

BLACKLINE LIVE

Winter 2018 update

blacklinesafety



CONTENTS

NEW MENU 5

ORGANIZATIONS 6

DEVICES 7

DEVICE DETAILS 8

TEAM MEMBERS..... 9

GROUPS 11

ROLES 13

RELATIONSHIPS..... 15

ORGANIZATION SELECT TOOL..... 18

MOVE TOOL 19

ROLES AND USERS HOW-TO'S 20

 Organization details 20

 Team members 21

 Groups 23

 Relationships..... 25

TRANSITION..... 27

New features in Blackline Live

• **What is changing in Blackline Live?**

• Blackline Safety introduces a new look for Blackline Live that better replicates the real-world structure of your organization. A number of new pages and features have been added to help you manage your employees and resources — teams can now operate within the same space in the portal and share resources with each other.

• The way you experience Blackline Live is dependent on the roles you are assigned. These roles help to ensure that each person within an organization will have access to the resources they need.

• Lastly, this update will allow your organization to create relationship agreements with others. You can choose to allow another organization to create, manage or monitor your resources for you. This system is particularly advantageous to those working with distributors and monitoring services, who can manage client assets while remaining in their own accounts.

• Blackline has made your transition to this new system easy and seamless — these new features are in place for you to take advantage of, but you can also choose to continue using the portal in the same way as before with minimal adjustments. Blackline is here to make sure your account is set up to meet your business's needs. If you need help, please contact our Customer Care team at [1-877-869-7212](tel:1-877-869-7212) or support@blacklinesafety.com.

New menu

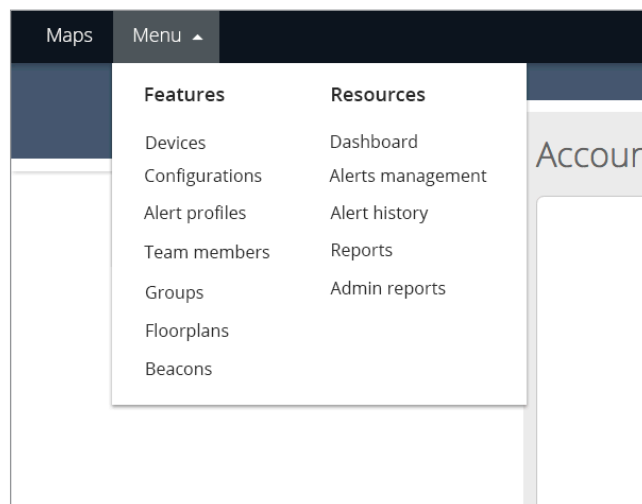
You will notice right away that Blackline Live looks a little different — with this update, new pages have been added and existing pages have been redesigned. This section will help you find your bearings in the updated Blackline Live portal.

Main menu

The main menu is split into two categories: Features and Resources. Some of our current pages have been renamed:

- Device Users is now **Devices**
- Device Configurations is now **Configurations**
- Alerts Setup is now **Alert profiles**
- Address Book is now **Team members**
- Beacon Setup is now **Beacons**

A new page has also been added to this menu — the **Groups** page.



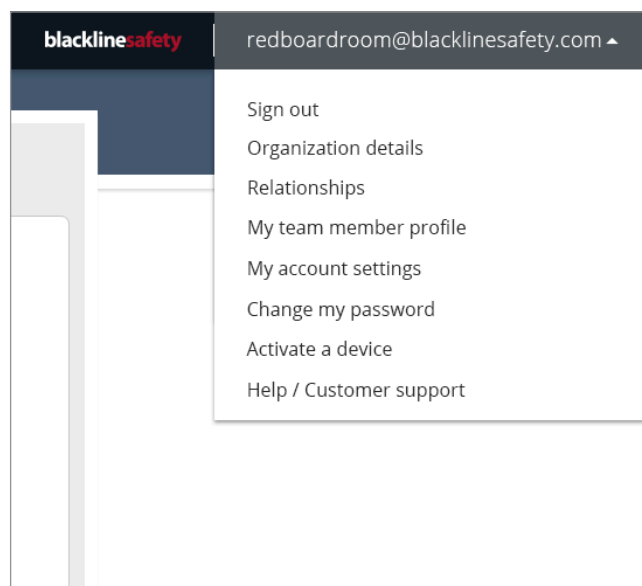
User menu

The user menu also features a few name changes:

- Account Settings is now **My account settings**
- Change Password is now **Change my password**

The menu features three new pages: the **Organization details** page, the **Relationships** page, and **My team member profile**.

You will learn more about these new pages as you make your way through this document and as you experience the new Blackline Live.



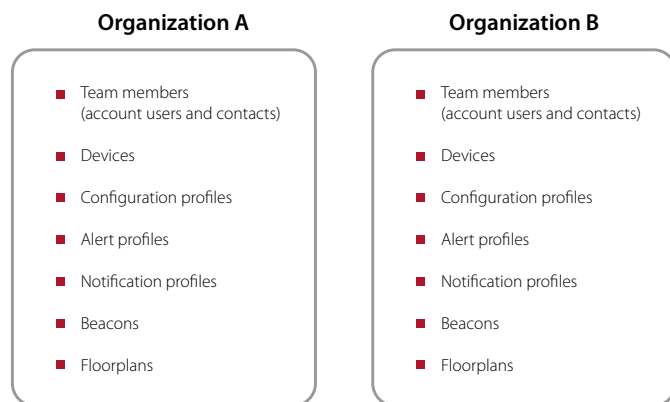
Organizations

Organizations are the basis of our new system structure, and they help keep all of your company's Blackline resources in one place. It is run by one or more organization admins, who have permission to create resources and edit organization information.

How is an organization different from an account?

Previously, every user on Blackline Live was considered an account and operated separately from one another. Each account had their own devices and resources.

In the new Blackline Live, devices and other resources belong to the larger organization. Team members in the same organization will have access to the same pool of resources.



Definitions

Organization

An entity that houses Blackline resources including devices, team members and profiles.

Account

A user in the previous Blackline Live system. Accounts had their own devices and resources, and did not share these with other accounts. Accounts have now become organizations.

Resources

Includes devices, groups, team members, profiles, beacons and floorplans. Resources belong within a single organization.

What are organization details?

The Organization details page contains basic information about your organization. All account users within the organization can view this page, but only organization admins have permission to make changes.

The Organization details page displays your organization's name and description, both of which can be edited by organization admins.

You can also choose which type of map information to display to your organization: LSD, NTS or both. Legal sub-divisions (LSD) show how townships are divided, while the National Topographic System (NTS) shows topographic details.

Organization details
An organization is the home of your company's Blackline devices and information.

Organization name
Organization A

Description
Organization description

☒ Display LSD map information

☒ Display NTS map information

[BACK](#)

Devices

The former Device Users page is now called Devices. It shows you all of the same information but in a slightly different format. The information on this page can now be organized using search, sort and pagination features, making it easy to look through large amounts of data.

What is this page showing me?

The Devices page is an overview of all of the devices that you have access to. It shows:

- **Status** — whether the device is online or offline, and whether it has unresolved alerts.
- **Check-in reminder** — the time left until the device requests a check-in.
- **Assigned team member** — the team member currently assigned to this device. Clicking on it allows you to assign a different team member.
- **Organization** — the organization the device belongs to.
- **Device ID** — the type of device and its ID number. Clicking on it links to the device's details page.
- **Device name** — the device's custom name. Clicking on it links to the device's details page.
- **Configuration profile** — the configuration profile that the device is currently assigned to.
- **Alert profile** — the alert profile that the device is currently assigned to.
- **Last communication** — the last time that the device was online. Clicking on it redirects you to the history view map, showing where the device was last seen.















