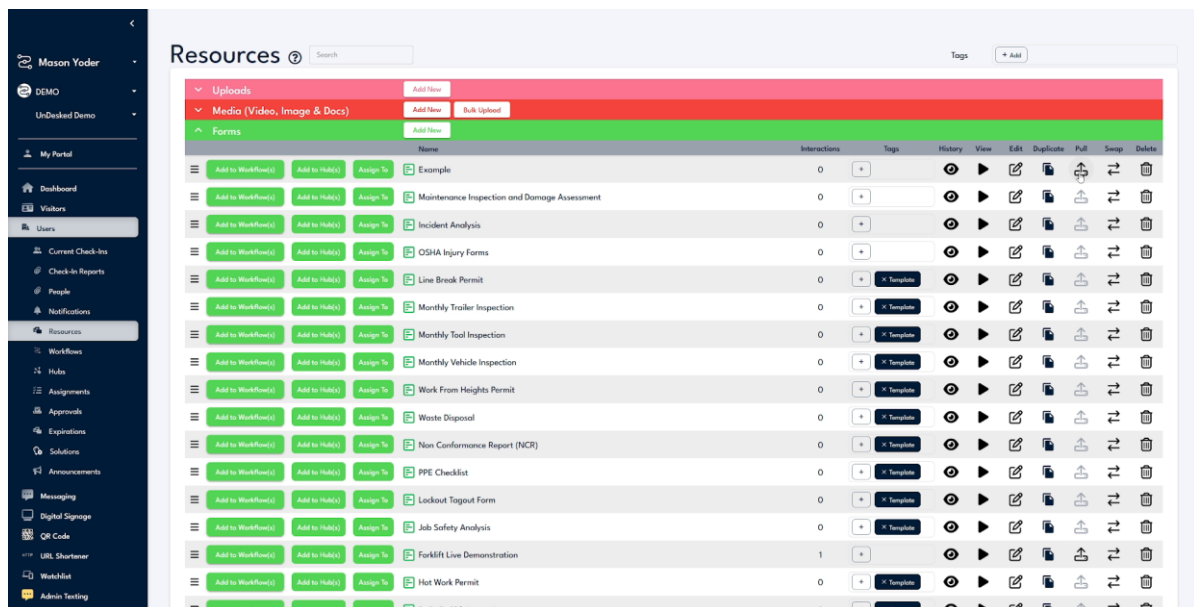


Managing Global Resources

This document provides a comprehensive overview of managing global resources, which allows for the seamless movement of resources across various organizational levels. For super administrators, there is an option to elevate resources to a global status. Follow the steps below to effectively utilize these features and ensure efficient resource management.

Step 1

In this video, we explore global resources. Global resources enable you to transfer a resource from one location to another, reaching up to an organizational level. For super administrators, it allows elevation to a global level. In this example, we will take a sample form and use the pull option.



The screenshot displays the 'Resources' management interface. On the left is a sidebar with navigation options: Mason Yoder, DEMO, Un-Desktop Demo, My Portal, Dashboard, Visitors, Users, Current Check-Ins, Check-In Reports, People, Notifications, Resources (selected), Workflows, Hubs, Assignments, Approvals, Expirations, Solutions, Announcements, Messaging, Digital Signage, QR Code, URL Shortener, Watchlist, and Admin Testing. The main content area is titled 'Resources' and includes a search bar and a 'Tags' section with an 'Add' button. Below this, there are three expandable sections: 'Uploads', 'Media (Video, Image & Docs)', and 'Forms'. The 'Forms' section is currently expanded, showing a table of resources. Each row in the table includes a menu icon, three buttons ('Add to Workflow(s)', 'Add to Hub(s)', 'Assign To'), a resource name, an 'Interactions' column with a count and a '+' button, a 'Tags' column with a dropdown, and a series of icons for History, View, Edit, Duplicate, Pull, Setup, and Delete.

