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## Forms Overview

The Forms section is where you may create Custom Forms, Plan-Event Editor, Relationship Editors or Organization Editors. Custom Forms are a way to add Data to a Plan or Event. A Custom Form is edited and completed. To add more Data, you must edit another Custom Form. Custom Forms are used once.

Plan-Event Editors are a way to View and/or Add Data to Events (Plans that have been Activated). Plan-Event Editors can be used any time a Plan is Activated. Plan-Event Editors can be used multiple times and can be used as a [plan or event dashboard](#).

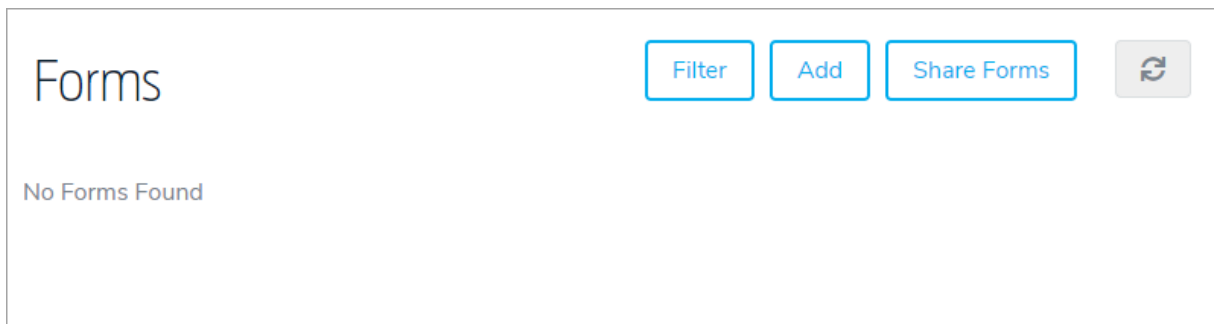
Relationship Editors are a way to View and/or Add Data to Relationships. Relationship Editors are specific to different Relationship Mappings.

Organization Editors are a way to View and/or Add Data to Organization Units. Organization Editors can be used by multiple organizations and can be used as an [organizational dashboard](#).

| Forms                                                          |                     |             |         |
|----------------------------------------------------------------|---------------------|-------------|---------|
| <div>FilterAddShare Forms</div>                                |                     |             |         |
| Title ↑                                                        | Type                | Description | Actions |
|                                                                | Custom Form         |             |         |
|                                                                | Custom Form         |             |         |
|                                                                | Custom Form         |             |         |
|                                                                | Plan - Event Editor |             |         |
|                                                                | Plan - Event Editor |             |         |
|                                                                | Plan - Event Editor |             |         |
|                                                                | Plan - Event Editor |             |         |
|                                                                | Custom Form         |             |         |
|                                                                | Custom Form         |             |         |
|                                                                | Custom Form         |             |         |
| Page size 10 < < < Page 1 of 13 > > > Displaying 1 - 10 of 130 |                     |             |         |

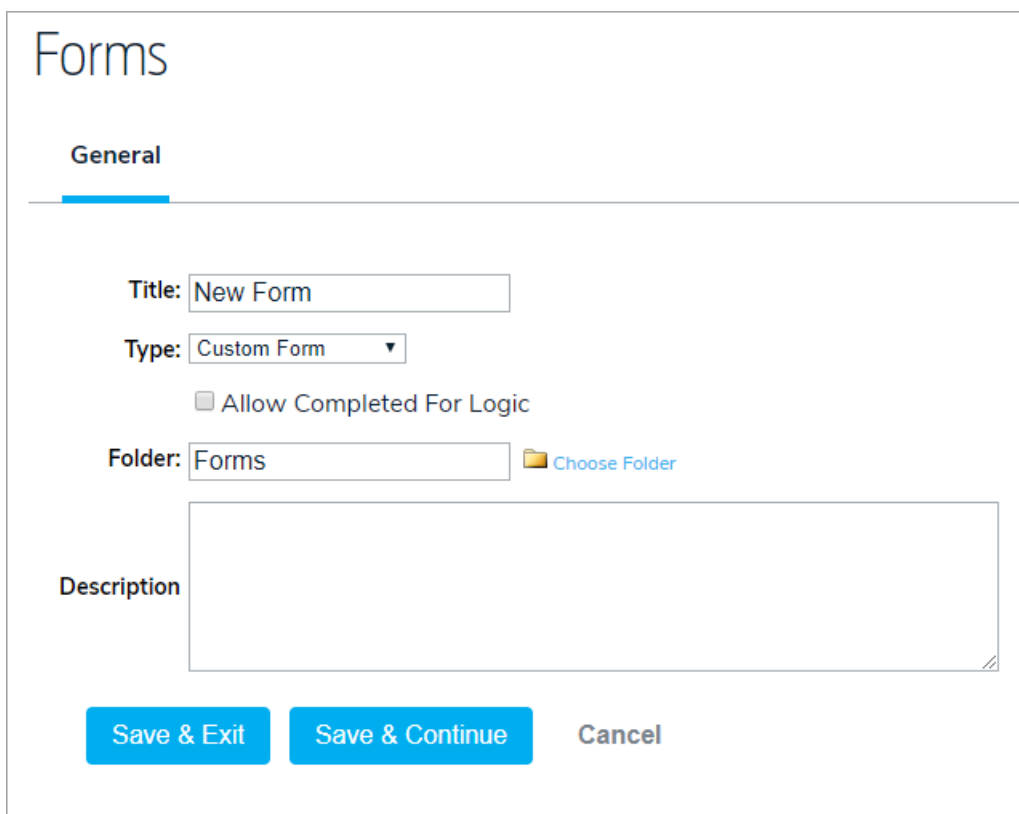
## Create a Form

1. To create a form, click the Forms icon in the navigation bar, then click Add.



The screenshot shows a web interface for managing forms. At the top left is the heading "Forms". To its right are three buttons: "Filter", "Add", and "Share Forms", followed by a circular refresh icon. Below the heading, the text "No Forms Found" is displayed.

2. Enter a name for the form in the Title field.
3. Select Custom Form, Plan - Event Editor, or Relationship Editor from the Type dropdown menu.

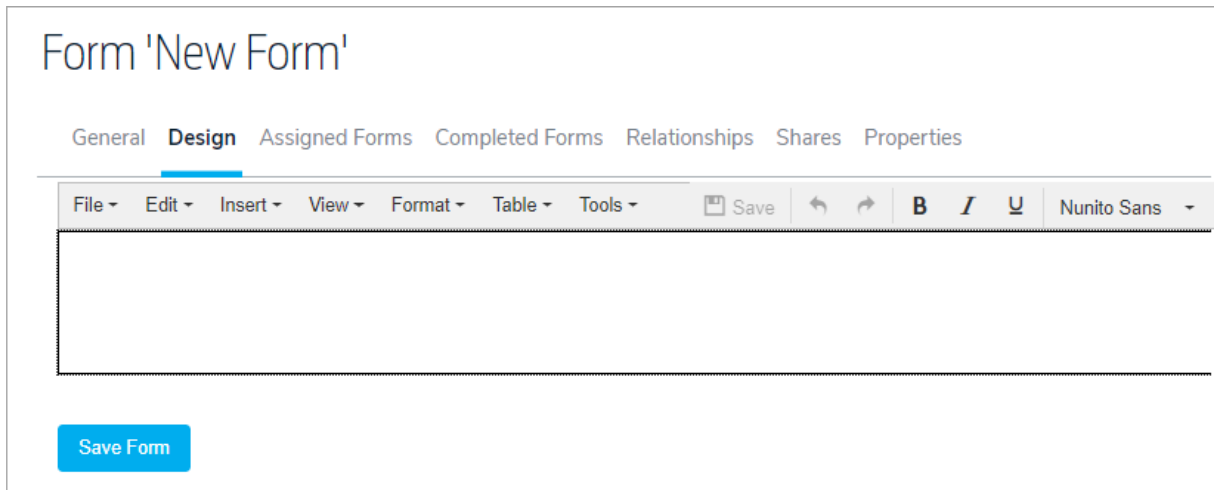


The screenshot shows the "Forms" creation dialog with the "General" tab selected. The "Title" field contains "New Form". The "Type" dropdown menu is set to "Custom Form". There is an unchecked checkbox for "Allow Completed For Logic". The "Folder" field contains "Forms" and has a "Choose Folder" link next to it. Below these fields is a large text area for the "Description". At the bottom of the dialog are three buttons: "Save & Exit", "Save & Continue", and "Cancel".

4. If you selected the Custom Form type and you wish to allow users to complete the form on behalf of someone else or for a resource, select the Allow Completed For logic checkbox.
5. Enter any additional information about the form in the Description field.
6. Click Save & Continue to display the additional configuration options (Design, Assigned Forms, Completed Forms, Relationships, Shares, and Properties).