[Maps](#) [Menu](#) **blacklinesafety** [loner.pilot@blacklinegps.com](#)

Devices

Organization
[Show all](#)

Search

Page 1/2

STATUS	CHECK-IN REMINDER	ASSIGNED TEAM MEMBER	ORGANIZATION	DEVICE ID	DEVICE NAME	CONFIGURATION PROFILE	ALERT PROFILE	LAST COMMUNICATION
	---	 Bob Green	Blackline Safety...	 0201301301	Bob's SMD	Bob's Config	Bob's Alert profile	 5 months ago
	00:01:45	Select to assign	Organization A	 0201301302	Test Loner Mobile	Not assigned	Test Alert profile	 1 month ago
	00:00:45	 Carol McCall	Blackline Safety...	 0201301204	McCall's SMD	McCall's Configuration	McCall's Alert profile	No communication
	Not supported	 Mike Smith	Organization B	 0201301301	Mike's SMD	Mike's Configuration	Mike's Alert profile	 2 months ago

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Device details

Device details is a new page that displays information regarding a specific device. This page can be accessed by clicking a device's ID or custom name from the Devices page. Some of the information on this page can be edited, and some can redirect the user to further information.

Device details

This page provides insight into your device, including technical details and assigned team members and profiles.

ASSISTED LOGOFF

Device name

Device Name

EDIT

Organization

Organization A

VIEW PROFILE

Assigned team member

Loner1 Pilot

VIEW PROFILE

G7c

3566000595

Profile details

Your device is currently assigned to the following profiles. Selecting one of the profiles will bring you to its edit page.

Device configuration: **Loner demo**

Alert profile: **Loner alert**

Notification profile: **Notify me**

Groups

Your device is currently in the following groups. Select a group by its name to see more information.

Search groups

All groups ▼

Sort by: Name ▼

Page: 1 / 1

All devices

Organization A

All devices in your organization

BACK

What are device details?

The Device details page collects information about a specific device — this includes identifying information as well as team members and profiles assigned to this device.

The first card includes identifying information such as:

- Device name
- Organization name
- Assigned team member
- Device type and ID

The profile details card shows the device configuration, alert and notification profiles the device is assigned to. Clicking on the name of the profile will redirect you to that profile page.

The groups card shows the groups that the device is currently assigned to. Devices can be assigned to multiple groups at once, and the search, sort and pagination features will help you sort through large amounts of information.

This page also allows monitoring personnel to perform an assisted log-off if required.

Team members

The new team members page is replacing Blackline Live's former address book. Instead of a single account having an address book of contacts, an organization itself will have a collection of team members. Team members are split into two categories: contacts and account users.



Contact

Contacts do not have log-in access to Blackline Live, and are simply sets of contact information in the portal. Like the previous Blackline Live system, they can be assigned to devices and alert profiles.



Account User

Account users are team members with credentials to log into Blackline Live — they can also be assigned roles that allow them certain permissions in the portal. They can also be assigned to devices and alert profiles.

FIRST NAME	LAST NAME	EMAIL	ORGANIZATION	PERMISSIONS	STATUS
Allen	Miller	amiller@blackline.com	Blackline Safety Co.	contact	verified
Ben	Howe	bhowe@blackline.com	Organization A	contact	pending
Betty	Williams	betwilliams@orga.com	Organization A	account user	verified
Carter	Steele	csteele@blackline.com	Blackline Safety Co.	contact	verified
Dixon	Pinto	dpinto@blackline.com	Blackline Safety Co.	account user	unverified
Ferris	Busch	ferrisbusch@gmail.com	Org 1	contact	verified
Josie	Harper	jharper@gmail.com	Organization A	contact	verified
Larry	Greenman	lgreenman@org1.com	Org 1	account user	pending
Meena	Gonzalez	meenag@gmail.com	Org 1	account user	verified
Mike	O'Malley	mikeomalley@blackline.com	Blackline Safety Co.	contact	verified
Patricia	Lee	pattlee@gmail.com	Blackline Safety Co.	account user	unverified
Stefan	Parker	sparker@orga.com	Organization A	contact	verified

Team member profile
Enter your team member's information

EDIT

First Name*
Josie

Last Name*
Harper

Email Address
jharper@gmail.com

Mobile Phone Number

Home Phone Number

Work Phone Number

Job Title

Company

Street

City

Province

Postal Code

Select a country

PERSONAL CONTACTS

Groups
Give this team member access to groups

What does 'status' mean?

A team member's status indicates the verification state of an email address. Status is shown in three possible states:

Pending — a verification link has been sent to this email, but there has been no response.

Active — the verification link has been opened, and the email has been confirmed to be active.

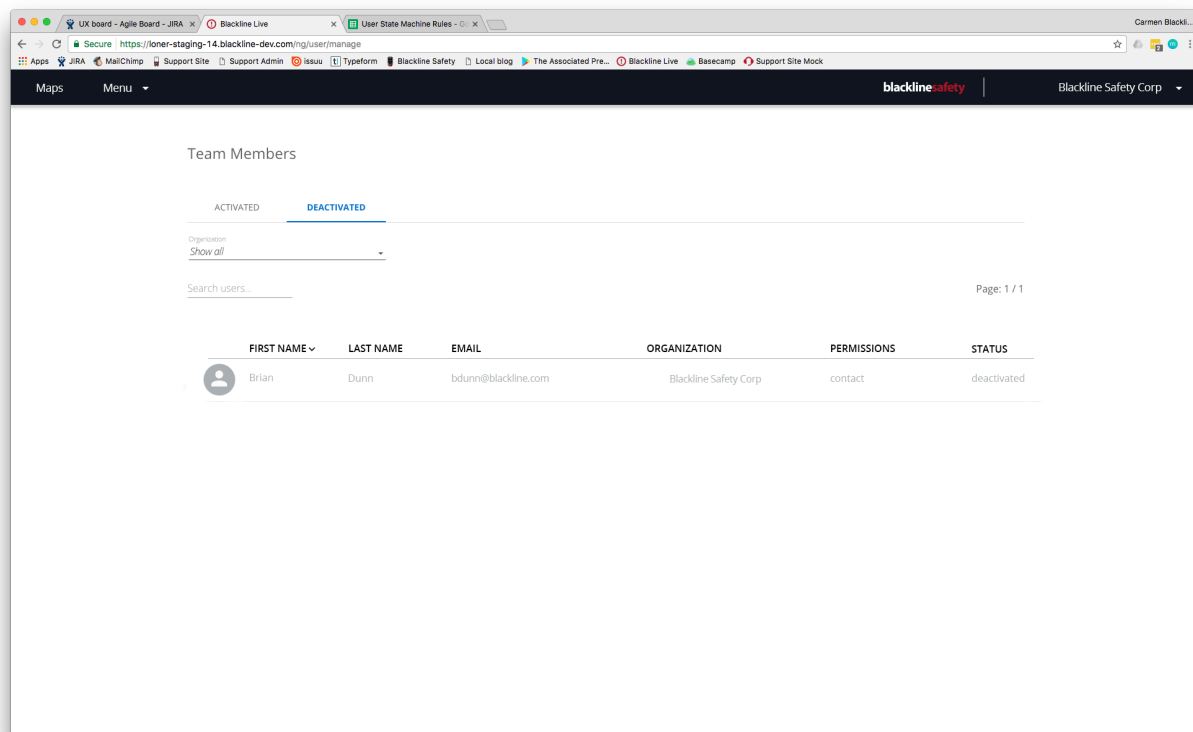
Only account users need to have their emails verified — all contacts will be shown as active. When assigning account users to alert or notification profiles as emergency contacts, it is important that their email is in active use.

Deactivated team members

In the case that a team member is no longer part of the business, they should be deactivated in Blackline Live. A team member that is deactivated can no longer be assigned to devices, alert profiles or notification profiles, and will no longer be in any groups. Any devices that they were assigned to them will become unassigned. Additionally, deactivated account users will lose log-in access to Blackline Live.

