BLUEPRINTS & MAPS USER GUIDE

inform • manage • respond

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Overview

The EmergHub Blueprints module allows for emergency managers to manage information regarding assets pertaining to an emergency event or incident. Acting essentially like a relational database system, Blueprint Entities are used as templates to create records that can appear on EmergHub's Map interface or be used separately. Emergency managers can look at the map and see the information they need to know at a glance.

With Blueprints, it is essential to plan out your actions beforehand in order to maximize your success and make sure you are being efficient with the system. It is also necessary to have prior knowledge of the particular attributes that go into creating an entity to be sure the records you create using the it contain all the information emergency managers need to know during an event.

The Map feature can also be used to target a particular geographical area to send alerts and other communications. The map can be overlaid with information from the common operating picture, such as the location of any personnel in the field or the sites of all health centers and other emergency departments. Information about the status of each facility can be added to the map as well and it will continue to update automatically as soon as new information is available.

Blueprints Dashboard

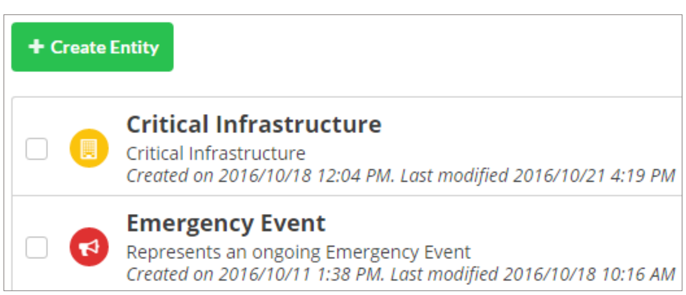
In order to create and manage your Blueprint Entities in the EmergHub platform, first you will need to go to the Blueprints Dashboard. Blueprints can be found in the top bar in the Applications dropdown menu. From here, you will be brought to the main Dashboard where you are able to create a new entity, edit entities, add records. Create and manage dropdowns, change the pictorial icons for any of your entities, and create reports.

From the Blueprints Dashboard, you are able to:

1 Create a New Entity

If you wish to create a new Blueprint Entity, there is a green Create Entity button at the top of the Blueprints Dashboard on the left-hand side in the Blueprints tab.

Clicking this button will direct you to the setup page where you have the ability to name the new entity and add any required fields. Refer to page 3 to learn how to create and set up your entity.



2 View the List of Entities

Below the Create Entity button, you will see a list of all of the Blueprint Entities created, with the most recent appearing at the top. If there are no entities listed, this means none have been created. You will be able to see the following information for each entity listed:

1. **Entity Name:** The name the creator gave the entity
2. **Description:** A brief definition of what the entity represents (optional)
3. **Created On:** The date and time the entity was created
4. **Last Modified:** The date and time the entity was last modified

③ Navigate Pages of Blueprint Entities

Your entities will appear in a list below the green Create Entity button on the Blueprint Entity Dashboard.

To navigate through pages of entities:

- Look to the bottom of your screen where you will find the page numbers indicating the total number of entities you have created
- Click either the page number you would like to visit to proceed to another page of entities or click the Next button, which will take you to the next page of entities. Or, enter the page number in the field located to the right of the Next button, and click Go to proceed directly to that page
- You can also choose how many entities to display at a time by clicking on the “Showing...” link located to the right of the number of displayed entities

④ Search for Blueprint Entities

If you are looking for a particular entities, you can easily search through your entities in the list on the Dashboard by:

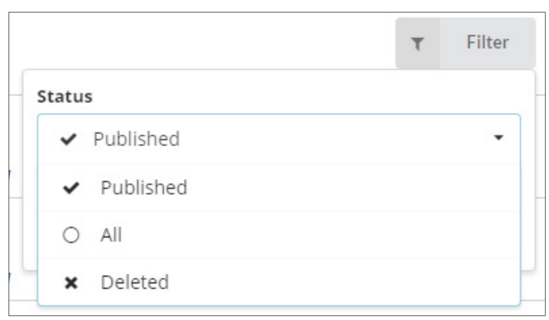
- Selecting the search box that appears in the top right-hand corner of the page next to the gray Filter button
- Typing in the text you would like the system to search for
- The list of entities will automatically filter to match the text

⑤ Filter Blueprint Entities

You have the ability to filter your entities to show items based on their status.

To filter your blueprints:

- Find the gray Filter button that is located at the top right-hand side of your screen in the Dashboard, beside the search bar
- Click the Filter button and a menu will appear where you will see a dropdown with options allowing you to filter entities to show those that are published, all entities, or only deleted entities
- Choose your desired option from the dropdown menu
- Click Apply to implement the filter. Or, click Clear if you do not wish to filter your entities, which will close the dropdown menu



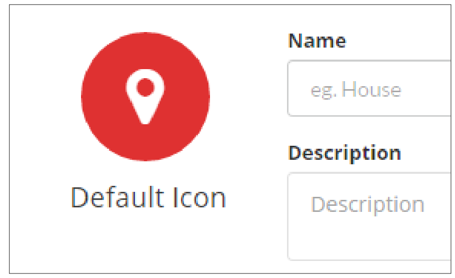
You are also able to filter entities by the date they were created or last modified. For each of these options there are Click to Set Date fields. Click either box and another dropdown menu will show up with two fields labeled Date and Time where you can manually insert the date and time you would like to use to filter entities. Below these fields there is a calendar you can also use to choose the date you would like to filter from. Click Apply to implement the filter. Or, click Clear if you do not wish to filter your entities, which will close the dropdown menu. The normally gray Filter button will appear green when a filter has been applied to your list of entities. To remove the filter, click on the Filter button again and select Clear to remove all filters on your entities.

Create a New Blueprint Entity

On the main Blueprints Dashboard, click the green Create Entity button and you will be directed to the Create New Entity page.

On this page you can:

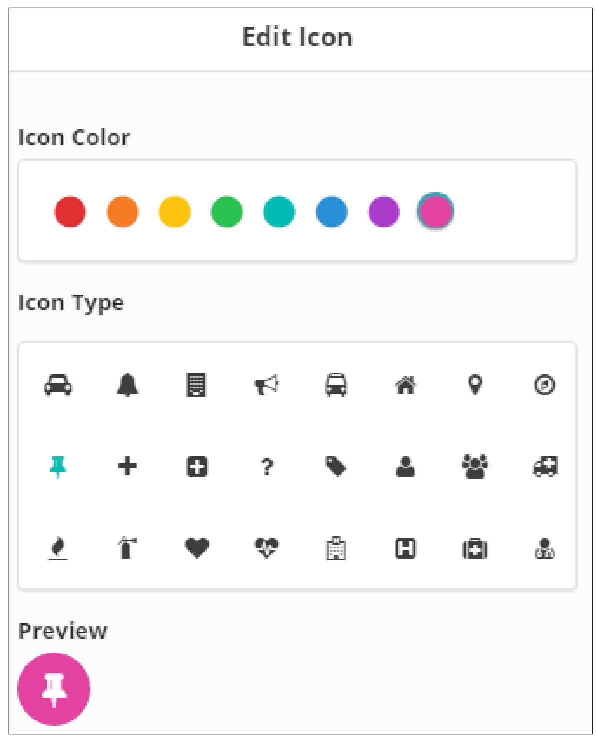
1 Add a Name and Description



At the top of the Blueprints Setup page, there are two fields where you can give your new entity a name and a description. The Name field is mandatory to fill out, however the Description field is optional. Simply type your desired text into these textboxes.

2 Choose a Default Icon

Blueprint Entity icons help to distinguish entities from each other and they are what are used on the Map view to illustrate the locations of records associated with a specific entity.



To choose the default icon for the new entity:

- Locate the icon image found at the top left of the Setup page and click on the image to bring out a sidebar from the right-hand side of the screen
- The first section in the sidebar will allow you to choose the color of the default entity icon. Select your desired color from the options available
- The next section in the sidebar is where you can select the image for the default icon. Choose your image type from the selection of available images
- View a preview of the default icon in the final section of the sidebar
- Click the blue Select Icon button that appears at the bottom of the sidebar to save the changes made to the default icon, or click Cancel to close the sidebar without saving your changes

3 Determine Entity Visibility

Beneath the Description field on the top of the setup page, there is a dropdown menu where you can determine the group of users who are able to view the entity. There are three visibility levels to choose from:

- **My Account:** This option means only users who belong to your account (sharing the same Account ID) will have access to view this entity

- **My Account Groups:** This option means only users who are part of any of the same account groups as your account will have access to view the entity. Refer to the Account Networks User Guide for more information about account groups
- **All Account Network Users:** This option means all users belonging to your account network are able to view the entity. Refer to the Account Networks User Guide for more information on account networks

4 Add a New Field

Blueprint Entity fields are essentially rows in a database where collected information for that entity will be stored. In the creation of any new entity, a Name field is automatically included as it is mandatory for every kind of entity.

To add a new field to your entity:

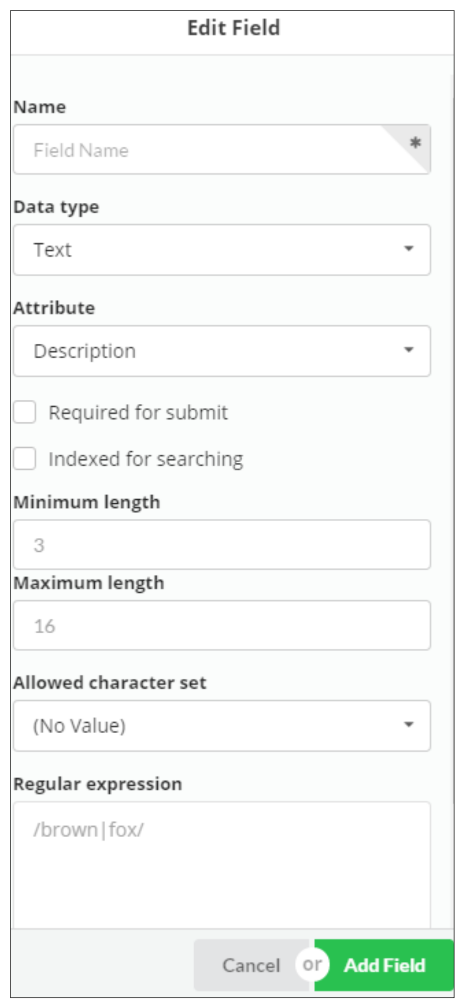
- Locate the green Add Field button found below the Fields section on the Blueprints Setup page
- Clicking this button will open a sidebar to the right of your screen. There are two fields in the sidebar - the first one being the Name field where you are asked to provide a name for the new field
- The second box requires you to select a data type for the new field. Select your chosen data type from the dropdown menu provided

Data Types

Data Types are storage classifications for the information being input into entity fields. Defining data types is important because a field's data type tells the system how to store the information provided within the field. Once you choose a data type for a field, you are not able to change it to make sure stored data does not get stored incorrectly.

