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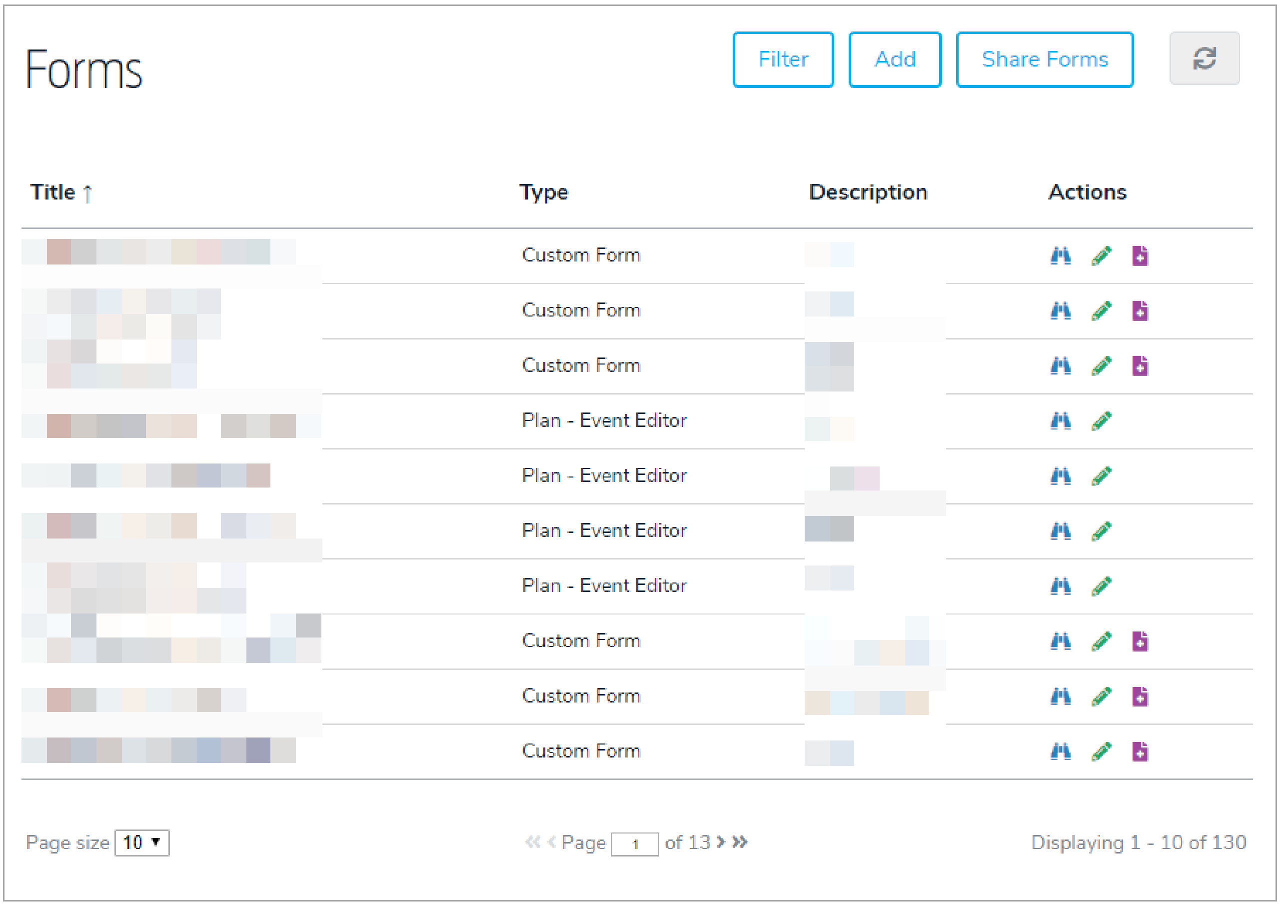
Forms Overview

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.

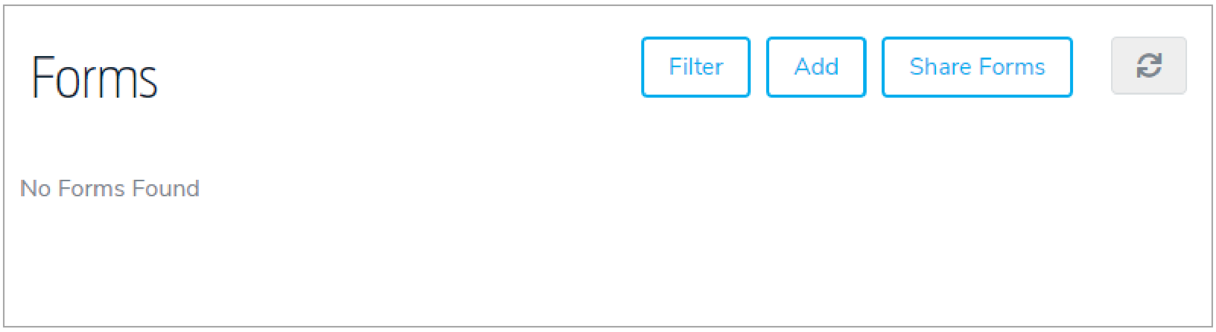
Relationship Editors are a way to View and/or Add Data to Relationships. Relationship Editors are specific to different Relationship Mappings.

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.

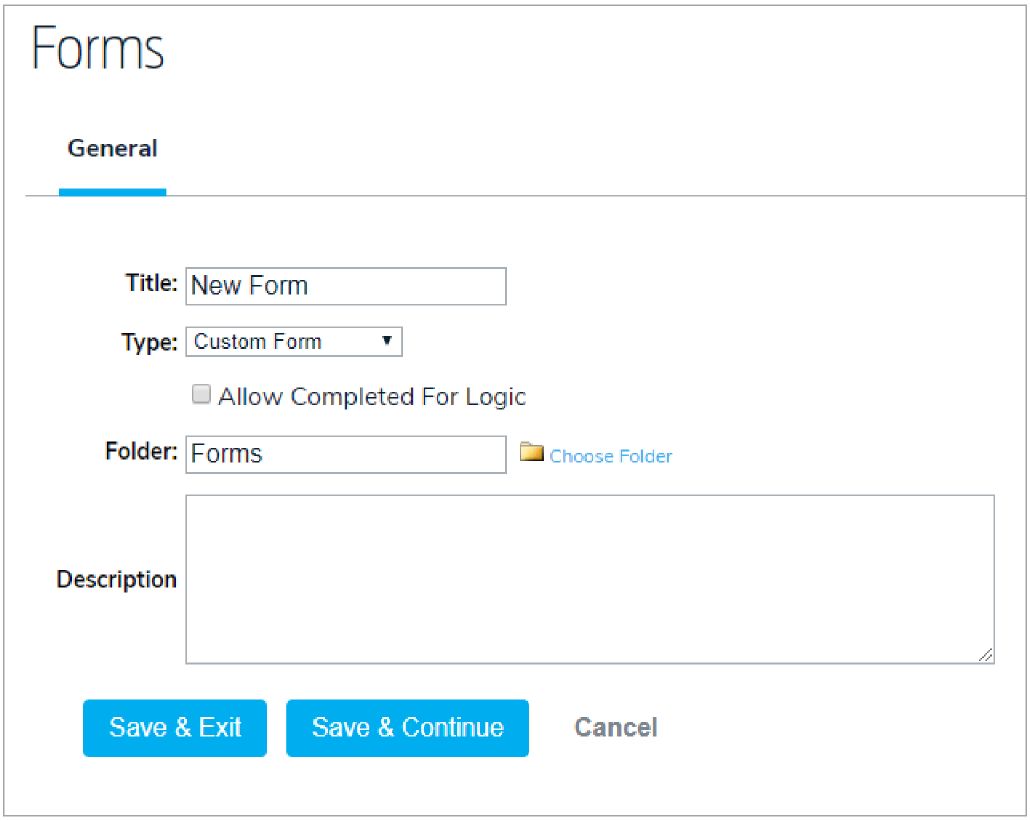


Create a Form

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



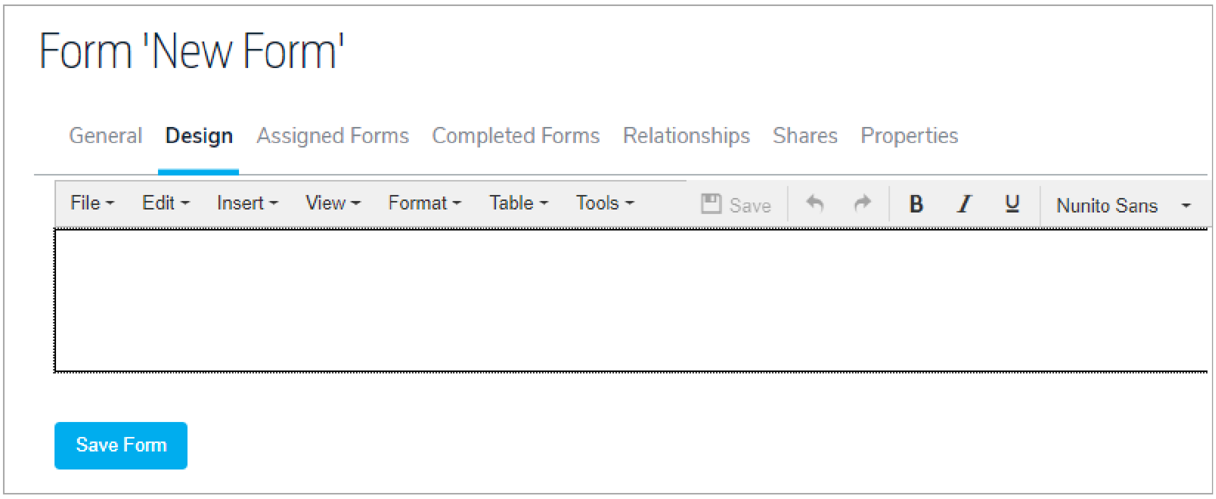
2. Enter a name for the form in the Title field.
3. Select Custom Form, Plan - Event Editor, or Relationship Editor from the Type dropdown menu.



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).

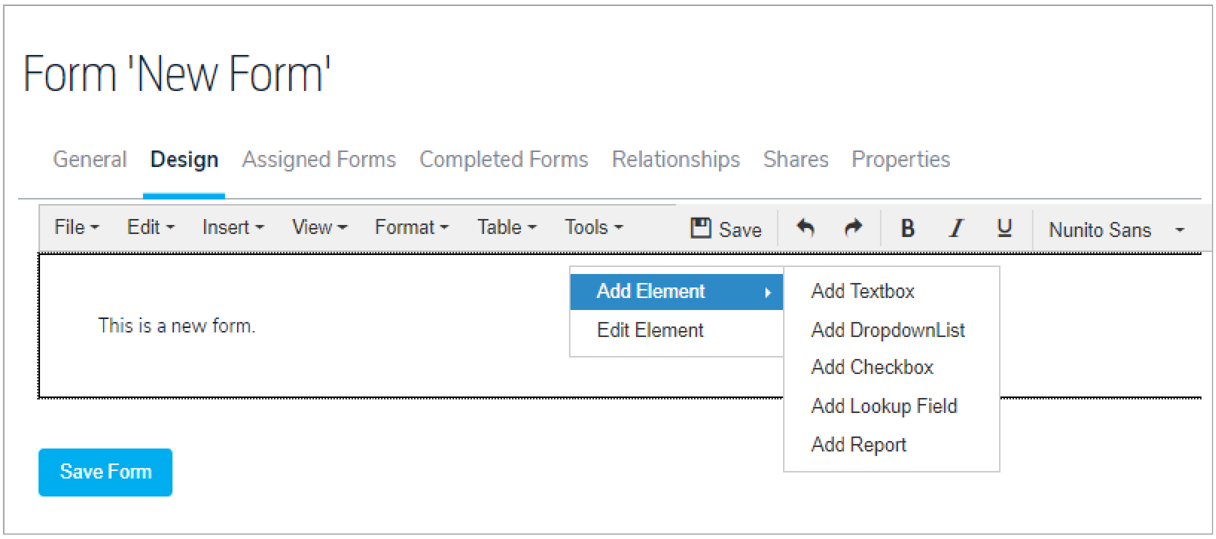
Design a Form

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 Form editor.

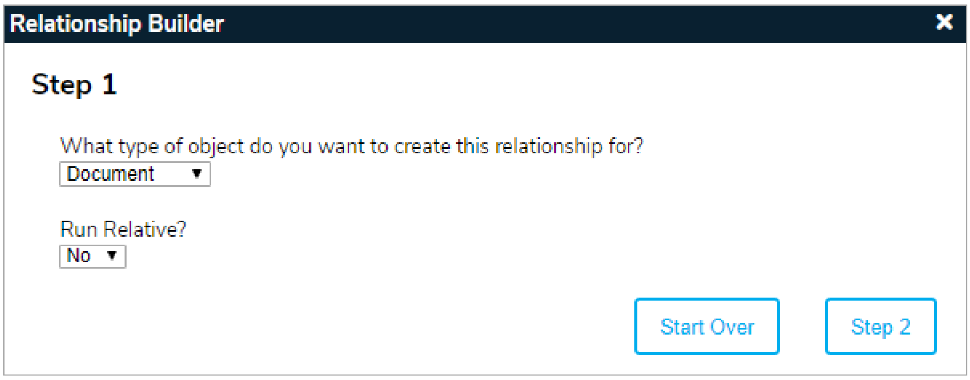
4. Enter text in the textbox, then use the options in the editor menu to format the form as needed.
5. To insert a textbox, dropdown list, checkbox, lookup field, click **Tools**, and click an element to insert it or right-click the textbox, hover your cursor over **Add Element**, then click an element.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



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

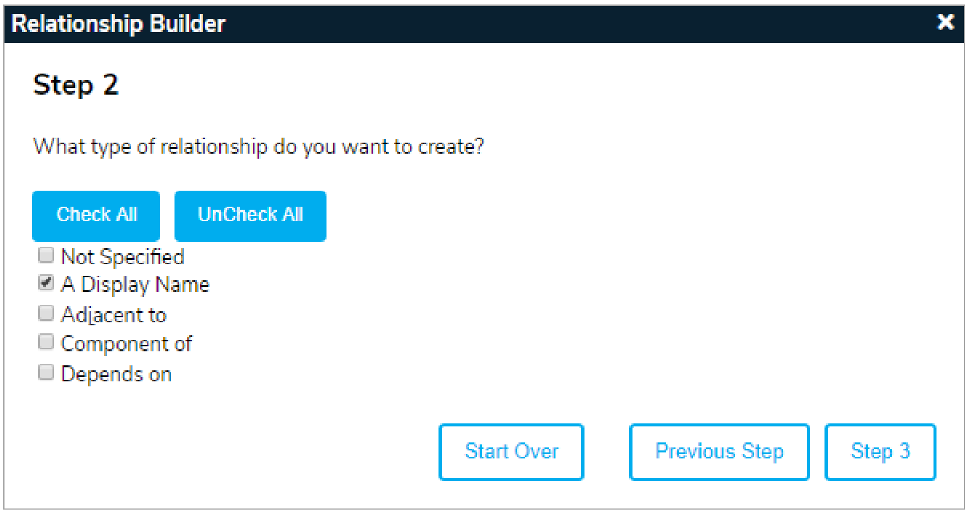
organization where the form is being accessed, you'd select **Yes**, but if the user should be able to select a document from another org, you would select **No.**



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.