Deactivated team members can still be seen by other users in the portal by clicking the 'Deactivated' tab on the team members page. A deactivated team member profile shows all of their contact information and group assignments at the time that they were deactivated.

Clicking the *activate* button will make this team member active in the portal again. The reactivated team member will be brought back, and will be put back into their original groups, provided the groups still exist. They will not be automatically reassigned to their original devices and alert profiles, so they will need to be manually reassigned.

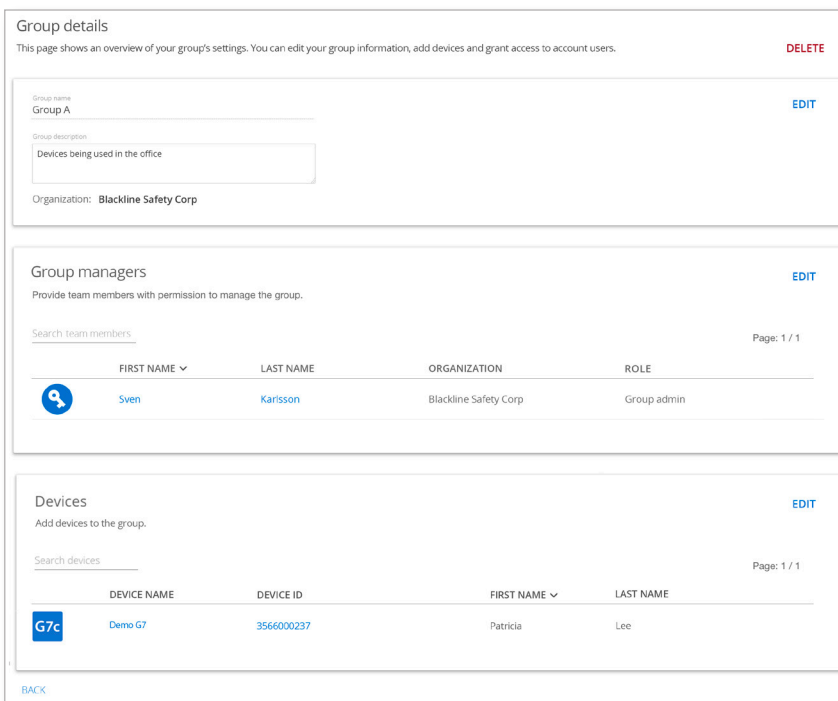
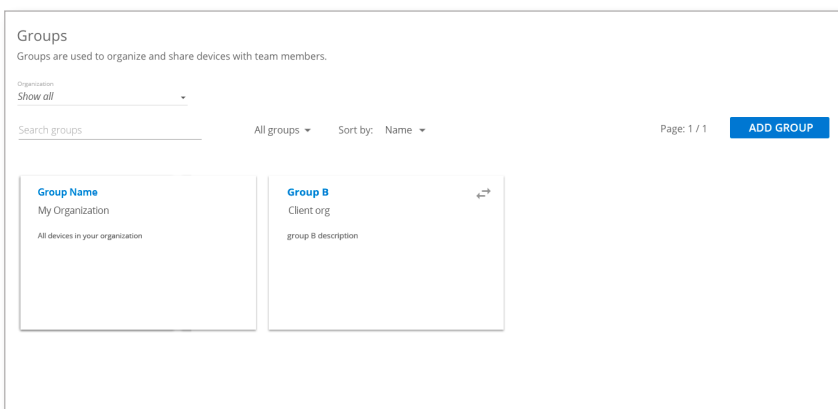


Groups

Groups are bundles of resources in your organization that are managed by select account users. Suppose your organization has 100 devices, and you want to give an employee access to 10 of them — Blackline Live achieves this by allowing you to organize your devices into groups and give select users access to these groups.

Using groups

Groups allow you to bundle devices together for the purpose of giving your team members access to them. Account users can be given access to groups by become a group manager of these groups. This allows them to see the group and devices within it. You can make as many or as few groups as your organization needs — the search, sort and pagination tools will help you manage large amounts of groups.



Definitions

Group

Contains a selection of devices in an organization. Account users can be granted certain permissions over devices by being assigned group manager roles. Groups are also used when sharing devices in a relationship agreement.

Group managers

Account users who are given specific roles in a group. These roles outline how they can manage devices in this group.

All devices group

A default group in every organization that automatically collects all devices. It cannot be deleted.

What are group managers?

Group managers are account users that are given access to a particular group so that they can see the devices within that group. The purpose of assigning group managers is to define their role over a group of devices.

What is the All devices group?

The All devices group is a default group that exists in every organization. It collects all devices as they are activated or moved into the organization. It cannot be deleted, and devices cannot be removed from it unless they are moved to a different organization altogether.

An account user’s role in the All devices group acts as their most basic role throughout the entire organization. For example, if an account user has a resolve only role in the All devices group, this means they can see all of the organization’s devices and resolve alerts on every device. However, they can also be given “higher access” roles in other groups, so that they might be able to manage or edit specific devices.

The All devices group plays a large part in relationships, and sharing it with another organization allows them to see all of the resources in your organization.

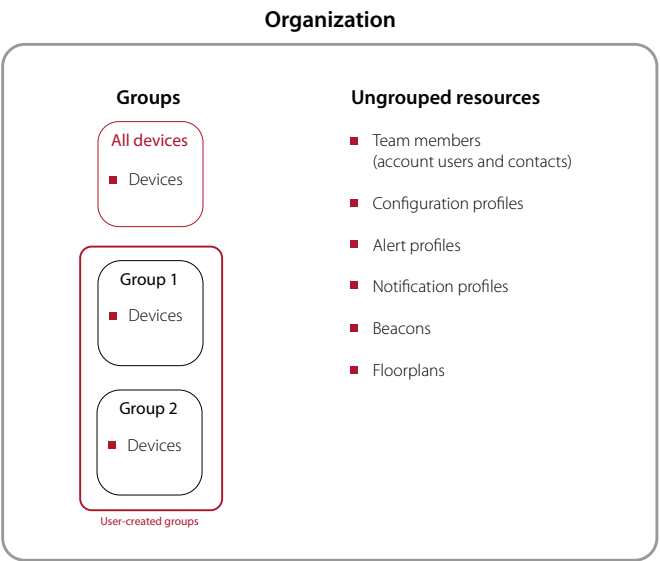
What are grouped and ungrouped resources?

Grouped resources

The resources that belong in groups — currently this only includes devices. Account users can only access grouped resources if they have been given a role in the group those resources are in.

Ungrouped resources

These resources belong in the organization, but not in particular groups. These resources include team members, configuration profiles, alert profiles, notification profiles, beacons and floorplans. They can be seen by all account users within an organization. Providers can only see these if the All devices group is shared with them.



Roles

Roles have changed with the implementation of Blackline Live's new structure — this section will introduce these roles, and go over how to assign them.

Roles

View only

Account users with a view only role can see resources that they have been assigned to, but cannot manage them. This role is best for users who might want to check their settings, but do not have the authority to change them.

Resolve only

These account users cannot edit any resources, but can manage and resolve alerts. Resolve only roles are often assigned to monitoring personnel, who are employed to carry out response protocols in the case of an alert.

Device admin

Device admins have permission to manage within the groups that they are assigned to. This role is best for account users who need to be able to edit devices within a group, but should not have influence over resources outside of the group.

Group admin

Group admins have administrative power over groups they have access to — they are able to organize and edit these groups as well as the resources within them. They act as support to the organization admin, but focus on administration of particular groups rather than the entire organization.

Organization admin

These account users have the highest-level role in your organization — they manage the organization and all of its resources and relationships, and should be the organization's primary point of contact with Blackline.