There are 12 different data type options to choose from:

- **(No Value):** This option will leave the data type field blank, therefore the information collected by this field will not be stored anywhere in the system
- **Capacity:** This option tells the system the data collected by this field is associated with amount of things the entity possesses
- **Date and Time:** This option tells the system the data collected by this field is temporal, associated with a particular moment in time
- **Dropdown:** This option tells the system the data collected by this field is associated with a specific dropdown menu you have created in the Dropdowns section of the Blueprints application. See page 16 for more information about dropdowns
- **Dropdown Multi-Select:** This option tells the system the data collected by this field is associated with a specific dropdown menu you have created in the Dropdowns section of the Blueprints



application. This field differs from the previous Dropdown field in that multiple options in this menu may be selected at one time

- **Email Address:** This option tells the system the data collected by this field is an email address
- **Location (Lat, Long):** This option tells the system the data collected by this field is a set of latitude and longitude coordinates and can be marked on the map
- **Long Text (256 characters or more):** This option tells the system the data collected by this field requires more storage space as it is composed of a longer set of characters, whether letters, numbers, or both
- **Map Region:** This option tells the system the data collected by this field is a specific area created on the EmergHub Map interface
- **Number (Integer):** This option tells the system the data collected by this field will be in the form of a whole number without decimals
- **Number (Decimal):** This option tells the system the data collected by this field will be in the form of either a whole number or a decimal
- **Related Entity:** This option tells the system this entity is related to another one that has been created
- **Text:** This option tells the system the data collected by this field is comprised of a set of characters whether it's letters, numbers, or both
- **Yes or No (Boolean):** This option tells the system the data collected by this field will be one of only two possible choices: yes or no

[**Note:** In order for an entity to be viewable on the Map interface, it must have a Location field. Refer to page 25 for more information about the Map.]

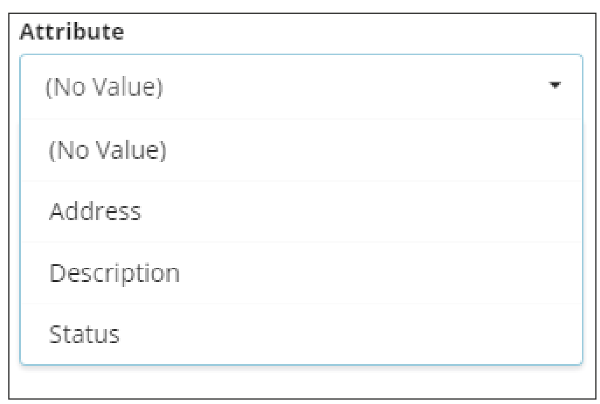
Attributes

While a field's data type refers to how the information collected by that field is to be stored, an attribute determines the properties of the field in question: what the information is that it is collecting. After choosing your data type in the Add Field sidebar, you will then have to choose an attribute for your field.

[**Note:** All data types except for Location (Lat, Long), Map Region, and Related Entity have an Attribute field appear in the sidebar once they are selected.]

For these data types, there are four different types of attributes to choose from:

- **(No Value):** This option means no attribute will be assigned to the field
- **Address:** This option means the field will be collecting the location of entity records via street name and postal/ZIP code
- **Description:** This option tells the system the field will be collecting longer text inputs
- **Status:** This option mean the field will be collecting information as to the status of an entity, whether it is operational or in various forms of degradation



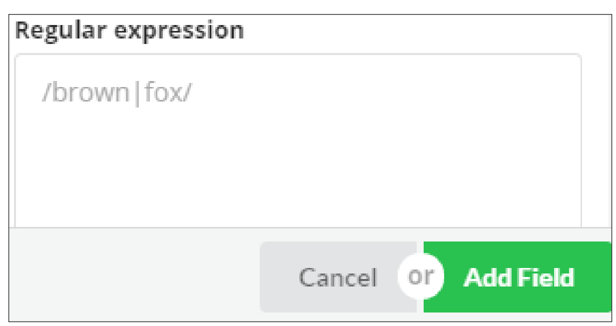
Other Field Options

Depending on the data type you have chosen for your new entity field, other options will appear in the Add Field sidebar that you must configure. **There are a total of eight possible other fields:**

- **Required for Submit:** This option is available with all data types except for Yes or No (Boolean) and is a checkbox you can click if you would like the user creating a record using this entity to be required to provide information in this field before the record can be created
- **Indexed for Searching:** This option is available with the Date and Time, Dropdown, Email Address, Number (Integer), Number (Decimal), and Text data types and is a checkmark that can be clicked if you would like the information gathered by this field for any record made from this entity to be searchable
- **Select Options:** This option is available with the Dropdown and Dropdown Multi-Select data types and it is a dropdown menu you can use to choose from any dropdown you have created in the Dropdown section of the Blueprints application to associate with this entity. Refer to page 16 to learn more about dropdowns.
- **Minimum Value/Length:** The Minimum Value option is available with the Number (Integer) and Number (Decimal) data types and the Minimum Length is available with the Text data type. These options ask you to enter the smallest number that must be inputted into this field when creating a record
- **Maximum Value/Length:** The Maximum Value option is available with the Number (Integer) and Number (Decimal) data types and the Maximum Length is available with the Text data type. These options ask you to enter the largest number that can be inputted into this field when creating a record
- **Related Entity:** This option is available with the Related Entity data type and is a dropdown menu where you can select from a list of entities one that is associated with the entity for which you are currently adding the new field

[**Note:** Related entities are a way to associate two records that may not be part of the same entity, but may have some dependencies on each other. For example, say you had a health center entity and a fire department entity. A number of hospital records created as part of the health center entity may be directly impacted if a specific fire department loses service capabilities. By having this fire department as a related entity to these hospitals you can be sure you are able to see at a glance that these hospitals are potentially vulnerable due to the fire station's operational issues.]

- **Allowed Character Set:** This option is available with the Text data type and is a dropdown menu that allows you to choose what kinds of characters are allowed in the field. The three options to choose from are: Alphabetic (a-z), Alphanumeric (a-z and 0-9), and Numeric (0-9)
- **Regular Expression:** This option is available with the Text data type and is a textbox where you are able to type out a regular expression you would like to associate with the entity field

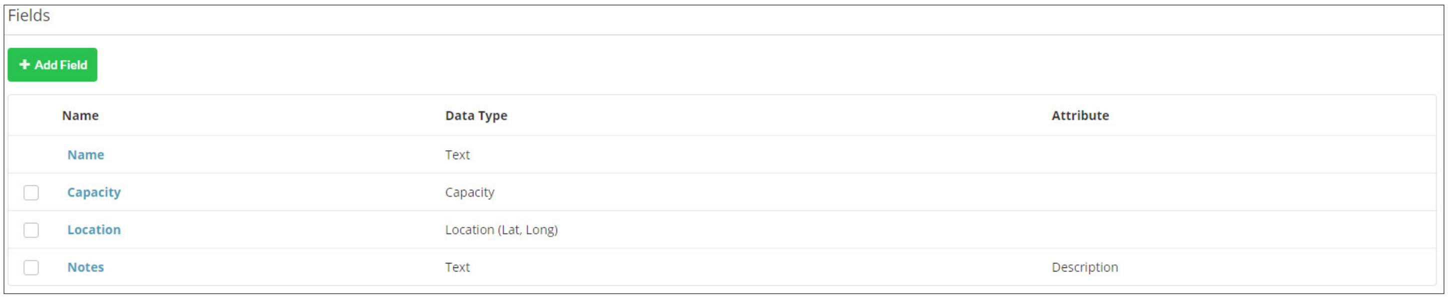


[**Note:** A regular expression is a special text string for describing a search pattern.]

Once you have chosen the name and data type for your new field and configured any attributes or other fields required in the sidebar, you can click the green Add Field button at the bottom of the sidebar to add the field to the entity. Or, if you do not wish to add the field to the entity, click the gray Cancel button instead to close the sidebar without saving the field settings.

You will see the new field appear in the table below the green Add Field button on the Blueprints Setup page. This table will have three columns of information in it: the field's name, data type, and attribute, if available.

Once you have added all the fields you wish to, click the blue Save Changes button at the bottom of the list.



Name	Data Type	Attribute
Name	Text	
Capacity	Capacity	
Location	Location (Lat, Long)	
Notes	Text	Description

5 Edit/Remove a Field

To edit the content of one of the fields in the table on the Create New Entity page:

- Look to the left-hand side of any entity field name in the list in the bottom section of the setup page where you will see a checkbox. Clicking the checkbox will cause two buttons to appear beside the green Add Field button, one being a blue Edit Field button
- Clicking this button will bring out a sidebar where you can edit the options for your entity field
- Click the blue Save button at the bottom of the sidebar to save your changes, or click Cancel to close the sidebar without saving any changes. Any changes you've made must be confirmed on the Updates page. See page 12 for more information

To remove a field from an entity:

- Look to the left-hand side of any entity field name in the list in the bottom section of the setup page where you will see a checkbox. Clicking the checkbox will cause additional buttons to appear beside the green Add Field button, one being a red Remove Field button

[**Note:** You are not able to delete the Name field, as this field is required for all entities.]

Entities and Records

Now that you have created a Blueprint Entity, you can return to the Blueprints Dashboard to take other actions regarding existing entities and records.

Existing entities refers to the Blueprint Entities you have already created. They will now appear on the main Blueprints Dashboard and are ready for you to edit, adjust, or add to. The purpose of entities is to provide a template for your records. Essentially a record is a row in your database that follows the format of your entity. For example, you could create an entity for hospitals that includes the location, status, and capacity. You could then fill in a record for every hospital in your jurisdiction so you have the information ready.

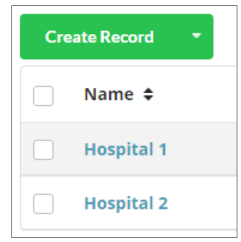
Each entity on the main Blueprints Dashboard has six options.

1 View Data

This option allows you to view existing record data and add/edit records.

To access the View Data option, locate the blue View Data Button found on the right-hand side of your screen across from each of your entities and click it for your selected entity. Clicking this button for any of the entities listed will direct you to a page where you will see a list of all the records that have been created using the entity and the attribute fields that were provided to them (these vary depending on the entity).