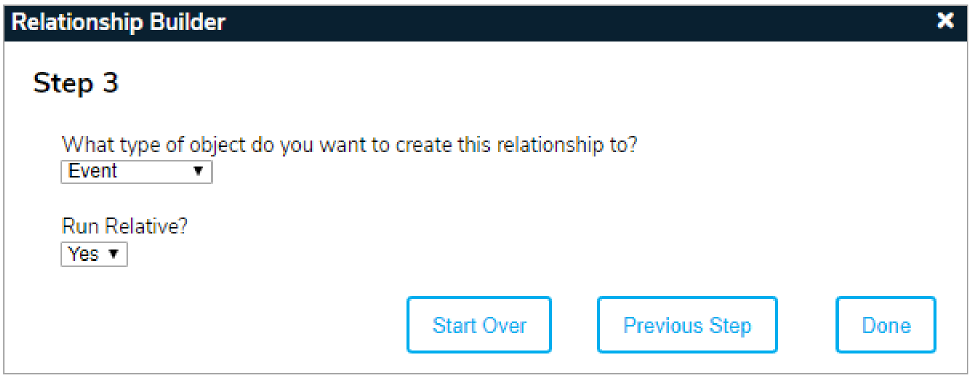


Step 2 of the Relationship Builder wizard.

f. Click Step 3.

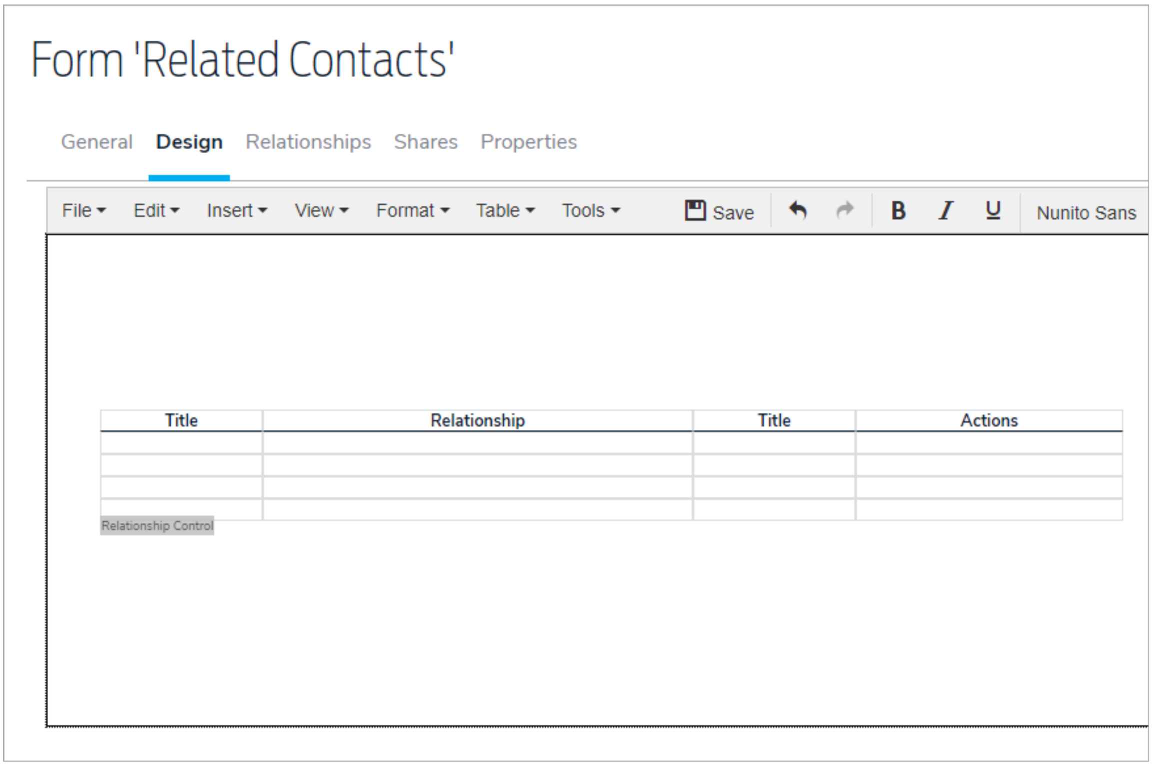
g. Select the type of object you want to create the relationship to from the dropdown menu.

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**.



Step 3 of the Relationship Builder wizard.

i. Click Done.



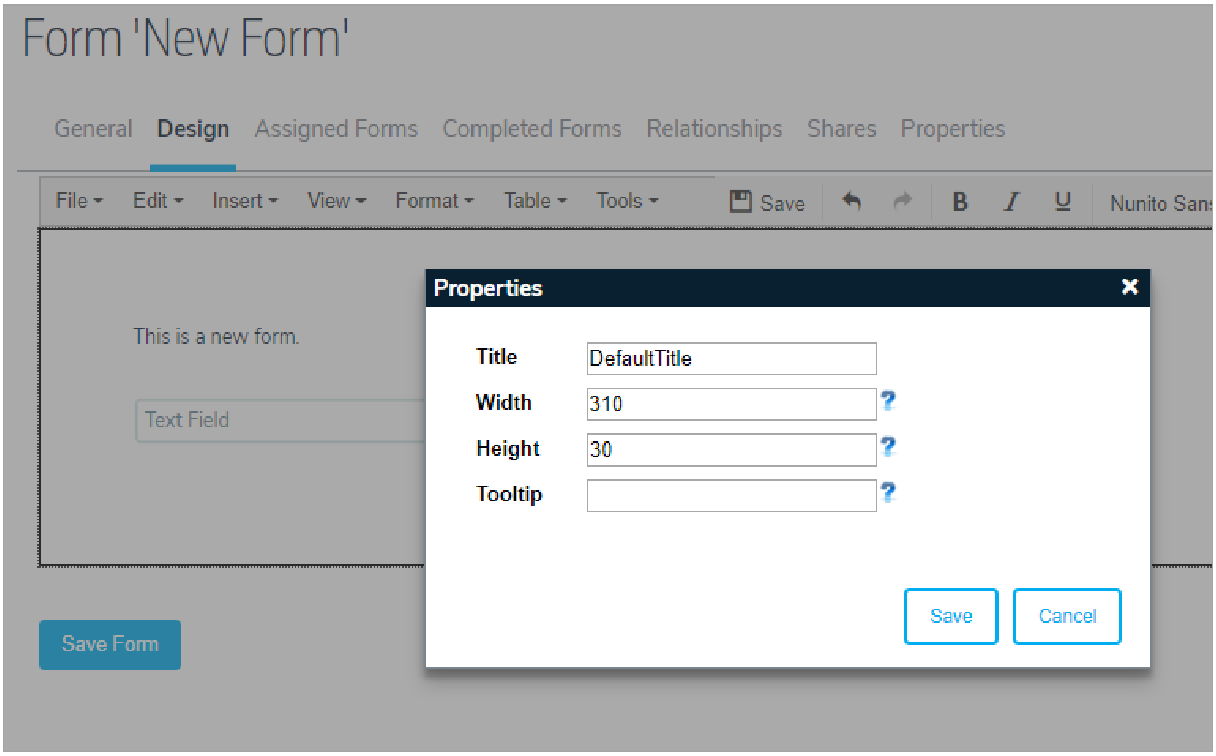
A completed relationship builder on a form.

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):

Title	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. 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.
Width	Allows the user to input the Width of an Object. (Textbox, Dropdown, and Lookup Field only. Includes Edit Variables.)

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

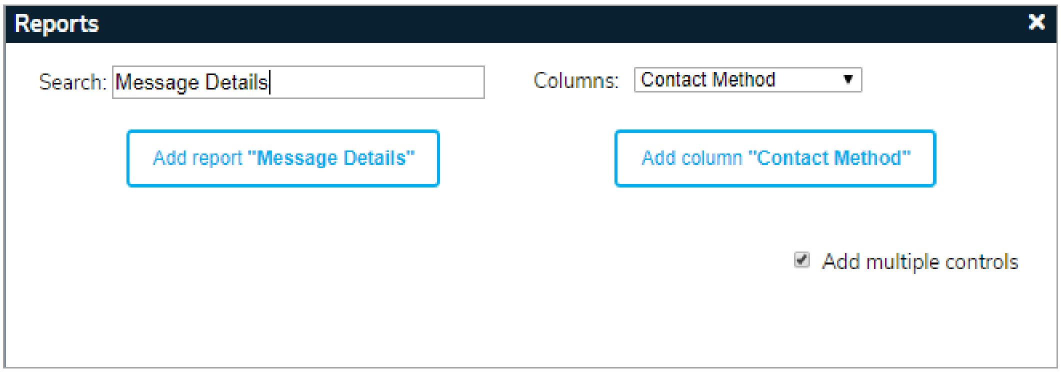
The Tools bar allows the user to include data from a Report into the form. The user can also right click in the form and add a report.

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.

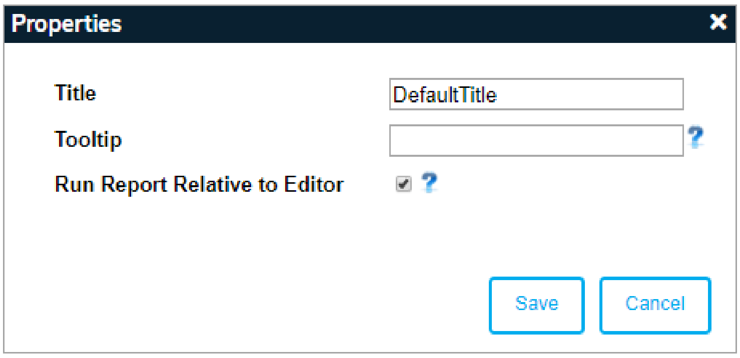
Once you select the Report, you can click to add the entire report or click on the arrow in the columns box and select field(s) to include. The "Add Multiple Controls" checkbox allows you to enter the report and specific fields at the same time, without searching for the Report again.

Select a specific field to add to your report.



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

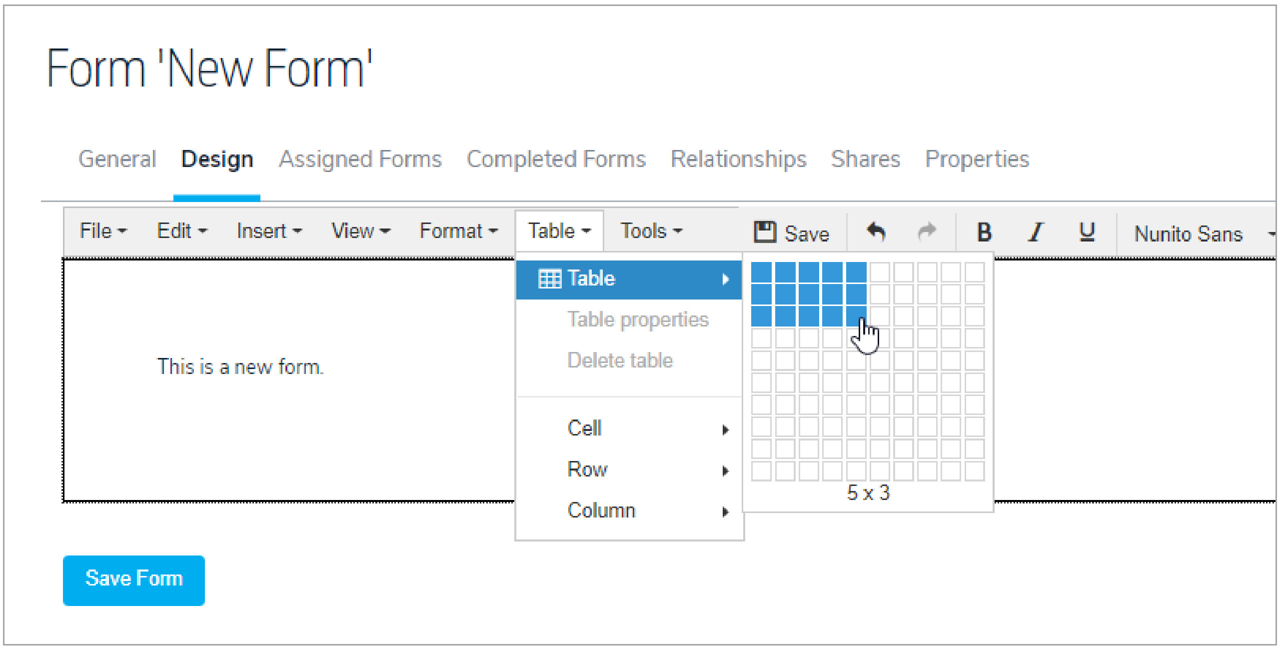
You can edit that field's Properties by right clicking in it. The following screen will be displayed:



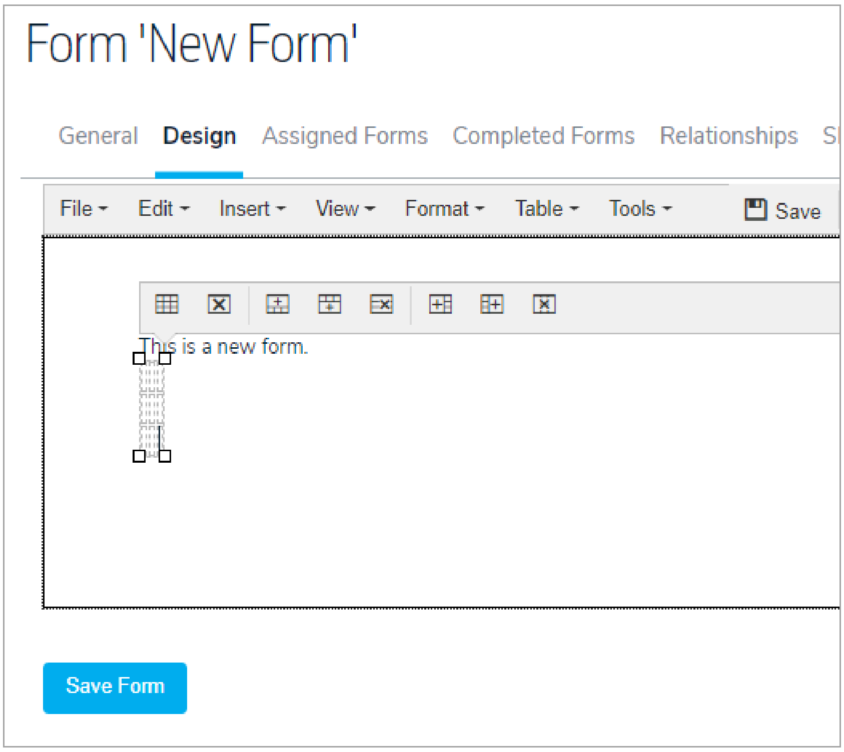
Tables on Forms

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.