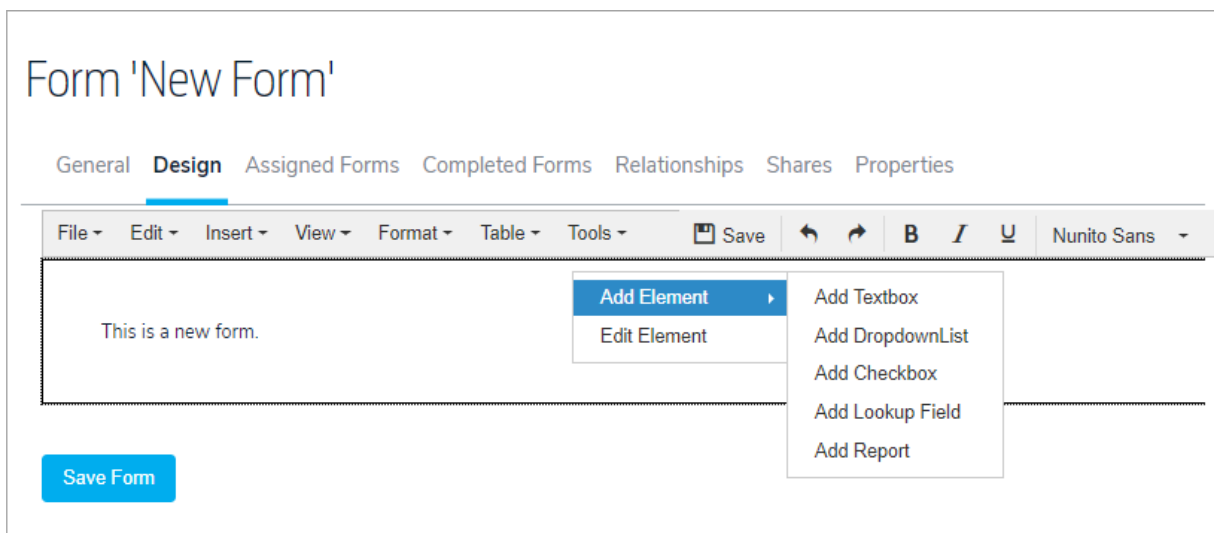
## Design a Form

1. To design a form, click the **Forms** icon in the navigation bar, then open the previously created form's settings.
2. Click the **Design** tab.
3. Click the textbox to display the form's editor.

The screenshot shows the 'Form 'New Form'' editor interface. At the top, there are tabs: 'General', 'Design' (which is selected and highlighted with a blue underline), 'Assigned Forms', 'Completed Forms', 'Relationships', 'Shares', and 'Properties'. Below the tabs is a toolbar with menus for 'File', 'Edit', 'Insert', 'View', 'Format', 'Table', and 'Tools'. To the right of the menus are icons for 'Save', undo, redo, bold (B), italic (I), underline (U), and a font selector set to 'Nunito Sans'. The main area is a large empty rectangular box representing the form canvas. At the bottom left of the canvas is a blue button labeled 'Save Form'.

*The Form editor.*

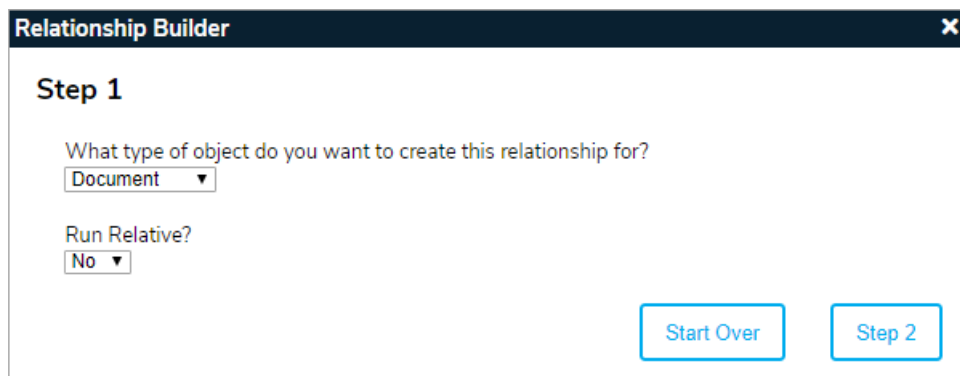
4. Enter text in the textbox, then use the options in the editor menu to format the form as needed.
5. To insert a textbox, dropdown list, checkbox, lookup field, click **Tools**, and click an element to insert it or right-click the textbox, hover your cursor over **Add Element**, then click an element. See the [Reports on Forms](#) article for more information on adding reports.

This screenshot shows the same 'Form 'New Form'' editor, but now the text 'This is a new form.' has been entered into the canvas. The 'Tools' menu is open, and the 'Add Element' option is selected, which has opened a sub-menu. The sub-menu contains the following options: 'Add Textbox', 'Add DropDownList', 'Add Checkbox', 'Add Lookup Field', and 'Add Report'. The 'Save Form' button remains at the bottom left.

*The Add Element list.*

6. To add the relationship builder to the an [Organization Form](#) or [Plan-Event](#) (dashboard) form type:
  - a. Click the form canvas > **Tools** > **Add Relationship Builder**.
  - b. Select the object you want to create the object for from the dropdown menu.
  - c. Select Yes from the **Run Relative?** dropdown menu to allow users to only select objects from the current organization or select No if you want to allow users to select objects outside of the current organization. For example, if you want users to create a relationship for a document object in the

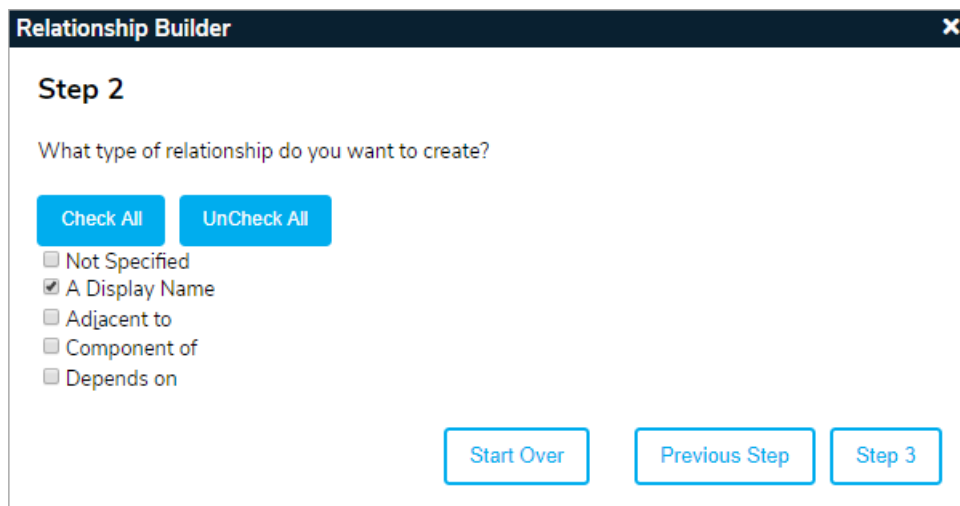
organization where the form is being accessed, you'd select **Yes**, but if the user should be able to select a document from another org, you would select **No**.



The screenshot shows a window titled "Relationship Builder" with a close button (X) in the top right corner. The main heading is "Step 1". Below it, the question "What type of object do you want to create this relationship for?" is followed by a dropdown menu showing "Document". Below that, the question "Run Relative?" is followed by a dropdown menu showing "No". At the bottom right, there are two buttons: "Start Over" and "Step 2".

*Step 1 of the Relationship Builder wizard.*

- d. Click Step 2.
- e. Select the relationship type(s) you want to create. Relationship types are configured in the [Referential Data Manager](#).



The screenshot shows a window titled "Relationship Builder" with a close button (X) in the top right corner. The main heading is "Step 2". Below it, the question "What type of relationship do you want to create?" is followed by two buttons: "Check All" and "UnCheck All". Below these buttons is a list of relationship types with checkboxes: "Not Specified", "A Display Name" (checked), "Adjacent to", "Component of", and "Depends on". At the bottom right, there are three buttons: "Start Over", "Previous Step", and "Step 3".

*Step 2 of the Relationship Builder wizard.*

- f. Click Step 3.
- g. Select the type of object you want to create the relationship to from the dropdown menu.
- h. Select Yes from the **Run Relative?** dropdown menu to allow users to only select objects from the current organization or select No if you want to allow users to select objects outside of the current organization. For example, if you want users to create a relationship to an event object within the current organization, you'd select **Yes**, but if the user should be able to select an event from another org, you would select **No**.

**Relationship Builder** [X]

**Step 3**

What type of object do you want to create this relationship to?  
 Event ▼

Run Relative?  
 Yes ▼

Start Over Previous Step Done

Step 3 of the Relationship Builder wizard.

- i. Click Done.

**Form 'Related Contacts'**

General **Design** Relationships Shares Properties

File Edit Insert View Format Table Tools Save [undo] [redo] **B** *I* U Nunito Sans

| Title | Relationship | Title | Actions |
|-------|--------------|-------|---------|
|       |              |       |         |
|       |              |       |         |
|       |              |       |         |
|       |              |       |         |

