User accounts in Global AlertLink are created in the Account section of a contact record's settings.

1. To create a user account, open the Contact record.
2. Click the Account tab.

The screenshot shows the 'Account' tab selected in a contact record's settings. The interface includes a top navigation bar with tabs: General, Contact-Methods, **Account**, Photo, Relationships, Shares, Forms, Locations, and Properties. Below the tabs are four main sections: 'Basic Info', 'Password', 'Security Question', and 'Role Membership'. The 'Basic Info' section contains fields for 'User Name' and 'Account Email', and checkboxes for 'Disable User', 'Enable User', and 'Password Never Expires'. The 'Password' section has fields for 'Password' and 'Confirm New Password', with a help icon next to the password field. The 'Security Question' section includes a 'Support Passphrase' field, a 'Security Question' dropdown menu, and a 'Security Answer' field. The 'Role Membership' section shows 'User's Current Roles' as 'User does not belong to any roles' with an '- Add -' link. At the bottom are three buttons: 'Add & Exit', 'Add & Continue', and 'Cancel'.

General Contact-Methods **Account** Photo Relationships Shares Forms Locations Properties

Basic Info

User Name:

Account Email:

Disable User ☐

Enable User ☐

Password Never Expires ☐

Password

Password: ?

Confirm New Password:

Security Question

Support Passphrase:

Security Question:

Security Answer:

Role Membership

User's Current Roles:

User does not belong to any roles

[- Add -](#)

Add & Exit **Add & Continue** Cancel

3. Enter a user name and account email.
4. Select the Enable User or Password Never Expires checkboxes as required.
5. Create a password and security question for the account.
6. Add the user to one or more roles to determine the permissions and privileges available to the user.
7. Click Add & Exit or Add & Continue.

Contact Photo

1. To upload an image for the contact, open the contact record.
2. Click the Photo tab.

Contacts

General Contact-Methods Account **Photo** Relationships Shares Forms Locations Properties

Contact photos should be a JPG, GIF, or PNG file. The recommended size for photos is 60 x 70 pixels.

Browse for a File to Upload:

Choose File

No file chosen

Upload

No Files have been Uploaded

3. Click Choose File.
4. Locate the photo on your local computer or network drives.
5. Select the file, then click Open.
6. Click Upload to save the photo the record.

Contact Relationships

You can create relationships between items and any record type (except for [News & Updates](#)) through the **Relationships** tab of that record.

For more relationship features, see the [Relationship Mapping](#) tool in Administration, the [Relationship Editor](#) form type, or the [relationship builder](#) tool on custom forms.

To add a relationship from the Relationships tab of a record:

1. Navigate to the applicable organization and open the record.
2. Click the **Relationships** tab.
3. Select a relationship type from the dropdown menu in the **Relationships** column. Relationship types are configured in the [Referential Data](#) settings.
4. Click the textbox on the left of the top row and enter keywords to search for and select an object or click the  icon to the right of the text field to display the **Association Tree**, then select an object.

Contacts

General Contact-Methods Account Photo **Relationships** Shares Forms Locations Properties

Modeler

Associated Items

Title ↑	Relationships 	Title	Actions
 Jane Doe	Not Specified ▾	John Doe 	
 Activate Plan	Not Specified ▾	 Jane Doe	  
 Activate Plan	Not Specified ▾	 Jane Doe	  
 Jane Doe	Not Specified ▾	 Activate Plan	  

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A new relationship in the relationships tab of an object.

5. Click the  icon to save the relationship.

6. Click the  icons to swap the objects in the relationship, delete the relationship, or view more information.

Contact Shares

Contacts, Documents, Resources, and Forms can be shared across business units. By sharing, you are creating a link to the original source record. This does not duplicate the record, so any changes made will impact all shares. To share a contact record, click the appropriate icon in the navigation bar, then click Share to select which record will be shared and its destination.

Manage Shared Documents

Selection

- Backups
- Business Group
- Corp
- DD
- Enterprise Data
- Enterprise DR Exercise
- KW
- New Org
 - Documents
 - Events
 - Plans
- NYDOH

Browse

Filter - Results

Filter

Reset

Destination

- New Org
 - Documents
 - Events
 - Plans
 - Plan 1
 - Documents
 - Plan 2

Browse

Filter - Results

Filter

Reset

Share

Local Folder Shares

No items to display

To view where the record is shared, as well as the subscription categories the record is subscribed to, if any, for each folder, click the Shares tab in the record. Click the pencil icon to edit the share or the delete icon to remove it.

