

Table of Contents

Global AlertLink User's Guide	3
<i>Relationships</i>	3
Relationships Tab	3
Advanced Relationship Mapping	4
Relationship Mapping, Editors & Reporting	6

Relationships Tab

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

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

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

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

Contacts

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

Modeler

Associated Items

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

Page Size 10 ▾ << Page 1 of 1 >> Displaying 1-3 of 3

A new relationship in the relationships tab of an object.

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

Advanced Relationship Mapping

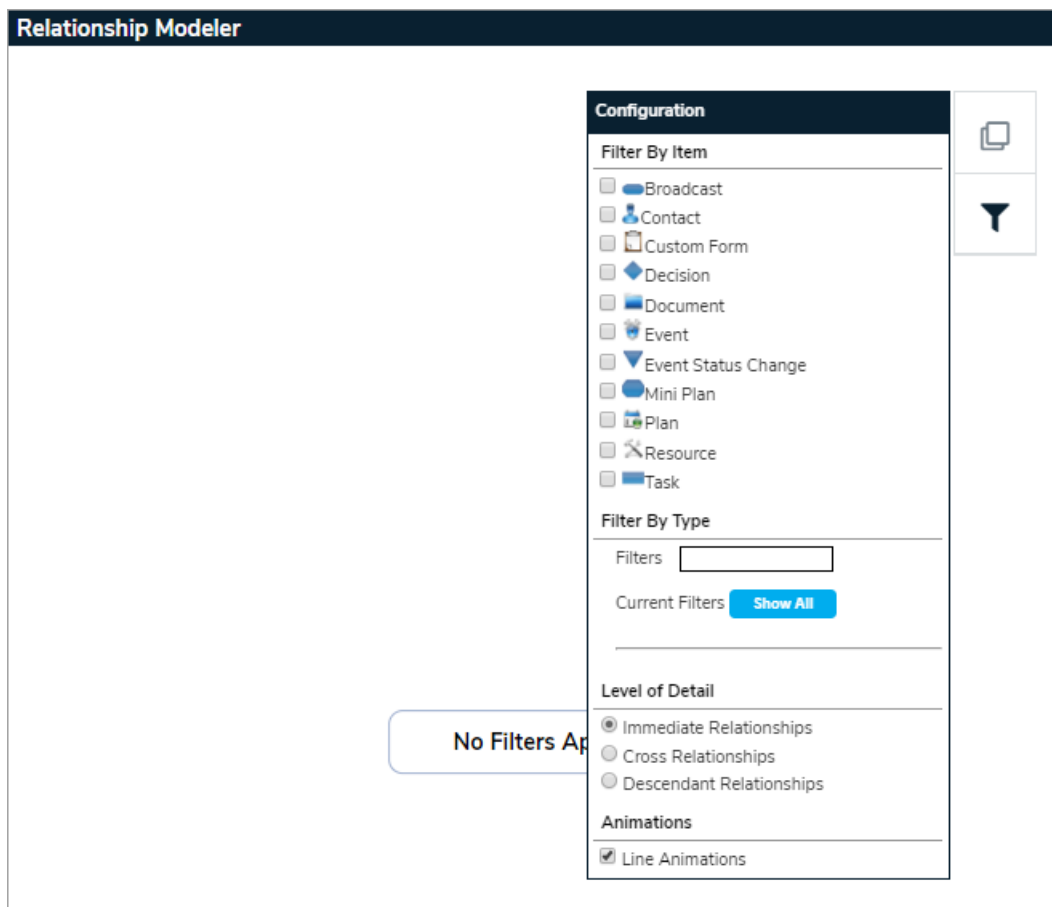
Relationships exist in everything we do and for business continuity, relationships are critical. Relationships may take many forms, from dependencies, to components, to employees within a building.

Relationships are set up in Referential Data so that you can use terminology and concepts unique to your organization or business unit.

The advanced relationship modeling in Global AlertLink provides an interactive interface to show relationships within your continuity data. The modeling is dynamically rendered from the data collected in BIAs, surveys, other applications or plans within the system. It is a live and interactive view of your Global AlertLink data. To access the modeler, click on the Modeler button under the Relationship tab for any object in the system.