Create a New Record



To create a single new record based off of this entity:

- Click the green Create New Record button at the top of the list of records
- A sidebar will appear to the right-hand side of your screen where you can fill out the entity field information related to your new record.
- Click the blue Save button at the bottom of the sidebar to save your new record, or the Cancel button to close the sidebar without saving your new record

To create multiple new records at once:

- Click the arrow on the right side of the green Create New Record button at the top of the list of records and choose the Bulk Import from File option that appears
- Upon arriving at the Data upload page, click the blue Choose File button and select the file you would like to upload from your device (acceptable formats include CSV, TXT, XLS, and XLSX)

Navigate Multiple Record Pages

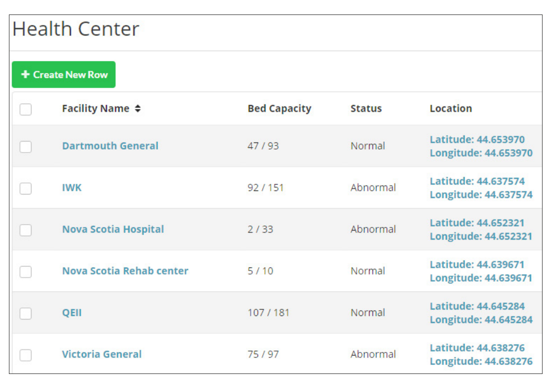
To navigate through the pages of entity records:

- At the bottom of the screen there are page numbers for the total number of records created for the entity
- Click either a page number you would like to visit to proceed to that page of records or click the Next button, which will take you to the next page. Or, enter the page number in the field located to the right of the Next button\ and click Go to proceed directly to that page
- You can also choose how many records to display at a time by clicking on the "Showing…" link located to the right of the number of displayed records

View and Edit Entity Records

To view and sort your records:

- Sort your records by clicking on the title of any column in the list of records. The records will be sorted according to the corresponding column information
- If there is a Location field given to the record, clicking on the blue button in this column will direct you to that particular location on the map

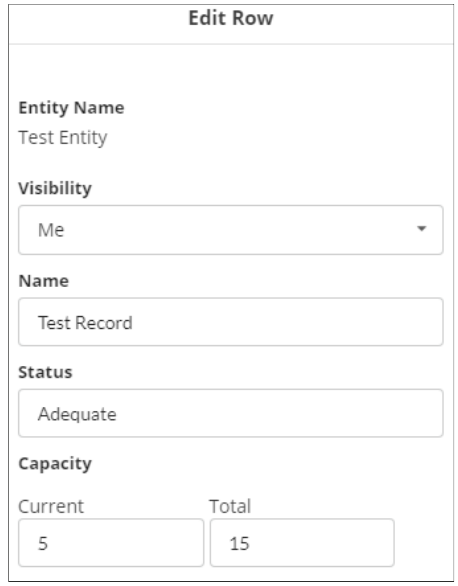

Health Center

+ Create New Row

Facility Name	Bed Capacity	Status	Location
Dartmouth General	47 / 93	Normal	Latitude: 44.653970 Longitude: 44.653970
IWK	92 / 151	Abnormal	Latitude: 44.637574 Longitude: 44.637574
Nova Scotia Hospital	2 / 33	Abnormal	Latitude: 44.652321 Longitude: 44.652321
Nova Scotia Rehab center	5 / 10	Normal	Latitude: 44.639671 Longitude: 44.639671
QEII	107 / 181	Normal	Latitude: 44.645284 Longitude: 44.645284
Victoria General	75 / 97	Abnormal	Latitude: 44.638276 Longitude: 44.638276

To edit the entity fields for any listed records:

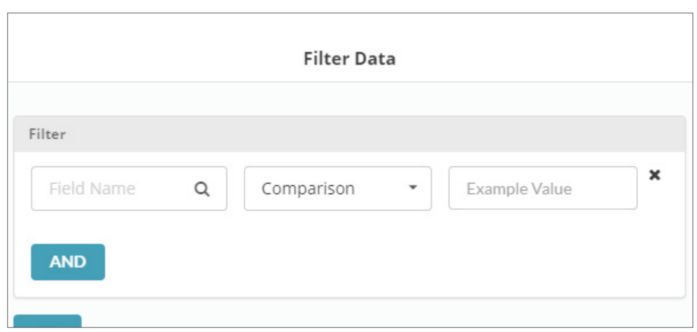
- Click on the name field for any of these records which will open a sidebar to the right of your screen where you can edit the content of the fields for this record. You can also bring up this sidebar by clicking on the checkbox located to the left of each of the record names in the list. A blue Edit Row button will appear next to the green Create New Row button found on top of the list of records
- Edit the record's entity field information in the corresponding sidebar that appears
- Click the blue Save button at the bottom of the sidebar to save the record, or the Cancel button to close the sidebar without saving your changes



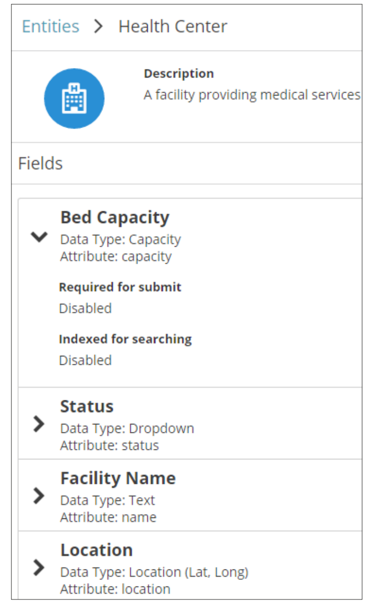
Filter Records

To filter your list of records:

- Click the gray Filter button located at the top right side of your screen next to the search bar. A sidebar menu will appear from the right of your screen where you will see four fields
- In the first field you are able to determine the visibility level from which you would like to filter your records. Choose to filter records from: any visibility level, records visible to only you, records visible to just the users of your account, records visible to anyone part of an account group you are a part of, or all members of the account network
- In the second field you are able to choose the field name by which you would like to filter your records. Choose your desired field by clicking on the option in the dropdown
- In the third field, choose the comparison parameter you would like the system to use when filtering records. There are 14 various options in this dropdown: is, is not, is empty, is not empty, contains, does not contain, greater than, less than, greater than or equal to, less than or equal to, within the past, within the next, starts with, or ends with. The availability of each of these options depends on the entity field you selected in the first field
- In the fourth field (if available depending on the field name and comparison parameter you chose), you must input the value you wish the system to look for when filtering your records. Type your desired value into this field
- Create additional filters for your records by clicking either the blue And or Or button, which will cause the system to show records that meet the criteria of all of your filters or at least one of them depending on whether you selected And or Or
- Click the blue Apply Filter button located at the bottom of the sidebar to filter your records, or click the Clear Filter or Close button to close the sidebar without implementing the filter



2 View an Entity

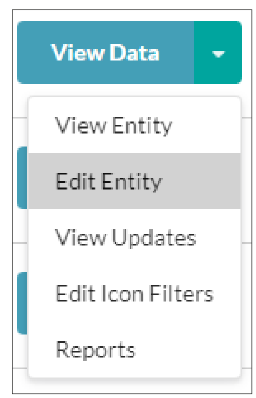


The second option you have back on the main Blueprints Dashboard is the ability to view an existing entity.

To view an entity and its corresponding fields:

- Look to the right-hand side of your screen underneath the search bar where you will see blue View Data buttons across from the each of the entities
- Clicking the downward-facing arrow next to the blue View Data button will bring up a dropdown menu where the first option is View Entity
- Click the View Entity button and you will be directed to the page for that entity displaying all of its information
- At the top of the page you will see the entity's default icon as well as the description for the entity if one was provided upon creation
- Below the first section, you will see a list of all the fields given to the entity. Beneath the field name, you will see the Data Type and Attribute given to the field.
- Clicking any of the field names will enlarge the field box to display a list of information associated with the entity field.

3 Edit an Entity

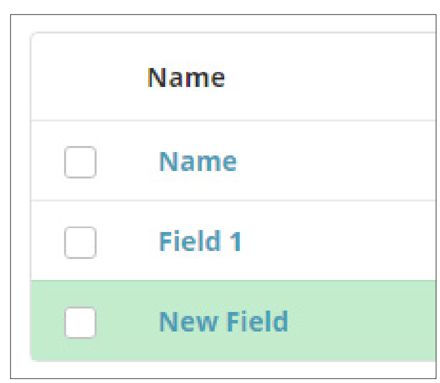


The third option you have back on the main Blueprints Dashboard is the ability to edit an existing entity.

To edit an entity:

- Look to the right-hand side of your screen underneath the gray filter button where you will see blue View Data buttons across from the each of the entities listed
- Click the downward-facing arrow to the right of the View Data button will make a dropdown appear, where Edit Entity is the second of five options
- Choosing this option will direct you to a page where you can edit the content of the entity
- At the top of this page you will see the Name and Description fields, which you are able to modify, as well as the default icon for the entity which you can also edit. You can add, edit, remove, or restore fields to the entity. Refer to page 4 for more information on these options

Add Entity Fields



To add a field to an entity:

- Click the Add Field button under Fields on Edit Entity Page
- Follow the steps on page 4 for adding a new field to an entity

Once complete, you will see the new field appear in the table of fields. The background of the new field will appear green. This is to highlight the change made.

Edit Entity Fields

To edit the fields for an entity:

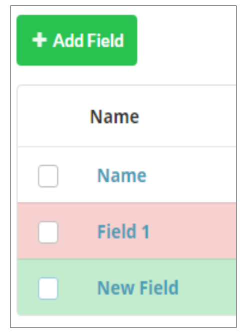
- Click the checkbox next to the entity field you wish to edit and click the blue Edit Field button that appears
- Make any changes you require in the sidebar that appears on the right

Once complete, you will see the new field appear in the table of fields. The background of the new field will appear green. This is to highlight the change made.

[**Note:** You are not able to edit Data Type field or any fields associated with it. The Data Type field tells the system how to store the information received from that field, so once you have chosen the storing method for a field you cannot change it because it would cause a risk of having collected information stored incorrectly - e.g. a date in a number field.]

Once complete, you will see the background of the field appear blue. This is to highlight the change made.

Delete an Entity Field



To delete an entity field :

- Click the checkbox next to the entity field you wish to edit and click the red Remove Field button that appears
- You will see the removed field still in the table of fields, but the background of the field will be red. This is to highlight the change made.

To restore a field to an entity:

- Look to the left-hand side of any entity field name with a red background in the list in the bottom section of the page. You will see a checkbox and clicking this checkbox will cause two buttons to appear beside the green Add Field button, one being a gray Restore Field button
- Clicking this button will restore the field and change the background back to white

Save Changes

Once you're satisfied with the changes made to the entity fields and clicked the blue Save button:

- A pop-up will appear asking you to review the changes to your entity
- Click the blue "I Accept" button to confirm you would like the changes to be applied to the entity or click Cancel to close the pop-up window without confirming the changes
- If you selected the I Accept button, you will then be directed to the Entity Updates page where you can confirm the updates of the entity fields by checking of the checkbox to the left of the update and clicking the green Apply Update button that appears, or click the Cancel button to prevent the field from being changed.