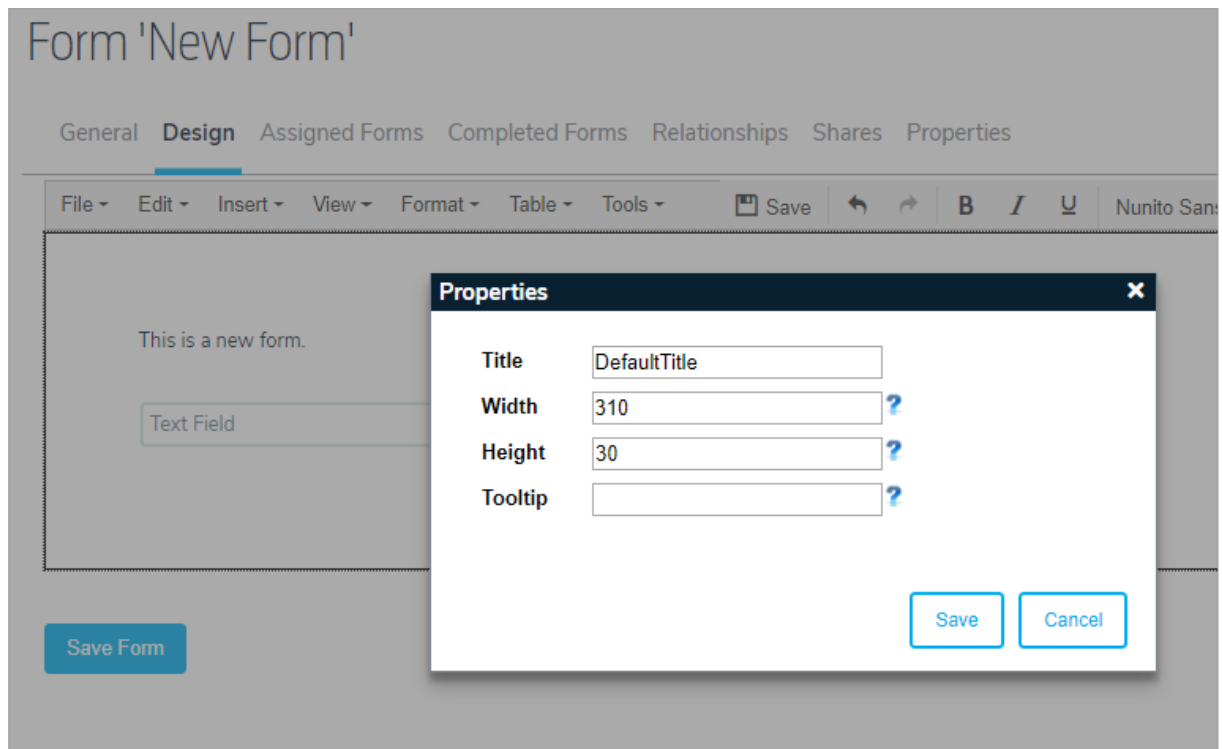
Relationship Control

A completed relationship builder on a form.

7. Repeat steps a. to i. above to continue adding more relationship builder forms.
8. To edit an element added to the form, right-click it, then click **Edit Element** to view and configure its properties. The following is a list of available properties (depending on the element):

|              |                                                                                                                                                                                                                                                                                                                                                                                                                  |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Title</b> | <p>Allows the user to input the Title of an object. Note: The title will not appear in the Form. Titles are important for naming and identifying objects, especially when you want to use the field in a report.</p> <p>For example, if you are using Text Fields, Drop Down Fields, Lookup Fields and Checkboxes you will want to assign them a Title (field name) so that the data can be used in reports.</p> |
| <b>Width</b> | <p>Allows the user to input the Width of an Object. (Textbox, Dropdown, and Lookup Field only. Includes Edit Variables.)</p>                                                                                                                                                                                                                                                                                     |

|                                      |                                                                                                                                      |
|--------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| <b>Height</b>                        | Allows the user to input the Height of an Object. (Textbox, Dropdown, and Lookup Field only. Includes Edit Variables.)               |
| <b>Tool tip</b>                      | Allows the user to specify what the tool tip will say. Tool tips are help text.                                                      |
| <b>Text Value</b>                    | Allows the user to specify what text to use (if any) for the label. (Checkbox Only)                                                  |
| <b>Referential Key</b>               | Allows the user to specify what options are listed in a Dropdown list by selecting a set of referential data. (Dropdown only)        |
| <b>Custom Key</b>                    | Allows the user to specify what options are listed in a Dropdown list by selecting a set of custom referential data. (Dropdown only) |
| <b>Action Enabled</b>                | Allows the user to specify whether the Add/Edit/Quick view buttons are visible. (Report only)                                        |
| <b>Add Enabled</b>                   | Allows the user to specify whether or not the option to add items is enabled. (Report only)                                          |
| <b>Share Enabled</b>                 | Allows the user to specify whether or not the option to share records items is enabled. (Report only)                                |
| <b>Export Enabled</b>                | Allows the user to specify whether or not the option to export the report table is enabled. (Report only)                            |
| <b>Folder Title</b>                  | Allows the user to specify whether or not a specific folder title should be designated when adding a resource record. (Report only)  |
| <b>Run Report Relative to Editor</b> | Specifies the Custom Form Query Report will be scoped to the Plan/Event/Organization where the Editor is used.                       |



*The chosen element's Properties window.*

9. To clear the form of all text, formatting, and elements, click **File > Clear Document**. To undo or redo your changes, cut, copy, or paste text, or select all content in the form, click the **Edit** option.
10. Click **Save Form** to save your changes.

## Reports on Forms

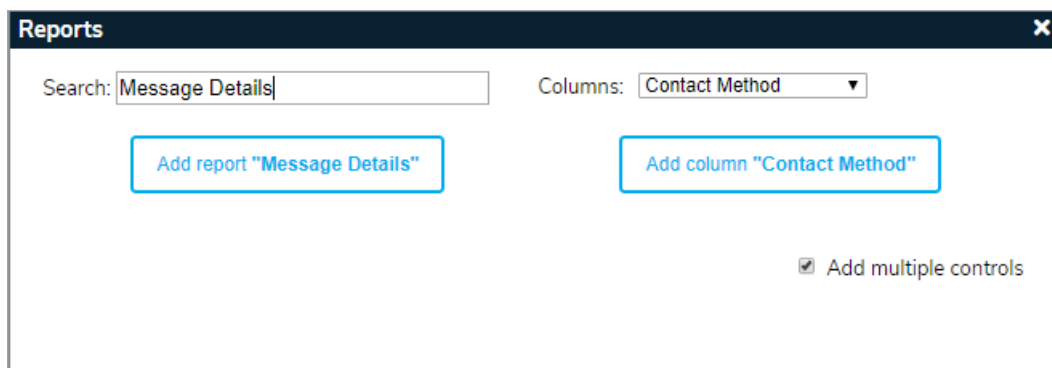
The Tools bar allows the user to include data from a Report into the form. The user can also right click in the form and add a report.

Only Reports that are Custom Form Queries can be added to the Form. The user has the option to include the entire report or specific fields (including metric fields).

To add a Report, type in the name of the Report or some letters that the Report starts with and it will search the system for Reports you are authorized to and allow you to select to include. In the search box, you will also see an icon that you can click on to see where the Report is physically stored.

Once you select the Report, you can click to add the entire report or click on the arrow in the columns box and select field(s) to include. The "Add Multiple Controls" checkbox allows you to enter the report and specific fields at the same time, without searching for the Report again.

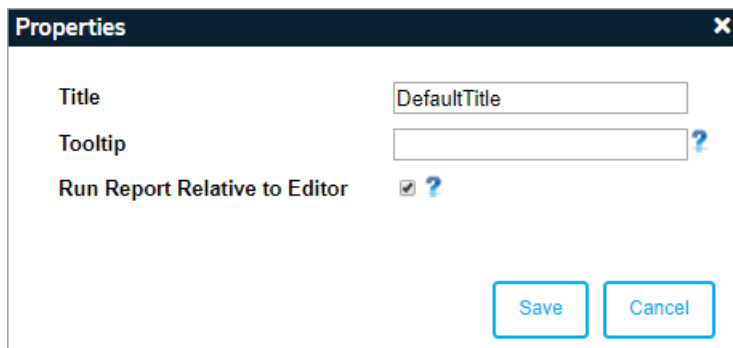
Select a specific field to add to your report.



The **Reports** dialog box features a search bar with the text "Message Details" and a columns dropdown menu showing "Contact Method". Below these are two buttons: "Add report 'Message Details'" and "Add column 'Contact Method'". At the bottom right, there is a checked checkbox labeled "Add multiple controls".

You will see this screen where you can specify if the field is to be Query Dropdown, Label, or Textbox.

You can edit that field's Properties by right clicking in it. The following screen will be displayed:

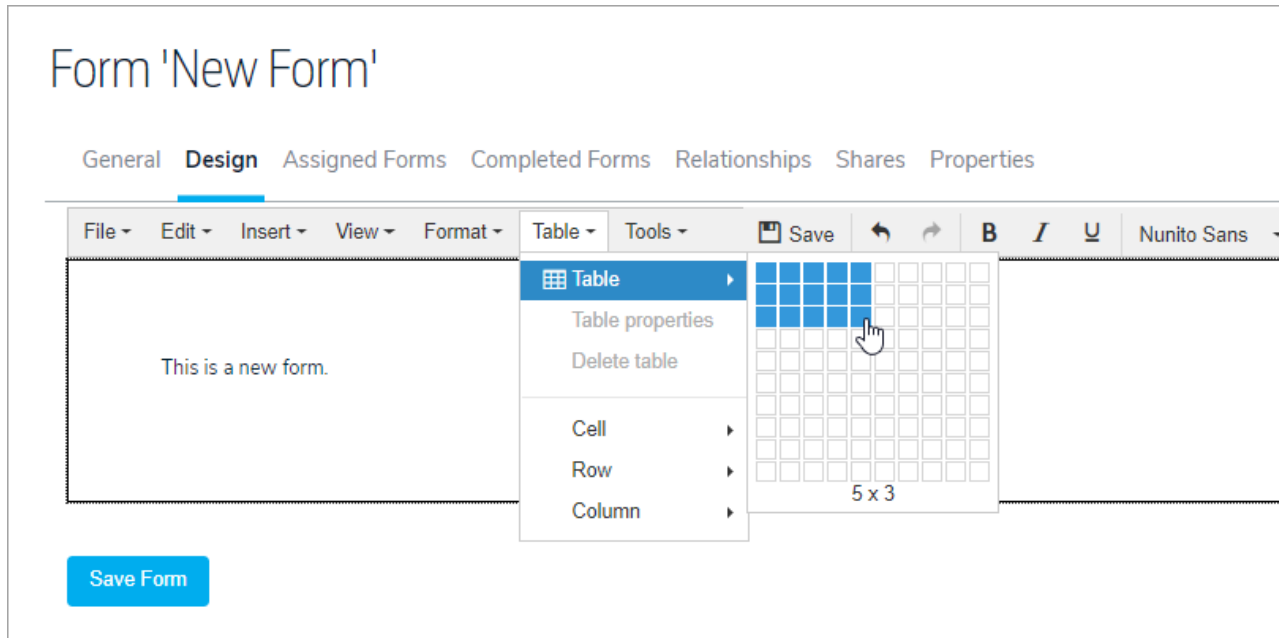


The **Properties** dialog box contains three settings: "Title" with a text box containing "DefaultTitle", "Tooltip" with an empty text box and a help icon, and "Run Report Relative to Editor" with a checked checkbox and a help icon. At the bottom are "Save" and "Cancel" buttons.

