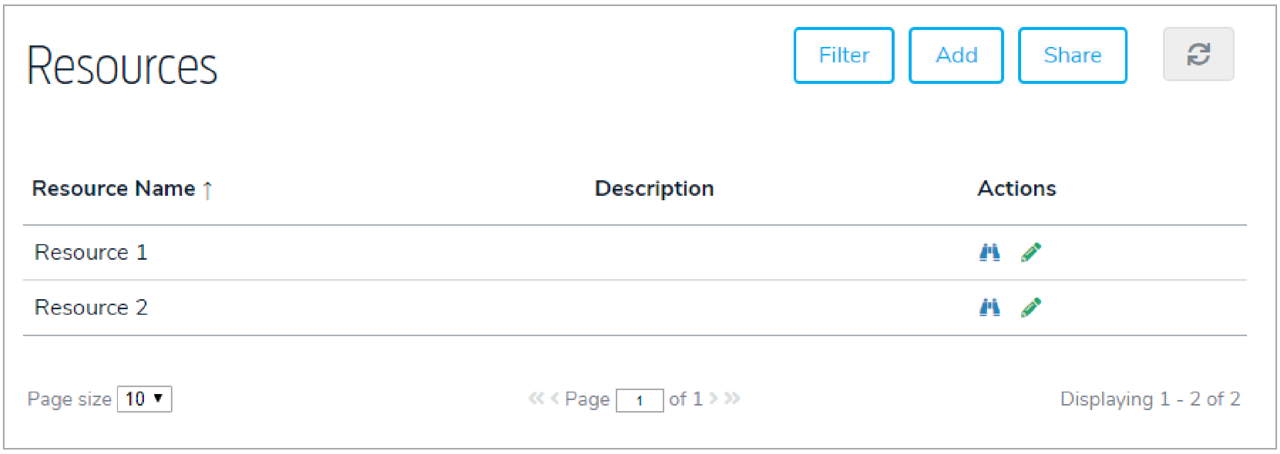
Table of Contents

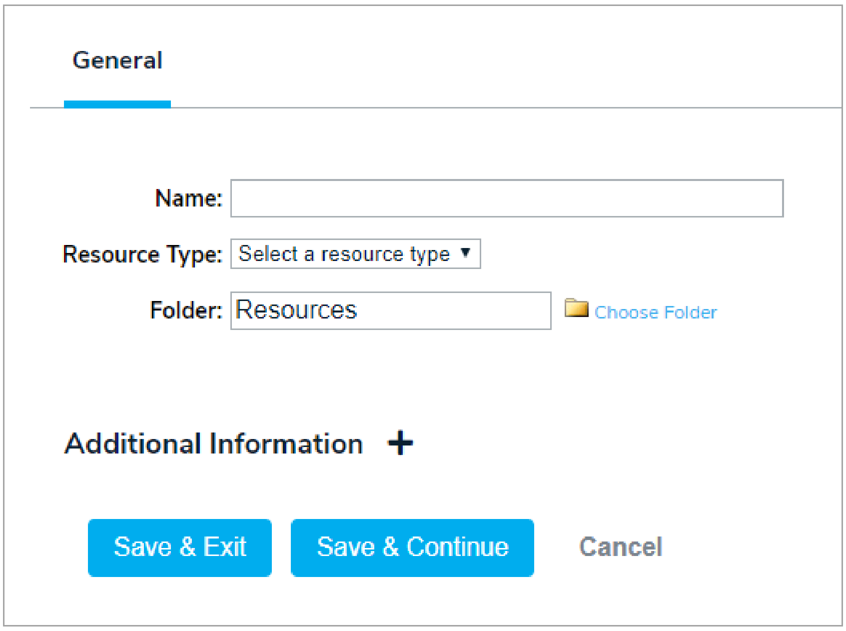
Resources Overview

Resources provides a sophisticated management system for a variety of resources needed in critical situations. Through this system you are able to create classifications of resources and store the required details needed for each, including items such as manufacturer, versions, inventory, quantity fields, etc.



Add a Resource

1. To add a resource, click Resources in the navigation bar, then click Add.
2. Enter a title for the record in the Name field.



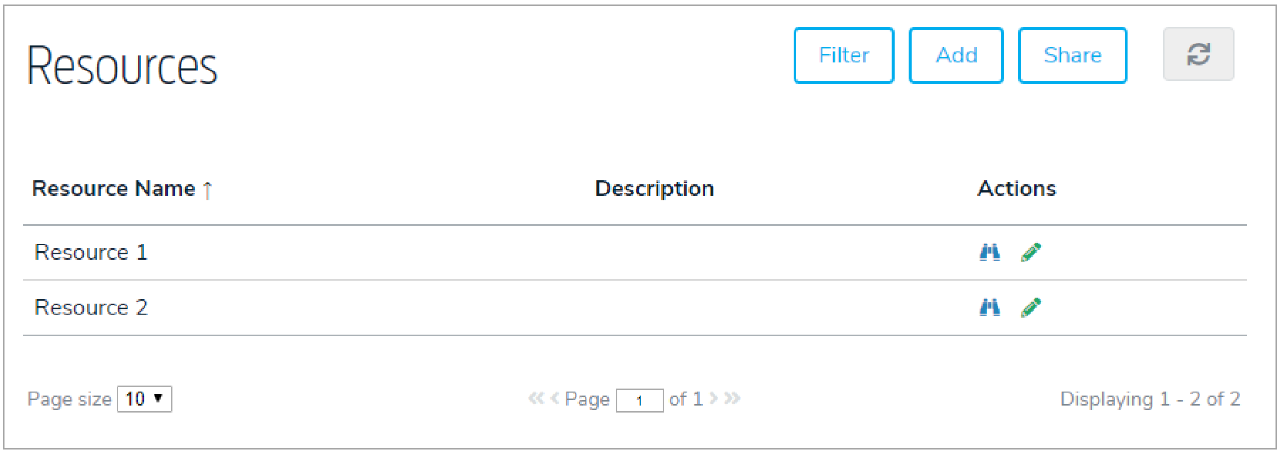
3. Select a a resource type from the Resource Type dropdown menu. The options in this menu are configured in the Referential Data settings.
4. If needed, select an alternate folder for the record by clicking Choose Folder.
5. Enter information in the custom fields, if any, in the Additional Information section.
6. Click Save & Continue.