Refer to page X for more information on Entity Updates.

Delete a Blueprint Entity

To delete an entity:

- Locate the red Delete Entity button found at the top right of the Edit Entity page. Click this button and you will be asked to confirm the deletion. Then, you will be directed back to the Blueprint Dashboard

4 View Updates

Whenever any changes are made to an entity after it has already been created, these updates are not automatically applied. EmergHub has a multi-step confirmation process in place for applying entity updates. This is because changes made to entities containing a large amount of data can take a while to implement, which is not ideal - especially during an active emergency event.

Another reason for the multi-confirmation process is that should the update contain a removal of an entity field, this could result in a major loss of data. This is why updates must be reviewed in the Updates tab before being committed.

To apply an update to an entity, click on the arrow beside View Data for the entity for which you wish to apply updates and choose "View Updates." You will see a list of all the pending updates organized in a table on this page, with the ability to filter and view updates with different statuses.

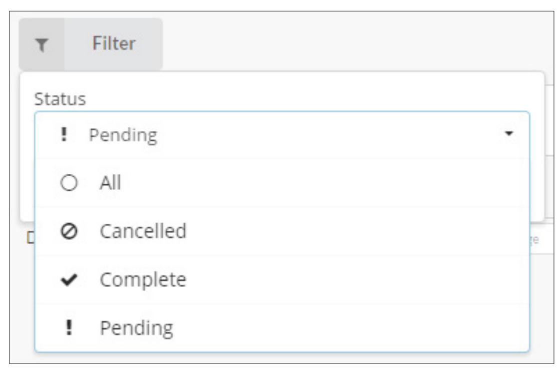
For each update, you will see five columns of information in the table:

- **Entity:** This column refers to the name of the entity the update belongs to
- **User:** This column refers to the user who made the update
- **Status**: This column refers to the current status of the update either: Pending, Canceled, or Complete
- **Date Created:** This column refers to the date and time the update was first created
- **Date Modified:** This column refers to the date and time the last change was made to the update in its pending state

On the Update page, you are able to:

Filter Updates

You are able to filter and view entity updates by their different statuses.



To do so:

- Locate the gray Filter button at the top left-hand corner of your screen
- Clicking this button will make a dropdown menu appear with the option to filter your updates by: All, Canceled, Complete, or Pending
- Select your filter option from the dropdown list, click the blue Apply button to implement the filter, and the list of updates will filter accordingly. Or, click the Clear button to close the dropdown without choosing a filter

Navigate Pages of Updates

To navigate through pages of updates:

- Look to the bottom of your screen where you will find the page numbers indicating the total number of updates waiting to be applied
- Click either a page number you would like to visit to proceed to that page of updates or click the Next

button, which will take you to the next page of updates. Or, enter the page number in the field located to the right of the Next button, and click Go to proceed directly to that page

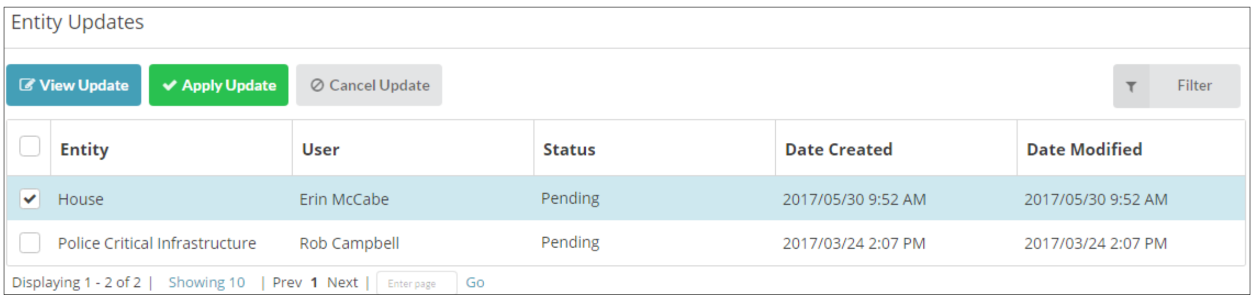
- You can also choose how many updates to display at a time by clicking on the “Showing…” link located to the right of the number of displayed updates

View a Pending Update

To view an update:

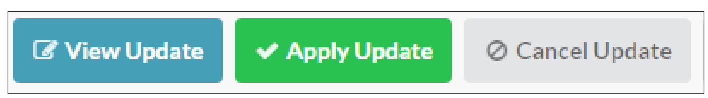
- Locate the checkbox found to the left of the update you wish to view
- Clicking the checkbox will cause three new buttons to appear to the left of the gray Filter button, one of them being a blue View Update button
- Click the View Update button and you will be directed to the Entity Setup page where you are able to see the pending update and edit it if you should choose to

Refer to page 10 for more information on editing an entity.



Apply a Pending Update

To apply a pending update:



- Locate the checkbox found to the left of the update you wish to apply
- Clicking the checkbox will cause three new buttons to appear on top of the list of updates; including a green Apply Update button
- Click the Apply Update button and a pop-up window asking you to confirm your action will appear. Click the green Apply Update button in the pop-up to implement the update. Alternatively, click the Cancel button to close the pop-up without applying the update

Depending on the size of the update, the update may take a few minutes to complete.

Cancel a Pending Update

To cancel a pending entity update:

- Locate the checkbox found to the left of the update you wish to cancel
- Clicking the checkbox will cause three new buttons to appear to the left of the gray Filter button, the third one being a gray Cancel Update button
- Click the Cancel Update button and a pop-up window will appear asking you to confirm the cancellation. Click the blue Cancel Update button to remove the update from Pending status and deny the update, or click Cancel to close the pop-up window without canceling the update.

5 Edit Icon Filters

Icons are the images that appear on the Map that represent each of the individual records that relate to a particular entity. You are able to set up filters for the entity to represent records with an abnormal status. For example, the icon could change color to indicate a change in status.

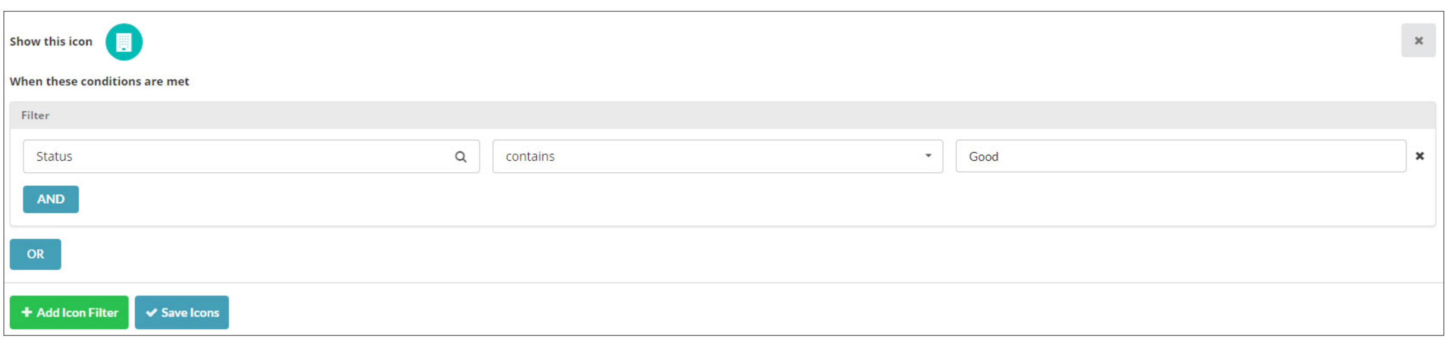
To enter the Blueprint Icon Builder:

- Look to the right-hand side of your screen on the main Blueprints Dashboard underneath the gray filter button where you will see blue View Data buttons across from the each of the entities listed
- Clicking the downward-facing arrow to the right of the View Data button will make a dropdown appear, where Edit Icon Filters is the fourth of five options
- Choosing this option will direct you to the Icon Builder page where you can set up different filters for your entity icon

Add a New Icon Filter

To add a new icon filter:

- Locate the green Add Icon Filter button below the default icon image and any previous filters that may have been added
- Clicking this button will cause additional fields to appear below the default icon and other existing filters where you can begin setting up your new filter
- First, you must determine the icon you want to be used when the new filter conditions have been met. Click the smaller icon image that appears next to the "Show this icon" text at the top of the filter creation section
- The Edit Icon sidebar will appear from the right side of your screen, where you can choose the color and image for the icon by selecting your desired options from the corresponding fields
- Click the blue Select Icon button at the bottom of the sidebar to save your icon settings or click Cancel to close the sidebar without saving the settings
- The next section in the Icon Builder is where you set the conditions that must be met in order for the default icon to change. In the Field Name textbox, select the field name from the dropdown you wish to be connected to this filter, or type the field name into the textbox to filter the results



- In the second textbox, select the comparison parameter you wish to use for the filter. Depending on the field name selected, you can choose one of the eight possible options from the dropdown that appears: is, is not, is empty, is not empty, contains, does not contain, starts with, or ends with

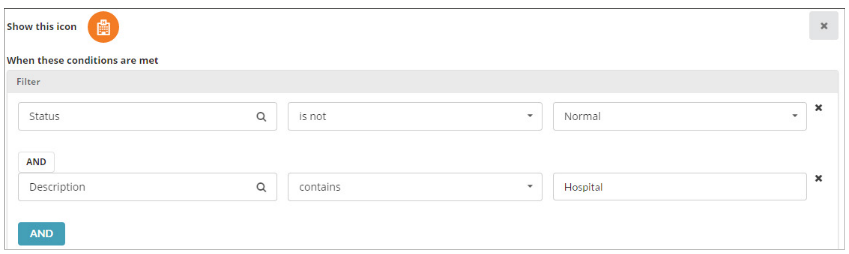
- Depending on the field name you selected in the first textbox when creating your filter, you may or may not see a Value textbox next to the comparison parameter textbox. If you do see this textbox, simply type in the value you wish the entity field name you chose to be compared to
- If you have finished editing your icon filters, click the blue Save Icons button at the bottom of the sidebar to save your icon filter settings for the entity and you will be directed back to the main Blueprints page

Add Multiple Sets of Conditions

You are also able to create more than one set of conditions for the icon filter.