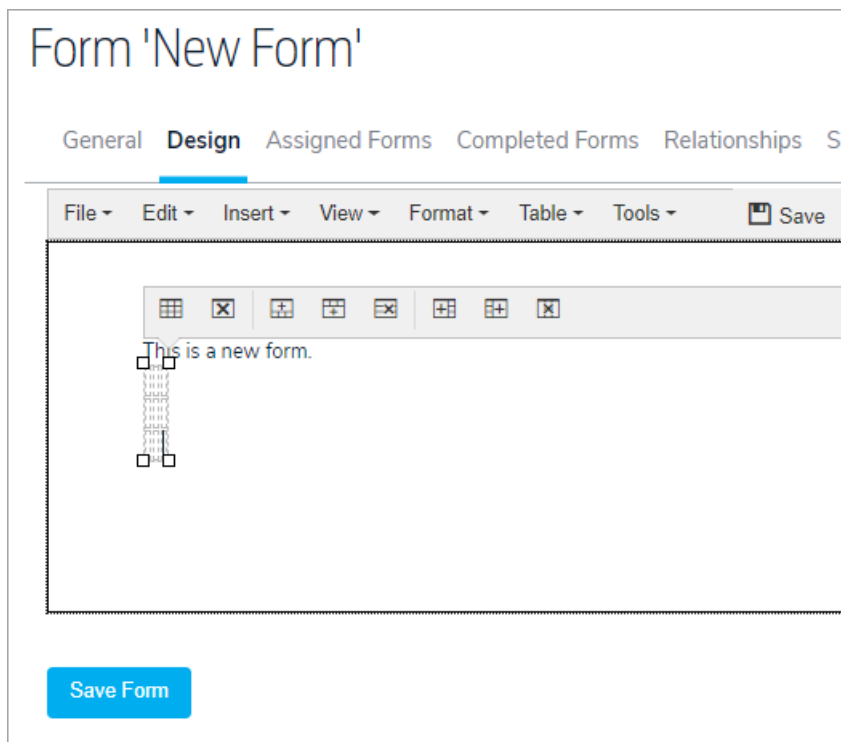
## Tables on Forms

The new Form Designer allows the user to use Tables to help layout the form, create different sections, and present data in a tabular format. Please watch the new training video on the [Resolver Support](#) site to see how tables can be used.

To add a new table to your form, click on "Table" and select the number of rows and columns you want.

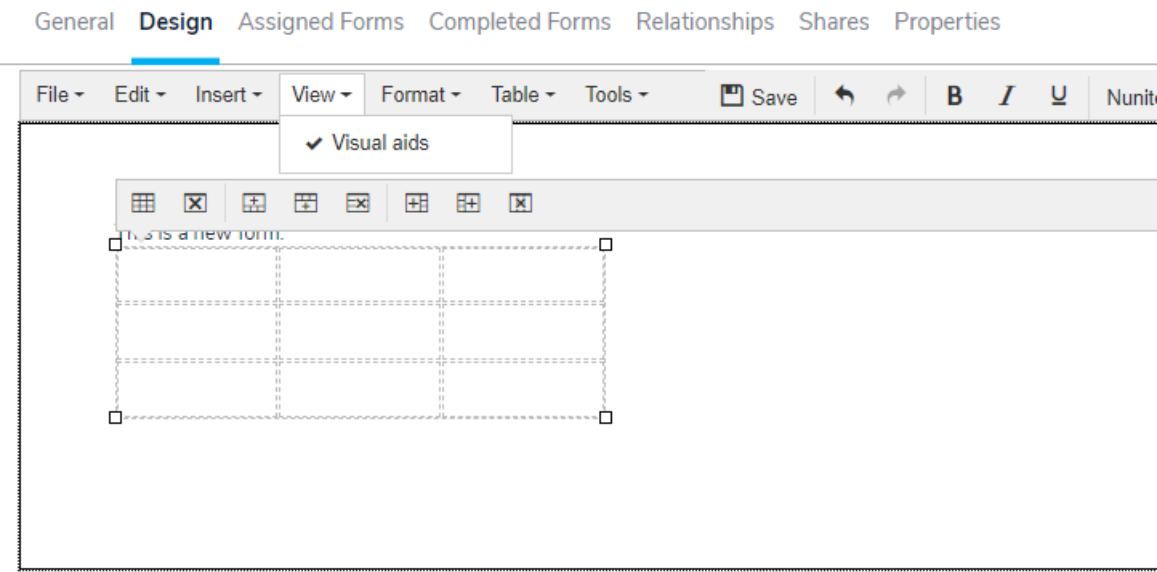


The table grid will be inserted into your form in a collapsed format.



You can adjust the size of the columns in the table by dragging the grid and adjusting the column margins. By clicking on Visual aids, you can display the grid lines of the table while you design the form and then remove them to see what the form would look like without them.

# Form 'New Form'



When you create a table, you can also edit the properties of the table. By clicking when the cursor is in the table, the properties tabs are displayed which allow you to add/delete rows or columns. In addition, you can set up properties for the entire table by clicking on the icon circled in red.

On this screen, you can adjust the height and width of the entire table (pixels), the spacing if any for the margins of the cells, whether you want a border for the table and a caption above it. You can also set cell alignment.

| Table properties     |      |              |     |
|----------------------|------|--------------|-----|
| General              |      | Advanced     |     |
| Width                | 341  | Height       | 121 |
| Cell spacing         |      | Cell padding |     |
| Border               |      | Caption      |     |
| Alignment            | None |              |     |
| <div>Ok Cancel</div> |      |              |     |

Clicking the Advanced tab on Table Properties allows the user to change the color of the border and add background colors as well.

Table properties

×

General

Advanced

Style

border-color: #f70000; background-color:

Border color

#f70000



Background color

#000000



Ok

Cancel

Tables are key to using the new Form Designer as you design and as the finished product for the end user. By highlighting individual cells, entire rows or columns, the user is able to set the cell and row properties as well.

Like table properties, you can set the pixel size for the width and height of cells and rows, indicate the cell/row type (how the cell/row will be used in the table), cell/row alignment, and whether or not set scope the desired properties for the row, the column, or a group of rows or columns. Like tables, you can also specify the border and background color of cells and rows.

# Form 'New Form'

General **Design** Assigned Forms Completed Forms Relationships Shares Properties

File Edit Insert View Format Table Tools Save Undo Redo Bold Italic Underline

This is a new form.

Table  
Table properties  
Delete table  
Cell  
Row  
Column

Insert row before  
Insert row after  
Delete row  
Row properties  
Cut row  
Copy row  
Paste row before  
Paste row after

Save Form

You can also merge and split cells in tables if necessary.

Form 'New Form'

General **Design** Assigned Forms Completed Forms Relationships Shares Properties

This is a new form.

|  |  |  |
|--|--|--|
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Save Form

## Assign a Form

Assigned forms appear to users in the My Forms section of GAL.

1. To assign a form, click the Forms icon in the navigation bar, and open the form you wish to assign.
2. Click the Assigned Forms tab.
3. Locate the user you want to assign from the Select Users pane, then click the user.

### Form 'New Form'

General Design **Assigned Forms** Completed Forms Relationships Shares Properties

## Form Assignment

#### Create New Form Assignments

**Select Users**

 Corporate

Browse Filter - Results

Filter

Reset

Advanced Filter

Due Date: [Set to Now](#)

AT: 

2

▼

: 

06

▼

PM

▼

Include Review: ☐

Assign Form

#### Assigned Forms

| Assigned To                  | Due Date | Status |
|------------------------------|----------|--------|
| No Forms have been assigned. |          |        |

4. Select a date and time the form will be assigned to the user in the Due Date section. To assign the form on today's date, click Set to Now.
5. Select the Include Review checkbox if a review is required, then enter the review details in the Add Review Schedule window.

Add Review Schedule

Title:

Type:

Select a review type ▾

Due Every:

Day(s) ▾

Start Date:

[Set to Now](#)

9/21/2018

AT: 2 ▾ : 06 ▾ PM ▾

6. Click Assign Form.

7. To edit the form, click the entry in the Assigned Forms section, then click Edit Assigned Forms.

Assigned Forms

| Assigned To   | Due Date               | Status    |
|---------------|------------------------|-----------|
| Plan Reviewer | 09/21/2018 02:06:00 PM | Requested |

Due Date:

09/21/2018 02:06:00 PM

Edit Assigned Form

## Completed Forms

The Completed Forms tab is where you may view a list of forms that have been successfully completed. For completed forms, you can edit the form and add Completed For logic, but you cannot add additional data to the form.