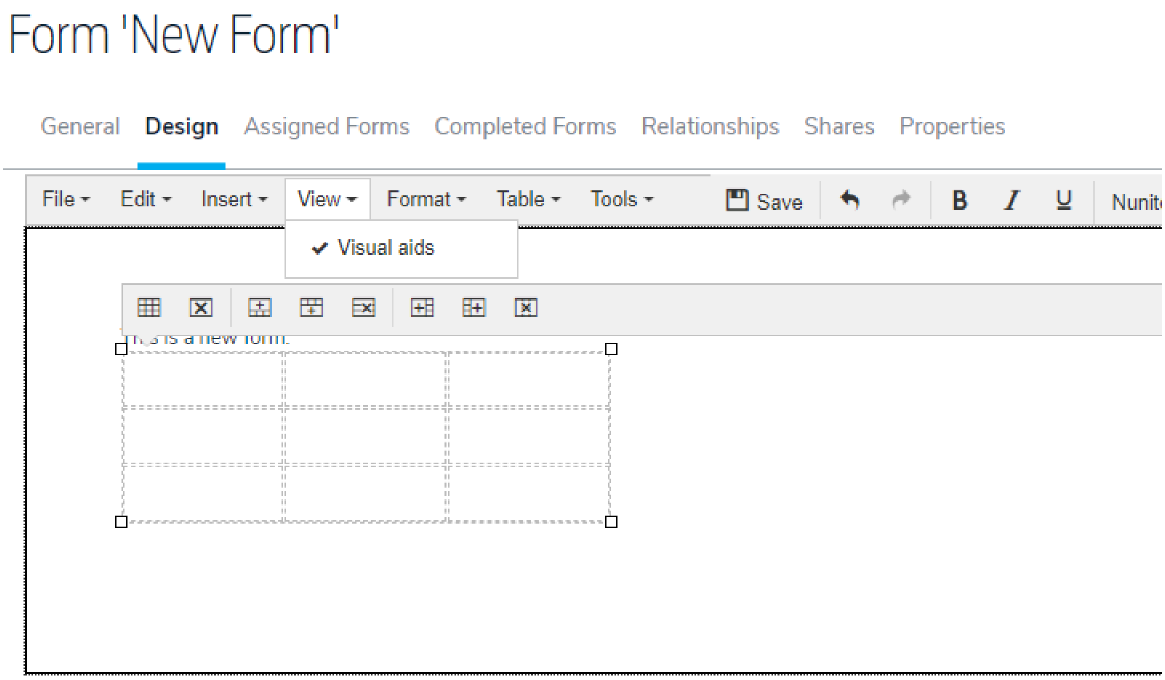
To add a new table to your form, click on "Table" and select the number of rows and columns you want.



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

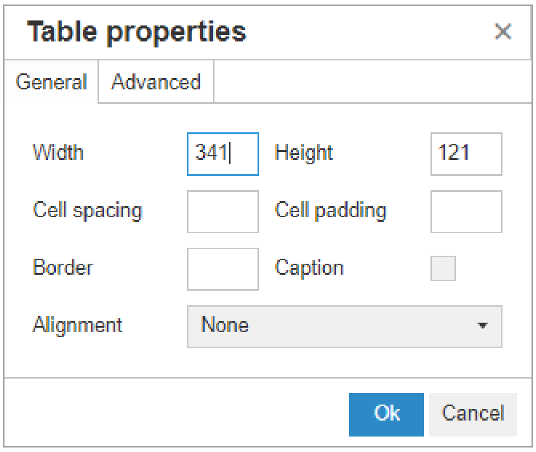


You can adjust the size of the columns in the table by dragging the grid and adjusting the column margins. By clicking on Visual aids, you can display the grid lines of the table while you design the form and then remove them to see what the form would look like without them.

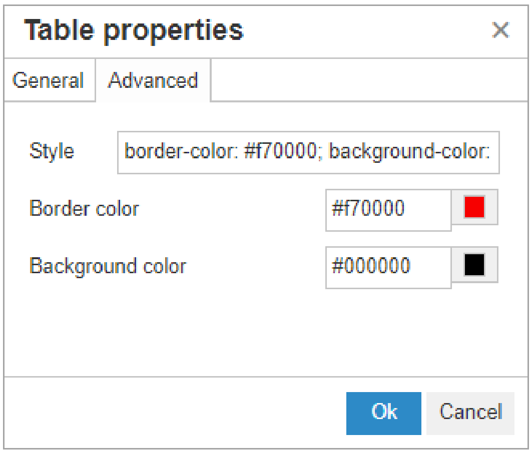


When you create a table, you can also edit the properties of the table. By clicking when the cursor is in the table, the properties tabs are displayed which allow you to add/delete rows or columns. In addition, you can set up properties for the entire table by clicking on the icon circled in red.

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.

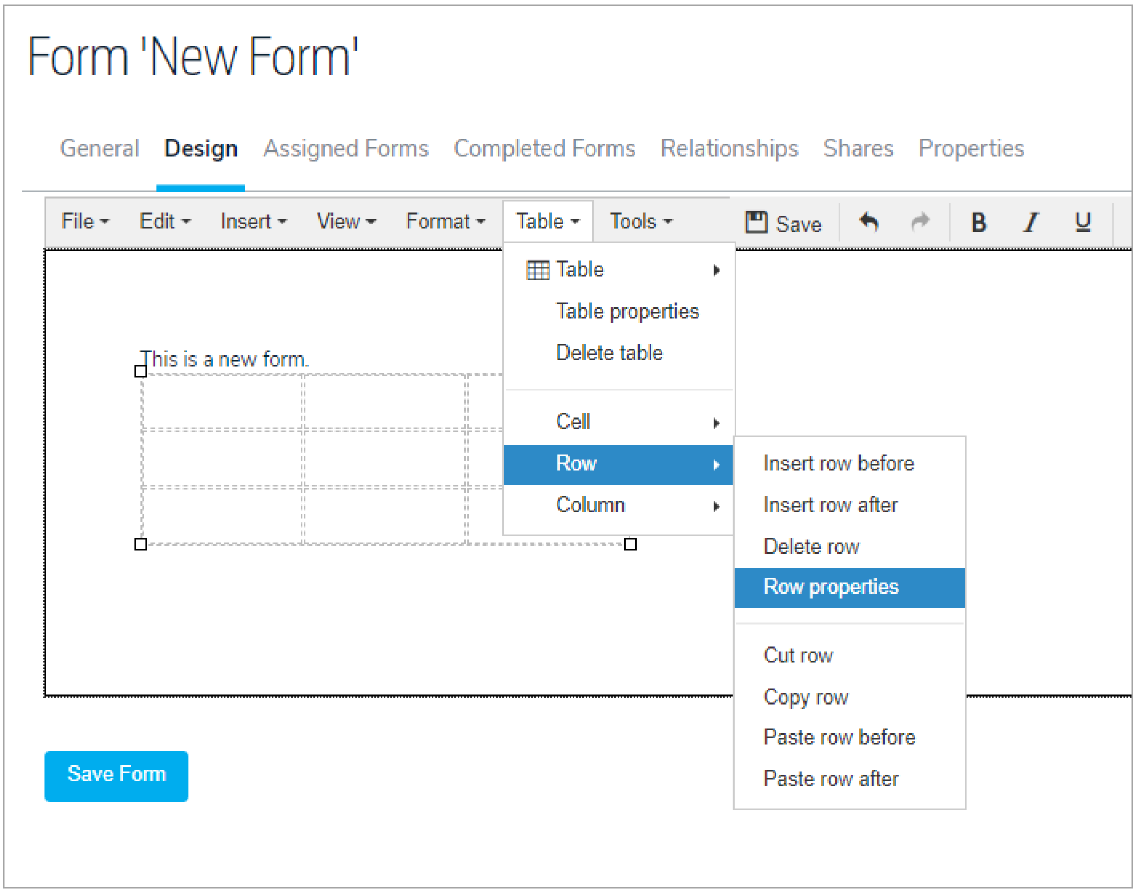


Clicking the Advanced tab on Table Properties allows the user to change the color of the border and add background colors as well.

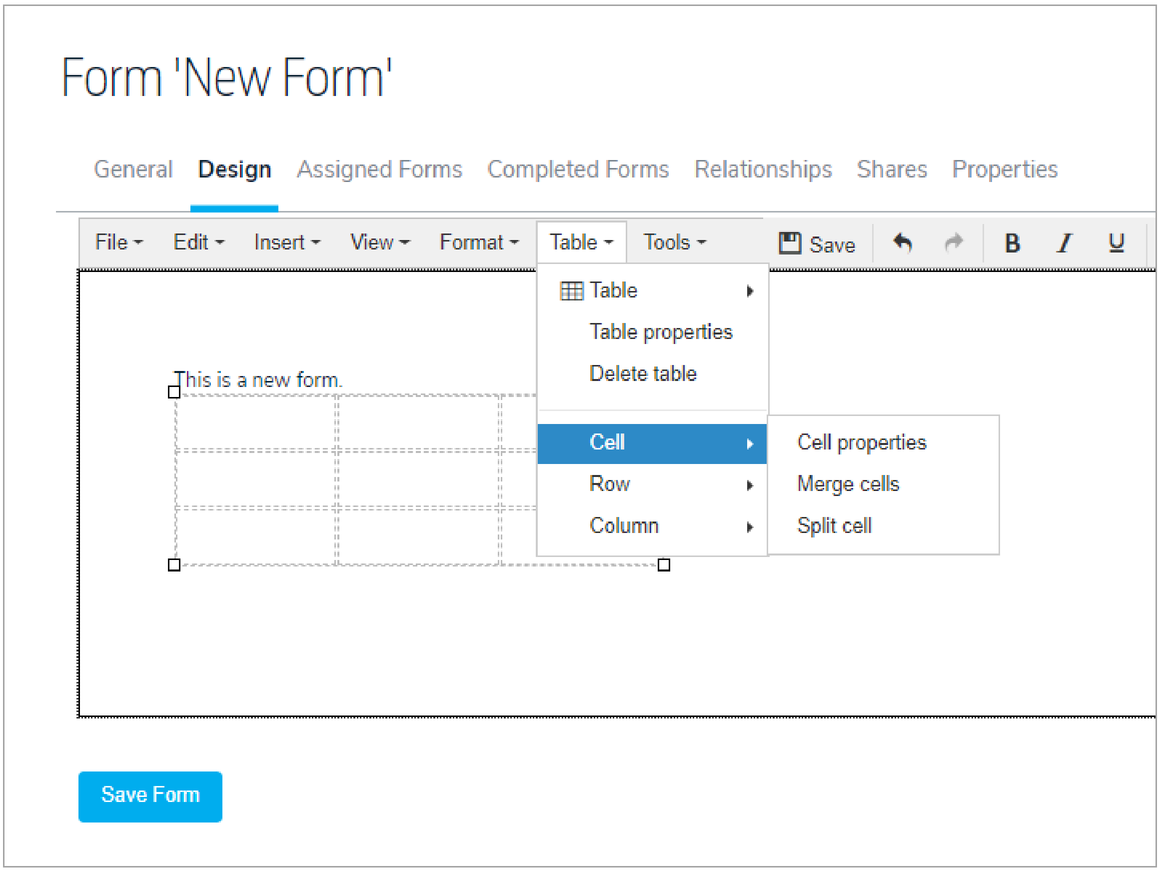


Tables are key to using the new Form Designer as you design and as the finished product for the end user. By highlighting individual cells, entire rows or columns, the user is able to set the cell and row properties as well.

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.