	Name	Interactions	Tags	History	View	Edit	Duplicate	Pull	Setup	Delete
≡	Example	0	+	👁	▶	✎	📄	🔄	⚙️	🗑
≡	Maintenance Inspection and Damage Assessment	0	+	👁	▶	✎	📄	🔄	⚙️	🗑
≡	Incident Analysis	0	+	👁	▶	✎	📄	🔄	⚙️	🗑
≡	OSHA Injury Forms	0	+	👁	▶	✎	📄	🔄	⚙️	🗑
≡	Line Break Permit	0	+ Template	👁	▶	✎	📄	🔄	⚙️	🗑
≡	Monthly Trailer Inspection	0	+ Template	👁	▶	✎	📄	🔄	⚙️	🗑
≡	Monthly Tool Inspection	0	+ Template	👁	▶	✎	📄	🔄	⚙️	🗑
≡	Monthly Vehicle Inspection	0	+ Template	👁	▶	✎	📄	🔄	⚙️	🗑
≡	Work From Heights Permit	0	+ Template	👁	▶	✎	📄	🔄	⚙️	🗑
≡	Waste Disposal	0	+ Template	👁	▶	✎	📄	🔄	⚙️	🗑
≡	Non Conformance Report (NCR)	0	+ Template	👁	▶	✎	📄	🔄	⚙️	🗑
≡	PPE Checklist	0	+ Template	👁	▶	✎	📄	🔄	⚙️	🗑
≡	Lockout Tagout Form	0	+ Template	👁	▶	✎	📄	🔄	⚙️	🗑
≡	Job Safety Analysis	0	+ Template	👁	▶	✎	📄	🔄	⚙️	🗑
≡	Forklift Live Demonstration	1	+	👁	▶	✎	📄	🔄	⚙️	🗑
≡	Hot Work Permit	0	+ Template	👁	▶	✎	📄	🔄	⚙️	🗑
≡	Dock Forklift Inspection	0	+ Template	👁	▶	✎	📄	🔄	⚙️	🗑

Step 2

Upon selecting the pull option, you will be prompted to transfer the resource to the current organization. Complete this action to move the example resource from its original demo account to the specified organization.

[illegible]

Step 3

In the "show all" section under resources and forms, you will find a duplicate form. It is crucial to understand that these forms are distinct; therefore, any changes or deletions apply only to the specific location where the action is performed.

Mason Yoder

DEMO

Show All

Watchlist

Admin Testing

Reports

Settings

Resources

Workflows

Hubs

Enroll

System Administrators

Logout

Video Tutorials

Support

English

Resources

Uploads

Add New

Media (Video, Image & Docs)