## Form 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

« < Page  of 1 > »

Displaying 1 - 1 of 1

## Add Records in Custom Form Design

In custom form design, you can include queries that allow you to add records. We have added a new field that allows you to specify a specific folder title for where the GAL object will be located. In this case, when the user adds a new record. This will be a subfolder under the folder that the custom form query report was scoped or runs relative to in the form.

## Dashboards Overview

In GAL, a dashboard refers to an **Organization Editor** or **Plan-Event Editor** form that displays and collects data related specifically to the organizational unit, plan, or event that it was shared to. This means you can create a single form and share it across multiple orgs, plans, or events. Additionally, this form can display data related to the component you're currently viewing or scope data outside the element.

Dashboards are typically used to display data through [reports](#), but they can also be designed to collect data, either through form elements or through the **relationship builder**. See the [Relationship Builder](#) article for more information on this tool.

Once a dashboard is created and shared, it can be accessed via the dashboard buttons in the top-right of the page.



The data a user can view on a dashboard is controlled by their permissions.

| Title  | Date ↓                 |
|--------|------------------------|
| News 3 | 09/24/2018 03:55:00 PM |
| News 2 | 09/24/2018 03:29:00 PM |
| News 1 | 09/24/2018 11:25:00 AM |

Page size  < > << >>

« < Page 1 of 1 > »

**Organizational Dashboards**

- [Active Events](#)
- [Events](#)
- [OrgRelationshipBuilder](#)
- [Plans](#)
- [Resources](#)

*The organizational dashboards panel, which is accessed via the button at the top-right of the page.*

For information on creating an editor form and adding it to a dashboard, see the following articles:

- [Create an Organizational Dashboard](#)
- [Create a Plan or Event Dashboard](#)
- [Relationship Builder](#)

## Create an Organizational Dashboard

An **organizational dashboard** is an **Organization Editor** form type that displays or collects specific information about the org it's been shared to, also allowing you to create scoped relationships, using the [relationship builder](#) tool, directly from the form. Examples of org dashboards include a list of contacts, plans, or active events in the org.

You can access an organizational dashboard any time you're working in the org to which the form has been shared (with the exception of [Plans](#) or [Events](#)).

The screenshot shows a software interface with a top navigation bar containing 'Corporate', 'GIS', 'Admin', 'Help', 'Vital Signs', 'My Tasks', 'My Forms', and 'Organizational Dashboards' (highlighted in blue). Below this is a breadcrumb trail 'Corporate » New Org'. On the left is a dark sidebar with various icons. The main content area is titled 'News & Updates' and contains a table with the following data:

| Title  | Date ↓                 |
|--------|------------------------|
| News 3 | 09/24/2018 03:55:00 PM |
| News 2 | 09/24/2018 03:29:00 PM |
| News 1 | 09/24/2018 11:25:00 AM |

Below the table, there is a 'Page size' dropdown set to '10' and a pagination control showing '« < Page 1 of 1 > »'. On the right side of the main content area is a blue sidebar titled 'Organizational Dashboards' containing a list of links: [Active Events](#), [Documents](#), [Events](#), [OrgRelationshipBuilder](#), [Plans](#), and [Resources](#).

*The Organizational Dashboards panel.*

An **executive dashboard** is an organizational dashboard that's been configured to display multiple, high-level [reports](#).

To create an executive dashboard, follow the instructions below, customizing the form as needed and adding the reports that summarize the status of the events, plans, resources, etc. in your organization.

## Form 'Executive Dashboard'

Form Generated



### Executive Dashboard

Total Plans: 29  
Past Due: 29  
Upcoming Reviews: 0

#### Tier 1 Processes

| Name                   | RPO        | RTO        | Actions |
|------------------------|------------|------------|---------|
| 72(t)                  |            |            |         |
| Action Copy Monetary   |            |            |         |
| Communication to Staff |            |            |         |
| Death Redemptions      |            |            |         |
| Human Resources        |            |            |         |
| New Accounts           | 4-24 hours | 4-24 hours |         |

#### Past Due Plans

| Title                         | Organization | Next Review Date       | Owner   | Actions |
|-------------------------------|--------------|------------------------|---------|---------|
| QA BC Plan                    | QA           | 01/30/2012 08:59:00 AM | Unknown |         |
| Launch Ops BC Plan            | Lauch Ops    | 04/15/2012 08:58:00 AM | Unknown |         |
|                               |              | 04/26/2012 08:54:00 AM |         |         |
| Information Security Policy   | I.T.         | 06/05/2012 01:30:00 PM |         |         |
| Division 1 BC Plan            | Division 1   | 12/11/2012 10:40:00 AM | Unknown |         |
| IT BC Plan                    | IT           | 05/30/2013 08:57:00 AM | Unknown |         |
| Production Operations BC Plan | Inventory    | 10/25/2013 08:55:00 AM |         |         |

*An example of an executive dashboard.*

### To create an organizational dashboard:

1. Navigate to an applicable organization using the the menu at the top-left of any page.
2. Click the **Forms**  icon in the menu to the left.
3. Click **Add**.

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

Corporate » New Org

Forms
Filter
Add
Share Forms

| Title ↑                  | Type                | Description | Actions |
|--------------------------|---------------------|-------------|---------|
| Events                   | Organization Editor |             |         |
| New Form                 | Custom Form         |             |         |
| New Form                 | Custom Form         |             |         |
| OrgRelationshipBuilder   | Organization Editor |             |         |
| Plans                    | Organization Editor |             |         |
| Relationship Editor Form | Relationship Editor |             |         |
| Resources                | Organization Editor |             |         |

Page size 10
<< < Page 1 of 1 > >>
Displaying 1 - 7 of 7

The Forms page.

- Enter a name for the form in the **Title** field.
- Select **Organization Editor** from the **Type** dropdown menu.
- Optional:** If needed, select an alternate folder for the form by clicking **Choose Folder**.
- Optional:** Enter a description of the form.

**Forms**

**General**

Title:

Type:

Folder:  [Choose Folder](#)

Description:

**Save & Exit** **Save & Continue** **Cancel**

*A new Organization Editor form.*

8. Click **Save & Continue**.
9. Click the **Design** tab.
10. To add a [report](#) to the form:
  - a. Click the form canvas > **Tools** > **Add Report**.
  - b. Enter keywords in the **Search** field to locate the existing report, then click to select it.

**Reports**

Search:  Columns:

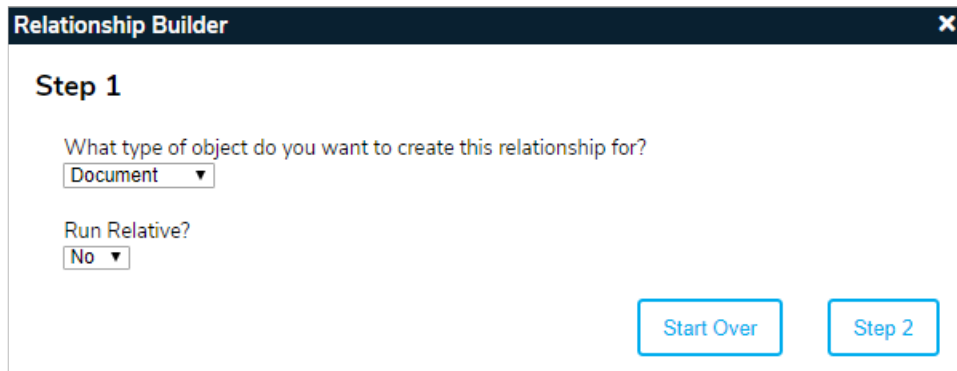
**Add report "EventsOrgEditor"**

☒ **Add multiple controls**

*The report settings.*

- c. Use the **Columns** dropdown menu to select the fields you want to include in the report. To include all fields, skip this step.
  - d. Click **Add report**.
  - e. Continue steps a. to d. above to add more reports.
11. To add the [relationship builder](#) tool to the form:
  - a. Click the form canvas > **Tools** > **Add Relationship Builder**.
  - b. Select the object you want to create the object for from the dropdown menu.

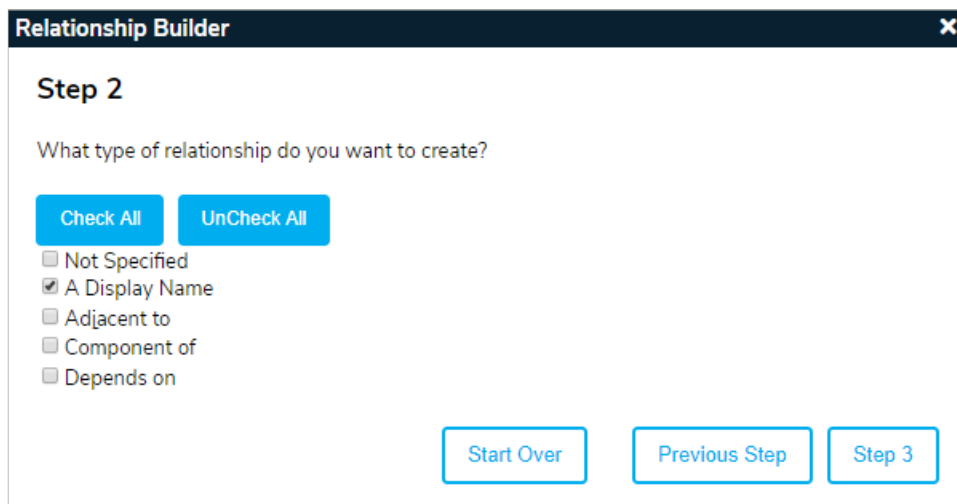
- c. Select **Yes** from the **Run Relative?** dropdown menu to allow users to only select objects from the current organization or select **No** if you want to allow users to select objects outside of the current organization. For example, if you want users to create a relationship for a document object in the organization where the form is being accessed, you'd select **Yes**, but if the user should be able to select a document from another org, you would select **No**.