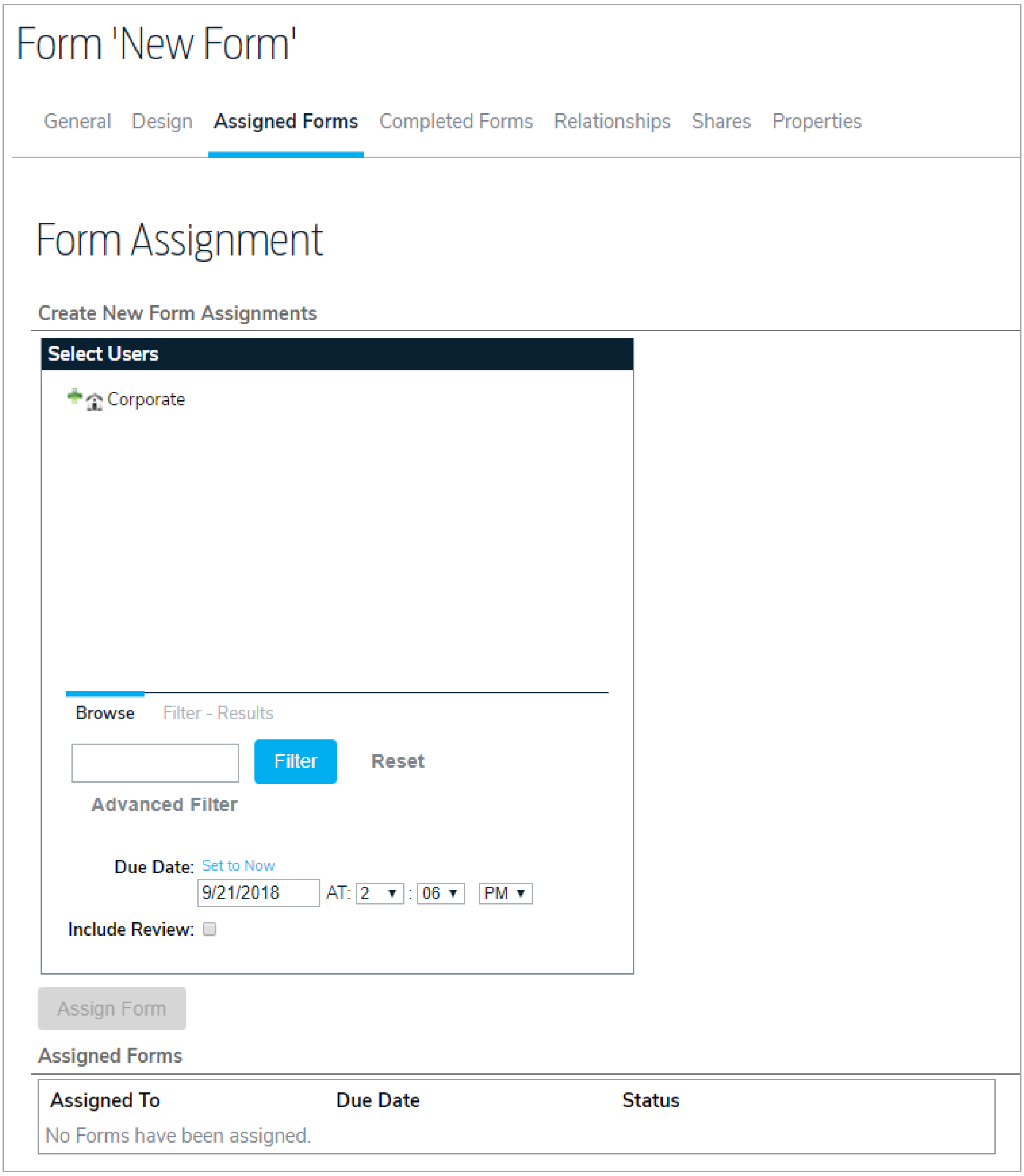
You can also merge and split cells in tables if necessary.


Form 'New Form'
General
Design
Assigned Forms
Completed Forms
Relationships
Shares
Properties
File
Edit
Insert
View
Format
Table
Tools
Save
B
I
U
Table
Table properties
Delete table
Cell
Row
Column
Cell properties
Merge cells
Split cell
This is a new form.
Save Form

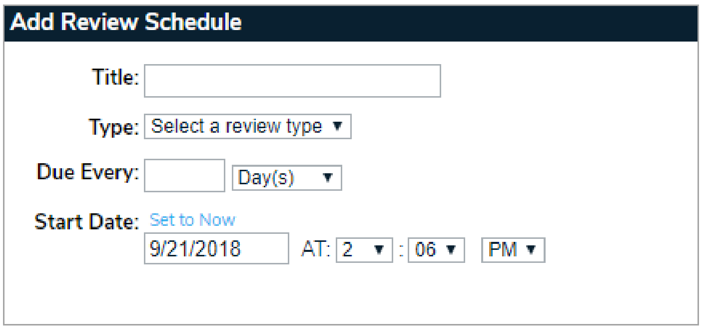
Assign a Form

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.

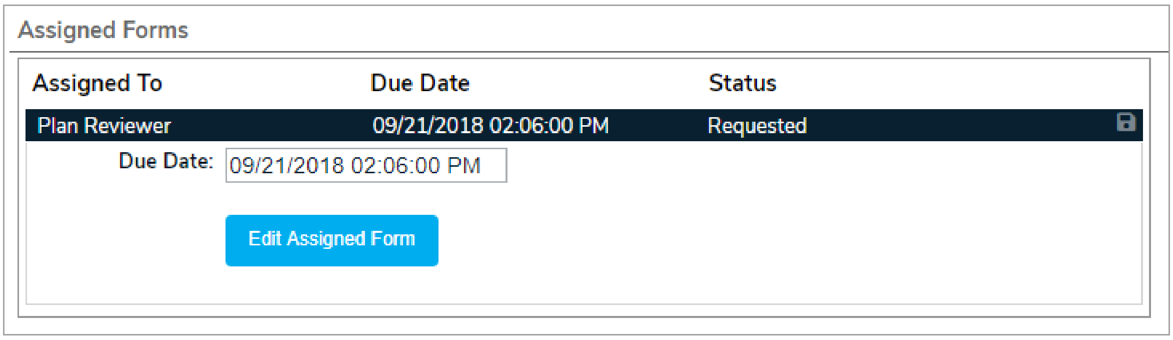


4. Select a date and time the form will be assigned to the user in the Due Date section. To assign the form on today's date, click Set to Now.
5. Select the Include Review checkbox if a review is required, then enter the review details in the Add Review Schedule window.



6. Click Assign Form.

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

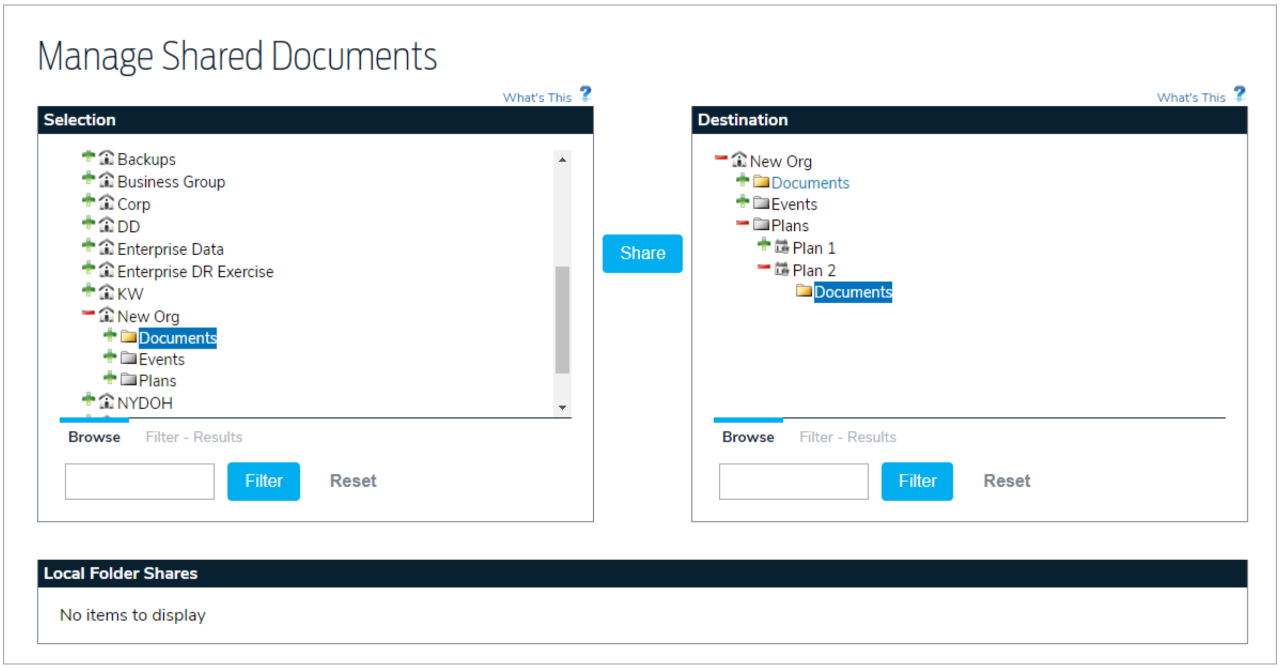


Completed Forms

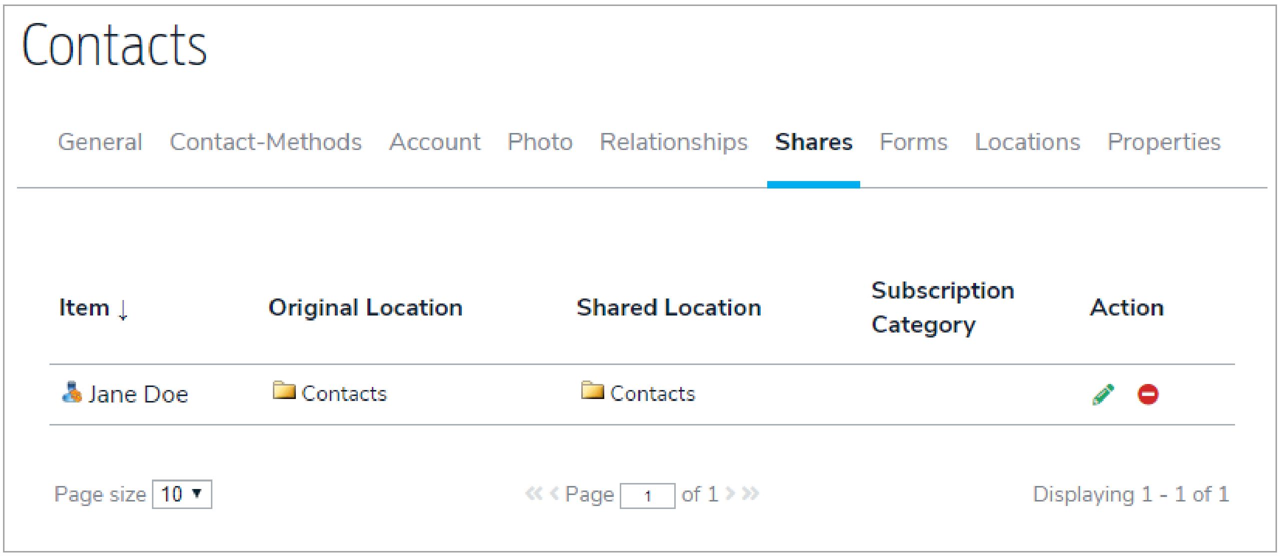
The Completed Forms tab is where you may view a list of forms that have been successfully completed. For completed forms, you can edit the form and add Completed For logic, but you cannot add additional data to the form.

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.



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.



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.

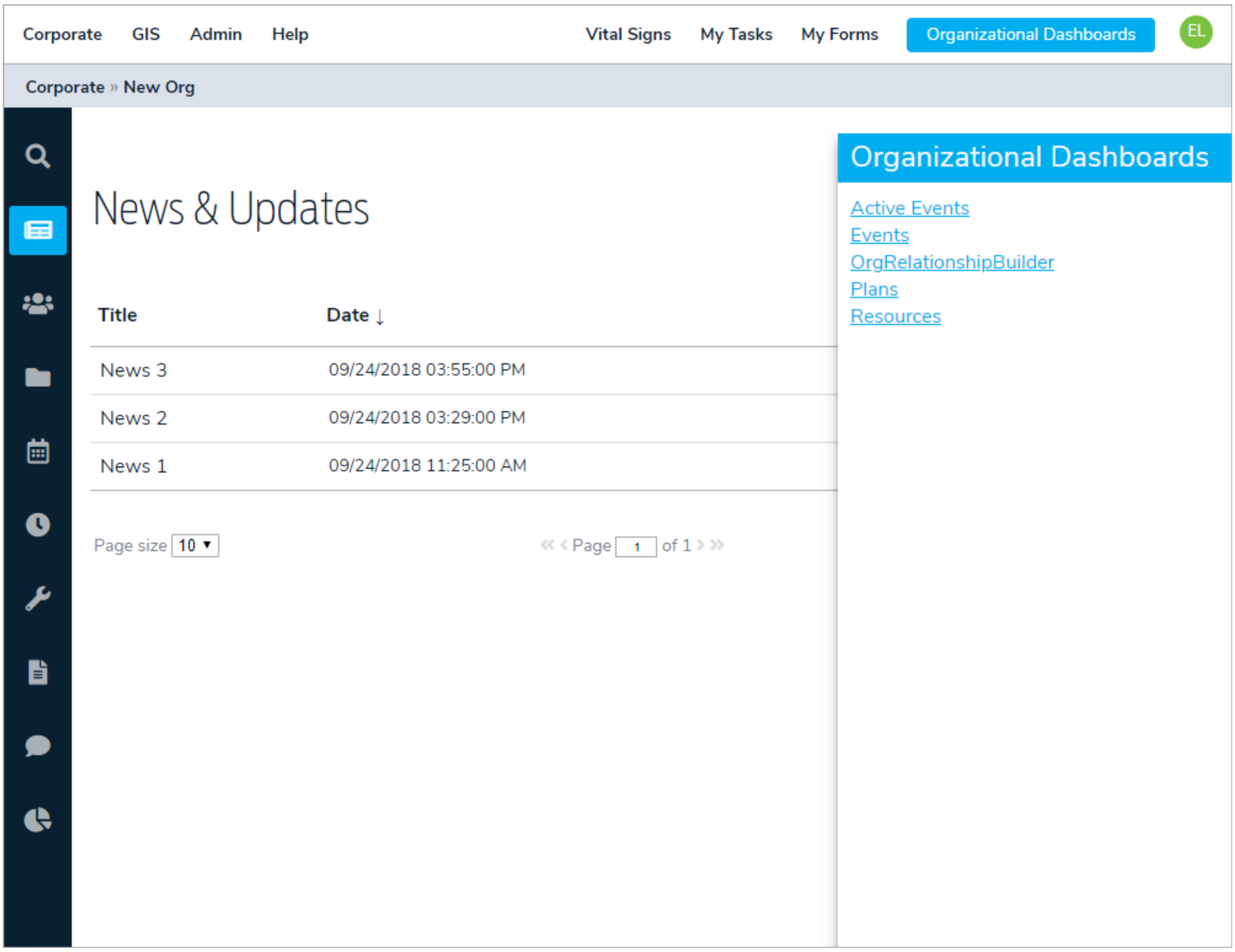
Dashboards Overview

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.



