BLUEPRINTS CORE USER GUIDE

2025-06-11

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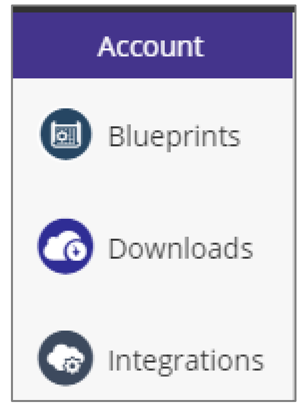
Overview



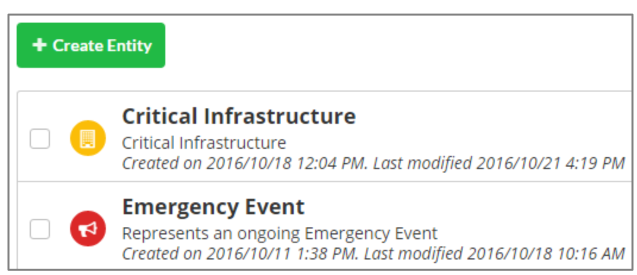
The SimplyCast Blueprints module allows users to manage asset information. Acting as a relational database system, Blueprint's entities are used as templates to create records that can appear on SimplyCast's Map interface or be used separately. Users can look at the Map application and see the information they need to know at a glance.

Please note that Blueprints requires some prior knowledge of attributes for entity creation, as you must be sure the records you create contain all information users must know for entity management. It is important to plan out your actions so as to maximize your efficiency and success with the system. You can use the Map application to send alerts and other communications over a geographical area of your choice. 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 critical infrastructure. Information about the status of each asset can be added to the Map as well, which will continue to update automatically as soon as new information is available.

Blueprints Dashboard

To begin creating and managing your Blueprint entities in the SimplyCast platform,first 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 can:



Create a New Entity

You will notice a green "Create Entity" button at the top left-hand side of the Blueprints Dashboard in the Blueprints tab.

This button will direct you to the setup page where you can name the new entity and add any required fields.

Refer to the *Create a New Blueprint Entity* section to learn how to create and set up your entity.

View the List of Entities

Below the "Create" Entity button, you will see a list of all of your blueprint entities, with the most recent 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 listed entity:

- **Entity Name:** The name the creator gave the entity.
- **Description:** A brief definition of what the entity represents (if available).
- **Created On:** The date and time the entity was created.
- **Last Modified:** The date and time the entity was last modified.

Navigate Multiple Pages of Blueprint Entities

Your entities will appear in a list below the green Create Entity button on the Entities page.

To navigate through pages of entities:

- Look for the page numbers at the bottom of your screen.
- Click either the page number or the "Next" button to visit another page of entities. Alternatively, enter the page number in the field to the right of the Next button and click Go to proceed directly to that page.
- Choose how many entities display at one time by clicking the "Showing…" link to the right of the number of displayed entities.

Search for Blueprint Entities

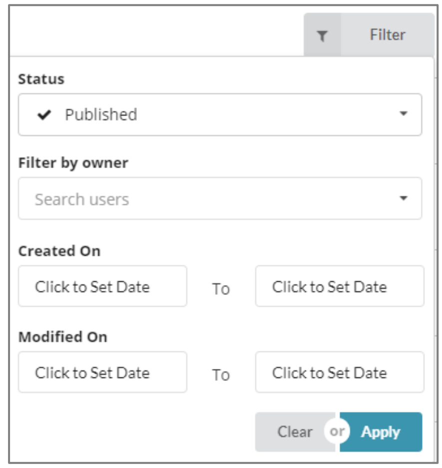
To search for a particular entity:

- Select the search box in the top right-hand corner of the page next to the gray "Filter" button.
- Type in the text you would like the system to search for.
- The list of entities will automatically filter to match the text.

Filter Blueprint Entities

You can filter entities based on their status, owner, and the dates they were created or last modified.

To filter your blueprints:



- Find the gray “Filter” button beside the search bar in the Dashboard at the top right-hand side of your screen.
- Click the “Filter” button to open a menu with a drop down. Use this to filter entities by status, owner, or the dates the entity was created or modified on.
- If you choose to filter your entities by status, a dropdown menu will appear with options to view only entities that have been published, entities that have been deleted, or all entities.
- If you choose to filter entities by owner, a dropdown will appear with options to view entities either owned by you or by any other users in your account network.
- You can also filter entities by the date on which 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 appear with two fields labeled “Date” and “Time”. Use these to manually insert the date and time you wish to filter entities by.
- Click in any of the date fields (indicated by “Click to Set Date”) to open the calendar and choose the dates you wish to filter from.
- Click the blue “Apply” button to implement the filter or click “Clear” if you do not wish to filter your entities. This will close the dropdown.

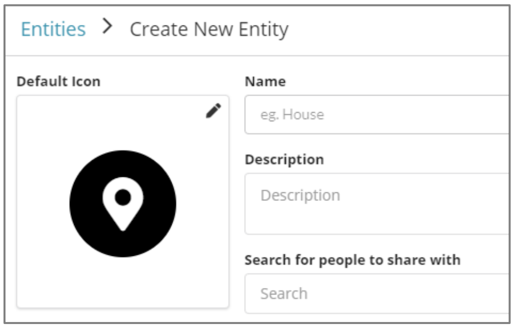
[**Note:** The normally gray “Filter” button will appear green when a filter has been applied to your entities. To remove the filter, click the “Filter” button again and select “Clear” to remove all filters from your entities.]

Entities

Creating an Entity

On the main Blueprints Dashboard, click the green “Create Entity” button to navigate to the “Create New Entity” page. Here you can create a new entity that can be used as a template for creating specific records or "instances" within the blueprint (e.g. inputting specific hospitals or clinics into the Healthcare Facilities blueprint entity for tracking and management purposes).

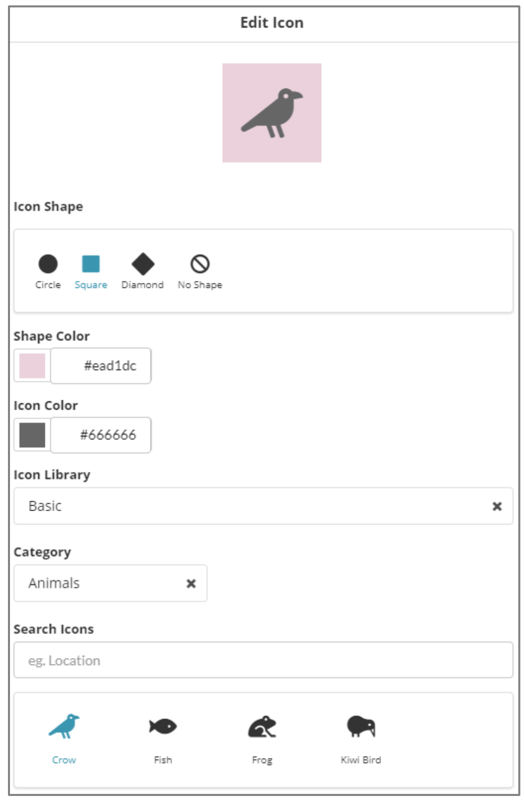
On this page you can:



Add a Name and Description

At the top of the “Create New Entity” page, there are two initial fields where you can give your new entity a name and a description. The “Name” field is mandatory, but the “Description” field is optional. Type your desired text into these textboxes.

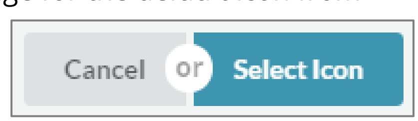
Choose a Default Icon



Blueprint entity icons distinguish entities from each other and are used in the Map application view to illustrate the locations of records associated with the specific entity.