Role permissions

	View	Resolve alerts	Create team member contacts	Reassign devices	Create and assign configurations, notifications and alert profiles	Create and manage groups	Create and edit team members with account access	Create and manage cross-organization relationships	Edit organization details
View only									
Resolve only									
Device admin									
Group admin									
Organization admin									

Why assign roles?

Roles help define how an account user views the portal, and what resources they have access to.

Keep in mind that account users need to have a role in at least one group in order to properly use Blackline Live. Without a role, they will only be able to see the organization’s ungrouped resources — they will not see any groups or devices.

How do I assign roles?

Roles are assigned on a group-by-group basis by assigning account users as group managers — in order to be assigned a role, you need to be a group manager in at least one group. This means that the account user will have this role over a specific selection of devices, and can have different permissions for different devices.

Access to the All devices group






A role in the All devices group allows an account user to have permissions over every device in the organization, and allows them to see every group in the organization. This role in the All devices group becomes their minimum role in every group. In the case that a role for a particular group has not been assigned, the account user’s access to that group is based on their role in the All devices group.

Group managers

Provide team members with permission to manage the group.

Search team members

Page: 1 / 1

	FIRST NAME	LAST NAME	ORGANIZATION	ROLE
	Devon	Pinto	Blackline Safety Corp	No access
	Patricia	Lee	Blackline Safety Corp	No access
	Sven	Karlsson	Blackline Safety Corp	No access
	Teagan	Kanatis	Blackline Safety Corp	
	Terry	Colmes	Blackline Safety Corp	

No access

Group admin

Device admin

Resolve only

View only

CANCEL

SAVE

Relationships

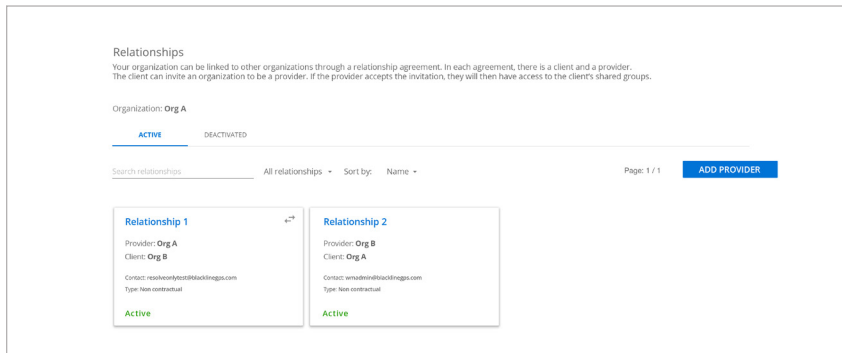
A relationship agreement is a one-way link between two businesses, where one business is allowed to manage or monitor the other's resources. Relationships are based on the idea of sharing groups, and always involve two parties: the client and the provider.

Clients

The client is the business that is receiving services. Client organizations invite a provider to a relationship agreement, and get to choose which roles the provider will have over their groups. Clients can edit non-contractual relationships.

Providers

The provider is the business in a relationship that is providing a service. They are being given permission by the client to manage or monitor their devices and resources. The provider cannot initiate a relationship or make changes to an existing relationship.



Why do I need relationships?

Relationships are used to give another organization access to your resources — the two most common services providers that will use this feature are monitoring services and reseller partners.

Monitoring services can observe the safety statuses of your devices and resolve alerts as they occur. Resellers help set up accounts and walk customers through the onboarding process. Relationships can also help resellers who offer device maintenance or account setup to their customers.

If you ever need another organization to manage your devices, relationships provide you a sharing structure that is applicable in any situation.

Definitions

Relationship agreement

A one-way link between two businesses in which one allows the other access to their groups and devices. In each agreement, there is a client and a provider.

Client

The business in a relationship that is receiving services.

Provider

The business in an agreement that is providing services.

Non-contractual relationship

An agreement that can be edited by the client after being agreed upon.

Contractual relationship

An agreement that is locked upon being agreed upon. Changes and termination of a relationship must be carried out by Blackline's Customer Care team.

Shared resources

Resources that a client shares with a provider as part of a relationship agreement.

How do I invite a provider to a relationship agreement?

If you would like to give another organization access to your resources, you can invite them to be your provider through the portal. Click the *add provider* button on the Relationships page and fill out the form.

You will need to provide a unique relationship name and the email of the organization admin that will be facilitating your shared resources. Select one of the three relationship types and click *send* when you're done.

If they accept the invitation to become your provider, they will gain access to the groups you have decided to share with them.

Add provider

A provider is the organization you choose to service your Blackline Live account. As the client, you can control the amount of access they have by editing their group permissions, and can terminate the partnership at any time.

Relationship name
Distributor relationship
Create a relationship name to describe the service your provider will have with your organization (eg. Monitor, Distributor, Contractor). 24 / 50

Contact email
distributor@gmail.com

Relationship type
A non-contractual relationship allows you to customize your provider's access to shared groups. Choosing not to assign your provider to your All Devices group will limit user and customer admin roles to resolve only.
A contractual relationship gives the provider either resolve only or customer admin access to your organization's All Devices group. Contracts cannot be changed by either party once agreed upon, and require Blackline's Customer Care team to add or deactivate the agreement.

☒ Non-contractual
☐ Contractual - Resolve only
☐ Contractual - Group admin

Search groups Sort by: Name Page: 1 / 2

Group	Roles
All Devices Org A <small>All devices in your organization</small>	No access
Group 1 Org A <small>Group 1 description</small>	Group admin
Group 2 Org A <small>Group 2 description</small>	No access
Group 3 Org A <small>Group 3 description</small>	Device admin
Group 4 Org A <small>Group 4 description</small>	Group admin

Roles
Device admin
☐ No access
☐ Group admin
☒ Device admin
☐ Resolve only
☐ View only

[BACK](#) [CANCEL](#) [SEND](#)

Relationship types

A client creating a relationship agreement will have to choose what kind of relationship to establish. There are three relationship types:

Non-contractual

A relationship that can be changed after being initially agreed upon. Only the client can make these changes. The client has full customization over the groups that can be shared.

Contractual

A relationship that can only be edited or deactivated by Blackline's Customer Care team. In a contractual group admin relationship, the client gives the provider access to their All devices group. They can choose to give their provider either a resolve only or group admin role over the All devices group.

How is assigning roles to a provider different from assigning roles to a group manager?

The kind of roles that you can assign to a provider are the same as what can be assigned to a group manager: group admin, device admin, resolve only and view only.

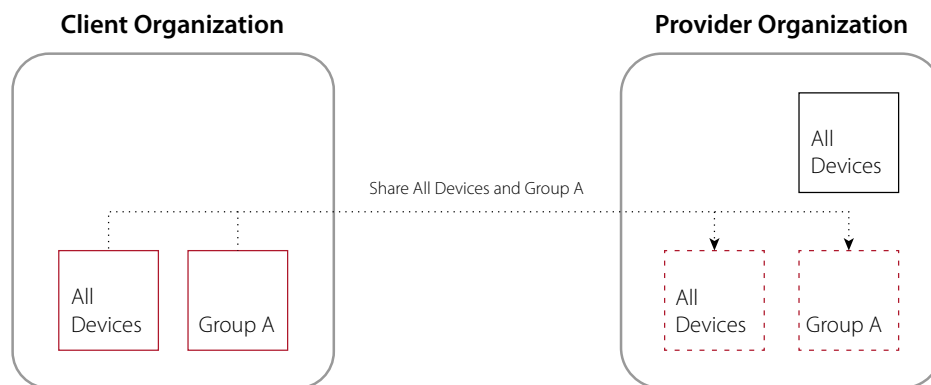
The largest difference is that the provider needs a role in the client's All devices group in order to see their ungrouped resources. Without a role in the All devices group, providers can only interact with the devices assigned to them.

Sharing groups

Relationships are based on the sharing of groups from one business to another. The client gives the provider access to specific groups in their organization and defines the extent of this access by assigning roles to each group.