To do this:

- Click either the blue And or Or buttons to make a second set of textboxes appear where you can use the previous steps to create a new set of filter conditions for the icon
- If you clicked the And button, both the new set of conditions and the first set must be met in order for the icon to be changed. If you chose the Or button, this means one of the condition sets must be met in order for the new icon to be applied
- If you have finished editing your icon filters, click the blue Save Icons button at the bottom of the sidebar to save your icon filter settings for the entity and you will be directed to the Entity Updates page. See page X.

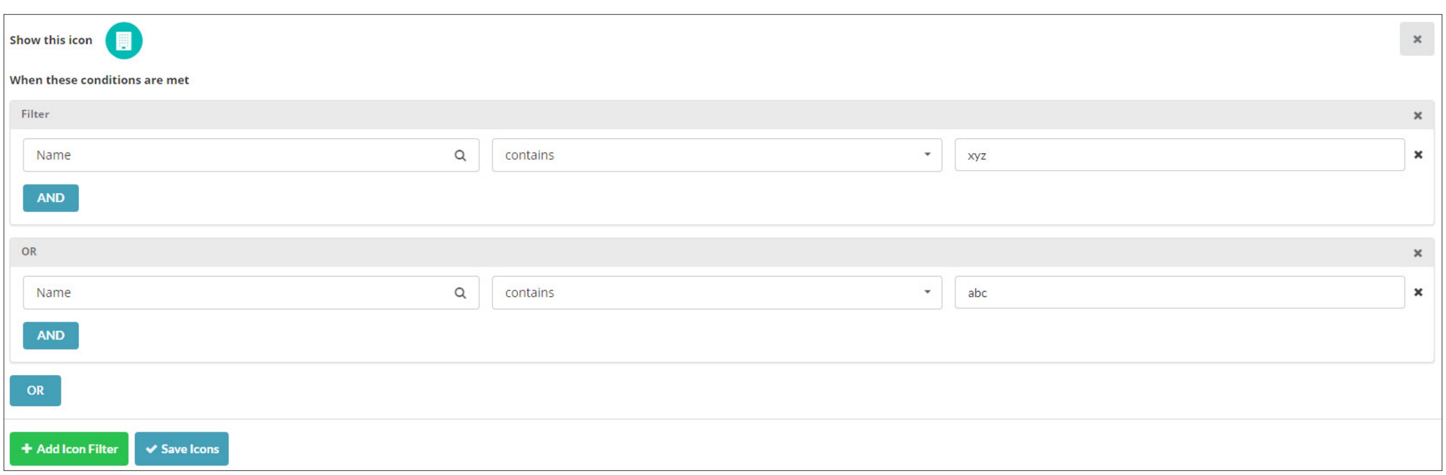


Add Multiple Icon Filters

You are also able to create more than one icon filter for an entity.

To create an additional icon filter with a different icon:

- Click the green Add Icon Filter that is located beneath the previous icon filter you have configured
- Repeat the configuration process found on page 14 to complete the new icon filter
- Click the blue Save Icons button at the bottom of the sidebar to save your icon filter settings for the entity and you will be directed back to the main Blueprints page



Delete an Icon Filter

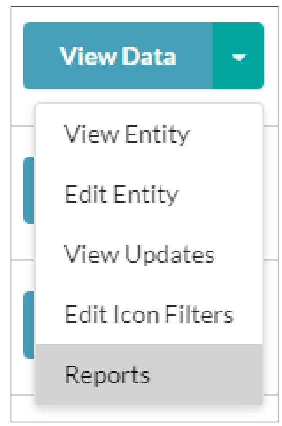
To delete an icon filter from an entity:

- Locate the gray “X” button found on the right hand side of your screen across from the smaller icon of one of your created filters
- Clicking the “X” button will immediately delete the chosen filter from the entity

To delete a particular set of conditions from a icon filter:

- Locate the “X” button that appears on the right-hand side of your screen across from the set of condition fields in a filter
- Clicking the “X” button will immediately delete the chosen condition set from the icon filter to cancel the deletion of a particular filter of condition set, simply navigate away from the Icon Builder page without clicking the blue Save Icons button.

6 Access Blueprint Reports



The final option on the Blueprints Dashboard is Reports.

To view or create a blueprint report, find the blue View Data button to the right of the entity’s name. Clicking the arrow on the right side of this button will bring up a dropdown menu. Clicking Reports will direct you to the Reports page for that particular blueprint entity, which will show any reports that have been created using this entity. You can also access the Reports section by clicking the Reports option available in the left-hand menu. For more information about Blueprint Reports, refer to page 19.

Dropdowns

Dropdown menus are used extensively within the Blueprints application. They are a tool used to provide users with a list of pre-set options from which to choose. Dropdowns can be used as their own field within an entity, for example, to determine the status of a record on or off the map.

In order to use dropdown menus as part of an entity, you will need to create them in the Dropdowns section of the application. To do so, locate the Dropdowns tab in the menu to the left of your screen. **On the Dropdowns page you are able to:**

1 Create a New Dropdown

If you wish to create a new dropdown, there is a green Create New Dropdown button at the top of the Dropdowns page in the Blueprints application.

Clicking this button will cause a pop-up window to appear where you have the ability to name the new dropdown. Refer to page 16 to learn how to create and set up your dropdown.

2 View the List of Dropdowns

Below the Create New Dropdown button, you will see a list of all of the dropdowns created by users in your account network, with the most recent appearing at the top. If there are no dropdowns listed, this means none have been created. **You will be able to see the following information for each dropdown listed:**

1. **Dropdown Name:** The name the creator gave the dropdown menu
2. **Dropdown Choices:** A dropdown selector you can click to show all available options created for that specific dropdown

3 Navigate Pages of Dropdowns

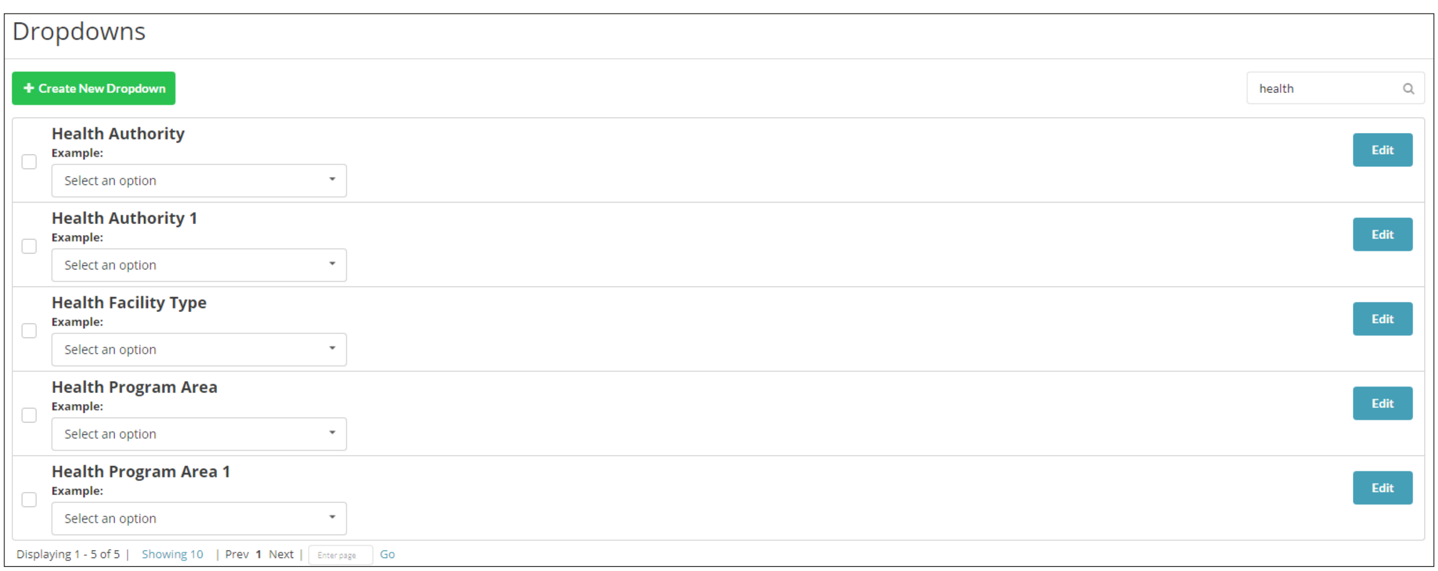
To navigate through the pages of dropdown menus:

- Look to the bottom of your screen where you will find the page numbers indicating the total number of dropdown menus created
- Click either a page number you would like to visit to proceed to that page of dropdowns or click the Next button, which will take you to the next page of dropdowns. Or, enter the page number in the field located to the right of the Next button, and click Go to proceed directly to that page
- You can also choose how many dropdowns to display at a time by clicking on the “Showing…” link located to the right of the number of displayed dropdowns

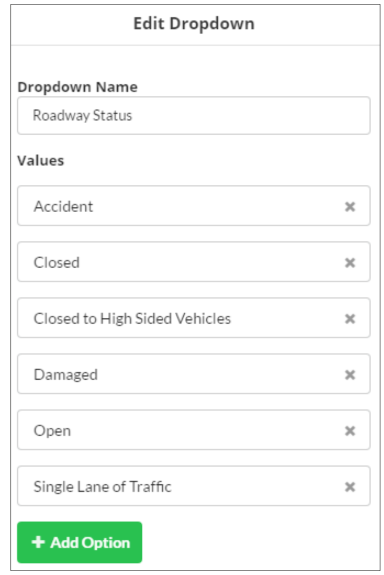
4 Search for Dropdowns

If you are looking for a particular dropdown you have already created, you can easily search through your dropdowns:

- Selecting the search box that appears in the top right-hand corner of the page above the list of dropdowns
- Typing in the text that you would like the system to search for
- The list of dropdowns will automatically filter to match the typed-in text



5 Edit a Dropdown

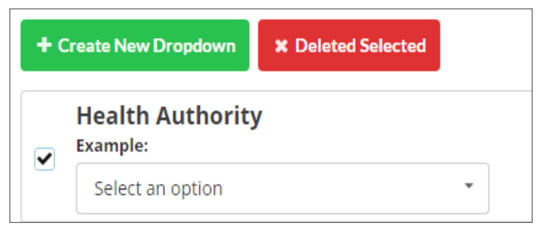


To edit the values of any dropdowns in the table:

- Look to the right-hand side of any dropdown in the list on the Dropdowns page where you will see a blue Edit button
- Clicking this button will bring out a sidebar from the right of your screen where you can add or remove any of the available choices in the dropdown or change the dropdown name
- Add a choice by clicking the green Add Option button found at the bottom of the available choices or delete any choice by clicking the "X" button located to the right of choice's name
- Click the blue Save button at the bottom of the sidebar to save your changes, or click Cancel to close the sidebar without saving any changes