To choose the default icon for the new entity:

- Locate the icon image at the top left of the “Create New Entity” 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 allows you to choose the shape of the icon. The available shapes are circle, square, diamond, or no shape.
- Next, choose the color for the icon background in the “Shape Color” field. Click the color dropdown menu in this field and a color selector will appear with pre-set swatches on the left. Either choose your desired color from this or manually select a color on the right. A preview appears at the top of the Edit Icon sidebar.
- Click the gray “Choose” button to set the background color for the icon.
- You can repeat this color selection process in the “Icon Color” field (under the “Shape Color” field) to select a color for the icon image.
- The Icon Library dropdown field offers a selection of icon images. The only option available at this time is the Basic library.
- Choose from one of the many icon categories available in the Category dropdown menu. Icon categories group the available icons based on industry or theme. Select a category to display all icon images pertaining to that specific category.
- Once you have selected a category, choose your desired image for the default icon from the selection of available images. Choosing an image will update the preview of the default icon at the top of the sidebar.

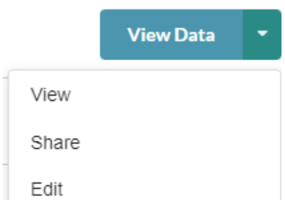


- Click the blue “Select Icon” button at the bottom of the sidebar to save any changes made to the default icon. Click Cancel to close the sidebar without saving your changes.

There are several actions you can take for each entity in your list of created entities, depending on your permission level.

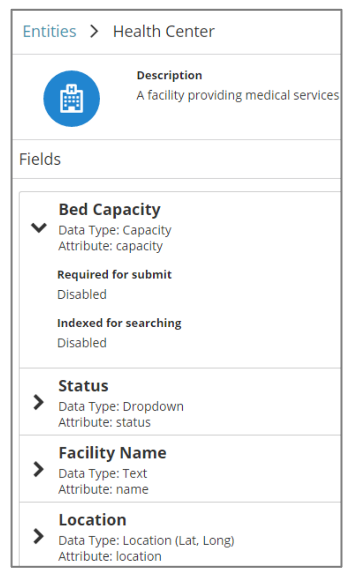
Available actions are:

View an Entity



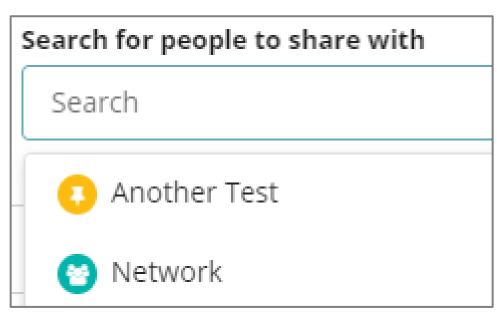
The next available option on the main Blueprints Dashboard is the ability to view an existing entity.

To view an entity and its corresponding fields:

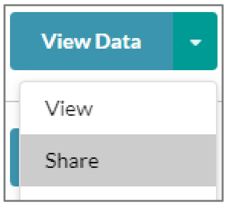


- Look to the right-hand side of the screen underneath the search bar. You will see blue “View Data” buttons across from each of the entities.
- Click the downward-facing arrow next to the blue View Data button to bring up a dropdown menu. “View Entity” is the first option you will see.
- The “View Entity” button will direct you to that entity’s page, displaying all its information.
- You will see the entity’s default icon at the top of the page, as along with 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.

Share the Entity

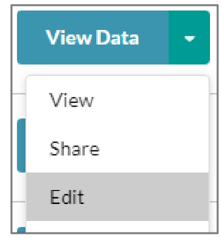


The next option available from the dropdown menu on the main Blueprints Dashboard is the ability to share an entity.



To share an entity:

- On the right-hand side of the screen, underneath the search bar, you will see blue "View Data" buttons across from each of the entities.
- Click the downward-facing arrow next to the blue "View Data" button to bring up a dropdown menu where you will see the "Share" option (if you have permission to share the entity).



- Select this option to produce a sidebar from the right of your screen where you can choose with whom to share the entity.

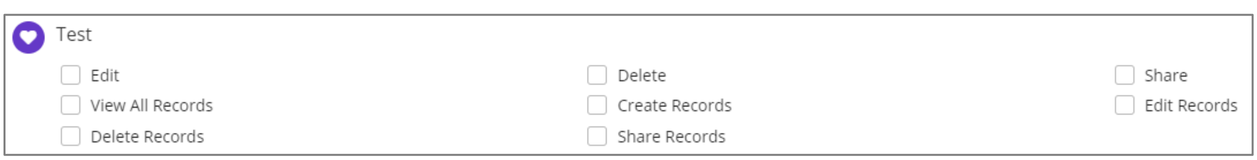
Refer to the *Share the Entity* section above for more information about the available sharing options.

Beneath the "Description" field on the top of the "Create New Entity" page is a dropdown menu where you can choose with whom this entity will be shared. Click this dropdown menu to produce a list of the various users, accounts, and account groups that you can share the entity with. Refer to the Account Networks User Guide for more information on each of these options.

When you choose a user, account, or group to share the entity with, it will be added to a section below the dropdown field. You can choose how much access the new user is given by checking off the various checkboxes that appear.

These checkboxes are:

- **Edit:** The new user will be able to modify the blueprint entity (add/remove/update fields).
- **Delete:** The new user will be able to delete the blueprint entity.
- **Share:** The new user will be able to share the blueprint entity with other users, accounts, or groups.
- **View All Records:** The new user will be able to view all the records created from this blueprint entity.
- **Create Records:** The new user will be able to create new records using the blueprint entity.
- **Edit Records:** The new user will be able to modify any existing records that have been created using the blueprint entity.
- **Delete Records:** The new user will be able to delete any existing records created using the blueprint entity.
- **Share Records:** The new user will be able to share any records created using the blueprint entity with other users, accounts, or groups.



Determine how much access the new user has by checking off one or more boxes. Click the black "X" button to the right of the relevant section to stop sharing the entity with a specific user, account, or group.

Add a New Field

Blueprint entity fields are like columns in a database where collected information for that entity will be stored. When creating a new entity, a "Name" field is automatically included, as this is mandatory for every kind of entity.

By adding fields to an entity you are essentially creating the template that will be used when adding new records or assets into the system. When creating new fields, you are adding new data input storage options for specific blueprint records, such as a specific hospital in a Healthcare Facilities blueprint entity. These fields allow you to add information about each record and have the information stored according to the data type selected.

To add a new field to your entity:

- Locate the green "Add Field" button in the Fields section of the "Create New Entity" page.
- Click this button to open a drawer on the right side of your screen. There are two fields in the drawer:
    - Name: Provide a name for the new field.
    - Data Type: Select a data type for the new field. Select your chosen data type from the dropdown menu provided. The data types are listed in the next section.

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.

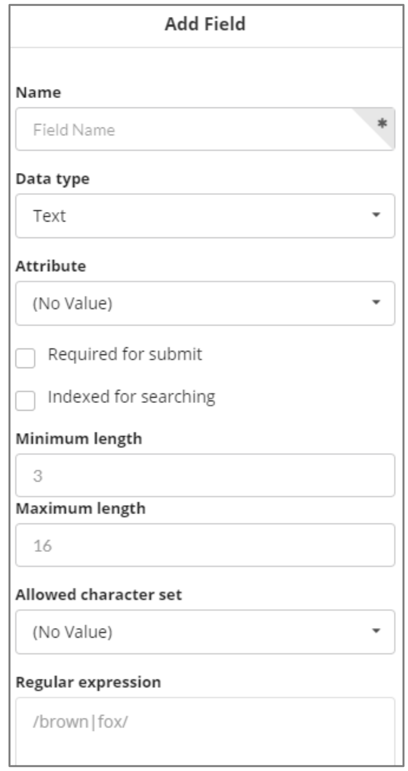
A field's data type cannot be changed after the entity has been created. This is to ensure data does not get stored incorrectly.

To choose your data type, click the dropdown menu.

There are 23 different data type options to choose from:

- **Capacity:** Tells the system that the data collected and stored by this field is associated with the total value an entity can manage. For example, a building with a safety capacity of 220 people.
- **Date:** Allows you to designate a date independent of time

- **Date and Time:** Tells the system that the data collected and stored by this field is temporal, associated with a moment in time.
- **Dropdown:** Tells the system that the data collected and stored by this field is associated with a specific dropdown menu created in the Dropdowns section of the Blueprints application. Refer to the *Dropdowns* section for more information.