When a client has shared groups with a provider, the provider will be able to see the client's resources amongst their own. Blackline Live offers options to filter and sort in order to organize owned and shared resources.

In the example below, the client organization has shared their All devices group and Group A with their provider. The advantage to sharing subsets of your total devices is if you need your provider to have different roles on certain devices. The provider will see the client's shared groups as well as their own. If provider and client groups have similar names, they will be labelled with the home organization's name to avoid confusion.



Relationship status

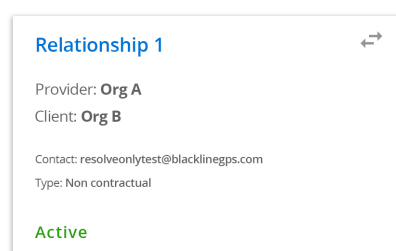
There are three relationship states:

Pending - The client has invited the provider to a relationship agreement, but the provider has not yet agreed or has declined the invitation.

Active - The provider has accepted the client's invitation, and the agreement is in effect.

Inactive - The relationship has been deactivated and is no longer in effect.

The status of a relationship agreement can be seen in its respective card on the relationships page.



All devices group access

The All devices group acts as a representation of all of your organization's resources. By sharing the All devices group with a provider, you give them the ability to see all of your devices, as well as team members, profiles, beacons and floorplans. This is incredibly important to consider when creating a non-contractual relationship where the provider can be given access to a custom combination of groups.

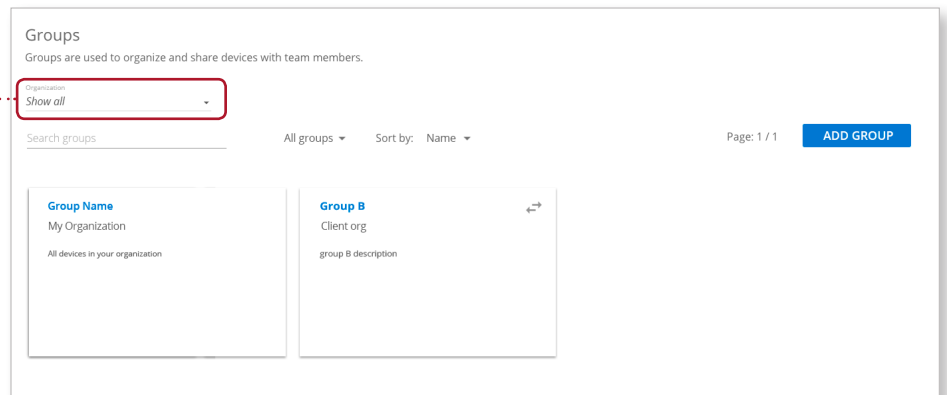
Be aware that if a provider is not given a role in the All devices group, they will not be able to see ungrouped resources like team members and profiles — this means that they cannot reassign team members or profiles on the client's behalf.

Organization select tool

The organization select tool is a new feature of Blackline Live, exclusively for the use of relationship providers that may be providing services to several client businesses. This tool allows them to filter to a specific client organization or to “show all” resources they have access to.

The organization select tool makes it easier for providers to navigate between their clients’ resources and their own by filtering down to the resources they need to manage.

The organization select tool appears on pages that collect and list available resources. Providers can use this tool to select a particular organization and filter down to only that organization’s resources.



“Sticky” selection

The organization selection tool is “sticky”. This means that the provider’s last selection using this tool will follow them from page to page, ensuring their list of available resources is consistent. For example, if a provider were to select Client A from the organization selection tool on the groups page and then go to the team members page, they would still be seeing resources belonging to Client A.

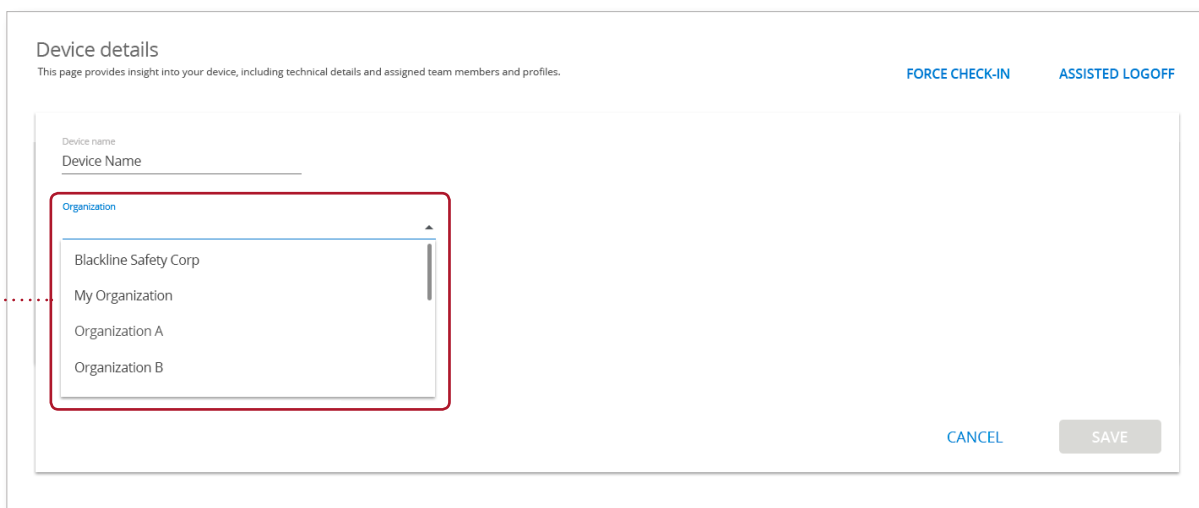
Some pages do not allow the organization to be changed. In these cases, the organization select tool will default back to the provider’s own organization and resources. As soon as they return to a page that allows organization select, their “sticky” selection will be in effect again.

Move tool

The move tool is another tool for providers — it looks a lot like the organization select tool, but instead applies to a specific resource. The move tool allows a provider to move a device or beacon from one organization to another. This tool will be useful for reseller partners who are maintaining equipment for several clients. Devices will leave the original organization's All devices group and will appear in the destination organization's All devices group.

Moving devices and beacons

Providers require a customer admin role in their client's All devices group in order to move devices or beacons. To all other roles, and customer admins without All devices access, the move tool will be disabled. The device can be moved if the only group it is in is the All Devices group — this helps to ensure that devices are not moved accidentally.

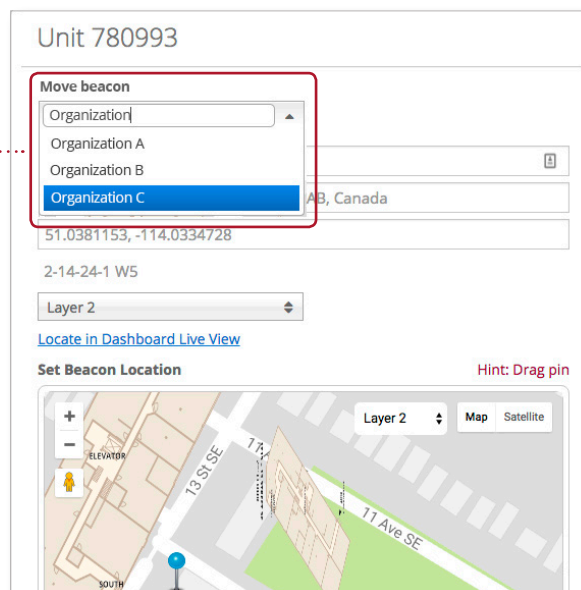


The screenshot shows the 'Device details' form. At the top, there are links for 'FORCE CHECK-IN' and 'ASSISTED LOGOFF'. Below the 'Device name' field, the 'Organization' dropdown menu is open, showing a list of organizations: 'Blackline Safety Corp', 'My Organization', 'Organization A', and 'Organization B'. A red dotted line points from the text 'The device can be moved if the only group it is in is the All Devices group' to the 'Organization' dropdown. At the bottom right of the form are 'CANCEL' and 'SAVE' buttons.