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The modeler, initially, will not have any filters applied and the screen will be blank.

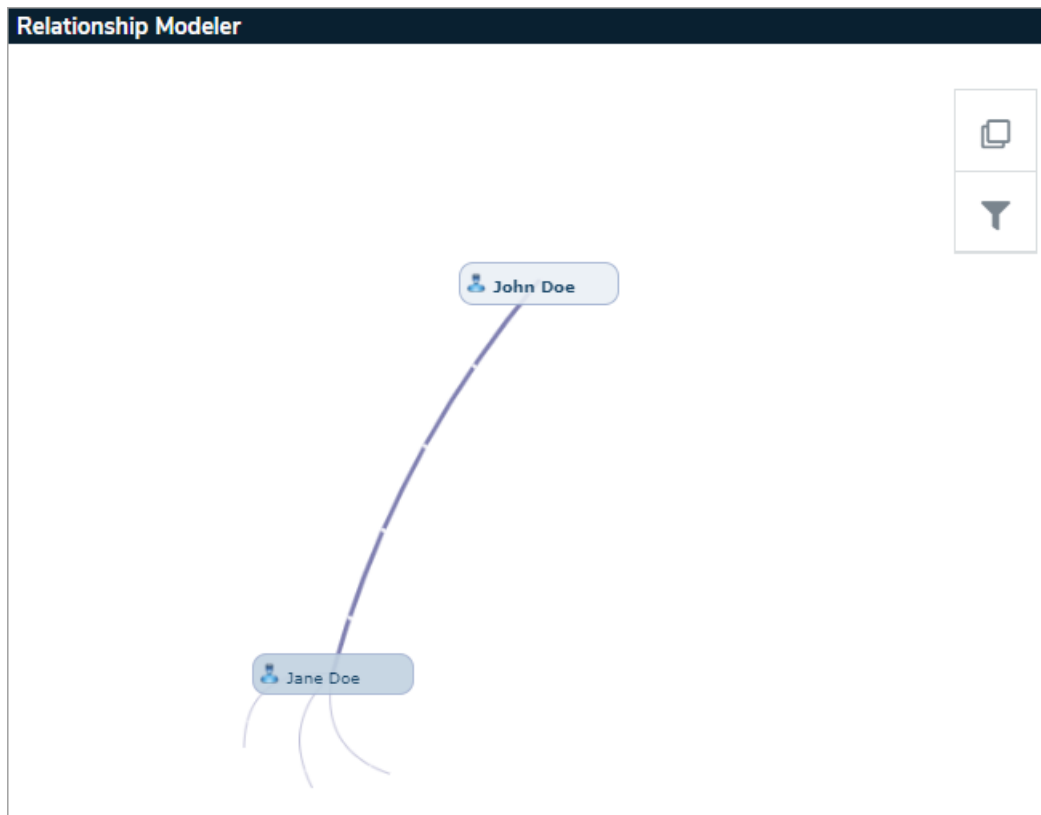


Some of the highlights of this feature include:

- You control the types of relationships available
- Multiple filter controls allow you to view the Items and Relationship Types you choose
- Add relationships and new items on the fly
- Dynamic and automated rendering from data collected in BIAs, surveys, other applications or managed within plans, etc.
- Link resources, assets, plans, documents, people, processes and other data to get a truly holistic view
- Animation show directional flows of relationships

Clicking the  icon will display the legend, while clicking the  icon will display the filters. This allows you to filter the view of relationships. Here you can select which GAL items to filter by and which Relationship Types to select.

They are meant to be used in conjunction with each other, e.g. select Documents and clicking the Show All button will show you all of the Documents related to this item regardless of the Relationship Type.



Resources are unique because they can have a Resource Type associated with them. When you click on Resource, you are presented with another Filter box in which you can type in the Resource Type(s) that you want to filter on or you can click Show All and see all of the Resource Types related to this item. You can remove individual Resource types or remove all.