The screenshot shows a dialog box titled "Relationship Builder" with a close button (X) in the top right corner. The main heading is "Step 1". Below it, the text "What type of object do you want to create this relationship for?" is followed by a dropdown menu showing "Document". Below that, the text "Run Relative?" is followed by a dropdown menu showing "No". At the bottom right, there are two buttons: "Start Over" and "Step 2".

*Step 1 of the Relationship Builder.*

- d. Click **Step 2**.
- e. Select the relationship type(s) you want to create. Relationship types are configured in the [Referential Data Manager](#).



The screenshot shows a dialog box titled "Relationship Builder" with a close button (X) in the top right corner. The main heading is "Step 2". Below it, the text "What type of relationship do you want to create?" is followed by two buttons: "Check All" and "Uncheck All". Below these buttons is a list of relationship types with checkboxes: "Not Specified", "A Display Name" (checked), "Adjacent to", "Component of", and "Depends on". At the bottom right, there are three buttons: "Start Over", "Previous Step", and "Step 3".

*Step 2 of the Relationship Builder.*

- f. Click **Step 3**.
- g. Select the type of object you want to create the relationship to from the dropdown menu.
- h. Select **Yes** from the **Run Relative?** dropdown menu to allow users to only select objects from the current organization or select **No** if you want to allow users to select objects outside of the current organization. For example, if you want users to create a relationship to an event object within the current organization, you'd select **Yes**, but if the user should be able to select an event from another org, you would select **No**.

Relationship Builder

Step 3

What type of object do you want to create this relationship to?

Event

Run Relative?

Yes

Start Over

Previous Step

Done

Step 3 of the Relationship Builder.

- i. Click **Done**.

Form 'Related Contacts'

General
Design
Relationships
Shares
Properties

File
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Insert
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| Title | Relationship | Title | Actions |
|-------|--------------|-------|---------|
|       |              |       |         |
|       |              |       |         |
|       |              |       |         |
|       |              |       |         |
|       |              |       |         |

Relationship Control

The relationship builder tool.

- j. Repeat steps a. to i. above to continue adding more relationship builder forms.
12. Continue designing the form, adding any elements to collect data, if needed. See the [Forms](#) section for more information.
13. [Share the form](#) to other organizations to add it to the **Organization Dashboards** panel.

## Create a Plan or Event Dashboard

A **plan** or **event dashboard** is an **Plan-Editor** form type that displays or collects specific information about the plan or event it's been shared to, also allowing you to create scoped relationships, using the [relationship builder](#) tool, directly from the form.

These dashboards can be accessed when working within the plan or event the form has been shared to. Note that in order for these forms to appear in additional **Plan Dashboards** or **Event Dashboards**, the form must be shared to the **Forms** folder within the applicable plan or event.

The screenshot shows a web application interface. At the top, there's a navigation bar with links: Corporate, GIS, Admin, Help, Vital Signs, My Tasks, My Forms, and a blue button labeled 'Plan Dashboards'. Below this is a breadcrumb trail: Corporate » Ztesters » Plans » Plan. On the left is a dark sidebar with various icons, including a calendar icon that is highlighted. The main content area is titled 'Plan Information' and has several tabs: General (selected), Visual Modeler, Action Steps, Relationships, and Properties. Under the 'General' tab, there are fields for 'Display Name: Plan', 'Folder: Plans', 'Interruption Level: 8.0 Edge', 'Severity Level: Minor', and 'Include GIS Selection: ☐'. Below these fields is a large text area containing a description: 'Just copy and paste the above table for each separate business function, to "emergency care and response" services required to ensure the provision of emergency services needed to save lives and restore public order after severe trauma or an accident. Safety of Canadians –includes those essential services (including ambulance) and broader safety services (including nuclear safety, HAZM, search and rescue, and public areas and public gatherings) required to maintain a life sustaining level of service and protect the safety of the individual so as to avoid high injury. S...'. The 'Plan Dashboards' panel on the right lists several links: Plan Resources, Related Contacts, Related Documents, Related Resources, and ResourcesOutsideofPlan.

*The Plan Dashboards panel.*

### To create a plan or event dashboard:

1. Navigate to an applicable organization using the the menu at the top-left of any page.
2. Click the **Forms**  icon in the menu to the left.
3. Click **Add**.

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

Corporate » New Org

Forms
Filter
Add
Share Forms

| Title ↑                  | Type                | Description | Actions |
|--------------------------|---------------------|-------------|---------|
| Events                   | Organization Editor |             |         |
| New Form                 | Custom Form         |             |         |
| New Form                 | Custom Form         |             |         |
| OrgRelationshipBuilder   | Organization Editor |             |         |
| Plans                    | Organization Editor |             |         |
| Relationship Editor Form | Relationship Editor |             |         |
| Resources                | Organization Editor |             |         |

Page size 10
<< < Page 1 of 1 > >>
Displaying 1 - 7 of 7

The Forms page.

- Enter a name for the form in the **Title** field.
- Select **Plan - Event Editor** from the **Type** dropdown menu.
- Optional:** If needed, select an alternate folder for the form by clicking **Choose Folder**.
- Optional:** Enter a description of the form.

# Forms

**General**

Title:

Type:

Folder:  [Choose Folder](#)

Description:

*A new Plan - Event Editor form.*

8. Click **Save & Continue**.
9. Click the **Design** tab.
10. To add a [report](#) to the form:
  - a. Click the form canvas > **Tools > Add Report**.
  - b. Enter keywords in the **Search** field to locate the existing report, then click to select it.

Reports

Search:

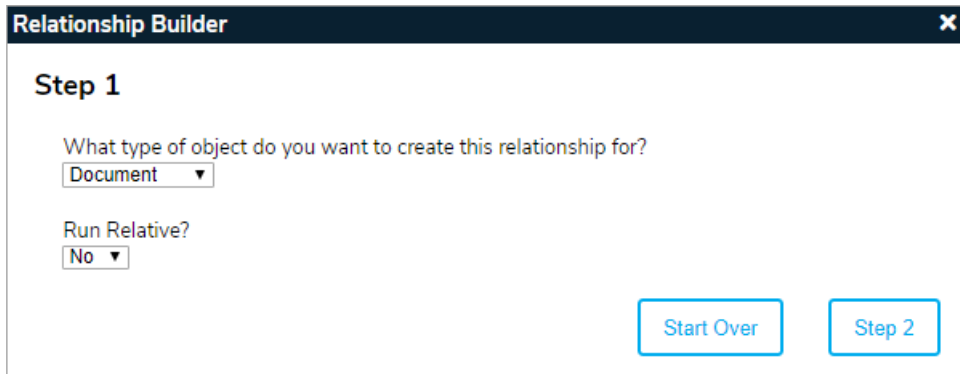
Columns:

☒ Add multiple controls

*Settings to add a report element to a form.*

- c. Use the **Columns** dropdown menu to select the fields you want to include in the report. To include all fields, skip this step.
  - d. Click **Add report**.
  - e. Continue steps a. to d. above to add more reports.
11. To add the [relationship builder](#) tool to the form:

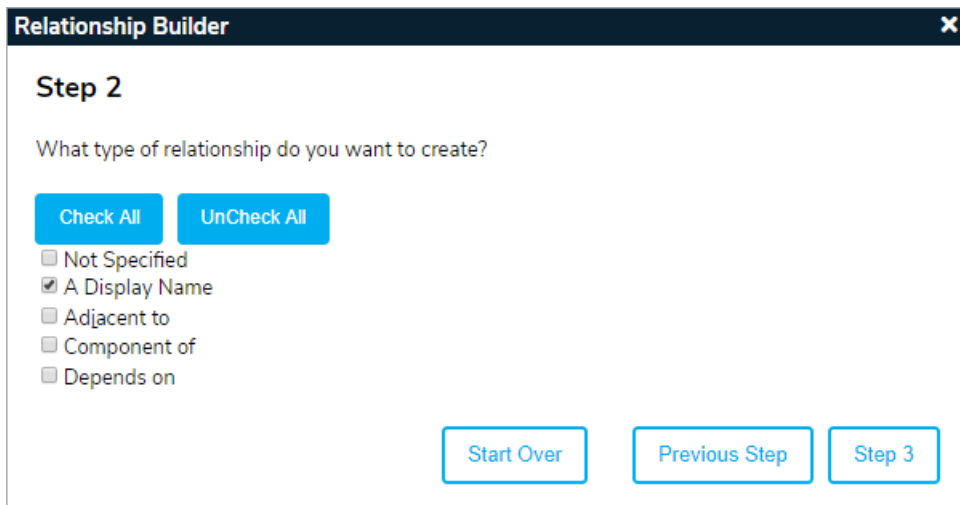
- a. Click the form canvas > **Tools** > **Add Relationship Builder**.
- b. Select the object you want to create the relationship for from the dropdown menu.
- c. Select **Yes** from the **Run Relative?** dropdown menu to allow users to only select objects from the current organization or select **No** if you want to allow users to select objects outside of the current organization. For example, if you want users to create a relationship for a document object in the organization where the form is being accessed, you'd select **Yes**, but if the user should be able to select a document from another org, you would select **No**.