Add New

Bulk Upload

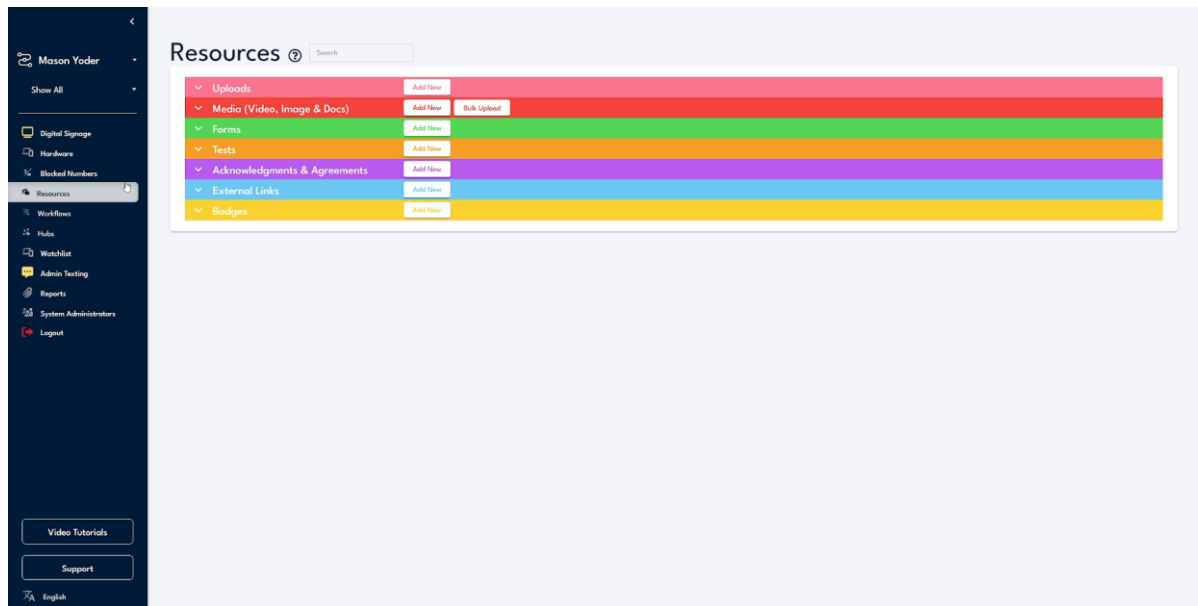
Forms

Add New

Name	History	View	Edit	Duplicate	Share	Pull	Swap	Global Rename	Delete
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>Example</div>									
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>Hazard Report</div>									
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>PPE Equipment Request</div>									
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>Chemical Spill</div>									
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>Confined Space Entry</div>									
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>Employee Evaluation</div>									
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>Employee Disciplinary Action Form</div>									
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>Daily Forklift Inspection</div>									
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>Hot Work Permit</div>									
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>Job Safety Analysis</div>									
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>Lockout Tagout Form</div>									
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>PPE Checklist</div>									
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>Non Conformance Report (NCR)</div>									
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>Waste Disposal</div>									
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>Work From Heights Permit</div>									
<div>Add to Workflow</div> <div>Add to Hub(s)</div> <div>Monthly Vehicle Inspection</div>									

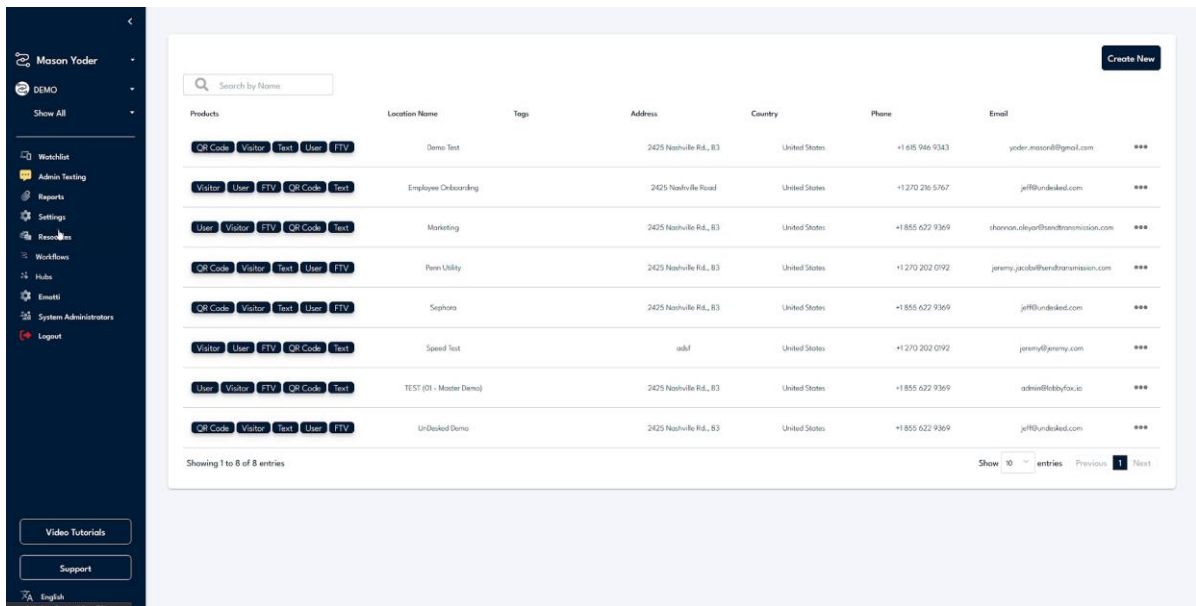
Step 4

Changes made at the location level remain specific to that location. When a resource reaches the organization level, global administrators have the option to pull it to a global level, moving it to a section independent of any organization.