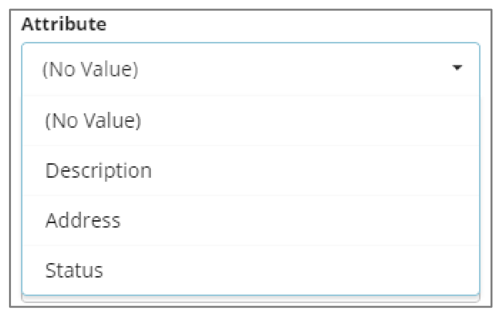
- **Dropdown Multi-Select:** Tells the system that the data collected and stored by this field is associated with a specific dropdown menu created in the *Dropdowns* section of the Blueprints application. This field differs from the previous Dropdown option in that multiple options in this menu may be selected at one time.
- **Email Address:** Tells the system that the data collected and stored by this field is an email address.
- **File:** Allows the user to specify that the entity is a file and to restrict the types of files that can be uploaded.
- **Generated ID:** Allows you to select custom prefixes and suffixes to apply to an automatically generated ID for each entity. This feature is useful in situations where each asset requires unique identifiers.
- **Location (Lat, Long):** Tells the system that the data collected and stored by this field is a set of latitude and longitude coordinates that can be shown on the Map.
- **Long Text (256 characters or more):** Tells the system that the data collected and stored by this field requires more storage space, as it is composed of a longer set of characters such as letters, numbers, or both.
- **Lookup:** Allows the entity to discern and display information from another entity in your database. You will need to select the entity (as well as the fields within that entity) that you want to look up.
- **Lookup Multi-select:** Similar to the “Lookup” function, but can be used to check the fields of multiple entities.
- **Map Region:** Tells the system that the data collected and stored by this field is from a specific area created on the SimplyCast Map interface.
- **Number (Integer):** Tells the system that the data collected and stored by this field will be in the form of a whole number without decimals.
- **Number (Decimal):** Tells the system that the data collected and stored by this field will be in the form of either a whole number or a decimal.
- **Phone Number:** Tells the system that the data collected and stored by this field is a phone number.
- **Related Entity:** Tells the system that this entity is related to another one that has been created.
- **Related Contact:** Tells the system that this entity is related to a specific contact that has already been created.

- **Related User:** Tells the system that this entity is related to a specific user that has already been created.
- **Related List:** Tells the system that this entity is related to a specific list that has already been created.
- **Related Account Network Group:** Tells the system that this entity is related to a specific account network group that has already been created.
- **Text:** Tells the system that the data collected and stored by this field consists of a set of characters such as letters, numbers, or both.
- **Yes or No (Boolean):** Tells the system that the data collected and stored by this field will be only "Yes" or "No".

[**Note:** For an entity to be viewable on the Map interface, it must have a Location **or** Map Region field. An entity may not have both a Location and Map Region data type, as a record cannot be both a specific address and an area of land. More information about the Map will be provided in the *Map* section of this guide.]

Attributes

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



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

- **(No Value):** No attribute will be assigned to the field.
- **Name:** This data type creates the field as the name field. An entity may only have one name field, and the name field will be used as an identifier for the entity.
- **Address:** The field will collect the location of entity records via street name and postal/ZIP code.
- **Description:** Tells the system that the field will collect longer text inputs.
- **Status:** The field will collect information regarding an entity's status, i.e. whether it is operational or in various forms of degradation.

Depending on the data type chosen for your new entity field, other options will appear in the "Add Field" sidebar for configuration.

There are eight possible other fields:

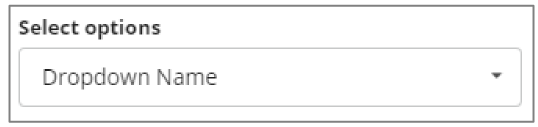
- **Required for Submit:** Available with all data types except for "Yes" or "No" (Boolean). Click the checkbox to indicate to the user that this section must be completed before the record

can be created. Additionally, this field must be completed when information is being updated.

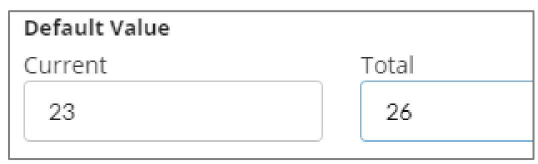
- **Indexed for Searching:** Available with the "Date and Time", "Dropdown", "Email Address", "Number (Integer)", "Number (Decimal)", and "Text" data types. Click the checkbox if you would like to improve how you find this entity or field while searching.

Note: This tool can be technically complex. You may want to consult your Account Manager or a developer before you engage with it.

- **Select Dropdown:** Available with the "Dropdown" and "Dropdown Multi-Select" data types. Use this dropdown menu to select which of your dropdown menus (created in the *Dropdowns* section of the Blueprints application) to associate with this entity.



  > You can also create a new dropdown menu from here with the "Create New Dropdown" option. This will open a new sidebar from the right of the screen where you can enter a dropdown name and create the available options by utilizing the green "Add Option" button. Delete options by clicking the "X" beside each option you wish to delete. Click the blue "Save" button when you have finished creating your new dropdown menu to return to the field creation sidebar, or click "Cancel" to return without creating a new dropdown menu.
- **Default Value:** Available with all data type options. Choose a default value that will appear in the new field that record creators can modify if needed.
  This option appears differently depending on the data type selected:
  > **Capacity:** Input the default "Current" and "Total" values for each new record.



  > **Date and Time:** Select a default date and time for each new record from the calendar dropdown menu.

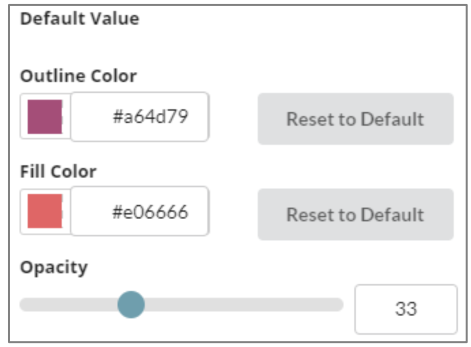
  > **Dropdown/Dropdown Multi-Select:** Select a default value from the chosen dropdown menu for each new record.

  > **Email Address:** Input a default email address for each new record.

  > **Location (Lat, Long):** Select a set of default latitude and longitude coordinates for each new record. If you do not know the coordinates off-hand, use the blue magnifying glass button to search for the coordinates by address.

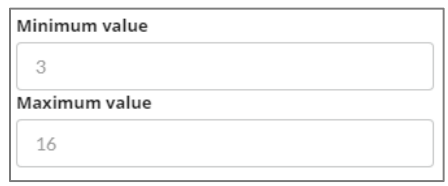
  > **Long Text:** Enter some default field text for each new record.

- > **.Map Region:** Select a default outline and fill color for a new region record by entering a Hex value, or choose a color from the color selector that appears when you click the color box. Reset to the default color by clicking the “Reset to Default” button next to either option. Choose a default opacity for a new region record by moving the slider in this field.

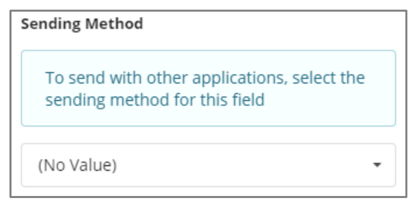


- > **Number (Integer and Decimal):** Enter a default number value that will appear for each new record.
- > **Phone Number:** Input a default phone number for each new record.
- > **Related Entity:** Selects another entity that can be associated with your current entity. This will create a permanent connection between the two. For further explanation see the **note** at the end of this page.
- > **Yes or No (Boolean):** Choose whether the default value for a new record will be “Yes” or “No” by checking off the checkbox or leaving it unchecked.

- **Minimum Value/Length:** The “Minimum Value” option is available with the “Number (Integer)” and “Number (Decimal)” data types, and the “Minimum Length” option is available with the “Text” data type. When creating a record, these options ask you to enter the smallest number/number of characters that must be input into this field.



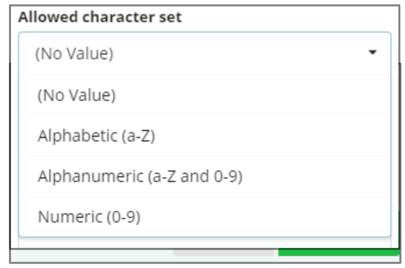
- **Maximum Value/Length:** The “Maximum Value” option is available with the “Number (Integer)” and “Number (Decimal)” data types, and the “Maximum Length” option is available with the “Text” data type. When creating a record, these options ask you to enter the largest number/number of characters that must be input into this field.