A special note about Quantity fields. Quantity fields enable users to allocate and track how much (quantity) of a resource is required when that resource is related to other GAL objects (Contacts, Documents, Resources, Plans, Tasks, Broadcasts, Decisions, or Forms).

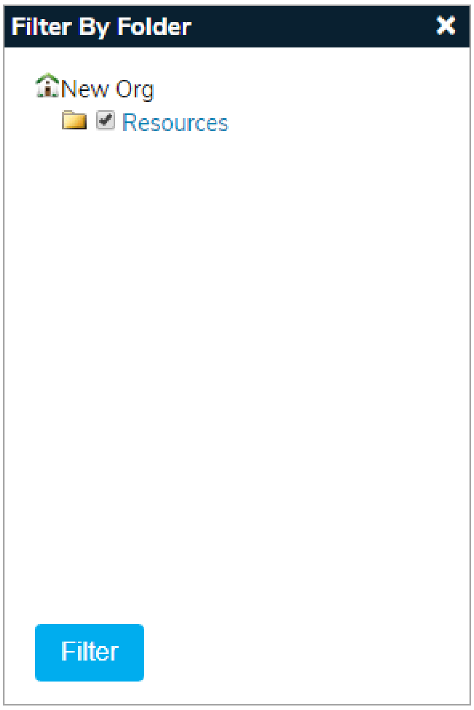
For example, you can specify, based on the relationship between the Fuel Gallons and the Building, what quantity is necessary if there is a prolonged power outage at that site. The distribution center is allocated 5 50-gallon fuel tanks as specified in Quantity Field 2.

View, Sort & Filter Resources

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



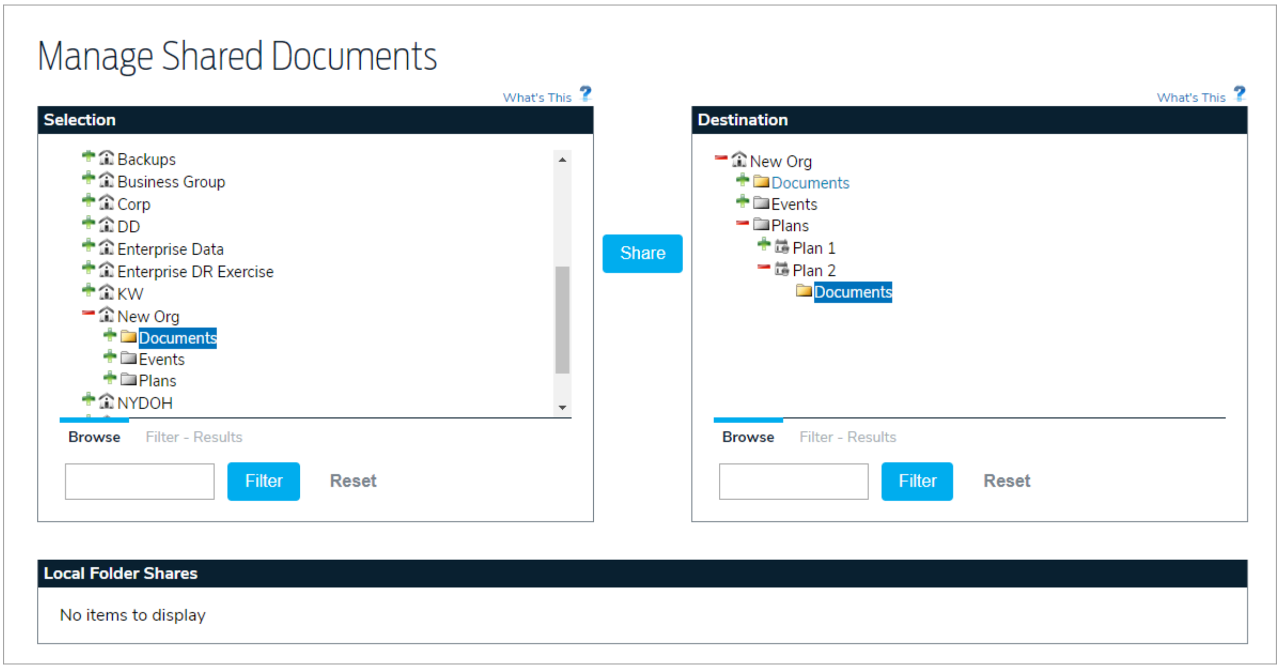
To filter the records by folder, click Filter, then select a folder.



To sort the records, click the column headers.

Resource 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.



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.