6 Delete a Dropdown

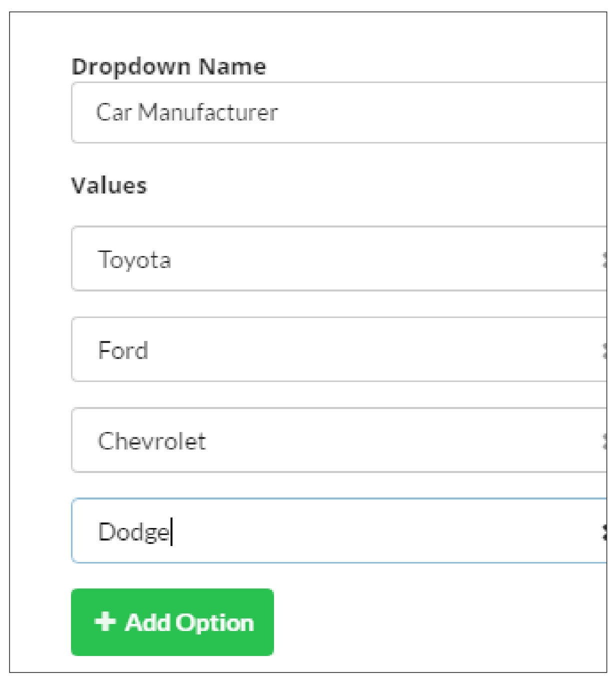
To delete a dropdown, locate the checkbox found to the left of any dropdown name in your list of dropdowns. Upon clicking this checkbox (or multiple if you wish to delete multiple dropdowns), a new, red Delete Selected button will appear at the top of the list of dropdowns, to the right of the green Create New Dropdown button. Clicking this button will delete the chosen dropdown.



[**Note:** If the dropdown has been added to any entity as a field, you will not be able to delete it because any data collected would be lost.]

Dropdown Setup

Once you click the green Create New Dropdown button a pop-up window will appear where you can enter the name for the new dropdown. Click the blue OK button to bring out the Create Dropdown sidebar from the right-hand side of your screen, or click Cancel to close the pop-up window without creating a new dropdown menu.



Once you have opened the Create Dropdown sidebar, you are able to:

1 Edit the Dropdown Name

At the top of the Create Dropdown sidebar window, you will see a field containing the name you have just given your dropdown. Click this field if you would like to modify the name of your dropdown.

2 Add/Remove Dropdown Values

Below the Dropdown Name field in the Create Dropdown sidebar, you will see a green Add Option button. This button will allow you to add the choices that users will be able to select from when configuring this dropdown field when it's been added to a blueprint. When the button is clicked, a field will appear above it where you can type in the first option for the dropdown menu. Continue adding options this way until you have all that you require. Delete any options by clicking on the "X" located to the right of the added options' names.

Click the blue Save button at the bottom of the sidebar to save your new dropdown menu, or click Cancel to close the sidebar without creating a new dropdown menu

Now, your new dropdown menu is ready to be used as a field in a new or existing blueprint. Refer to page 10 for more information regarding blueprint creation.

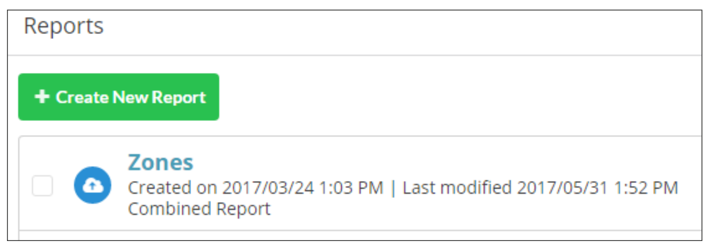
Reports

Blueprints Reports differ from the standard reporting interface that is available with other EmergHub applications. Reporting in the Blueprints sense means you are able to create custom summaries containing information from one or more blueprints in order to manage and compare incoming data from these entities.

To access Blueprints reports, locate the menu on the left side of your screen and select the Reports tab. **Once on the Reports Dashboard, you are able to:**

1 Create a New Report

If you wish to create a new custom report, there is a green Create New Report button at the top of the Reports Dashboard.



Clicking this button will cause a sidebar to appear where you have the ability to create the new report. Refer to page 19 to learn how to create and set up your custom Blueprints Report.

2 View the List of Reports

Below the Create New Report button, you will see a list of all of custom reports created, with the most recent at the top. If there are no reports listed, this means none have been created. You can see the name of the report, the report's visibility, when it was created, when it was modified, and which entity is being reported on. [**Note:** If there is more than one blueprint included in, the report will be defined as a combined report.]

3 Search for Reports

If you are looking for a report, search through your reports in the list by:

- Selecting the search box that appears in the top right-hand corner of the page above the list of reports
- Typing in the text you would like the system to search for
- The list of reports will automatically filter to match the text

4 Edit a Report

To edit an existing report:

- Click on the name of the report you wish to edit that appears in the list of created reports
- You will be directed to a page where you can view all the records included in this report, as well as the blueprint entity they belong to. Above the list of records there is a blue Edit Report button that you can click to enter the Edit Report page. Refer to page 19 for more information about the report setup process

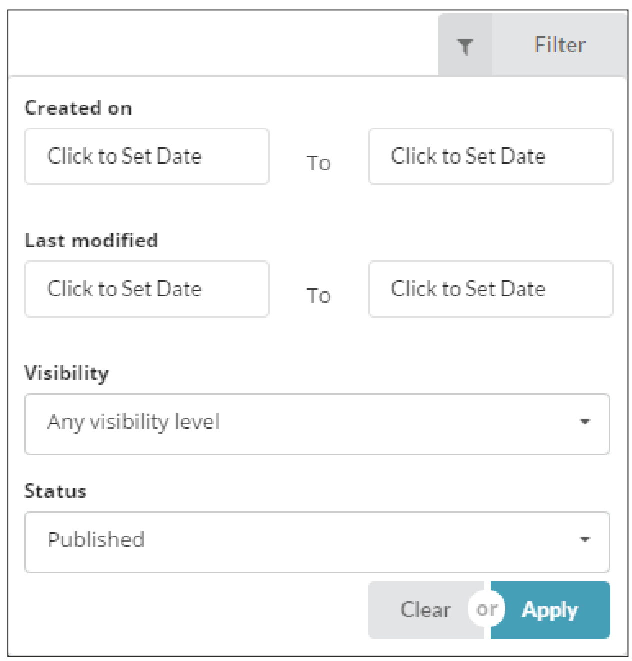
5 Delete Reports

To delete a report, locate the checkbox found to the left of any report name in your list of reports. Upon clicking this checkbox (or multiple if you wish to delete multiple reports), a new, red Delete Report(s) button will appear at the top of the list of reports, to the right of the green Create New Report button. Clicking this button will delete the chosen reports.

6 Filter Reports

To filter your list of reports:

- Click the gray Filter button located at the top right side of your screen next to the search bar. A dropdown menu will appear where you will see four fields
- In the first field set you are able to choose a date range within which you would like to see the reports that were created. Click on the Click to Set Date fields in this field set to open a calendar dropdown where you can select your desired dates and times
- In the second field sets, you are able to choose a date range within which you would like to see the reports that were most recently modified. Click on the Click to Set Date fields in this field set to open a calendar dropdown where you can select your desired dates and times
- In the third field you are able to determine the visibility level from which you would like to filter your reports. Choose to filter reports from: any visibility level, reports visible to only you, reports visible to just the users of your account, reports visible to anyone part of an account group you are a part of, or all members of the account network
- In the final field in the Filter dropdown you are able to select a report status that you would like to filter reports by from three available options in the dropdown menu in this field: Any Status, Published, or Deleted



- Click the blue Apply button located at the bottom of the sidebar to filter your reports, or click the Clear button to close the sidebar without implementing the filter

Single Entity Report Setup

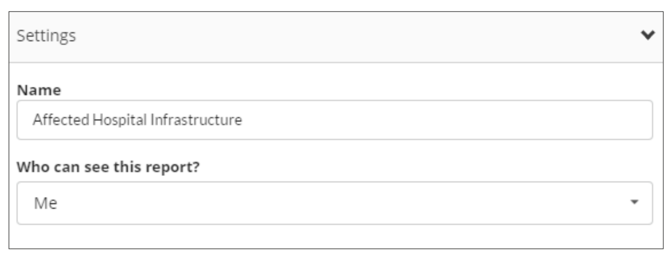
To set up a custom report using only one entity:

- Click on the green Create New Report button, which will open a sidebar from the right side of your screen
- In the sidebar, the first field you will see is the Name field, where you must enter the name for the new report
- The second field in the sidebar is a dropdown menu where you can choose which entity you would like to create the report for. Select <u>one</u> entity from this list
- Click the green Create Report button at the bottom of the sidebar to proceed to the next part of the Report Setup Process, or click Cancel to close the sidebar without creating a new report
- After clicking the green Create Report button you will be directed to the Edit Report page. Here the screen is split into two halves: the left side shows a preview of what the report will look like and the right side is where you can modify what information appears in the report
- Looking to the left-hand side of the screen, you will see three sections with fields to configure with regard to your report: Settings, Columns, and Filter.

Settings

The first section of the Edit Report sidebar is the Settings section where you are able to configure the report name and visibility settings. **To do so:**

- Click on the Name field to modify the name given to the report when it was first created
- The second field contains the visibility dropdown menu where you can determine who is able to see this report in their Reports Dashboard. Select whether you would like to limit the report's visibility so that just you are able to view it, just the members of your account, members of any account groups you are a part of, or the entire account network

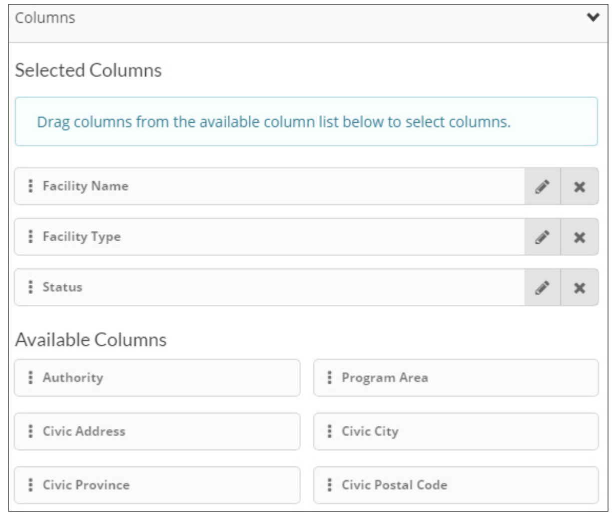


Columns

The second section of the Edit Report sidebar is the Columns section where you are able to determine which data columns (fields) you would like to appear in your report. This section is divided into two parts: Selected Columns and Available Columns. **To choose the columns that will appear in your report:**

- Click and drag your desired data columns from the Available Columns list up to the Selected Columns section one at a time

[**Note:** Any column with the Name data type will automatically be placed into the Selected Columns section, but can be removed.]