- **Sending Method:** Available for the “Email Address” and “Phone Number” data types and indicates whether the entity can receive messages from the “Alerts”, “Live Survey”, and “Recall” applications (Please refer to the respective user guides for more information).
  Select “Email” (or any other email fields added to the CRM as custom columns) from the dropdown menu for the “Email Address” data type. For the “Phone Number” data type, select whichever phone number method the entity will use to receive messages from the dropdown menu. The default options are “Phone (Voice)”, “Mobile (SMS)”, and “Fax”, and any other phone options that were added to the CRM will also appear.
- **Related Entity:** Available with the “Related Entity” data type. Select a created entity from the dropdown menu to be associated with the new entity.

[**Note:** Related entities are a way to associate two records that may not be part of the same entity, but which may have dependencies on each other, For example, many hospital records created as part of a 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 see the moment they are potentially vulnerable due to the fire station's operational issues.]

- **Allowed Character Set:** This dropdown menu is available with the "Text" data type and allows you to choose what kinds of characters are permitted in the field:
    - Alphabetic (a-z)
    - Alphanumeric (a-z and 0-9)
    - Numeric (0-9)



Regular Expression: This textbox is available with the "Text" data type and is where you can type out a regular expression you would like to associate with the entity field.

[**Note:** A regular expression is a special text string that describes a specific search pattern.]

- **Merge Tags:** This option is available with all data type options. Users can associate a merge tag with their new entity field, which can be set up to send automatic notifications whenever the information in this field is modified (Refer to the *Blueprint Triggers User Guide* for more information). To associate a merge tag with a field, type out the name of the merge tag and click the green "+" button to save the tag. This will add it to the section below the button. You can remove any of a field's associated merge tags by clicking the black "X" button beside the merge tag you want to remove.

Once you have chosen the name and data type for your new field and configured any attributes or other fields required in the sidebar, 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 to close the sidebar without saving the field settings.

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

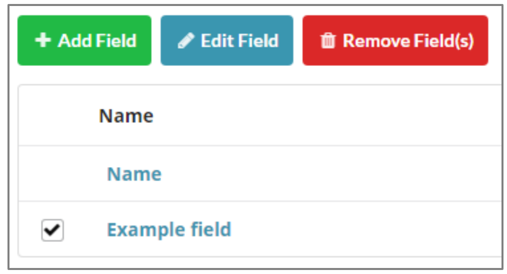
You can continue to add as many fields as needed for the entity.

+ Add Field

Name	Data type	Attribute
Name	Text	Name
Status	Dropdown	Status
Location	Location (Lat, Long)	

Edit/Remove a Field

To edit the content of a field in the table on the "Create New Entity" page:



- In the bottom section of the "Create New Entity" page, you will find a list of entity fields, each with a checkbox on its left side. If you click the checkbox, two buttons will appear beside the green "Add Field" button: a blue "Edit Field" button and a red "Remove Field" button.
- Click the blue "Edit Field" button to open a sidebar where you can edit the options for your chosen entity field.

[**Note:** You can also click on the name of the field in the "Name" column to open this sidebar.]

- 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.

To remove a field from an entity:

- In the bottom section of the setup page, you will find a list of entity fields, each with a checkbox on its left side. If you click the checkbox, additional buttons will appear beside the green "Add Field" button: a blue "Edit Field" button and a red "Remove Field" button.
- Click the red "Remove Field" button to delete the field. You can also select multiple fields and delete them in the same way.

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

Once you are satisfied with your fields and settings, click the green "Create Entity" button to save your entity.

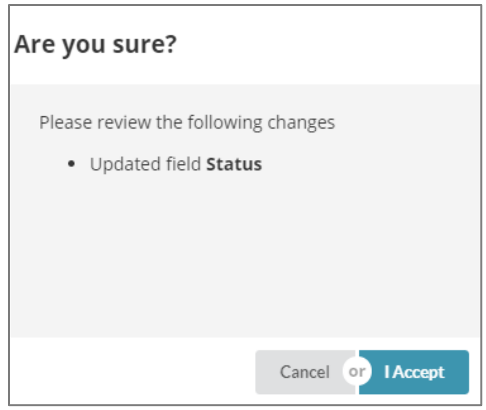
Once you have created a blueprint entity, you can return to the "Blueprints Dashboard" to take other actions regarding your existing entities and records.

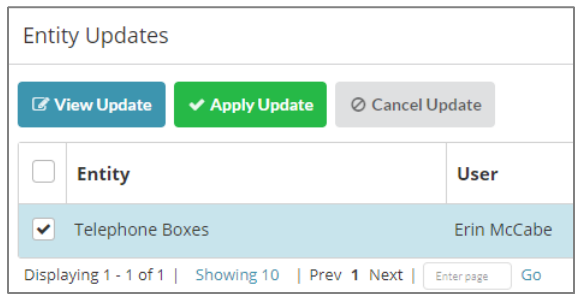
"Existing entities" are the blueprint entities you have already created. These will appear on the main "Blueprints Dashboard" ready for you to edit, adjust, or add to (depending on your permission level). The purpose of entities is to provide a template for creating new records. Essentially a record is a row in your database that follows the format of your entity. For example, you could create an entity for health centers that includes location, status, and capacity fields. You could then add a record for every hospital or clinic in your jurisdiction by filling out the (entity) template, so you have the information ready to view at a glance.

Save Changes

Once you're satisfied with the changes to your entity fields and have 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 clicked the "I Accept" button, you will be directed to the "Entity Updates" page. Confirm your updates by checking off the checkbox to the left of each entity field and click the green "Apply Update" button, or click the gray "Cancel Update" button to prevent a field from being changed.





More information about entity updates is provided in the *View Updates* section.

Records

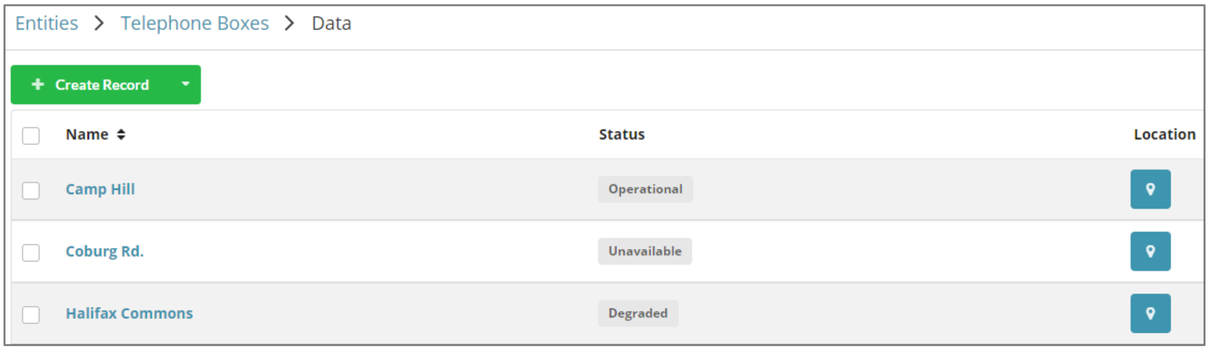
View Data

View existing record data and add/edit/delete records.

To access the View Data option:

- Click the blue "View Data" button on the right-hand side of your screen, across from any entity.

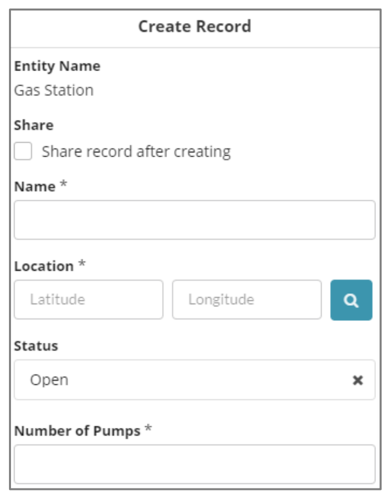
- You will be directed to a page listing all records created using the entity and the attributes provided to each record (these will vary depending on the entity). If there are no records listed, this means none have yet been created.