Note: The Filter boxes on this screen will try to predict the value when you key in a few letters. Any Resource Type that contains the letters "te" will be displayed and the user can click on the appropriate one.

Relationship Mapping, Editors & Reporting

In Global AlertLink (GAL) 7.10.00, a new form type has been added, Relationship Editors. Relationship Editors allow the user to map a relationship editor form to specific relationship types between GAL objects. This form allows the user to enter additional data about the relationship to be included in your plans and reports.

A new administrative tool, Relationship Mapping, has been added to the Admin dropdown. The Relationship Mapping screen allows the user to define which relationship editor form(s) are to be associated to which object/object type(s) and relationship type(s).

Relationship Mapping

Add

Object 1 Type	Object 1 SubType	Relationship Type ↑	Object 2 Type	Object 2 SubType	Custom Form	Actions
Contact		22	Document			
Contact		22	Event			
Event		A Display Name	Resource	Application		
Contact		Adjacent to	Plan			
Contact		Adjacent to	Contact			
Contact		Adjacent to	Contact			
Contact		Adjacent to	Plan			
Contact		Adjacent to	Contact			
Contact		Adjacent to	Plan			
Contact		Adjacent to	Document			

Page size 10

<<Page 1 of 3>>

Displaying 1 - 10 of 25

The Relationship Mapping tool.

Before you add a relationship map, the relationship editor form must be created. The design of the form does not have to be finished but a form must exist. To create a new relationship editor form, click Add from the Forms component and select Relationship Editor from the form type dropdown menu. The form can be edited to include variables such as the name, type, and path of each object in the relationship, as well as what type of relationship the two objects share.

Forms

General

Title:

Type: Relationship Editor

Folder: Custom Form

Description: Relationship Editor

Choose Folder

Save & Exit

Save & Continue

Cancel

The Form Creation screen.

To use the Relationship Mapping tool, hover your cursor over **Admin**, then click **Relationship Mapping**. The user selects the Object 1 Type (the left side of the Relationship). If the Object 1/2 Type is a resource, an Object 1/2 Sub-type will be required. For example, if you select **Plan** as the Object 1 Type, a sub-type is not required; however, if you select a resource as the Object 1/2 Type, a sub-type (Resource Type) is required. If the resource does not have a resource type, select **No Resource Type** and only resources that do not have a resource type will be valid.

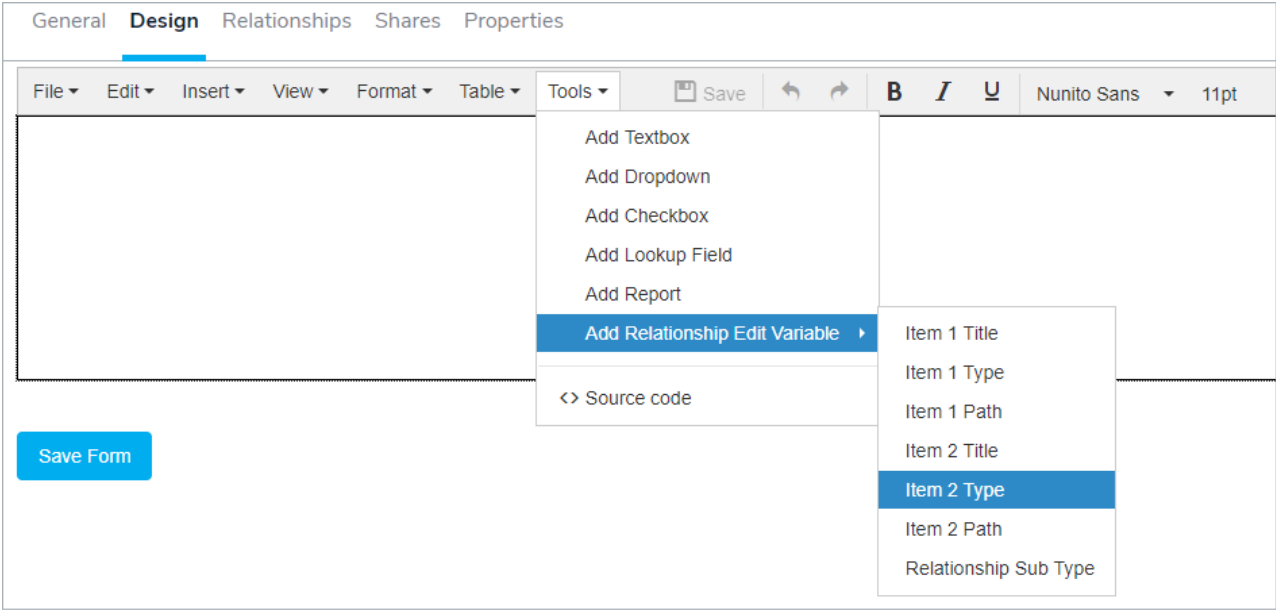
The Relationship Mapping Tool helps the user by indicating with red or green highlights if the field is or is not completed. In the example below, the