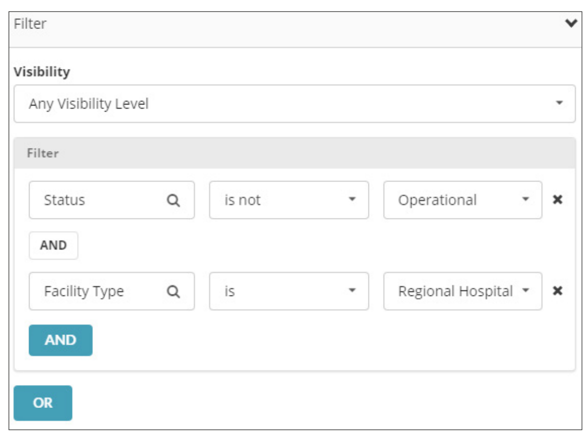


- To remove a column from the Selected Column section, click the "X" button to the far right of the column name, which will move the deleted column back to the list of available columns
- To edit the name of the column once you have added it to your list of selected columns, locate the pen icon found to the left of the "X." A pop-up window will appear where you can modify the name of the column if you so choose. Click the blue OK button at the bottom of the window to save your settings or click the Cancel button to close the pop-up without changing the column name

Filter

The last section of the Edit Report page is the Filter section where you are able to set the conditions for which specific information will appear in your report. **To set your report filter:**

- First, you must determine the visibility level of the information you wish to include in your report. You can choose to create the report using information that is visible only to you, to your account, to members of any account groups you are a part of, or your entire account network
- Next, you will see three more fields below the Visibility field where you can set up a filter
- In the first field you are able to choose the field name you want to use to filter the records in your report. Choose your desired field by clicking on the option in the dropdown
- In the second field, choose the comparison parameter you would like the system to use when filtering the report's records. There are 19 various options in this dropdown: is, is not, is empty, is not empty, contains, does not contain, greater than, less than, greater than or equal to, less than or equal to, within the past, within the next, starts with, ends with, is any of, is none of, yes, no, or has any of. The availability of each of these options depends on the entity field you selected in the first field

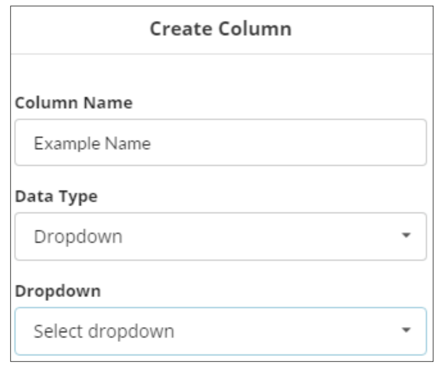


- In the third field (if available depending on the field name and comparison parameter you chose), you must input the value you wish the system to look for when filtering the records s appearing in your report. Type your desired value into this field, or choose from the available dropdown depending on the case
- Create additional filters for your report's records by clicking either the blue And or Or buttons, which will cause the system to show records that meet the criteria of all your filters or at least one of them
- Click the blue Preview Settings button located at the bottom right side of the page to load a preview of what the filtered report will look like in the left-hand side of your screen. If you are satisfied with your filtered report, click the Complete button at the bottom right of your page to bring up a pop-up asking you to save your filter. Click OK to complete the setup process and return to the Reports Dashboard or Cancel to return to the setup screen

Combined Entity Report Setup

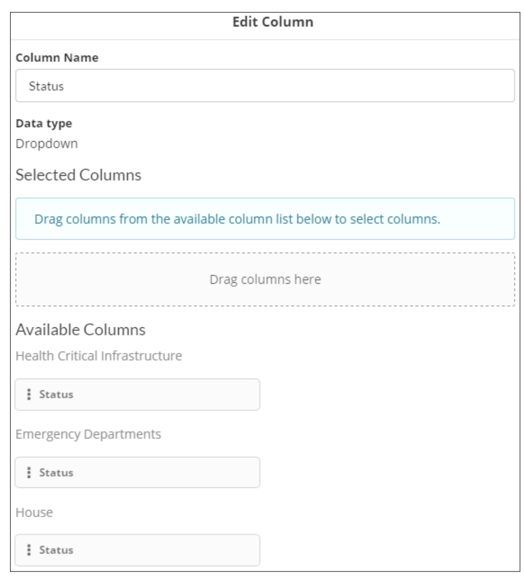
To set up a custom report using multiple entities:

- Click on the green Create New Report button which will open a sidebar from the right side of your screen
- In the sidebar, the first field you will see is the Name field, where you must enter the name for the new report
- The second field in the sidebar is a dropdown menu where you can choose which entities you would like to create the report for. Select the desired entities from this list
- Click the green Create Report button at the bottom of the sidebar to proceed to the next part of the report setup process, or click Cancel to close the sidebar without creating a new report
- After clicking the green Create Report button you will be directed to the Create Columns page where you must create the data columns that will appear in your report. Clicking on the green Create Report Column button that appears on this page will cause a sidebar to appear to the right of the screen with two fields



- The first column field in this sidebar is where you must input the name of the new column you are creating. Type your desired column name into the textbox provided
- In the second field, you must choose a data type for the column. Select a data type from the options available in this field's dropdown menu. Depending on the data type selected, further fields may appear in the sidebar to configure. Refer to page 4 for more information on data types

[**Note:** The only data types that will be available in the dropdown menu are data types that appear in each of the entities chosen to make up this report. Essentially you can only combine like items into the new column. For example, if all chosen entities contain a date and time field in their blueprint, then the Date and Time data type will appear in the dropdown. However, if only one of the entities contain a Dropdown field, then the Dropdown data type will not be available for selection in the Create Column's data type dropdown.]



[**Note:** In order for the Dropdown data type to be available for selection in this field, all chosen entities must possess the same dropdown menu in their blueprint (e.g. A Status dropdown with Operational, Degraded, and Closed for options).]

- Click the green Create Column button at the bottom of the sidebar to create your new report column, or click Cancel to close the sidebar without creating a new column. If you created the column, a new Edit Column sidebar will appear where you can merge the similar columns belonging to each entity into the newly created custom report column
- Click and drag the names of the columns from each of the chosen entities that best match the custom column you created from the Available Columns section to the Selected Columns section above it in the sidebar

[**Note:** For example, if you are combining three entities into one report and each have some variation on the naming of the Date and Time field (Date and Time, Date/Time, Date & Time), you can consolidate them into the common custom-created column by clicking and dragging them from the Available Columns list to the Selected Columns list. Each column must have the same data type.]

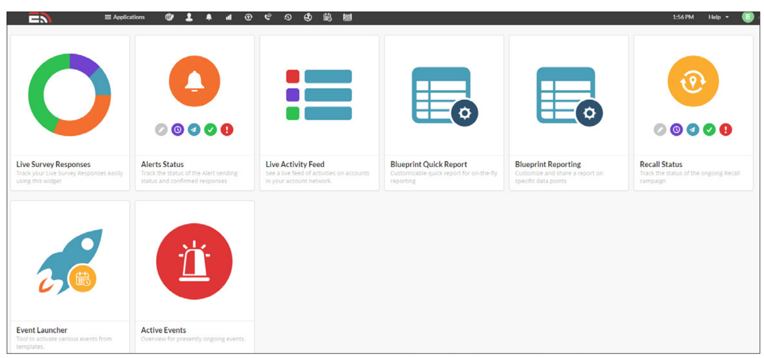
[**Note:** The Name field is automatically added to your combined report. Click the button with the pen image to open up the Edit column sidebar where you can ensure the correct fields have been selected from each entity.]

- Create as many custom columns as you would like to include in your combined report in this way. Delete a created column by clicking the "X" button located to the right of the given column name, and edit any created column by clicking the button with the pen image
- Once you are satisfied with your custom report columns, click the Next button at the bottom right of your screen to proceed to the Edit Report page. Here the screen is split into two halves: the left side shows a preview of what the report will look like and the right side is where you can modify what information appears in the report
- Looking to the left-hand side of the screen, you will see two sections with fields to configure with regard to your report: Settings and Filter. This page is the same as the Edit Report page for a single entity report. except there is no Columns section. Refer to page 19 to learn how to complete the report creation process.

Blueprints Widgets

You are able to add Blueprint Reports to your custom or event dashboards in Command Hub. **There are two different types of Blueprints widgets you can add to your dashboard:**

- Blueprint Quick Report
- Blueprint Reporting



Blueprint Quick Report

The first Blueprints widget you will see after accessing the widgets screen from the blue Add Widgets button located at the top right of your custom or event dashboard in Command Hub, is the Blueprint Quick Report. This widget allows you create a quick, on-the-fly report that will be displayed on your dashboard. Refer to the Command Hub User Guide to learn how to set up a quick report.

[**Note:** You can only select one entity per quick report. For reports with more than entity, use the Reports feature in the Blueprints application to create the report and select it using the Blueprint Reporting widget.]

Blueprint Reporting

The second Blueprints widget you will see after accessing the widgets screen from the blue Add Widgets button located at the top right of your custom or event dashboard in Command Hub, is the Blueprint Reporting widget. This widget allows you to select a custom report that you have already created on the Blueprints Reporting page and have it appear on your dashboard. Refer to page 19 to learn how to create a custom report.

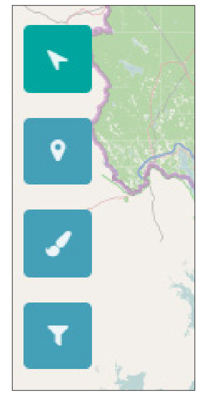
The Map

To access the Maps feature in EmergHub, locate the top black bar on your screen and click on the Applications menu. A dropdown menu will appear where you can choose Map among the options. You will be directed to a map interface (centered on your current geographical location) where you have the ability to create new regions, add new points of interest, and manage them by monitoring the icons as they change color.