Create a New Record

You can create new records for your chosen entity from the "View Data" page.

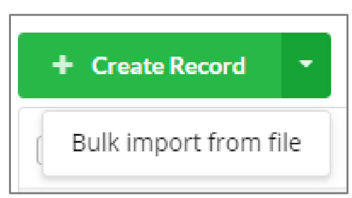
To create a single record:



- Click the green "Create Record" button at the top of the list of records.
- A sidebar will appear on the right-hand side of your screen where you can fill out the entity field information related to your new record.
- Click the green "Create Record" 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.

One of the fields in the "Create Record" sidebar is a "Share" checkbox that you can click if you want to share the new record with any users, accounts, or account groups once it has been created. Upon clicking "Create Record", a new sidebar will open where you can select a user, account, or account group with whom to share the new record from the dropdown menu. Refer to the *Share Records* section for more information.

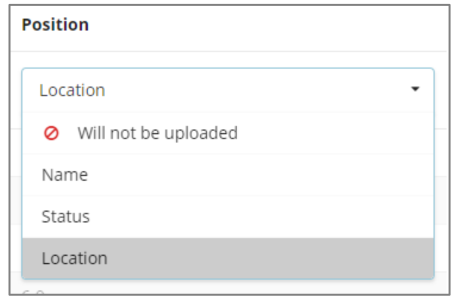
To create multiple new records at once:



- At the top of the list of records, find the green "Create New Record" button and click the arrow on its right side. Choose the "Bulk Import from File" option that appears.
- On 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).

- When you have selected a file, click the black “Next button” at the bottom right of the screen. You will be directed to the “Map Fields” page where you can match the information columns in the selected file with fields in the blueprint entity.

- A dropdown menu will appear below the column name for each of the columns in the uploaded fileIf a column in the uploaded document matches a field within the entity, they will automatically map. If there is no match, the value for the dropdown menu will be “Will not be uploaded.” Click the dropdown for each information column to reveal a list of all available fields in the blueprint entity and select the appropriate field in which to store that column’s information.

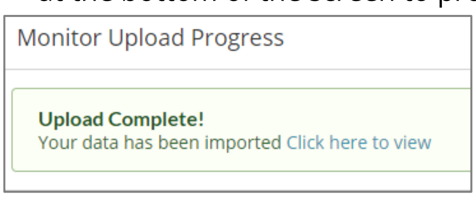


[**Note:** You cannot proceed with the data upload without mapping at least one column to the “Name” field.]

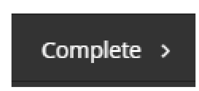
- Share the uploaded data by clicking the blue “Share Uploaded Records” button at the top right of the screen. A sidebar will open. Choose to share the uploaded records with any users, accounts, or account groups in your account network from the dropdown menu in this sidebar. A new section containing three checkboxes will appear below the field once you’ve made a selection. Refer to the *Share Records* section for more information about the sharing options.

- Click the blue “Save” button at the bottom of the sidebar to save the sharing settings.

- Once you have all columns mapped to your liking, click the black “Next” button at the bottom of the screen to proceed to the upload page. From here, you can monitor the upload process. Once the upload of the data is complete, you will be able to view the data by clicking the link in the completion message. This will re-direct you to the “View Data” section of the Blueprints application.



- Alternatively, you can click the black “Complete” button at the bottom of the screen to be taken to the “View Data” section of the application.



Navigate Multiple Record Pages

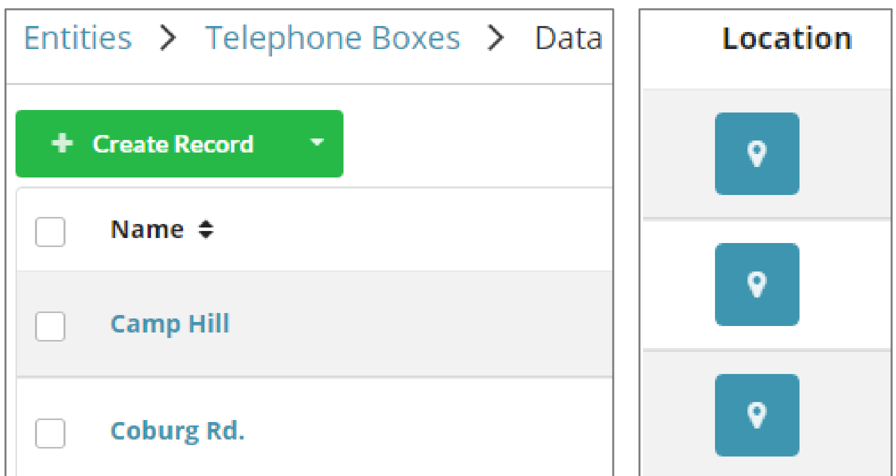
To navigate through multiple pages of entity records:

- Find the page numbers at the bottom of the screen.
- To navigate between pages of records, click either a page number or on the “Next” butto. If you know the number of your chosen page of records, you can also enter your chosen it into the field located to the right of the “Next” button and click “Go” to proceed directly to that page.
- 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

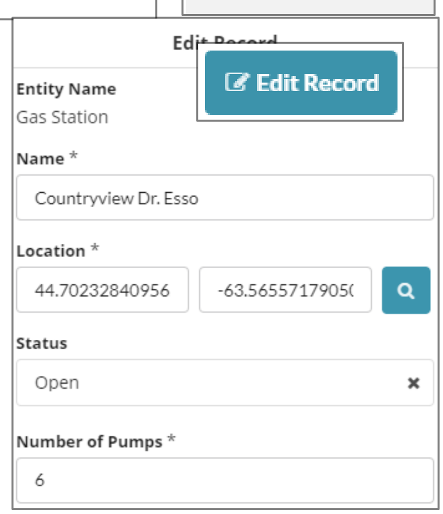
To view and sort your records:

- Your records will be sorted according to the corresponding column information. Click on the title of any column.
- If your record has a “Location” field, click on the blue button in this column to see that location on the Map.



To edit the fields for any listed records:

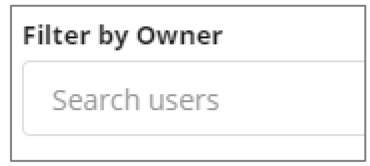
- Click on the contents of a record’s “Name” field to open a sidebar where you can edit the content of each field for this record. You can also bring up this sidebar by clicking the checkbox to the left of each of the record names in the list. A blue “Edit Record” button will appear next to the green “Create Record” button at the 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.

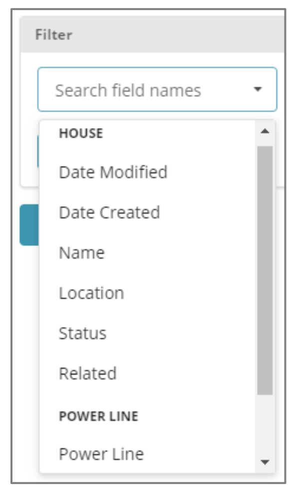
Filter Records

To filter your list of records:



- Click the gray “Filter” button next to the search bar at the top right of your screen. A sidebar menu will appear with four fields in it.
- You can use the **first field** to filter your records by owner (creator), or choose to filter records by any user you can see in the dropdown menu. This is not a mandatory filter option; if you do not choose an owner, the filter will apply to all available records.
- Use the **second field** to choose which field name to filter your records by. You can select your desired field by clicking the option in the dropdown.

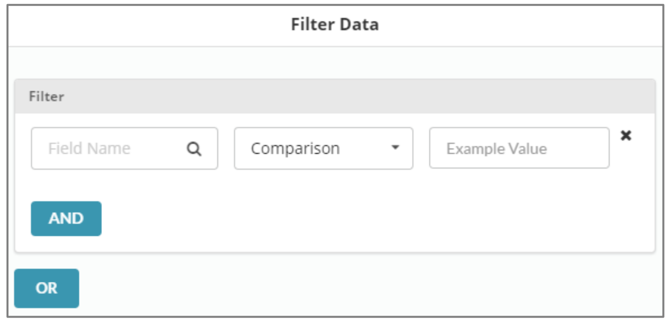
[**Note:** If the blueprint entity has a related entity associated with it, you will be able to see and select the available fields from that entity as well as the fields from the current entity.]