Where can these resources be moved to?

A provider can move devices and beacons between client organizations and themselves. The provider can take a device or beacon from a client organization and put it in their own organization, or inversely put one of their own devices or beacons in the client's organization.

Providers can also move a device or beacon from one client organization to another client organization, provided that the provider has a customer admin role in both clients' All devices groups. Even if these clients have no relation to each other, the provider acts as a connection between them.



The screenshot shows the 'Unit 780993' form. The 'Move beacon' dropdown menu is open, showing a list of organizations: 'Organization A', 'Organization B', and 'Organization C'. A red dotted line points from the text 'Where can these resources be moved to?' to the 'Move beacon' dropdown. Below the dropdown, there are fields for 'AB, Canada', '51.0381153, -114.0334728', and '2-14-24-1 W5'. There is a 'Layer 2' dropdown and a 'Locate in Dashboard Live View' link. At the bottom, there is a 'Set Beacon Location' section with a map and a 'Hint: Drag pin' text. The map shows a street view with a blue pin and a yellow location icon.

Blackline Live how-to's

There are a lot of actions that you can accomplish with the new Blackline Live system — some have been carried over from the old system, but some may be completely new. This section provides an assortment of how-to tutorials for new actions you'll find yourself doing frequently.

Organization details

How do I change my organization details?

NOTE: Only organization admins can edit the organization details page.

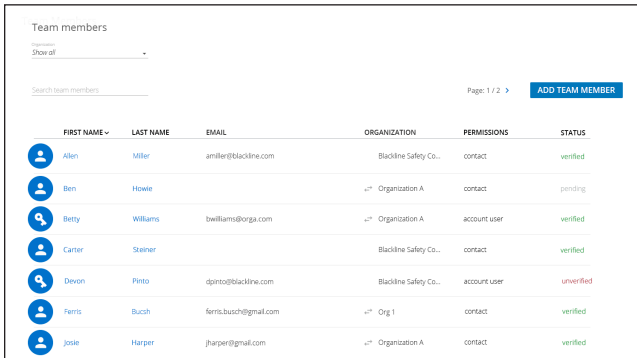
1. Click on your organization name in the right-hand side of the menu to open a dropdown menu
2. Select the organization details page from the dropdown
3. On the organization details page, click the *edit* button in the top right corner of the details card. This will open an editable version of the card.
4. Use the text fields and checkboxes to define your organization. Organization name is a required field with a 40 character limit. The description field does not have a character limit, but part of a long description may be hidden in view mode.
5. Select *save* to save changes. The card should go back to view-only mode

The screenshot shows the 'Organization details' page in a view-only state. At the top, it says 'Organization details' and 'An organization is the home of your company's Blackline devices and information.' Below this is a card containing the following fields: 'Organization name' with the value 'Organization A', 'Description' with the value 'Organization description', and two checkboxes, both of which are checked: 'Display LSD map information' and 'Display NTS map information'. An 'EDIT' button is located in the top right corner of the card. A 'BACK' button is located at the bottom left of the page.

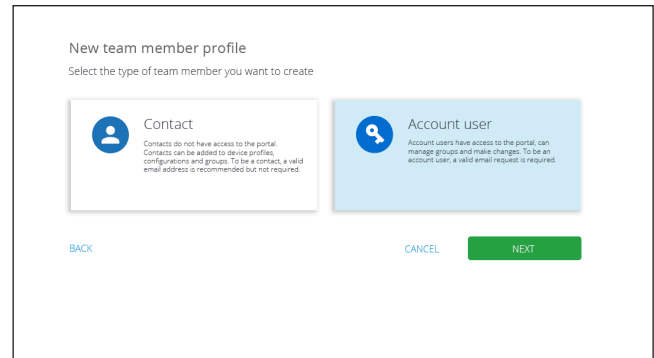
The screenshot shows the 'Organization details' page in an edit state. At the top, it says 'Organization details' and 'An organization is the home of your company's Blackline devices and information.' Below this is a card containing the following fields: 'Organization name' with the value 'My Organization' and a character count of '15 / 40', 'Description' with a text area, and two checkboxes, both of which are checked: 'Display LSD map information' and 'Display NTS map information'. 'CANCEL' and 'SAVE' buttons are located in the bottom right corner of the card. A 'BACK' button is located at the bottom left of the page.

Team members

How do I make a new team member?



1. Go to the Team members page and select the *add team member* button.



2. Click on either the account user or contact user card and click the *next* button to continue. Select contact if the team member will not be using Blackline Live; select account user if they will.

3. Fill out the new team member profile. Ensure all required fields are filled. Remember to fill out your company name as well — this is the information monitoring personnel will see when you get an alert.

4. If creating an account user, select a role for them in at least one group. Click *save* when finished.

5. You will see the new profile in view-only mode. An *edit* button should now be visible in the corner of the first card, and will allow you to make future changes.

In view-only mode, the groups card only shows the groups that the team member has been assigned to. This card also has an *edit* button so that changes can be made.

How do I verify a new account user's email?

1. Create a new account user, fill out the profile information and press *save*. A verification email will send to the email address in the profile. The account user's status will be pending.
2. The account user should log into their email and find the email sent from Blackline Live.
3. Click the verification link in the email.
4. The page will redirect to Blackline Live. The team member's status should now be verified.

How do I deactivate a team member?

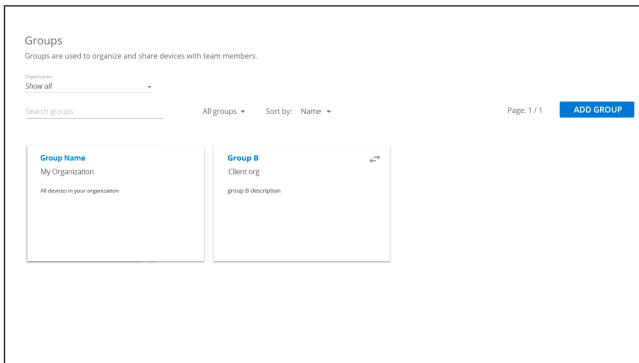
1. Go to the team member profile you want to deactivate.
2. Select the *deactivate* button at the top right of the profile page.
3. A pop-up asking you to confirm your choice will pop up. Select *deactivate* in the modal to continue.
4. The page will refresh as a deactivated profile. This team member profile will now be located under the deactivated tab on the team members page.

How do I give a contact log-in access to Blackline Live?

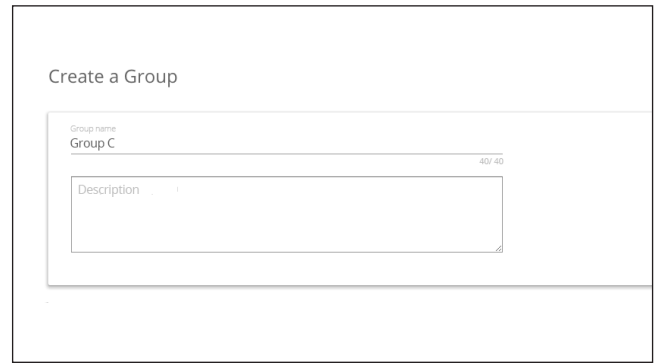
1. Go to the contact profile that you want to change.
2. Select *change to account user* at the top right of the profile page.
3. A pop-up will appear warning that this user will gain access to Blackline Live. Click *make account user* to continue.
4. The page will refresh — the contact will now be an account user, and you will be brought to an editable version of their profile. Required fields will be indicated by red inline text. In order to continue, they will need an email and an assignment to at least one group.
5. Once completed, press *save*. The page will go into view-only mode, and their email status will be pending.