The screenshot shows a dialog box titled "Relationship Builder" with a close button (X) in the top right corner. The main heading is "Step 1". Below it, the text "What type of object do you want to create this relationship for?" is followed by a dropdown menu currently showing "Document". Below that, the text "Run Relative?" is followed by a dropdown menu currently showing "No". At the bottom right, there are two buttons: "Start Over" and "Step 2".

*Step 1 of the Relationship Builder.*

- d. Click **Step 2**.
- e. Select the relationship type(s) you want to create. Relationship types are configured in the [Referential Data Manager](#).



The screenshot shows a dialog box titled "Relationship Builder" with a close button (X) in the top right corner. The main heading is "Step 2". Below it, the text "What type of relationship do you want to create?" is followed by two buttons: "Check All" and "UnCheck All". Below these buttons is a list of relationship types with checkboxes: "Not Specified" (unchecked), "A Display Name" (checked), "Adjacent to" (unchecked), "Component of" (unchecked), and "Depends on" (unchecked). At the bottom right, there are three buttons: "Start Over", "Previous Step", and "Step 3".

*Step 2 of the Relationship Builder.*

- f. Click **Step 3**.
- g. Select the type of object you want to create the relationship to from the dropdown menu.
- h. Select **Yes** from the **Run Relative?** dropdown menu to allow users to only select objects from the current organization or select **No** if you want to allow users to select objects outside of the current organization. For example, if you want users to create a relationship to an event object within the current organization, you'd select **Yes**, but if the user should be able to select an event from another org, you would select **No**.

Relationship Builder

Step 3

What type of object do you want to create this relationship to?

Event

Run Relative?

Yes

Start Over

Previous Step

Done

Step 3 of the Relationship Builder.

- i. Click **Done**.

Form 'Related Contacts'

General
Design
Relationships
Shares
Properties

File
Edit
Insert
View
Format
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| Title | Relationship | Title | Actions |
|-------|--------------|-------|---------|
|       |              |       |         |
|       |              |       |         |
|       |              |       |         |
|       |              |       |         |

Relationship Control

The relationship builder tool added to a form.

- j. Repeat steps a. to i. above to continue adding more relationship builders to the form.
12. Continue designing the form, adding any elements to collect data, if required. See the [Forms](#) section for more information.
13. [Share the form](#) to other plans or events to add it to their **Plan Dashboards** or **Event Dashboards** panels.

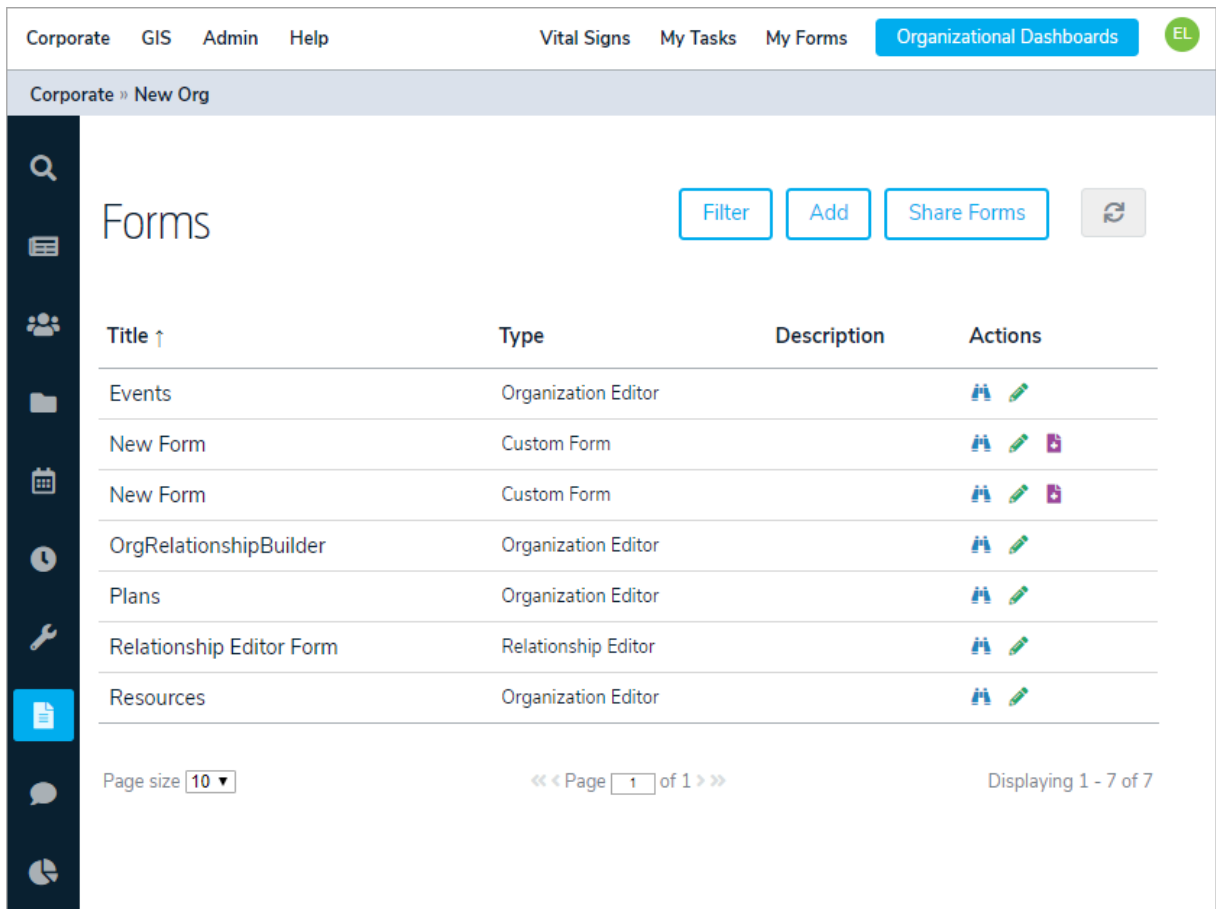
## Share a Dashboard Form

If you want multiple organizations, plans, or events to access a [dashboard](#) form, that form must be shared. Once shared, it can be accessed from the **Organizational Dashboards**, **Plan Dashboards**, or **Event Dashboards** slide-out panel.

Note that you can only share **Organization Editor** forms to orgs and **Plan-Event Editor** forms to plans and events.

### To share a dashboard form:

1. Navigate to the organization you wish to share the form to using the menu at the top-left of any page.
2. Click the **Forms**  icon in the menu to the left.
3. Click **Share Forms** to display the **Manage Shared Custom Forms** page.

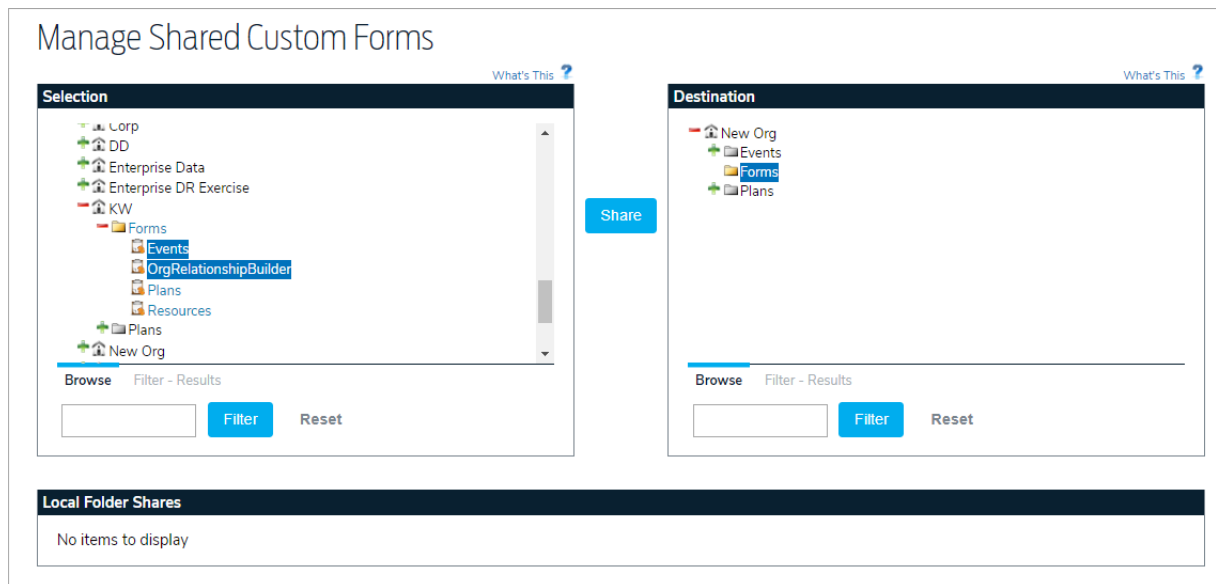


The screenshot shows the 'Forms' page within an application. At the top, there is a navigation bar with links: Corporate, GIS, Admin, Help, Vital Signs, My Tasks, My Forms, and Organizational Dashboards (highlighted in blue). Below this is a breadcrumb trail: Corporate » New Org. On the left, a dark sidebar contains various icons, with the 'Forms' icon (a document with a checkmark) highlighted in blue. The main content area is titled 'Forms' and includes buttons for 'Filter', 'Add', 'Share Forms', and a refresh icon. Below these buttons is a table with the following columns: Title ↑, Type, Description, and Actions. The table lists seven items: Events (Organization Editor), New Form (Custom Form), New Form (Custom Form), OrgRelationshipBuilder (Organization Editor), Plans (Organization Editor), Relationship Editor Form (Relationship Editor), and Resources (Organization Editor). Each item has icons for viewing, editing, and deleting. At the bottom, there is a 'Page size' dropdown set to 10, a pagination control showing 'Page 1 of 1', and a status message 'Displaying 1 - 7 of 7'.

| Title ↑                  | Type                | Description | Actions |
|--------------------------|---------------------|-------------|---------|
| Events                   | Organization Editor |             |         |
| New Form                 | Custom Form         |             |         |
| New Form                 | Custom Form         |             |         |
| OrgRelationshipBuilder   | Organization Editor |             |         |
| Plans                    | Organization Editor |             |         |
| Relationship Editor Form | Relationship Editor |             |         |
| Resources                | Organization Editor |             |         |

*The Forms page.*

4. Use the **Selection** panel to the left to navigate to the organization and **Forms** folder that contains the dashboard forms you want to share.
5. Click the **Forms** folder to share all the forms or select one or more individual forms. Click a selected form again to deselect it, if needed.
6. Use the **Destination** panel to the right to navigate to the organization and **Forms** folder you wish to share the dashboard forms to.
7. Click the **Forms** folder to select it.