- In the **third field**, choose the comparison parameter to use when filtering records. There are 18 options in this dropdown
    - Is
    - is not
    - is equal to
    - is not equal to
    - 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
    - is any of
    - is none of
    - starts with
    - ends with.

The availability of each of these options depends on the entity field selected in the "Field Name" field.

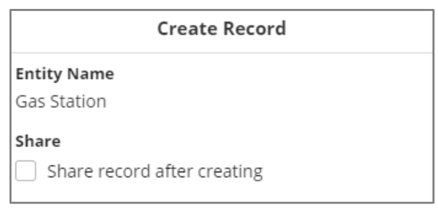
- In the **fourth field** (if available depending on your chosen field name and comparison parameter), input the value you want the system to look for when filtering records. Type your desired value into this field.



- Create additional filters for records by clicking either the blue "And" or "Or" button. The system will show records that meet the criteria of all filters, or at least one of them (depending on whether you selected "And" or "Or", respectively).
- Click the blue "Apply Filter" button at the bottom of the sidebar to filter your records or click either the "Clear Filter" or "Close" button to close the sidebar without implementing the filter.

Share Records

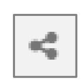
You can share blueprint records with other users, accounts, and account groups in two ways:



1. When you are creating or uploading one or more records
2. From the main "View Data" page with the list of all existing records.

When clicking the green "Create Record" button to add a single record, there is an option in the "Create Record" sidebar to share the record upon its creation. Click the green "Create" button to complete the creation of the record.t=The "Share" sidebar will appear.

When uploading new records in bulk, there is a blue "Share Uploaded Records" button that will produce the same "Share" sidebar when clicked.

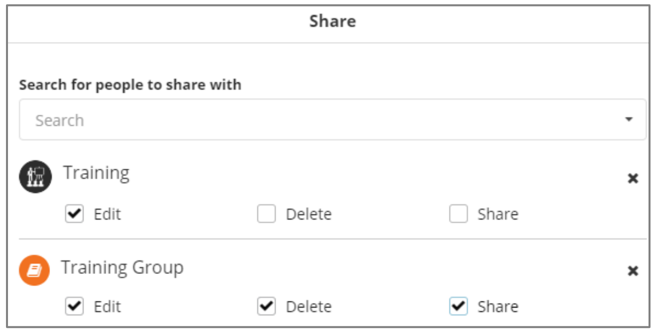


To share an existing record, click the gray "Share" icon that appears to the right of the record's name in the table of records. The "Share" sidebar will appear.

When the "Share" sidebar is open, you are presented with a dropdown that prompts you to "Search for people to share with". When you choose a user, account, or group to share the record(s) with, they will be added to a section below the dropdown field. You can choose how much access the recipient has by checking off the one or more of the checkboxes that appear.

These checkboxes are:

- **Edit:** The recipient will be able to modify the blueprint record.
- **Delete:** The recipient will be able to delete the blueprint record.
- **Share:** The recipient will be able to share the blueprint record with further users, accounts, or groups.

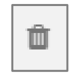


Click the black "X" button to the right of the relevant section to stop sharing the entity with a specific user, account, or group.

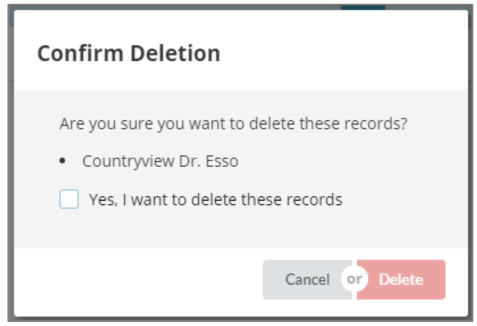
When you are satisfied, save your sharing settings by clicking the blue "Save" button at the bottom of the "Share", or click "Cancel" to close the sidebar without sharing the record(s).

Delete Records

To delete a record from the list on the “View Data” page:



- Locate the gray trashcan icon on the right side of the table, across from the record you want to delete.
- Click this icon to open a pop-up window that asksyou to confirm the deletion of the record.
- Check the box in this pop-up window and then click the red “Delete” button to confirm the deletion, or click the gray “Cancel” button to close the pop-up without deleting the record.

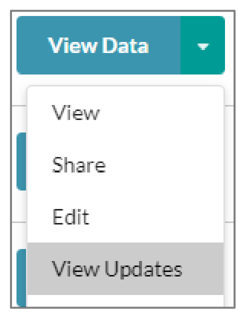


- To delete multiple records at once, check the boxes to the left of the names of the records you want to delete.

- A red “Delete Records” button will appear that opens the same deletion confirmationpop-up window. As before,checkthe box in the window and click the red “Delete” button.

View Updates

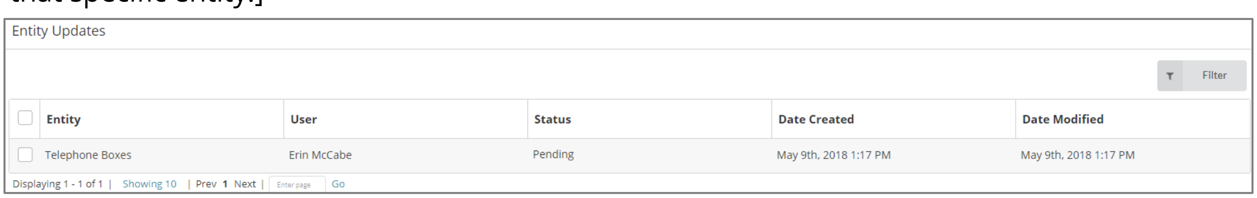
Any changes made to an entity after it has already been created are not automatically applied. SimplyCast has a multi-step confirmation process in place for applying entity updates, as changes made to entities containing a large amount of data can take a while to implement. This is not ideal—especially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



The multi-confirmation process is also in place to protect your data, much of which would be lost should the update contain the removal of an entity field. To safeguard against this instance, updates must be reviewed in the “Updates” tab before being committed.

To apply an update to an entity you have created, click on the arrow beside its “View Data” option and choose “View Updates.” You will see a table of all pending updates, and can filter and view updates with different statuses.

[**Note:** The “Entity Updates” page is also accessible immediately after clicking the “I Accept” button to save changes made to an entity. You will automatically be redirected to this page for that specific entity.]


Entity Updates

Filter

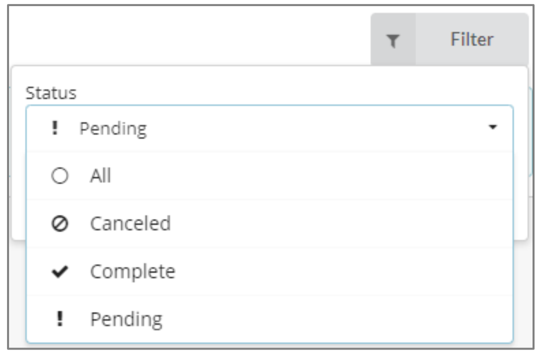
Entity	User	Status	Date Created	Date Modified
Telephone Boxes	Erin McCabe	Pending	May 9th, 2018 1:17 PM	May 9th, 2018 1:17 PM

Displaying 1 - 1 of 1 | Showing 10 | Prev 1 Next | Enter page Go

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

- **User:** The user who made the update.
- **Status:** The current status of the update (either “Pending”, “Canceled”, or “Complete”).
- **Date Created:** The date and time the update was first created.
- **Date Modified:** The date and time the last change was made to the update in its pending state.

On the “Updates” page, you can:



Filter Updates

You can filter and view entity updates by their status.

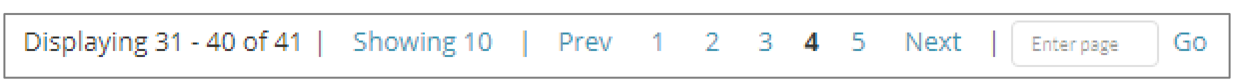
To do so:

- Locate the gray “Filter” button at the top right-hand corner of your screen.
- Click this button to open a dropdown menuwhere you can choose 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. Alternatively, click the “Clear” button to close the dropdown without choosing a filter.
- When a filter has been applied, the formerly gray “Filter” button will appear green. To remove a filter, click this button again and select “Clear”.