user has selected Resource for Object 1, so the Object 1 sub-type is highlighted in red to indicate that this field must be completed. The other fields highlighted in red are also required to complete the relationship map. The user can click in any of the boxes to see the values that are available, (e.g. clicking **SubType** will show all the resource types defined in Referential Data. Likewise, if the user clicks in the Custom Form box they will see all the relationship editors created in the system. The user can also type a few letters of the Custom Form, SubType or Relationship Type and a dropdown will appear showing values that meet that criteria.

The user can map multiple forms to the same object 1/2/relationship type criteria if required. The user has a lot of flexibility with the Relationship Mapping tool, because they can add as many resource types and relationship types as they need.

Once the relationship map is created, when a relationship is created that matches that criteria, a blank relationship editor form icon will be associated with that relationship and will be grayed out indicating that the form has not been edited. Once a user edits the form, the icon will turn green.

The user clicks on the form icon and a new window is opened displaying the relationship editor form. The user updates the form and saves it. The form data is stored with the relationship and is unique to that relationship instance. The user can also add relationship edit variables to the form to show the relationship the form is being completed for.



The Add Relationship Edit Variable tool on a Relationship Editor Form.

Several new custom view reports were created to access the relationship editor form data. Every combination available on the Relationship Mapping tool is available as a report.

Report Wizard

General

Back

Report Type Data Types Scope Fields Filters

What would you like your report to Focus on? Form Data ▼

What form would you like to report on? Relationship Editor Form
[Select Form](#)

What type of Report would you like? Custom Form ActionStepBroadcasts ActionStepBro
Custom Form ActionStepBroadcasts ActionStepDei
Custom Form ActionStepBroadcasts ActionStepMin
Custom Form ActionStepBroadcasts ActionStepSta
Custom Form ActionStepBroadcasts ActionStepTas
Custom Form ActionStepDecisions ActionStepDeci
Custom Form ActionStepDecisions ActionStepMinif
Custom Form ActionStepDecisions ActionStepStatu ▼

Back

The Report Wizard.

This report type is very different from the other custom form query reports. The data that is available on the report includes all the fields (including its custom fields) for the object on the left side of the relationship (Object 1), all the fields for the Object on the Right side of the Relationship (Object 2), all the fields about the relationship, and all of the fields on the Relationship Editor.

In the Custom Form Plans Resources Relationship Editor report type, the plan object is Object 1 (left side) of the relationship and the resource is Object 2 (right side) of the relationship. Fields include:

- **Form Fields:** Includes all the fields on the Relationship Editor.
- **Plan Custom Fields:** Shows all the custom fields on the plan object.
- **Plans General:** Shows all the general fields on the plan object.
- **Relationship:** Shows all the fields about the relationship type.
- **Resources Custom Fields:** Shows all the custom fields associated with the resource object type.
- **Resources General:** Shows all the general fields on the resource object.

In addition, the listing or custom form query report types on the form data itself are available as well.

If you have additional questions regarding Relationship Editors, contact support@resolver.com.