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

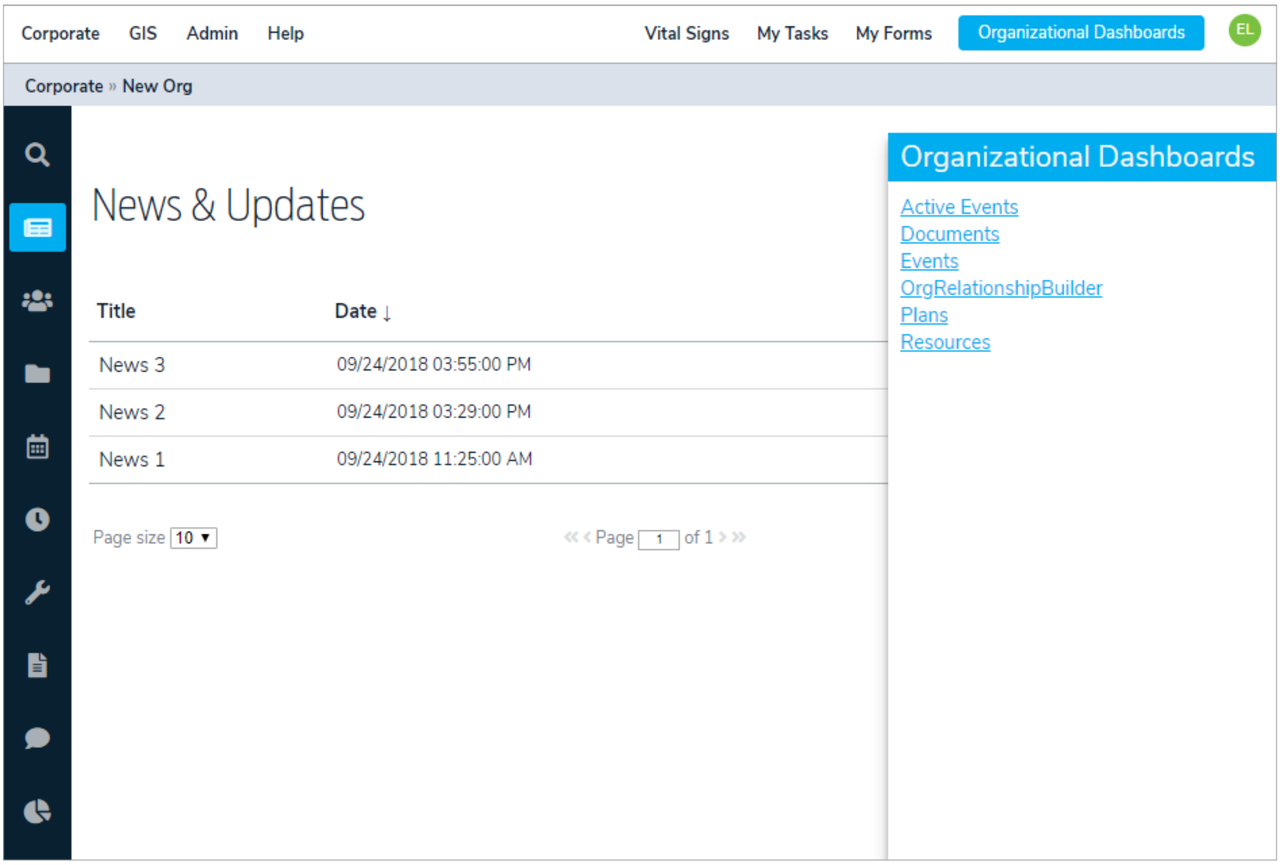
For information on creating an editor form and adding it to a dashboard, see the following articles:

- 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.

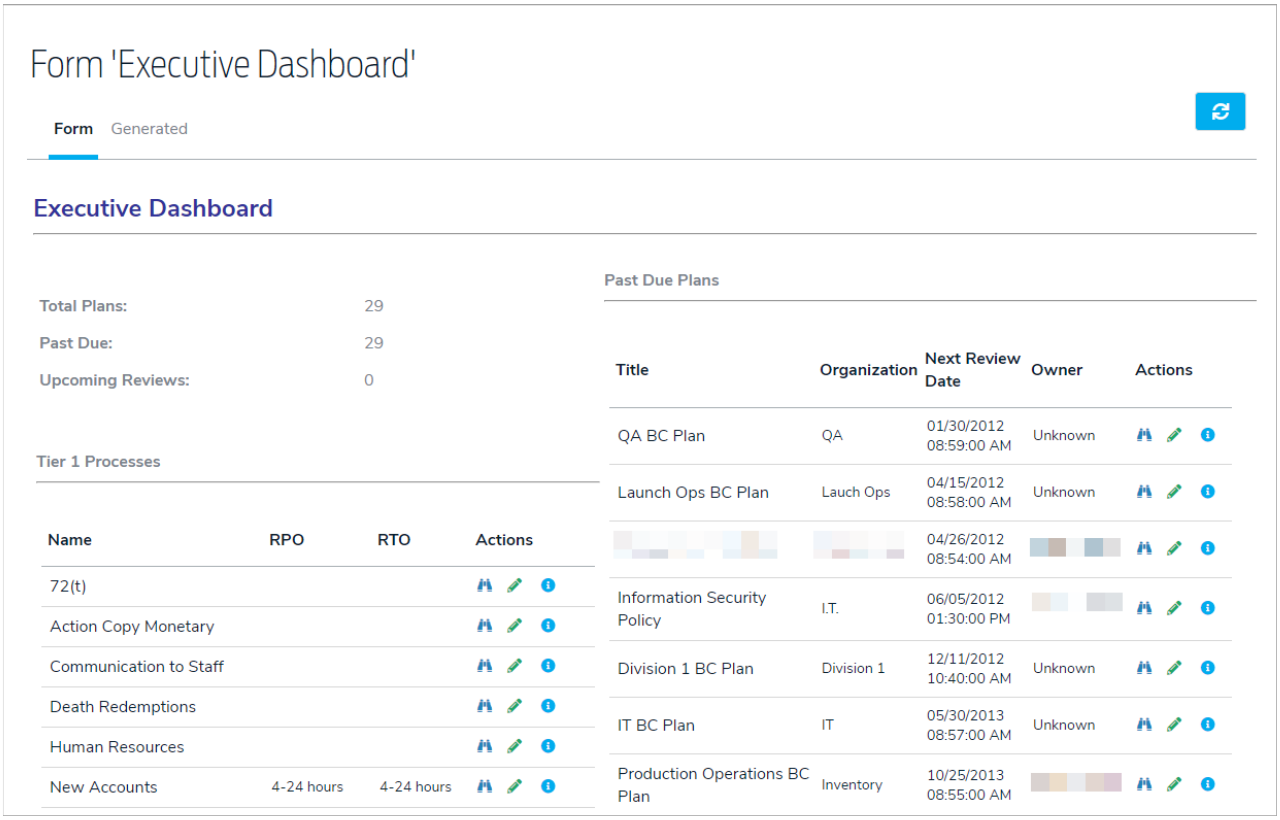
You can access an organizational dashboard any time you're working in the org to which the form has been shared (with the exception of Plans or Events).



The Organizational Dashboards panel.

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

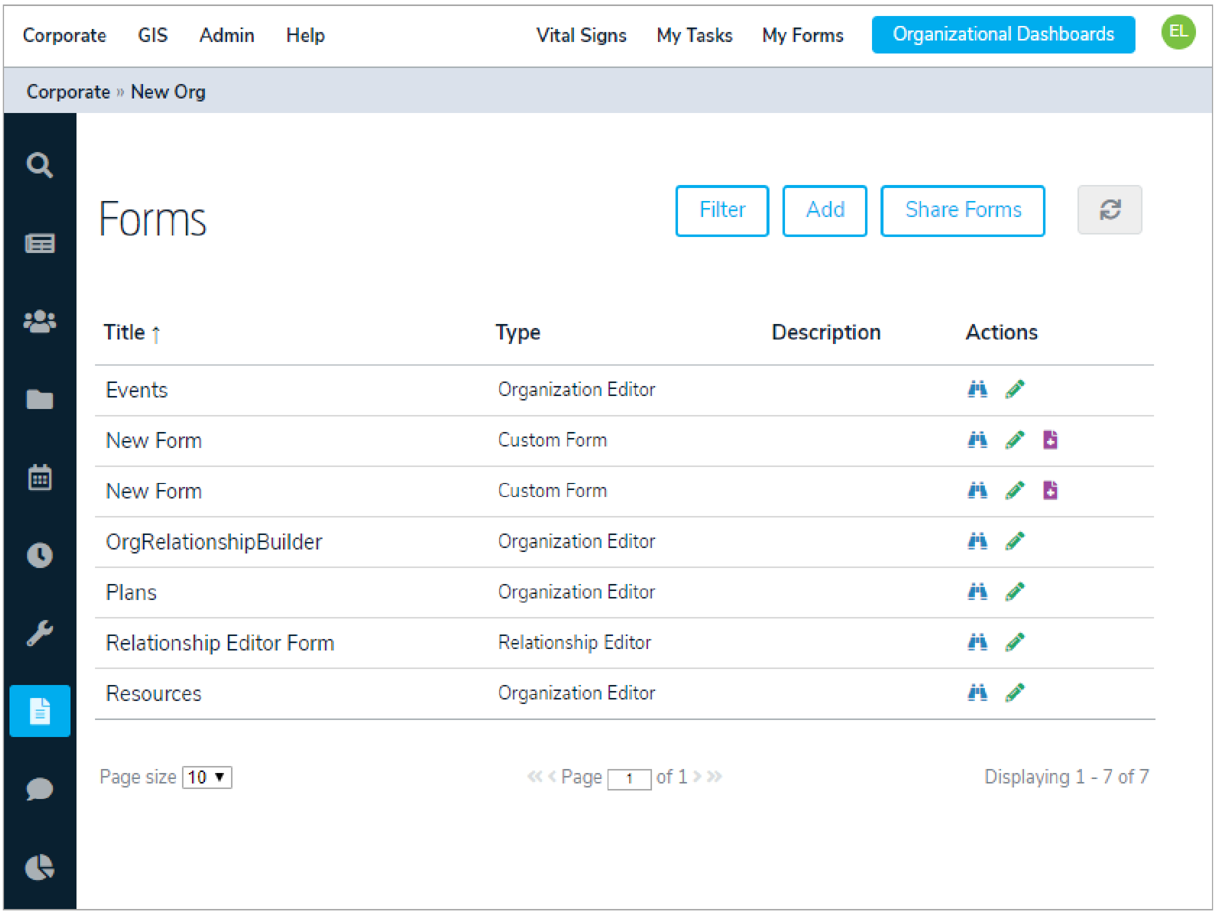
To create an executive dashboard, follow the instructions below, customizing the form as needed and adding the reports that summarize the status of the events, plans, resources, etc. in your organization.



An example of an executive dashboard.

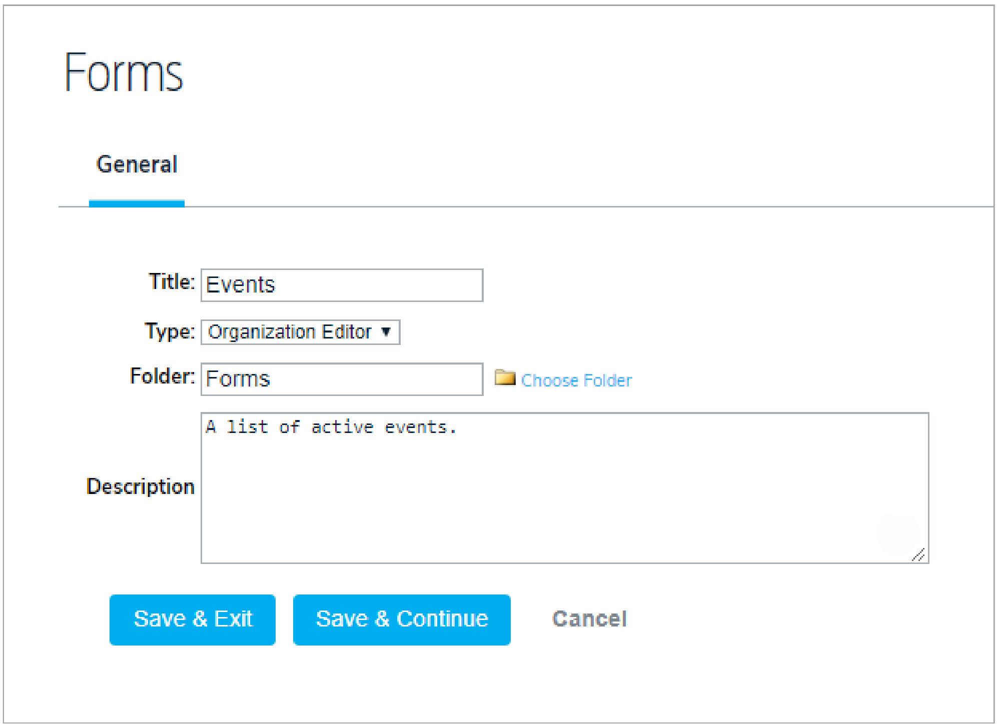
To create an organizational dashboard:

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**.