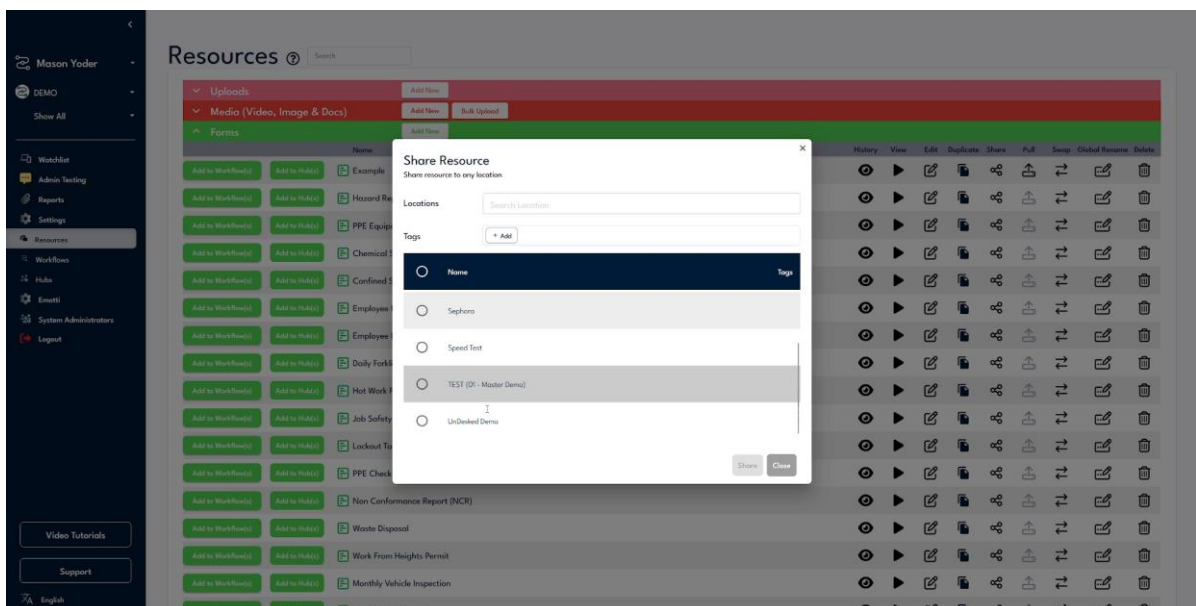
Step 5

Navigate to resources and forms, and you will find the resource here. To illustrate, you can delete it from this section and then return to the demo account.



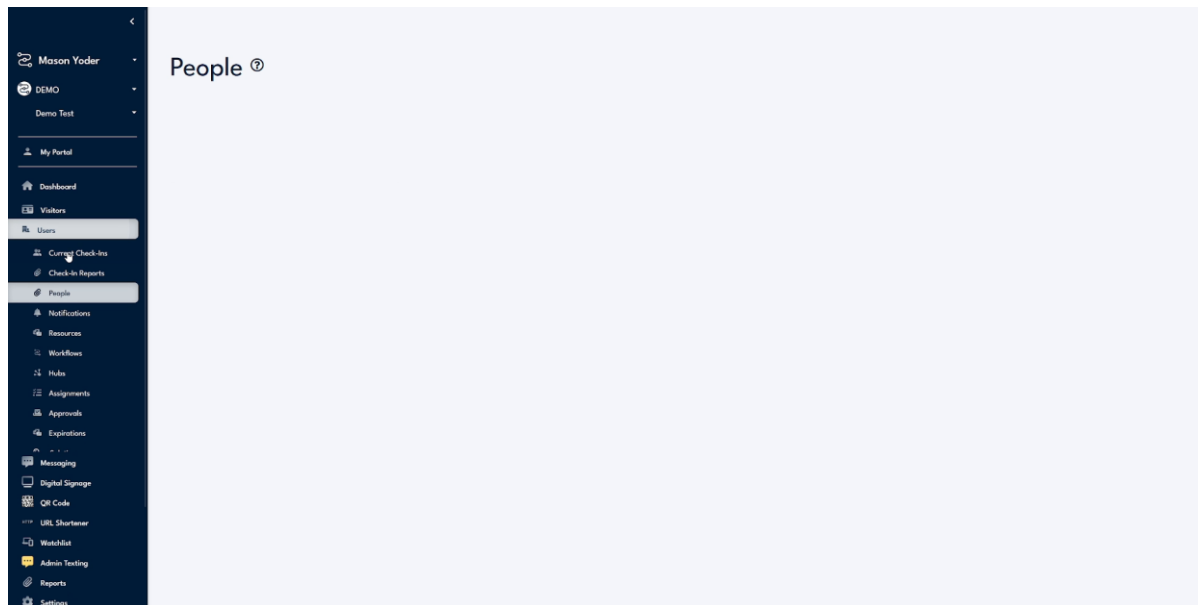
Step 6

The example form remains available. Additionally, it can be shared across various locations within the demo organization. By utilizing the share option, you can explore locations through search, scrolling, or tag-based filtering.



Step 7

Proceed to add the form to this demo test. The system will prompt you to specify whether the resource pertains to visitor management or user management. We will choose to share it under user management, ensuring the visitor option is unchecked, before proceeding to that account.



Step 8

The example form is now visible here. To further demonstrate the distinctness of the forms, you can delete it at this level and return to the organization level, where it remains intact. Similarly, it is still present at its original source.