Groups

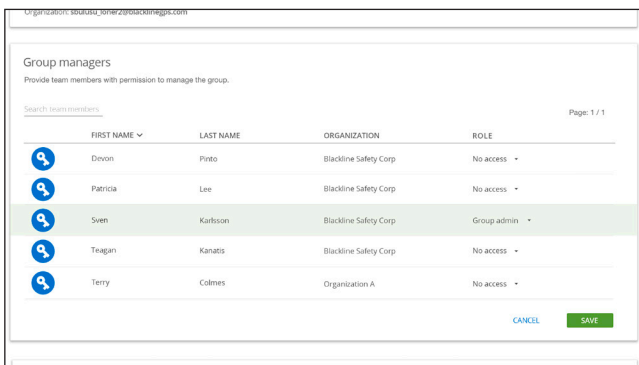
How do I create a group?



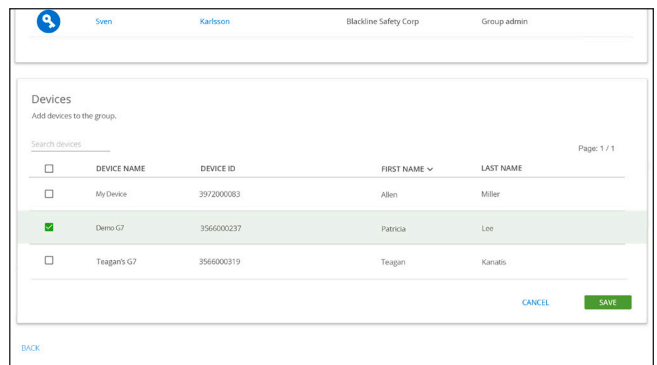
1. Go to the groups page from the menu and select the *add group* button.



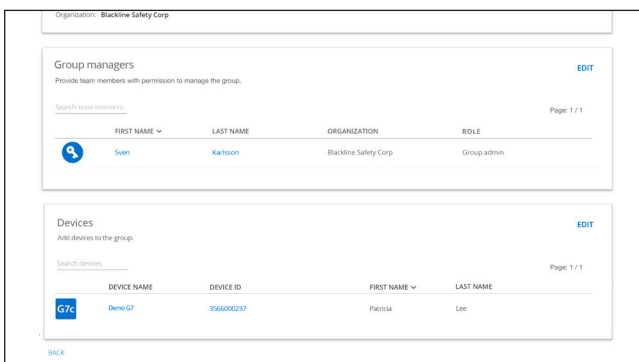
2. Fill out the group's name and description. Select *save*. You will be redirected to a group details page where you can made additional changes to the group.



3. Press *edit* in the second card to edit group managers. Select which account users will manage this group and what roles they will have within it. *Save* when finished.



4. Press *edit* in the third card to assign devices to this group. Devices can exist in multiple groups, so placing one here will not make it disappear from other groups. Select *save* to save changes.



5. Once changes are saved, the card will go back to a view-only state.

How do I edit a group?

1. Go to the group details page of the group you would like to edit.
2. Select the *edit* button in the card you would like to make changes in — this will open an editable version of the card.
3. Select *save* once you have finished making changes — the card will go back to a view-only state that reflects your changes.

How do I assign roles to team members in my organization?






1. Go to the groups page and click on the group you want to assign a user to. This will take you to the group details page.
- NOTE:** Remember that assigning an account user to the All devices group will give them a role over ALL devices in the organization.
2. Scroll down to the Group managers card and press *edit* in the top right corner.
3. Find the user you want to assign to this group and use the dropdown menu to assign them a role within this group. Once selected, that user will be highlighted in green.
4. Select *save* to save changes.
5. The card will refresh to show these changes in a view-only state. The user has now been assigned to the group.

Group managers

Provide team members with permission to manage the group.

Search team members

Page: 1 / 1

	FIRST NAME ▾	LAST NAME	ORGANIZATION	ROLE
	Devon	Pinto	Blackline Safety Corp	No access ▾
	Patricia	Lee	Blackline Safety Corp	No access ▾
	Sven	Karlsson	Blackline Safety Corp	Group admin ▾
	Teagan	Kanatis	Blackline Safety Corp	No access ▾
	Terry	Colmes	Organization A	No access ▾






[CANCEL](#) [SAVE](#)

Group managers

Provide team members with permission to manage the group.

Search team members

Page: 1 / 1

	FIRST NAME ▾	LAST NAME	ORGANIZATION	ROLE
	Devon	Pinto	Blackline Safety Corp	No access ▾
	Patricia	Lee	Blackline Safety Corp	No access ▾
	Sven	Karlsson	Blackline Safety Corp	No access ▾
	Teagan	Kanatis	Blackline Safety Corp	No access ▾
	Terry	Colmes	Blackline Safety Corp	No access ▾

No access ▾

Group admin

Device admin

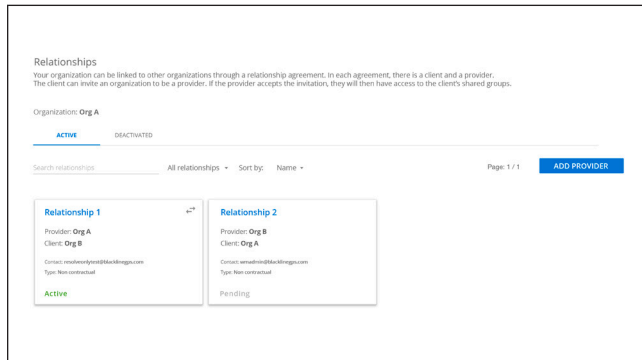
Resolve only

View only

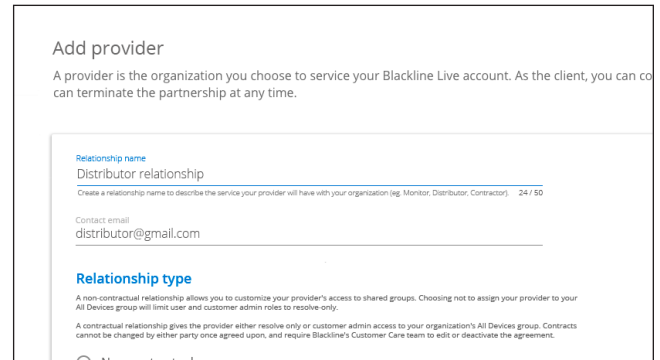
[CANCEL](#) [SAVE](#)

Relationships

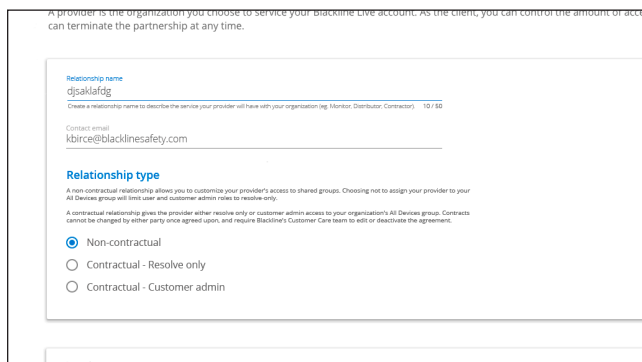
How do I create a relationship agreement?



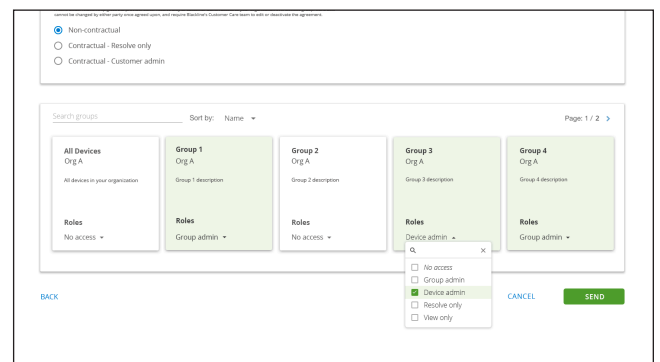
1. Go to the relationships page and select the *add provider* button.