Navigate Multiple Pages of Updates

To navigate through pages of updates:

- Find the page numbers at the bottom of your screen.
- Click either a page number to visit that page of updates or click the “Next” button to proceed to the next page of updates. You can also enter the page number in the field to the right of the “Next” button and click “Go” to navigate directly to that page.
- 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.

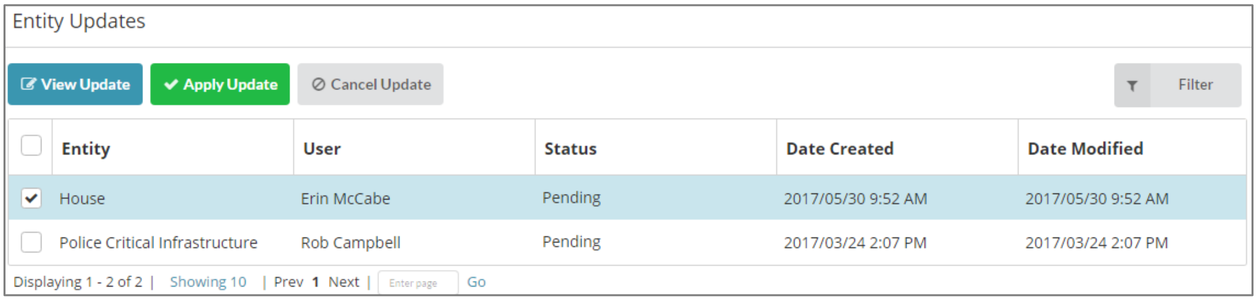


View a Pending Update

To view an update:

- Locate the checkbox to the left of the update you wish to view.

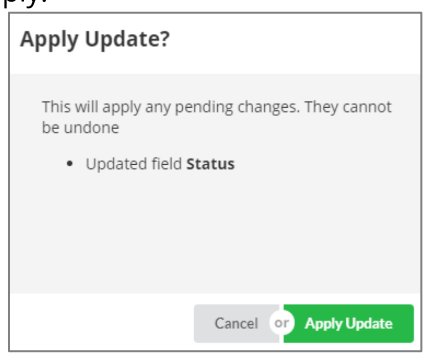
- Clicking the checkbox will cause three new buttons to appear. One of these is a blue “View Update” button.
- Click the “View Update” button to be directed to the “Entity Setup” page where you can see the pending update and edit it if desired. Refer to the *Edit an Entity* section for more information about editing entities.



Apply a Pending Update

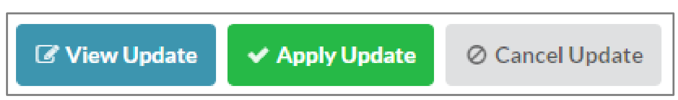
To apply a pending update:

- Locate the checkbox 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 to open a pop-up window asking you to confirm your action. 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.



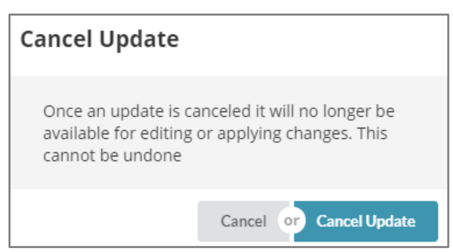
[**Note:** Depending on the size of the update, the update may take a few minutes to complete.]

Cancel a Pending Update



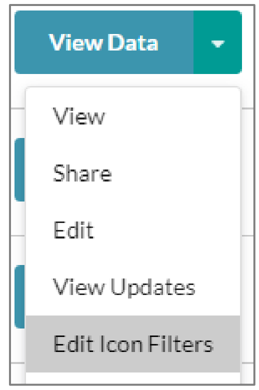
To cancel a pending entity update:

- Locate the checkbox 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 is a gray “Cancel Update” button.



- Click the “Cancel Update” button to open a pop-up window 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.

Edit Icon Filters



Icons are images that appear on the Map to represent each of the individual records that relate to a particular entity. You can set up filters for the entity to demonstrate when records have a varied or abnormal status. For example, the icon could change color to indicate a change in status.

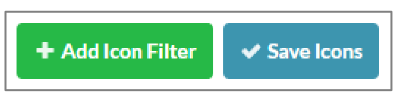
Whenever a field or set of fields within the entity is manually or automatically modified manually to match a different filter condition (either in the “Blueprints" application or via the “Map” interface), the icon will change automatically to reflect the new icon filter condition set up on the “Edit Icon Filters” page.

To enter the Blueprints Icon Builder:

- Look to the right side of the main Blueprints Dashboard and find the 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 to open a dropdown. If you have permission to edit this particular entity, an “Edit Icon Filters” option will appear.
- Choosing this option will direct you to the Blueprint Icon Builder where you can set up different filters for your entity icon.

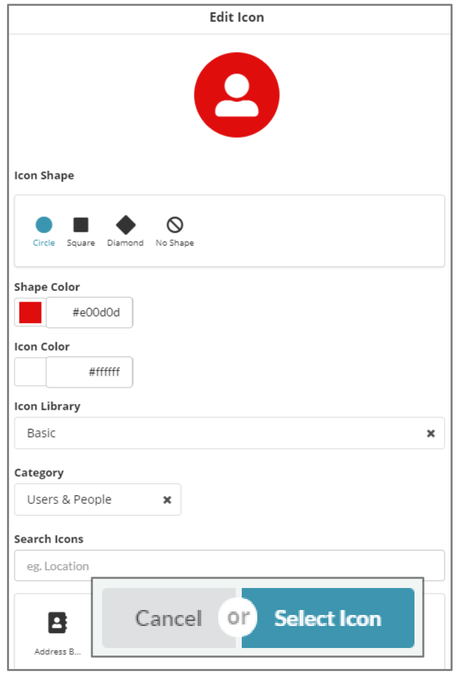
Add a New Icon Filter

To add a new icon filter:



- Locate the green “Add Icon Filter” button below the default icon image and any previous filters.

- Clicking this button will cause additional fields to appear below the default icon and other existing filters. You can now begin setting up the new filter.
- First, determine which icon will be used when the new filter condition(s) are met. To edit the icon, click the smaller icon image that appears at the top of the filter creation section next to the "Show this icon" text.
- The "Edit Icon" sidebar will open from the right side of your screen. Choose the icon shape, icon image, and the colors of the background and icon respectively by selecting your desired options from the corresponding fields. Refer to the *Choose a Default Icon* section for more information.
- 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 condition(s) that must be met in order for the default icon to change to the icon you just configured.

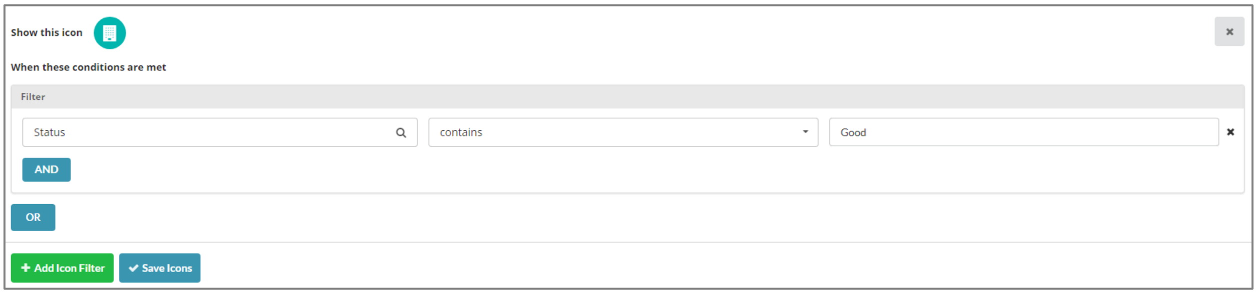
- In the "Field Name" textbox, select a field name from the dropdown to connect a field to your filter.

[**Note:** Only the fields that are included in the entity will be available for selection.]