Contacts

General Contact-Methods Account Photo Relationships **Shares** Forms Locations Properties

Item ↓	Original Location	Shared Location	Subscription Category	Action
Jane Doe	Contacts	Contacts		

Page size

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Displaying 1 - 1 of 1

Contact Forms

To view the forms a user has completed, started, or is requested to complete, click the Contacts icon in the navigation bar, then click the Forms tab.

From the Actions column of this page, you can view or edit the form or display additional information about the form.

Contacts							
General Contact-Methods Account Photo Relationships Shares Forms Locations Properties							
Title ↓	Status	Assigned To	Completed By	Completed For	Completed Due To	Completed Date	Actions
Custom Form	Complete				 Corporate	05/22/2018 02:36:54 PM	  
Custom Form	Complete					05/22/2018 04:51:23 PM	  
Custom Form	Complete		 Admin Account	 Admin Account		05/22/2018 05:12:55 PM	  
Custom Form	Complete				 Corporate	05/22/2018 02:48:08 PM	  
Custom Form	Complete				 Corporate	05/22/2018 02:48:33 PM	  
Custom Form	Complete					05/22/2018 04:25:10 PM	  
Custom Form	In Progress					05/22/2018 04:40:18 PM	  
Custom Form	Requested						  
Custom Form	Complete				 Corporate	05/22/2018 05:57:05 PM	  
Custom Form	Complete				 Corporate	05/22/2018 05:58:24 PM	  
Page size 10 ▼ << Page 1 of 3 >> Displaying 1 - 10 of 30							

Contact Locations

The Locations tab of a contact record allows you to add one or more location entries for the user (e.g. Home Work). The location types are created and managed in the [Referential Data](#) settings.

Note: The data entered in the Latitude and Longitude fields are used in the the GIS Mapping Services.

Contacts

GeneralContact-MethodsAccountPhotoRelationshipsSharesFormsLocationsProperties

New Location

Location Type: Home

Is this the primary location: ☒

Title:

Address Line 1: 123 Street Avenue

Address Line 2:

City: Citytown

State: Arkansas

Zip Code: 0000

Country: USA

Latitude:

Longitude:

Add

Current Locations

Title	Location Type	
	Home	 

To edit an existing location, click it in the Current Locations section. To mark the location as the primary, click the star icon.

Current Locations

Title	Location Type
Home Location Type: Home Title: Address Line 1: 123 Street Avenue Address Line 2: City: Citytown State: Arkansas Zip Code: 0000 Country: USA Latitude: Longitude: Work	

Notes About the Country Field

The Country field for the contact's primary location is required to route international SMS messages. A location entry must be specified that corresponds to the contact's SMS device address, i.e. +56XXXXXXXXX is a mobile device address for Argentina and if you want to send SMS to this device you must specify a location record with a country = Argentina.

However, some international phone formats do not use country code, e.g. Canada, the Caribbean, U.S. Pacific Countries and Bermuda. Contacts that are in these countries also require a location record with the proper country in order to properly route SMS messages.

However, for international phone calls, if the country field is left blank, we will use the country code identifier in the contact method for the phone device type, i.e. +56XXXXXXXXXX will be recognized as a phone number in Argentina and an international call will be placed.

It is our recommendation that if you have contacts that are in other countries, you always create a location record with the proper country specified.

Contact Properties

The Properties tab of a record allows you to select an account or role as an owner of the record, review system information, schedule reviews, view existing schedules, pending reviews, and the record's history.

Contacts

[General](#) [Contact-Methods](#) [Account](#) [Photo](#) [Relationships](#) [Shares](#) [Forms](#) [Locations](#) **[Properties](#)**

Ownership

Owner:

No Owner Specified

[Choose Owner](#)

Added By:

Added Date: 09/17/2018 05:13:08 PM

Last Updated By:

Last Updated Date: 09/17/2018 05:13:08 PM

Reviews

New Schedule: Title:

Type:

Select a review type ▼

Trigger: ☒ Schedule ☐ Dependent

Due Every:

Day(s) ▼

Start Date: [Set to Now](#)

9/19/2018

 AT:

2 ▼

 :

28 ▼

PM ▼

Assigned To:

Unassigned

[Set Assignment](#)

☐ Automatically Notify Assignee When Assigned?

Add