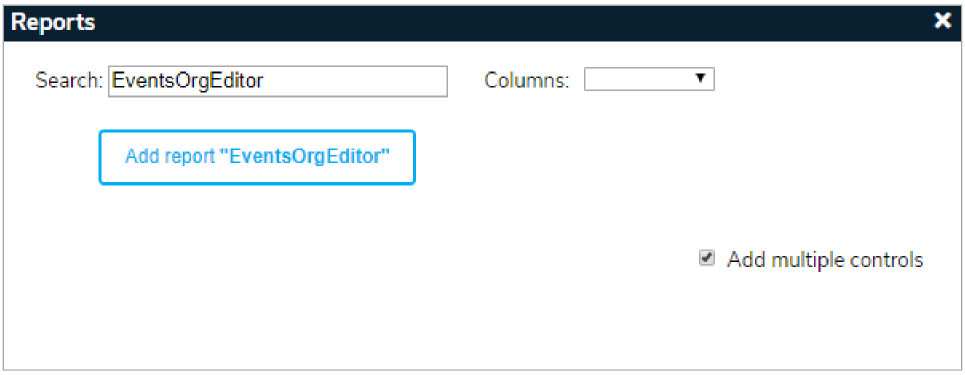
The Forms page.

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



A new Organization Editor form.

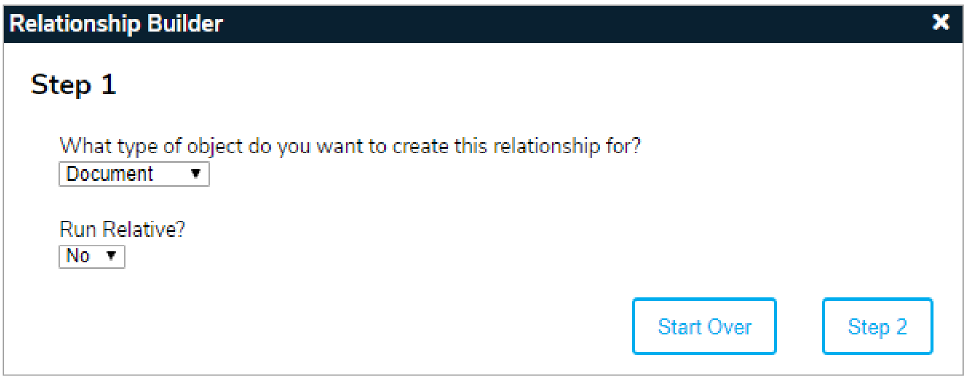
8. Click **Save & Continue.**
9. Click the **Design** tab.
10. To add a report to the form:
    a. Click the form canvas > **Tools > Add Report.**
    b. Enter keywords in the **Search** field to locate the existing report, then click to select it.



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.

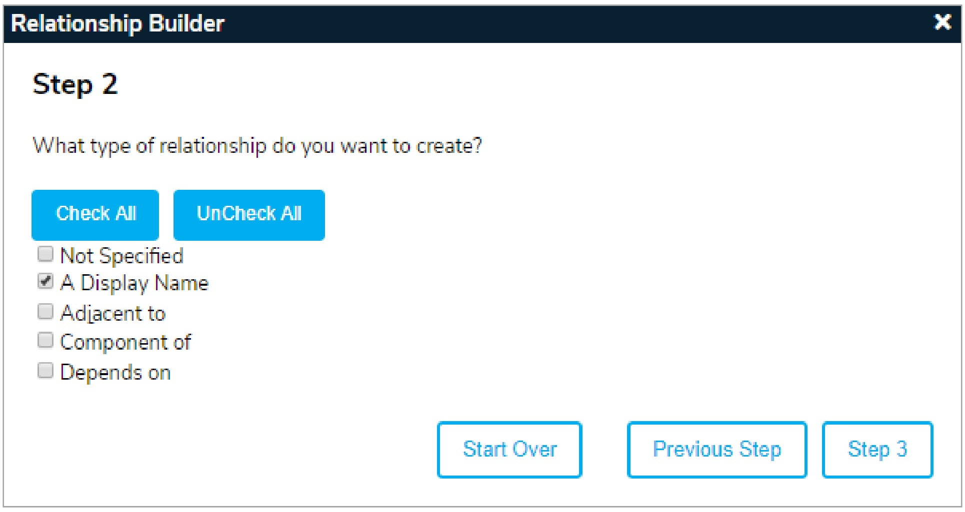
c. Select **Yes** from the **Run Relative?** dropdown menu to allow users to only select objects from the current organization or select **No** if you want to allow users to select objects outside of the current organization. For example, if you want users to create a relationship for a document object 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.**



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.

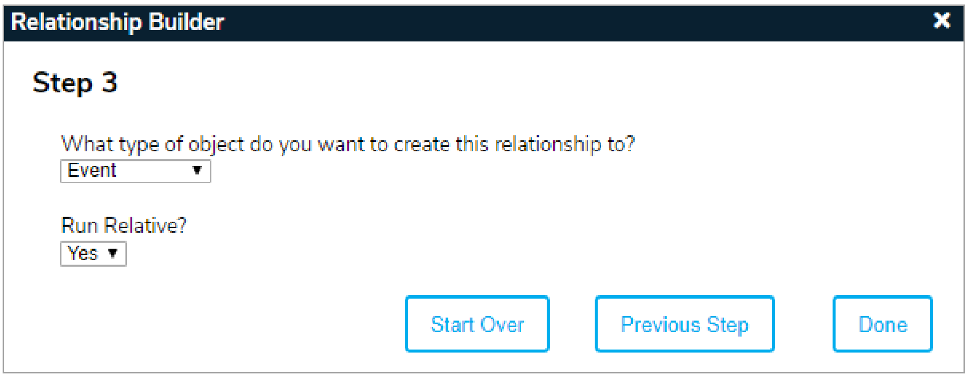


Step 2 of the Relationship Builder.

f. Click **Step 3**.

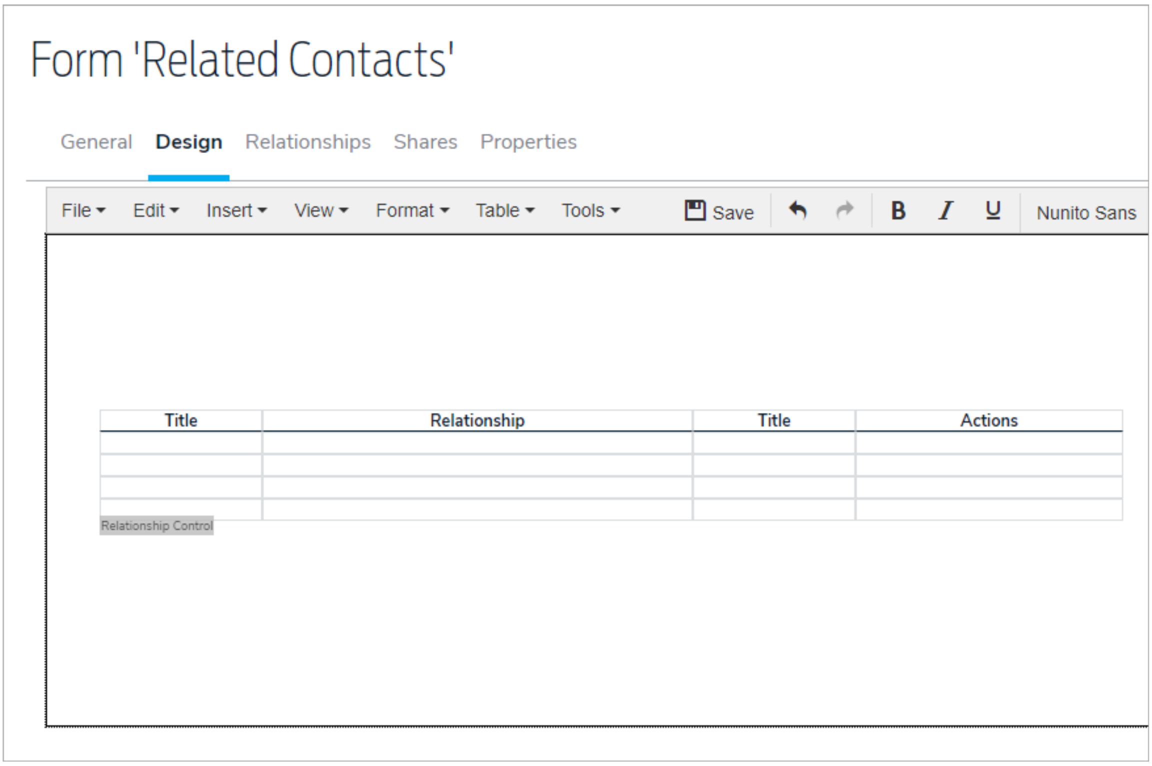
g. Select the type of object you want to create the relationship to from the dropdown menu.

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.**



Step 3 of the Relationship Builder.

i. Click **Done**.



The relationship builder tool.

j. Repeat steps a. to i. above to continue adding more relationship builder forms.

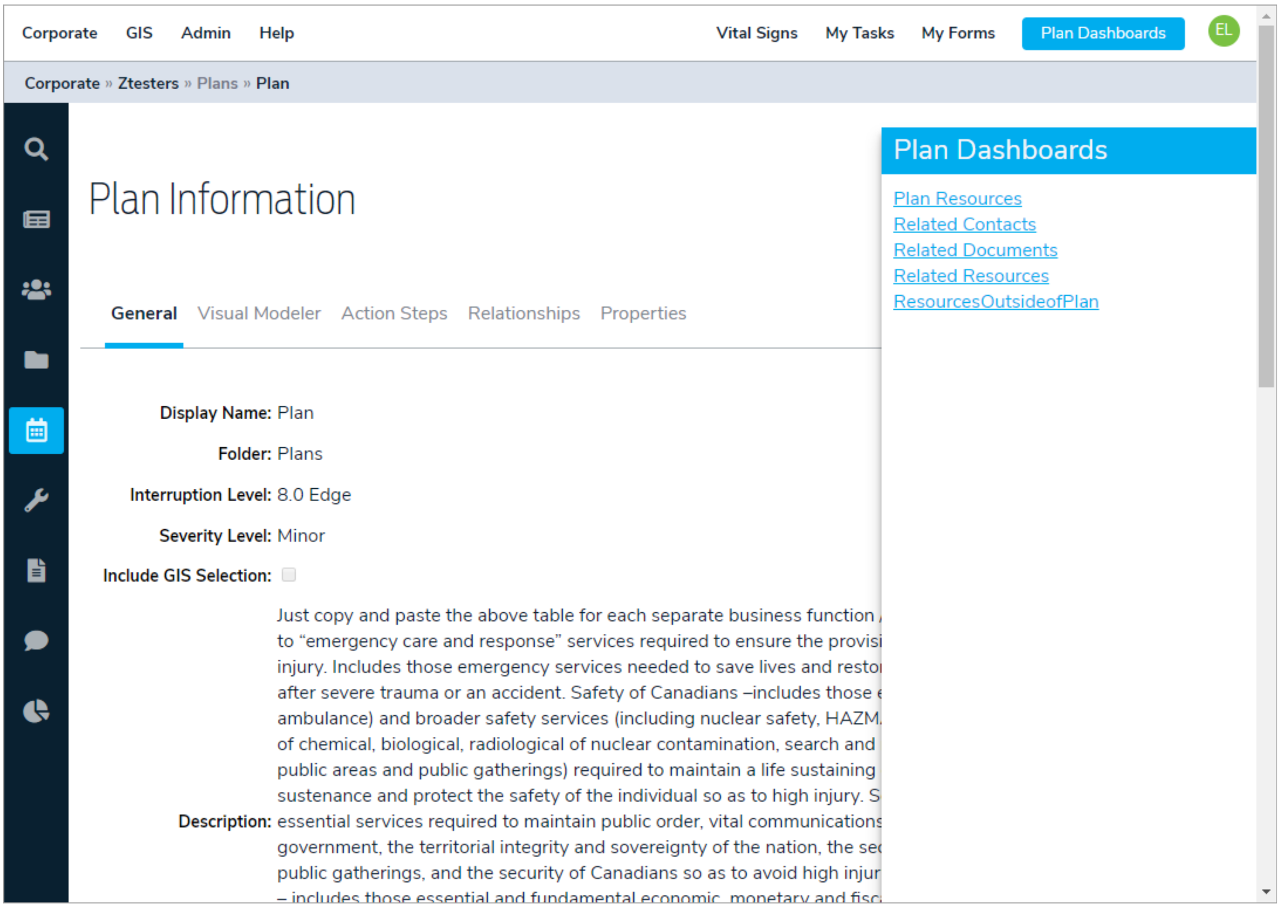
12. Continue designing the form, adding any elements to collect data, if needed. See the Forms section for more information.

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.