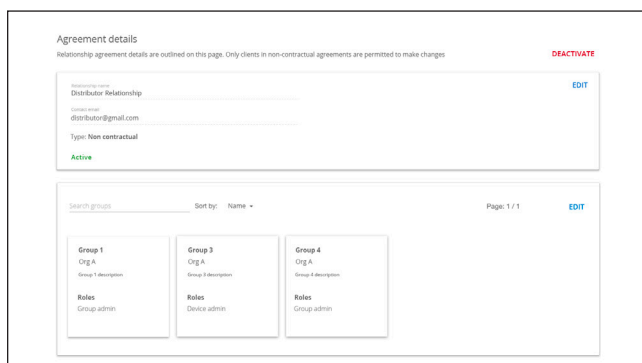
2. Fill out the relationship name and contact email. Ensure the contact email is associated with an organization admin in the Blackline Live system.



3. Select which type of relationship to create.



4. If creating a non-contractual relationship, select which roles to assign your provider in which particular groups. If creating a contractual relationship, the provider will have access to all devices.



5. Select *send* — the page will redirect you to the details page of the relationship agreement you just initiated. The new agreement will also be visible on the Relationships page with a pending status. Once the provider accepts the agreement, this status will change to active.

How to edit a relationship?

Edit a non-contractual relationship

NOTE: You must be the client in a non-contractual relationship in order to make changes

1. Go to the relationships page and click on the agreement you would like to edit.
2. Select *edit* in the top right corner of the card you would like to change — you can edit the relationship name and provider contact email in the first card, and group permissions in the second.
3. Select *save* once you have finished making changes. The card will go back to its view-only state. Your provider will be notified by email that changes have been made to the relationship agreement.

Edit a contractual relationship

Contractual relationships cannot be changed by the client or provider. You will need to contact Blackline's Customer Care team in order to make changes or deactivate the relationship.

How to deactivate a relationship?

1. Go to the relationships page and click on the agreement you would like to deactivate
2. Select *deactivate* in the top right corner of the page.
3. A pop-up will appear asking you to confirm your action. Click *deactivate* to continue.
4. The page will refresh, and the relationship will now be inactive.

Transition

Blackline has taken extra care to make sure that your transition to the new system is seamless and intuitive. Your updated account will still contain all of the information you had — the new features being introduced are meant to enhance and organize your assets, but are optional. This section will walk you through what changes you should expect as an established Blackline Live customer transitioning to the new system.

Organizations

When you transition, your account will become an organization admin within your updated account. Your organization will have the same name as your account email. To make changes to your organization information, go to the organization details page and select *edit*. To make changes to your personal information, go to *my team member profile* and select *edit*.

If your business uses more than one Blackline Live account, each account will be converted into an individual organization. To take advantage of Blackline's new organization-centric structure, you can merge multiple accounts into one organization by contacting Blackline's Customer Care team.

Groups

Your organization will automatically have only one group — the All-devices group. This group cannot be deleted, and devices cannot be removed from it. It will automatically gather all devices in your organization as they are activated or moved. All devices in your account prior to migration will be in this group.

To create new groups, go to the Groups page and select *add group*.



Team members

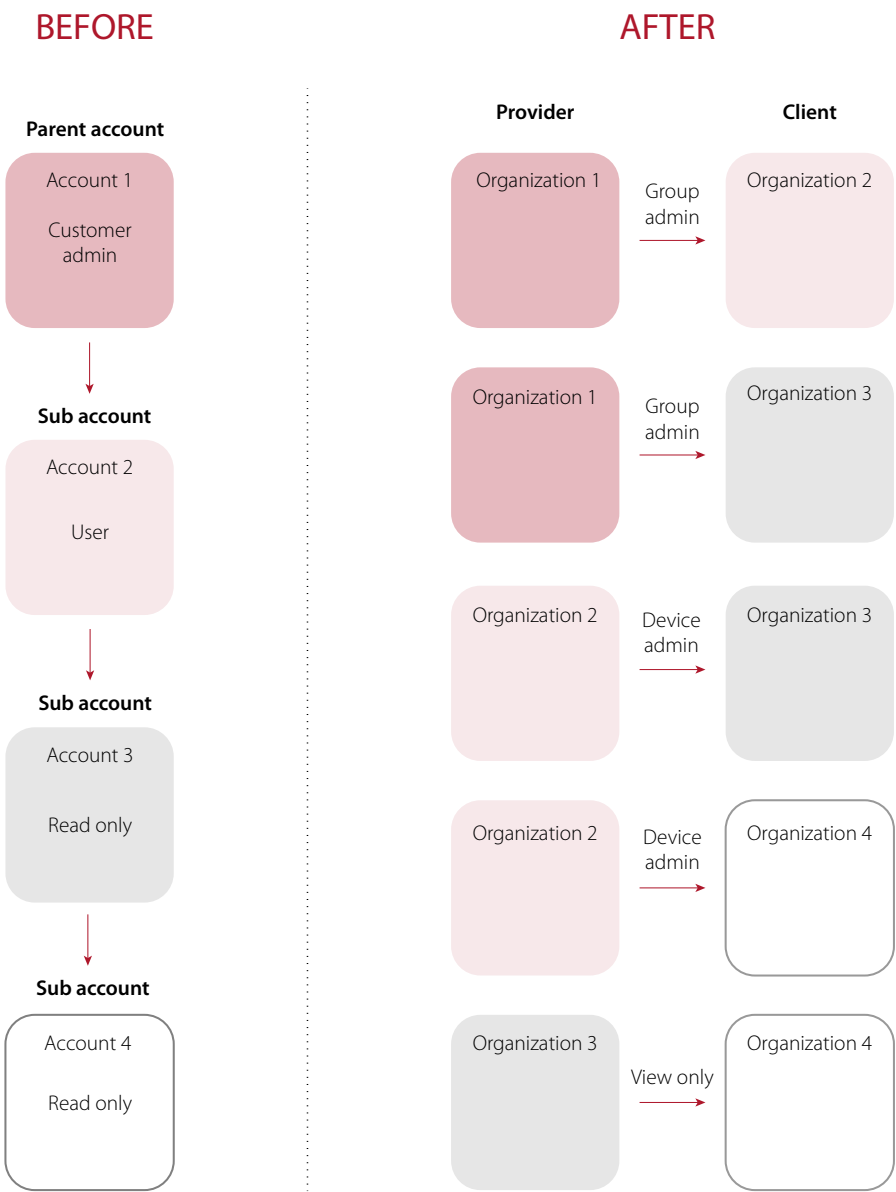
After migration, all contacts in your address book will be converted to contacts in your Team members list. You can convert your contacts to account users and invite them to the portal by pressing the *change to account user* button on their profile.

Relationships

Chains of parent accounts and child subaccounts are transitioned into individual relationship agreements after the update. Any parent account will become a provider, while any child subaccount will become a client. It is possible for an account in one of these chains to become both a provider and a client after migration.

Account and subaccount chains are converted to relationships up to two subaccounts deep. For example, if a chain looks like: Acc 1 > Acc 2 > Acc 3 > Acc 4, Acc 1 will become a provider for Acc 2 and 3, but not 4.

The parent account’s role in Blackline Live becomes their provider role in the relationship. This role will take effect over the client’s All-devices group.





Contact us.

We've got your back. Reach out to Blackline's Customer Care for any questions or assistance during your transition to the new Blackline Live.

Customer Care | 1-877-869-7212 | support@blacklinesafety.com





www.BlacklineSafety.com