Once on the Map interface, you are able to:

1 Determine an Area to View

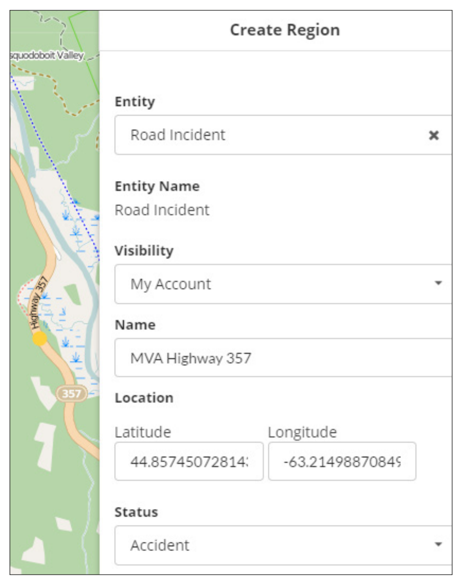
To navigate the Map to find a specific area:



- Make sure the arrow button at the top of the vertical menu of blue buttons on the left-hand side of your page is selected (it will appear greener than the others when chosen)
- Click and drag your mouse to scroll over to different areas of the map. More of the map will become visible as you scroll to the edges of your screen
- Zoom in on a specific area of the map by finding the small blue "+" button at the top left-hand side of your screen
- Zoom out on the area by clicking the blue "–" button located below the "+" button

2 Create a Point of Interest

A point of interest is a singular spot on the map that has a particular significance. Points of interest would be classified the same as a record but are added via the map. A point of interest refers to a particular occurrence of an entity, such as a specific hospital within a Healthcare center entity.



To create a new point of interest:

- Locate the vertical menu of four blue buttons on the left-hand side of your screen
- Click the second button from the top, which will allow you to create a new point of interest (the button will appear greener when selected)
- When the button is selected, a blue dot will appear at the end of your mouse that will turn yellow when you click a place on the map where you would like the point of interest to be placed
- After selecting a location, a sidebar will open on the right side of your screen with a dropdown menu to select the entity type of the point of interest you are creating. When you click on your chosen entity type, the entity will appear in the sidebar where you can use it to fill in the relevant information regarding your new point of interest
- Once you have completed filling in the blueprint for your point of interest, click the blue Save button at the bottom of the sidebar to save the new point of interest. Or, click the Cancel button to close the sidebar without creating the new point of interest

3 Edit/Delete a Point of Interest

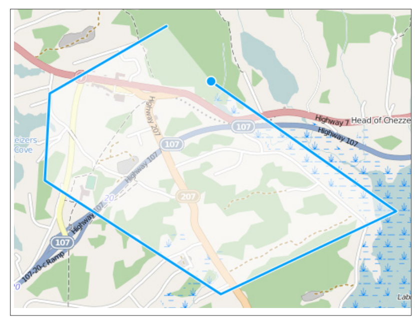
To edit a point of interest you have created or have permission to modify:

- Click on the point of interest you would like to edit and the Edit region sidebar will open to the right of your screen
- Modify the information fields appearing in the sidebar as desired
- Click the blue Save button at the bottom of the sidebar to save your changes, or click Cancel to close the sidebar without making any changes to the point of interest

To delete a point of interest you have created or have permission to modify:

- Click on the point of interest you would like to edit and the Edit Region sidebar will open to the right of your screen
- In the sidebar you will see a red trashcan button located next to the Entity Name field. Click this button to cause a pop-up to appear where you are asked to confirm the deletion of the point of interest. Check off the checkbox in the pop-up and click the red Delete button to delete the point of interest, or click the gray Cancel button to close the pop-up without deleting the point of interest

4 Draw a New Region



A region is essentially a polygonal area that is affected or impacted by an incident or event. You are able to create regions on the map based on information you receive pertaining to the incident or event. Regions can also be used as a method of determining the contacts to whom a message is sent.

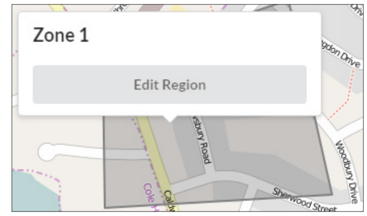
To draw a new region:

- Click the blue paintbrush button that appears in the vertical menu of buttons on the left side of the map screen. Once the button is clicked, a blue dot will appear at the end of your mouse indicating the function is active
- Click on the point of the map where you would like to begin your new region. Now, once you move your mouse away from that spot, a blue line will stretch from that point to your mouse
- Continue clicking your mouse until you complete a closed-in region by connecting the blue line back to the first point you made, or double click at any time to automatically close the region
- Once you have closed in your region, a sidebar will appear from the right side of your screen where you are asked to choose the entity to which the region belongs from the dropdown of available entities. If there are no options in the dropdown menu, this means you have not created any entities and you cannot create a new map region. Refer to page 3 for more information on how to create an entity

[**Note:** Unless you have created the entity or have permission to select an entity created by another user, you will not be able to select an entity from the dropdown menu. Refer to the Account Network User guide for more information on permissions.]

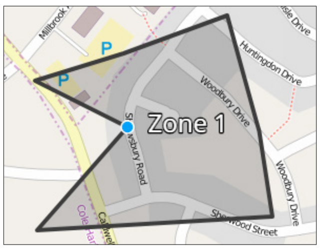
- After choosing the region's entity type from the dropdown menu, fill in the necessary fields associated with the chosen entity that appear in the sidebar
- Click the blue Save button found at the bottom of the sidebar to complete the region's creation, or click the gray Cancel button to close the sidebar without creating the region

5 Edit/Move a Region



To edit a created region:

- Click on the region you would like to edit and the borders will become a thicker to indicate it has been selected and a pop-up will appear containing a gray Edit Region button to click
- Hover your mouse over one of the region's borders and a blue dot will appear at the end of your mouse showing that the region can be altered

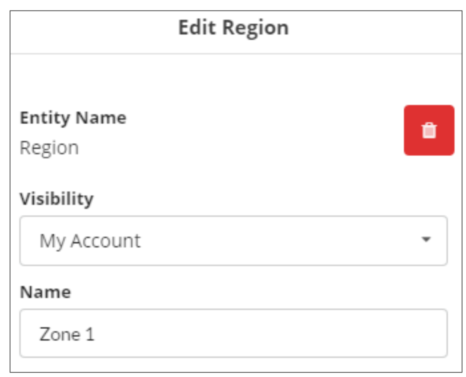


- Click, hold, and drag the region's border to a new location on the map
- Repeat as necessary to the region's various borders until you are satisfied with the region's shape
- Edit the content of any fields appearing in the Edit Region sidebar on the right of your screen, including the visibility of the region. Choose from the Visibility dropdown menu in the sidebar whether the region will be visible on just your map, the maps of the users in your account, the maps of any account group members, or the maps of everyone in your account network
- Click the blue Save button at the bottom of the sidebar to save the region, or Cancel to close the sidebar without saving any changes

To move a region to a different location on the map:

- Click on the region you would like to edit and the borders will become thicker to indicate it has been selected and a pop-up will appear containing a gray Edit Region button to click
- Click anywhere within the region's borders, hold, and drag the region to a new location on the map

6 Delete a Region



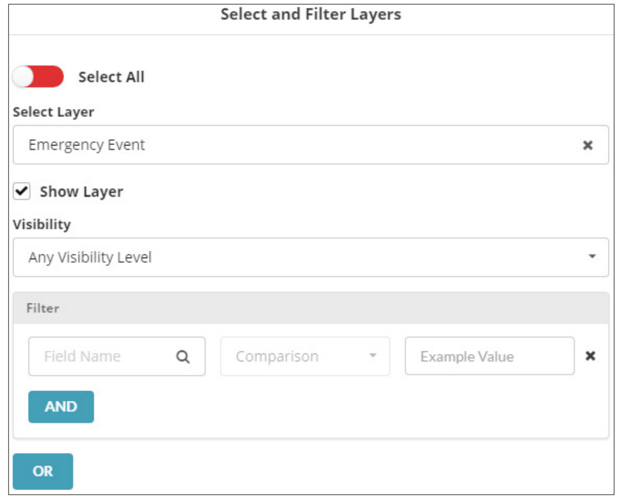
To delete a region you have created or have permission to modify:

- Click on the region you would like to edit and the borders will become thicker to indicate that it has been selected and a pop-up will appear containing a gray Edit Region button to click
- In the Edit Region sidebar that appears to the right of your screen, you will see a red trashcan button located next to the Entity Name field. Click this button to cause a pop-up to appear where you are asked to confirm the deletion of the element. Check off the checkbox in the pop-up and click the red Delete button to delete the region, or click the gray Cancel button to close the pop-up without deleting the region

7 Filter Entity Layers

When you have multiple entities, each with several records displayed on the map, the map interface can get cluttered really easily with all of the icons. To minimize this clutter, you are able to filter which entities are shown on the map at any given time. Keep in mind, only entities with a location field are able to be displayed on the map.

To filter entity layers:



- Click on bottom blue button displaying a funnel image that appears in the vertical menu on the left side of the screen
- A pop-up menu will appear to the right of your screen where you can select and filter your entity layers. At the top of this sidebar is a Select All toggle button you can use to show all available entity layers on the map at once. Slide the toggle to the right side so that it appears green and click the blue Save button to close the sidebar. To pick and choose which layers are visible, ensure the toggle is slid to the left and colored red
- The second field in the sidebar is where you can configure the filter settings for any of the entity layers you have permission to view. Click on this field and a dropdown menu will appear where you can choose your desired entity layer to configure
- Once a layer has been selected from the dropdown menu, additional fields will appear in the sidebar. The first is a checkbox that you are able to click if you would like the layer to be displayed on the map

[**Note:** If you have the Select All toggle enabled, the Show Layer checkbox will be grayed out and inactive.]

- Below the checkbox is the Visibility field where you can choose to show the records of the chosen entity that are visible only to you, the users of your account, members of any account groups you are part of, or are shared with the entire account network. Select your desired option from the dropdown menu provided in this field
- Next, you will see three more fields below the Visibility field where you can set up a filter to display only specific records of the entity
- In the first field you are able to choose the field name by which you would like to filter the records of the entity. Choose your desired field by clicking on the option in the dropdown
- In the second field, choose the comparison parameter that you would like the system to use when filtering the entity's records. There are 19 various options in this dropdown: is, is not, is empty, is not empty, contains, does not contain, greater than, less than, greater than or equal to, less than or equal to, within the past, within the next, starts with, ends with, is any of, is none of, yes, no, or has any of. The availability of each of these options depends on the entity field you selected in the first field and the fields within it
- In the third field (if available depending on the field name and comparison parameter you chose), you must input the value you wish the system to look for when filtering the entity records. Type your desired value into this field, or choose from the available dropdown depending on the case
- Create additional filters for your records by clicking either the blue And or Or buttons, which will cause the system to show records that meet the criteria of all of your filters or at least one of them
- If you are satisfied with your filtered layer, choose another layer to configure from the Select Layer dropdown in the sidebar, or click the blue Save button at the bottom right of the sidebar to save your filter. Click Cancel to close the sidebar without saving the filter(s)