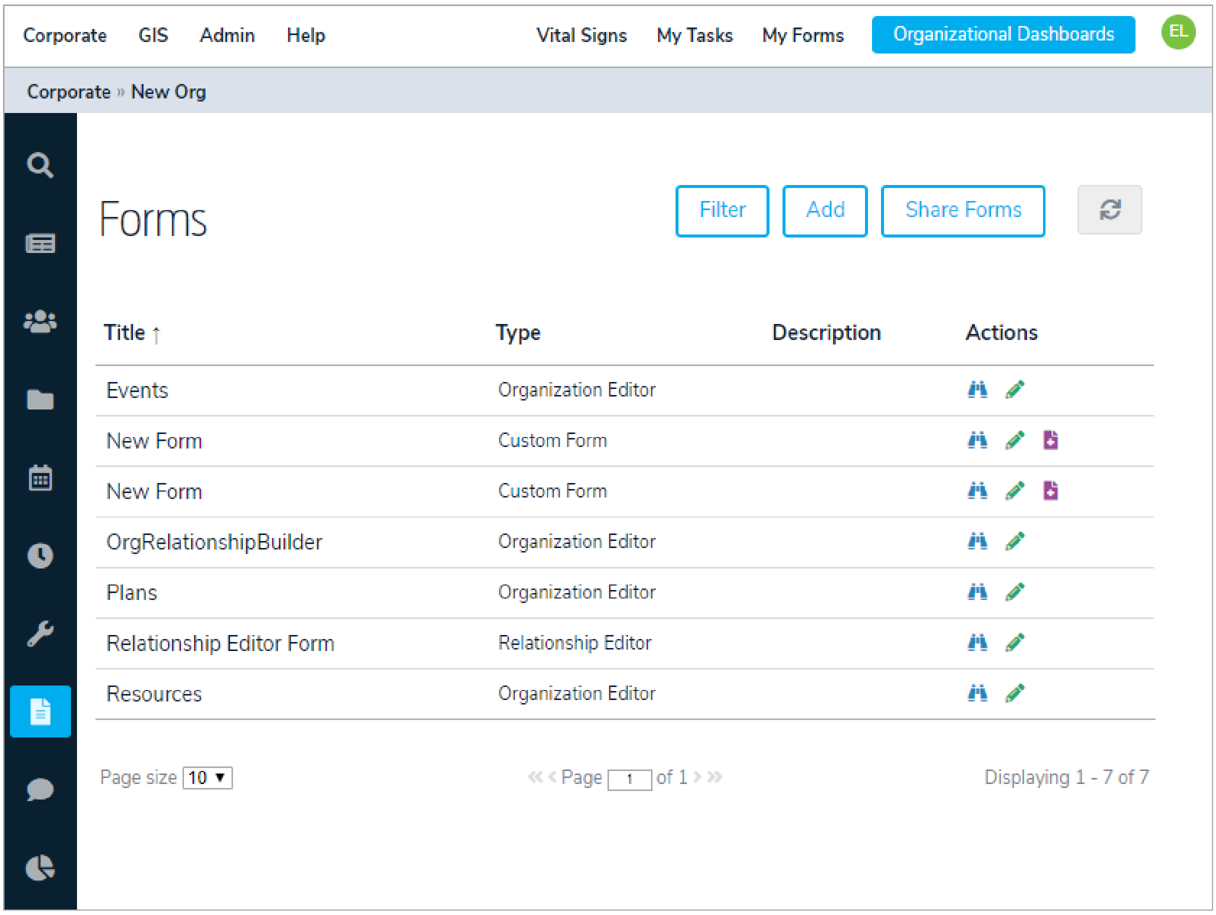
These dashboards can be accessed when working within the plan or event the form has been shared to. Note that in order for these forms to appear in additional **Plan Dashboards** or **Event Dashboards**, the form must be shared to the **Forms** folder within the applicable plan or event.



The Plan Dashboards panel.

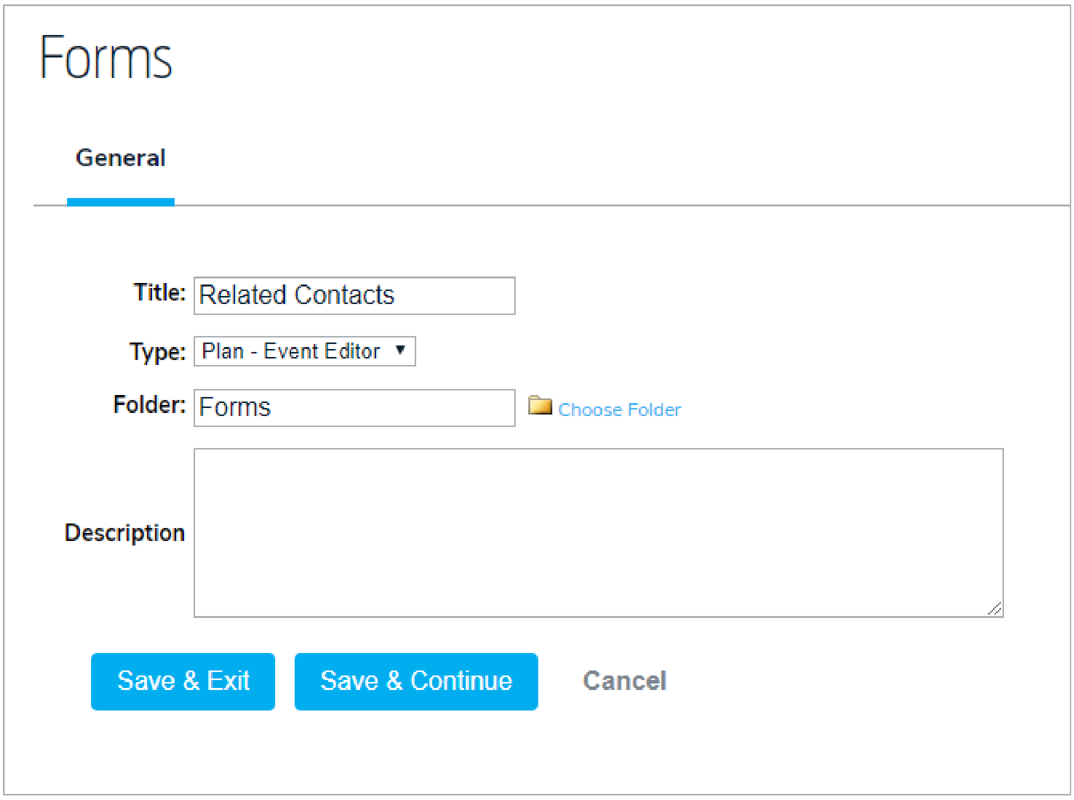
To create an plan or event dashboard:

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**.



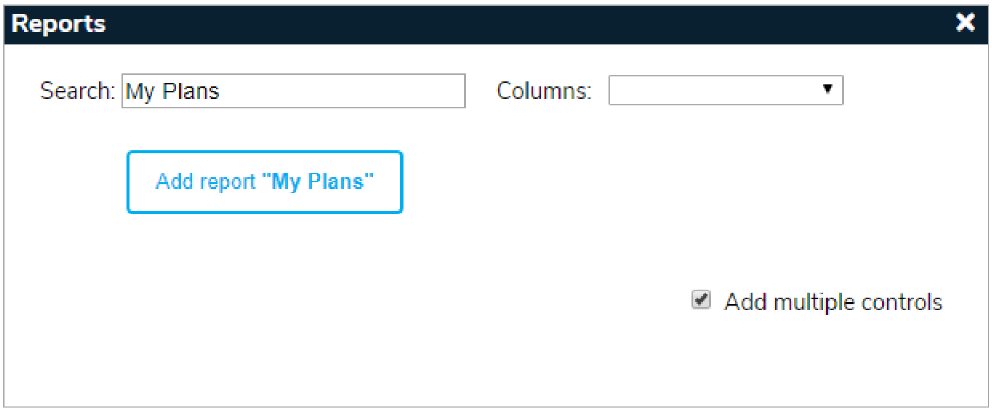
The Forms page.

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



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.



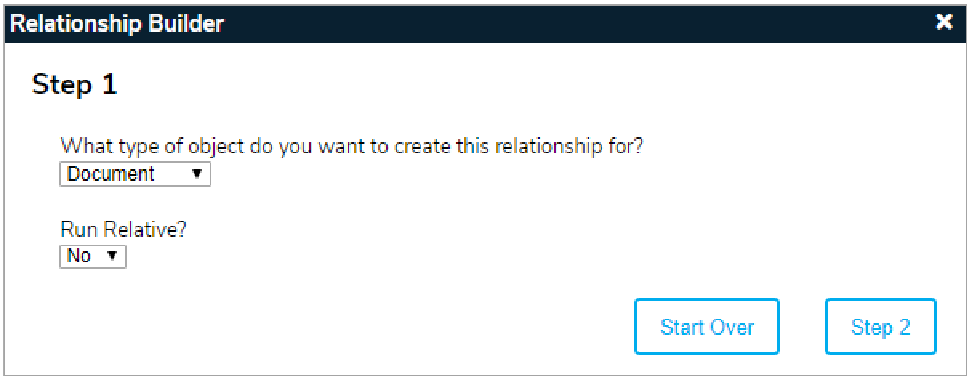
Settings to add a report element to a form.

    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.

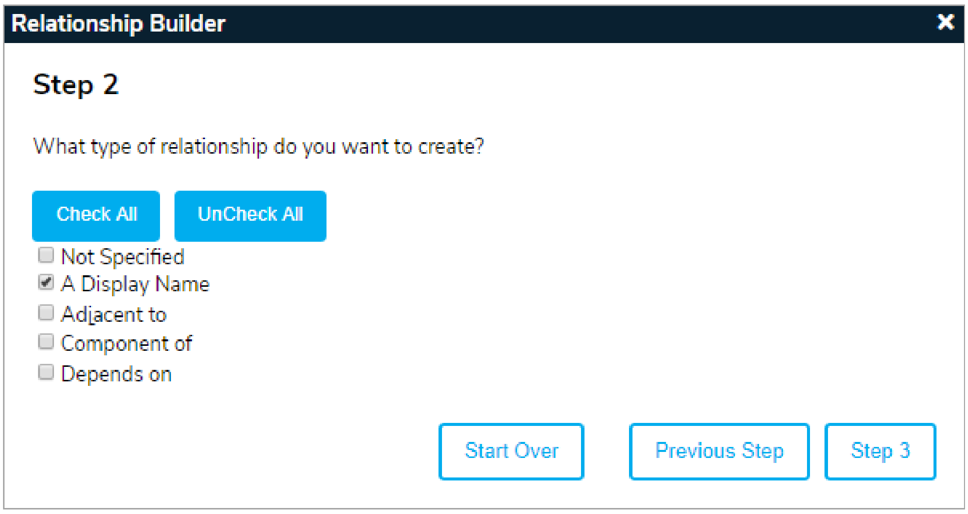
c. Select **Yes** from the **Run Relative?** dropdown menu to allow users to only select objects from the current organization or select **No** if you want to allow users to select objects outside of the current organization. For example, if you want users to create a relationship for a document object 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.**



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.

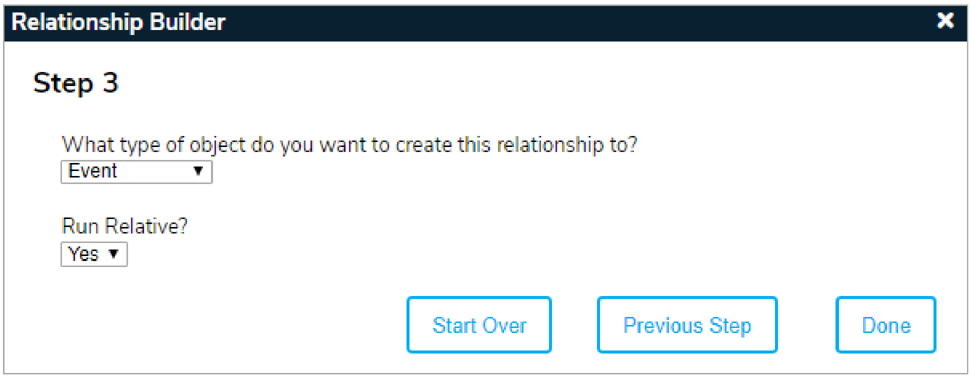


Step 2 of the Relationship Builder.

f. Click **Step 3**.

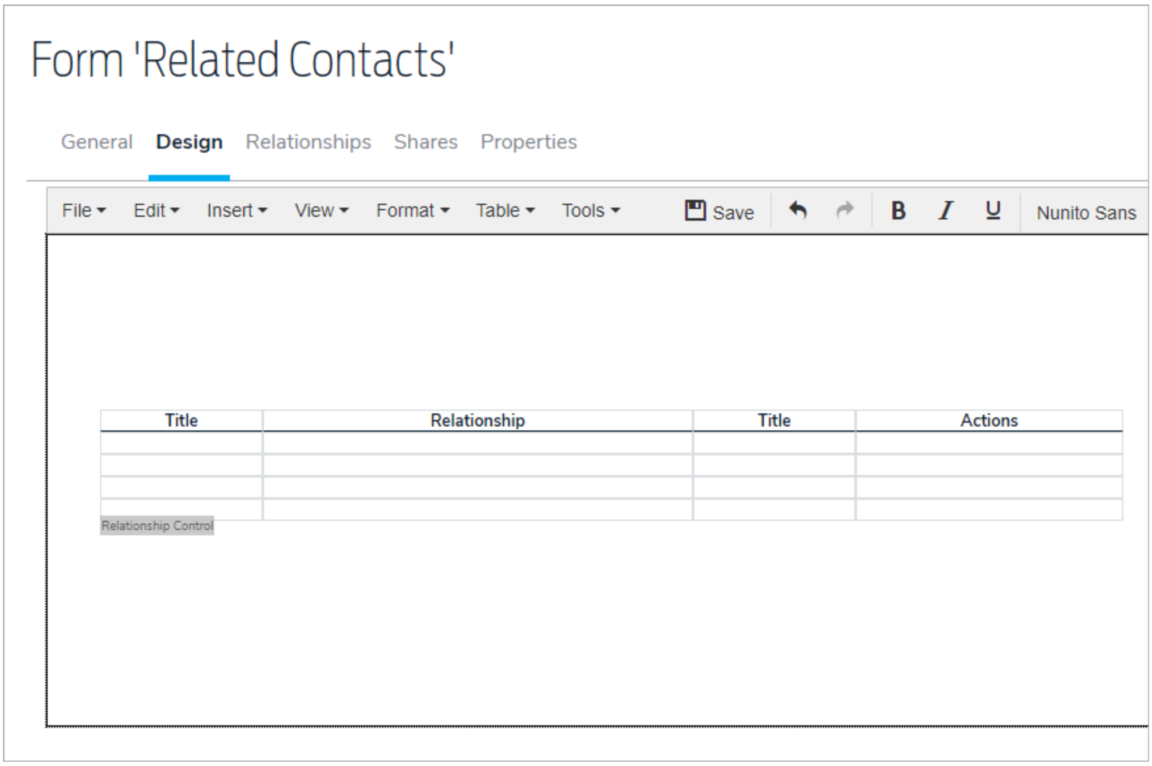
g. Select the type of object you want to create the relationship to from the dropdown menu.

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.**



Step 3 of the Relationship Builder.

i. Click **Done**.



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.