*The Manage Shared Custom Forms page.*

8. Click **Share**.

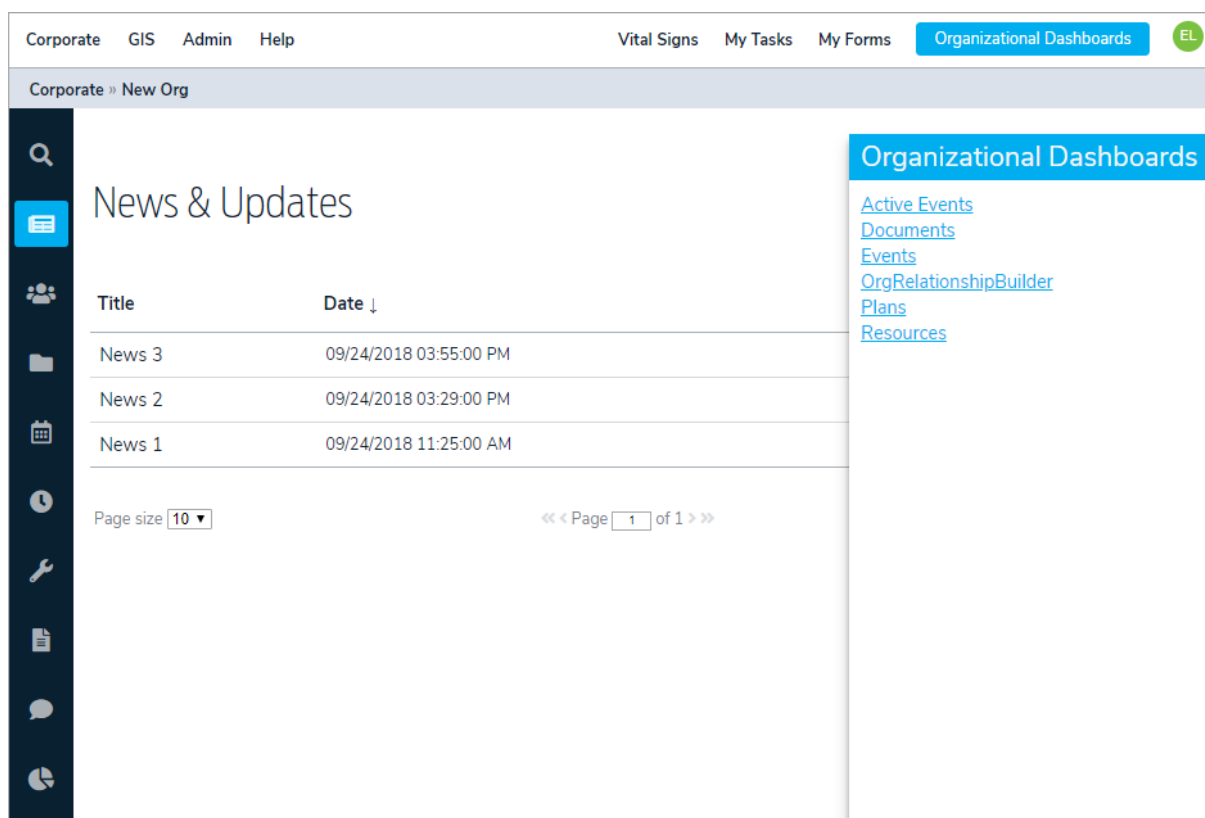
## Relationship Builder

The **relationship builder** is a tool that can be added to [Organization Editor](#) or [Plan-Event Editor](#) (dashboard) forms, and allows users to create scoped relationships directly from the form. Administrators can select the type of objects the relationship is created between, if one or both of the objects come from within or outside the current org, and the type of relationship.

To add a relationship builder tool to a dashboard form, see the [Create an Organizational Dashboard](#) and [Create a Plan or Event Dashboard](#) articles. See the [Advanced Relationship Mapping](#) article for information on defining which form is displayed for each item and relationship type.

### To use the relationship builder tool on a dashboard form:

1. Click the **Organizational Dashboards**, **Plan Dashboards**, or **Event Dashboards** link at the top-right of the page to display the dashboard panel.
2. Click the link to the form that contains the relationship builder tool.



*The Organizational Dashboards panel.*

3. Click the text box on the right of the top row and enter keywords to search for and select an object or click the  icon to the right of the field to display the **Association Tree**, then select an object. Depending on the configurations made by an administrator, you may or may not be able to select an object outside the current organization.

Form 'Documents'

Form Generated

Associated Items

| Title ↑                                               | Relationships | Title                                                 | Actions |
|-------------------------------------------------------|---------------|-------------------------------------------------------|---------|
| <input type="text" value="Select Item to Associate"/> | Component of  | <input type="text" value="Select Item to Associate"/> |         |
| Document 1                                            | Component of  | Plan 1                                                |         |

Page Size 10 < > << >> Page 1 of 1 <> << >> Displaying 1-1 of 1

The relationship builder on a form.

- If more than one relationship type was added to the tool by an administrator, select the relationship type from the **Relationships** dropdown menu.
- Click the text box 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 field to display the **Association Tree**, then select an object. Depending on the configurations made by an administrator, you may or may not be able to select an object outside the current organization.

Form 'Documents'

Form Generated

Associated Items

| Title ↑                                 | Relationships | Title                               | Actions |
|-----------------------------------------|---------------|-------------------------------------|---------|
| <input type="text" value="Document 2"/> | Component of  | <input type="text" value="Plan 2"/> |         |
| Document 1                              | Permission    | Plan 1                              |         |

Page Size 10 < > << >> Page 1 of 1 <> << >> Displaying 1-1 of 1

A relationship on the form that has not yet been saved.

- Click the icon to save the relationship.



Enabling **Auto Refresh** on the form will clear any unsaved selections in the relationship builder.

- The relationship builder will create a new **Relationship Editor form** and prompt the user to enter in the required information.

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



## Incident Submission Forms

The Incident Submission Form (ISF) allows select plans to be executed from virtually anyone in your organization without having to log in to Global AlertLink. This feature can be secured to your needs.

To navigate to the Incident Submission Form, you must enter the URL: <http://GALURL/IncidentForm/ISF.aspx>

There are five standard forms included in your system.

### Basic Forms

This allows the user to see all of the active events in the system that they have permission to view. In addition, the user can click **New Report** and submit a new event.

#### New

This allows the user to select the organizational unit and plans that they have permission to activate, complete any message parameters for messages in the plan, and click the **Submit** button to activate.

#### New By Folder

This form functions identically to the **New** form, except that the user chooses a plan by selecting a folder from a hierarchy tree. To use this form, enter <http://GALURL/IncidentForm/ISF.aspx?form=newByFolder>.

#### Update

This allows the user to select an active event that they have permission to, and update that active event with another Plan.

Depending upon how your ISF is designed, the screen is dynamic-based upon the incident type selected. Choosing an incident type will display additional fields/questions that should be completed. As you complete certain questions, additional questions may appear.

Once you complete the form, click the **Submit** button at the bottom of the screen to activate the incident.

#### Update By Folder

This form functions identically to the **Update** form, except that the user chooses a plan by selecting a folder from a hierarchy tree. To use this form, enter <http://GALURL/IncidentForm/ISF.aspx?form=updateByFolder>.

## Activating & Updating an Incident

### What Happens When You Activate?

There are several pre-defined business rules and actions that occur upon activation of an incident. The following provides an overview of the process. Upon activating, the plan associated with the Incident Type is activated. The activation then follows the standard Global AlertLink plan processing rules.

Each Incident Type plan is stored for a business unit or organization within a Plans folder. To access these plans, login to the Global AlertLink system, navigate to your organization, and then click Plans

from the right portion of the screen.

### Updating an Incident

You may also update an existing incident from an ISF. Typically, this will load the activation form based upon the initial activation or previous update. Make the appropriate changes and click the Submit button.

Upon submitting an update, the system will merge in the workflow contained within an Update Plan that could be set to simply send an updated notification to the same recipient list as the original activation.

### Additional Items

The list of questions for each Incident Type is typically set and may not be edited. When updating an incident, you may not change certain types of fields such as Incident Type and other key question fields. You may manage the process flow that occurs after incident activation as well as incident update by editing the plans associated with the ISF. You may also customize the process flow of each incident type if required.

Upon incident update, the system will automatically insert an asterisk (\*) beside any data point that has changed since last update in the message.

ISF's are highly customizable to each business unit organization. Global AlertLink provides customization services to design, build and support your ISFs. If you would like to learn more about how ISFs

can work in your business, please contact Global AlertLink at [support@resolver.com](mailto:support@resolver.com).