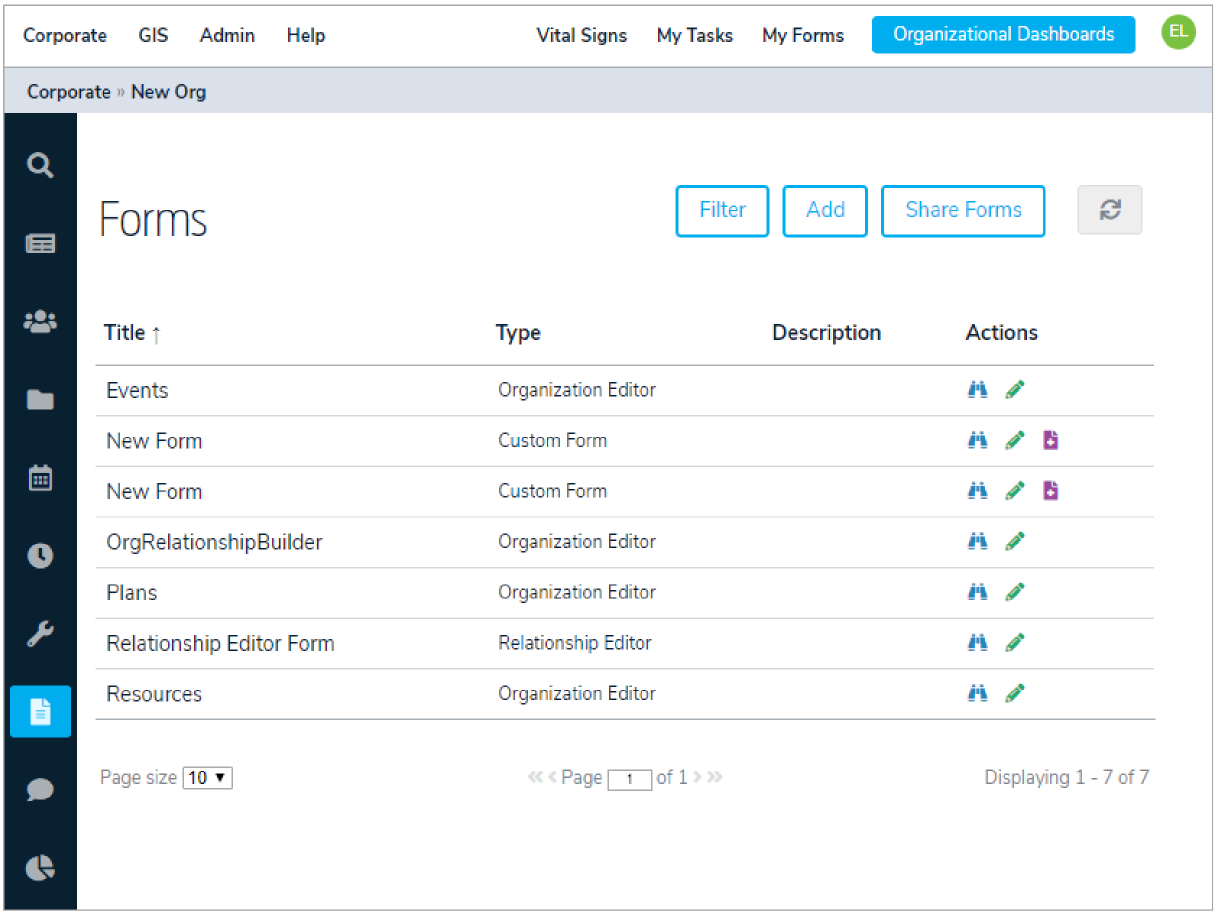
Share a Dashboard Form

If you want multiple organizations, plans, or events to access a dashboard form, that form must be shared. Once shared, it can 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.

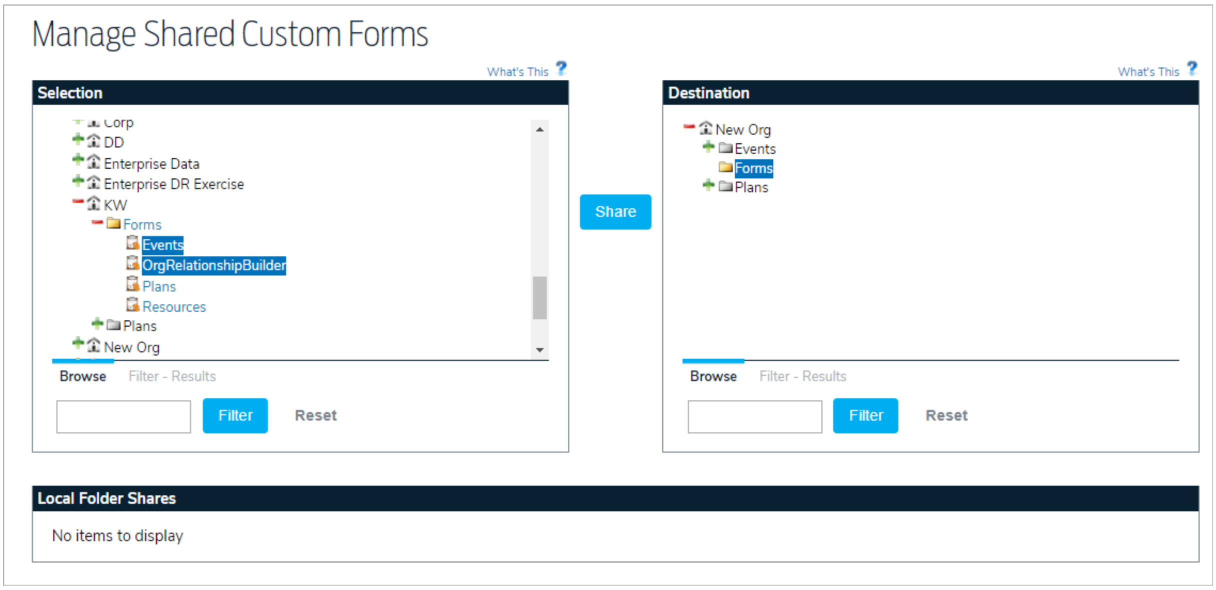
To share a dashboard form:

1. Navigate to the organization you wish to share the form to using the 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 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.**

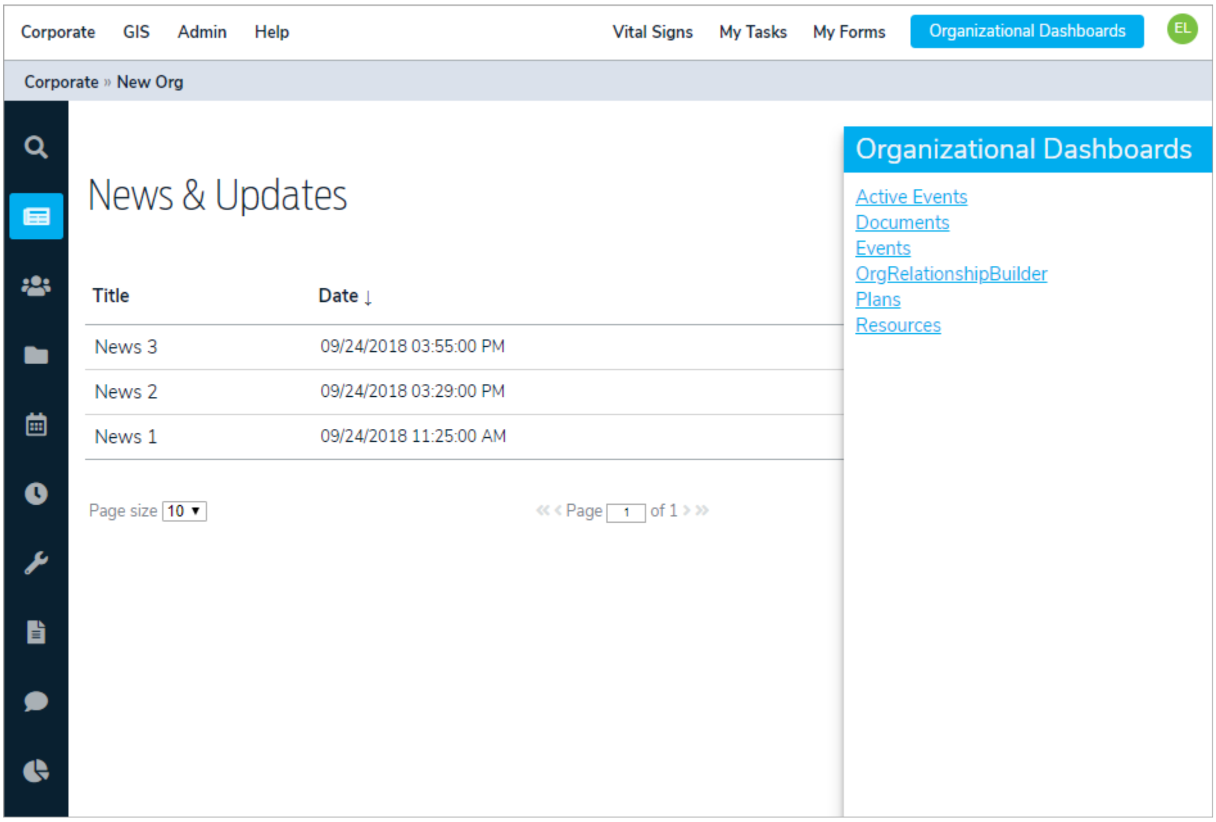
Relationship Builder

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.

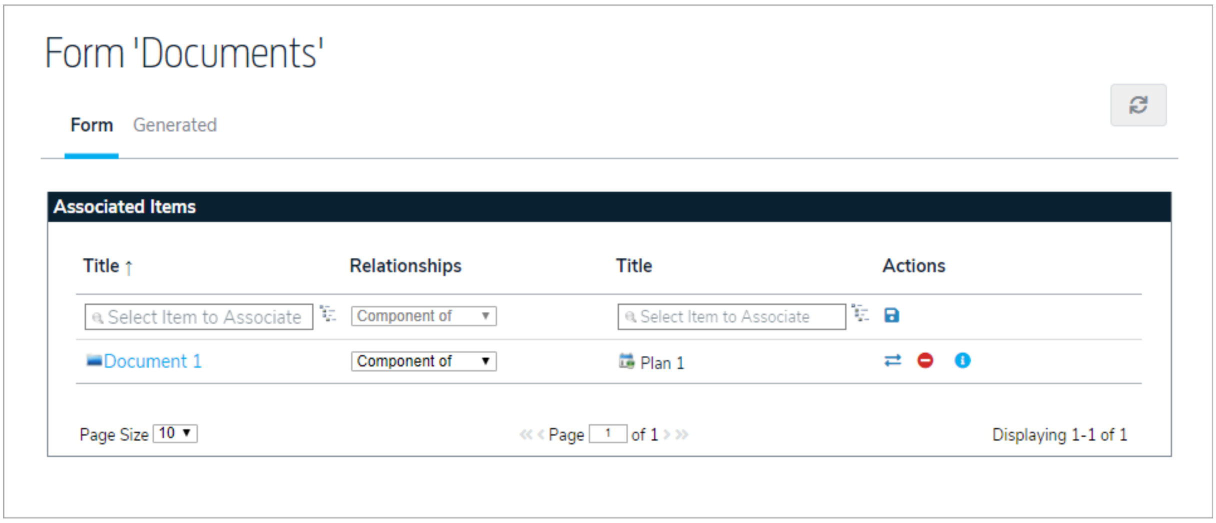
To use the relationship builder tool on a dashboard form:

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.

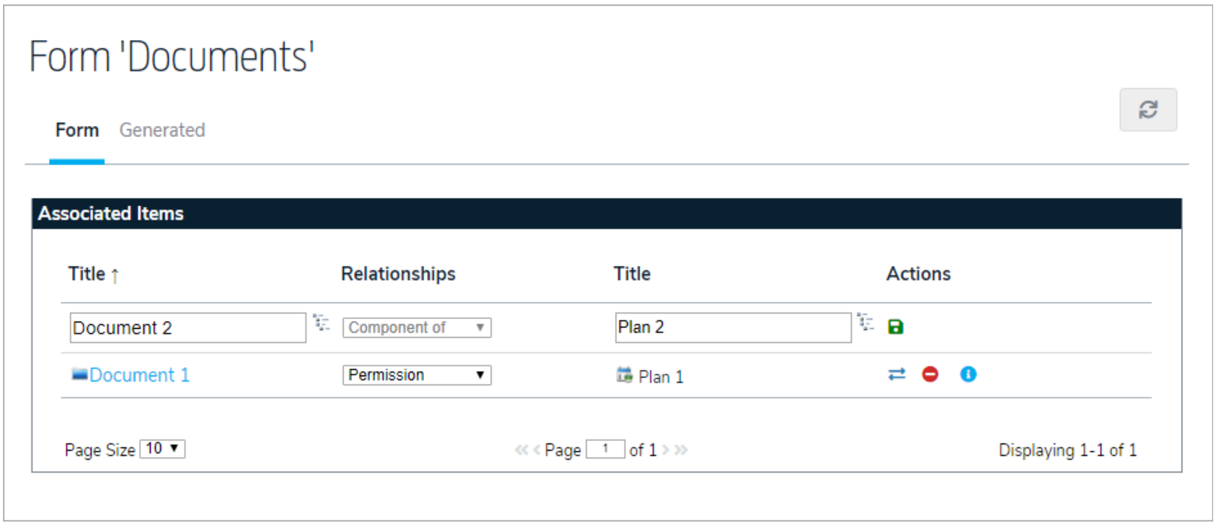
3. Click the text box on the right of the top row and enter keywords to search for and select an object or click the  icon to the right of the field to display the **Association Tree**, then select an object. Depending on the configurations made by an administrator, you may or may not be able to select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



The relationship builder on a form.

4. If more than one relationship type was added to the tool by an administrator, select the relationship type from the **Relationships** dropdown menu.

5. 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.

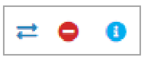


A relationship on the form that has not yet been saved.

6. Click the  icon to save the relationship.

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

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

8. 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.