- In the second textbox, select the comparison parameter you wish to use for the filter. Depending on the selected field name, you can choose one of 18 possible options from the dropdown that appears:
    - Is
    - Is not
    - Is equal to
    - Is not equal to
    - Is empty
    - Is not empty
    - Contains
    - Does not contain
    - Starts with
    - Ends with
    - Is any of
    - Is none of
    - Is greater than
    - Is less than
    - Is greater than or equal to
    - Isless than or equal to
    - Within the past

- Within the next

- Depending on the field name you selected in the first textbox when creating your filter, you may or may not see an "Example Value" field next to the comparison parameter textbox. If you see this textbox, type in the value you wish the entity field name to be compared to.



[**Note:** For any Date fields, this Example Value field will be a "Click to Set Date" field, which will produce a calendar when clicked so you can select a date value.]

- If you have finished editing your icon filters, click the blue "Save Icons" button at the bottom of the page to save your icon filter settings for the entity. You will then be directed back to the main Blueprints dashboard.

Add Multiple Condition Sets

You can create more than one set of conditions per icon filter.

To do this:

- Choose between "And" or "Or" to determine if your second set of conditions will be in addition to your first set, or if they are also an option but not connected.
- If you clicked the "And" button, both the new set of conditions and the first set must be met for the icon to be changed. If you chose the "Or" button, at least one of the condition sets must be met for the new icon to be applied.
- If you need more than two conditions, you can click "Add Field Clause" to add another condition, or you can click "Add Section" to create a new set of conditions completely separated from the first set.

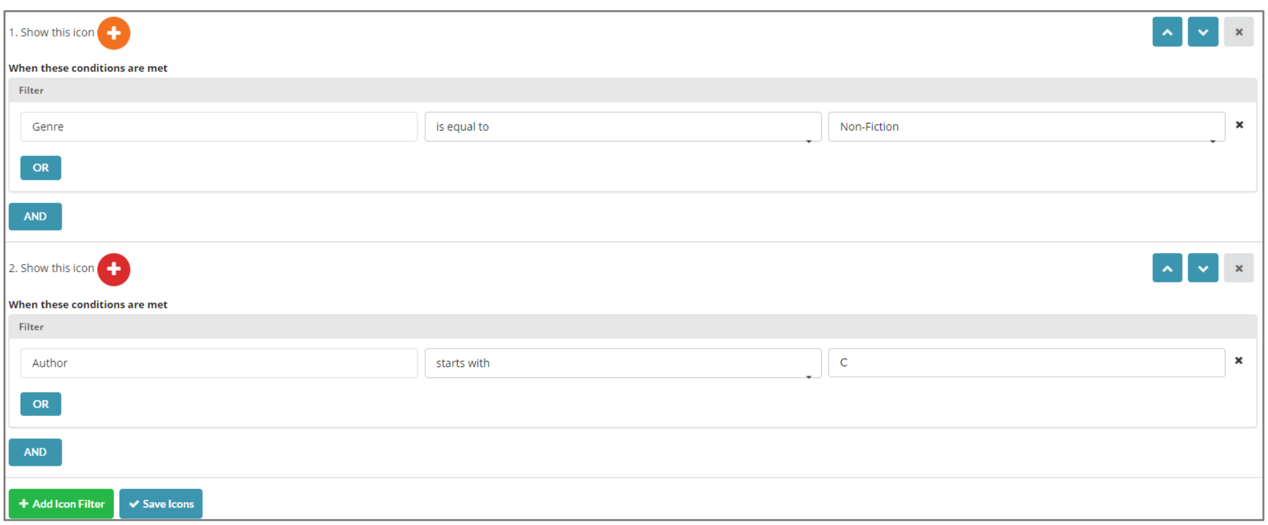
- Once you have finished editing your icon filters, click the blue “Save Icons” button at the bottom of the sidebar to save your entity’s icon filter settings. You will then be directed to the main Blueprints Dashboard.

Add Multiple Icon Filters

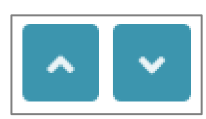
You can create more than one icon filter for an entity.

To create an additional icon filter with a different icon:

- Click the green “Add Icon Filter” button beneath any previously configured icon filters.
- Repeat the configuration process in the *Add a New Icon Filter* and *Add Multiple Sets of Conditions* sections.
- Click the blue “Save Icons” button at the bottom of the page to save your entity’s icon filter settings. You will be directed back to the main Blueprints page.



Change Icon Filter Priority

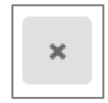


You can use the blue up and down arrow buttons on the right to choose the order in which your icon filters appear. The rules at the top of the list are higher priority when applied to the filter than those further down. Your icon will change on the Entity Dashboard depending on which rule's conditions have been met, and where in the priority list that icon is.

To move an icon filter up or down in the list:

- Locate the two blue arrow buttons to the right of a filter's icon image.
- Click either the up or down-facing arrow button to change the order (and priority) of the filters for this entity.

Delete an Icon Filter



To delete an icon filter from an entity:

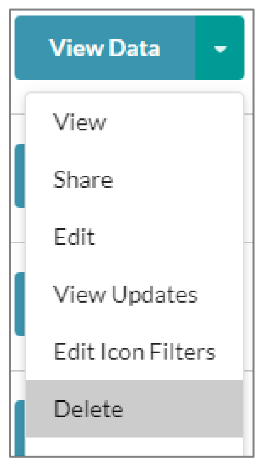
- Locate the gray "X" button beside the two blue arrow buttons on the right-hand side of your screen, across from your created filter's smaller icon .
- Click the "X" button to immediately delete the chosen filter from the entity.

To clear the contents of an icon filter condition:

- Locate the "X" button on the right-hand side of your screen, across from a filter's set of condition fields.

- Click the "X" button to immediately clear the contents of the chosen condition set from the icon filter.

Delete an Entity

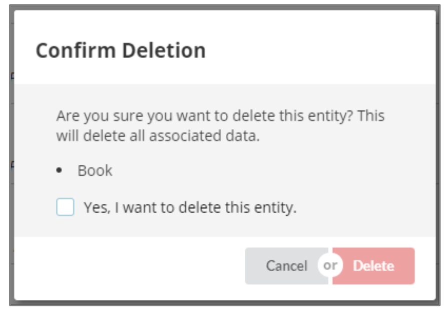


Your next available option on the main Blueprints Dashboard is the ability to delete an existing entity.

[**Note:** You can only delete an entity if you have the necessary permission to do so. Refer to the *SimplyCast Account Networks User Guide* for more information about permissions.]

To delete a blueprint entity:

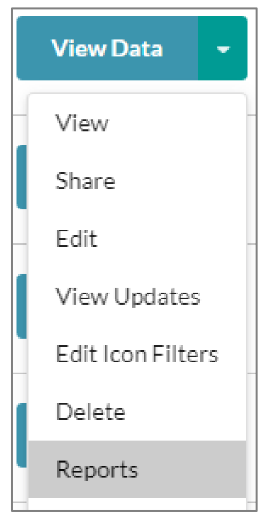
- On the main Entities dashboard, find the arrow to the right of the blue "View Data" button that corresponds to the entity you wish to delete.
- Click this arrow to open a menu with "Delete" as an available option.
- Select "Delete" and a pop-up window will appear asking you to confirm the deletion.
- Check off the checkbox and click the red "Delete" button to delete the entity. Alternatively, click "Cancel" to close the pop-up window without deleting the entity.



Access Reports

The next available option for existing entities on the Blueprints Dashboard is "Reports".

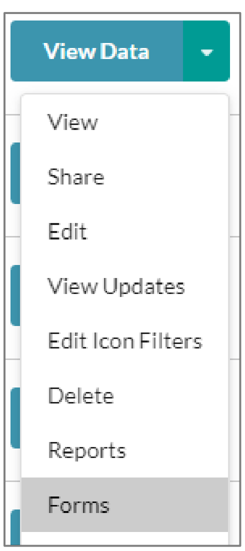
To view or create a blueprint report, find the blue "View Data" button to the right of the entity's name. Click the arrow on the right side of this button to open a dropdown menu. Click "Reports" to navigate to the Reports page for that particular blueprint entity, which will display any reports created using this entity.



You can also access the main "Reports" section by clicking the "Reports" option in the left-hand menu.

Blueprint reports are explained in detail in the *Blueprint Reports* user guide.

Access Entity Forms



When a blueprint entity is created, it serves as the template for the creation of any new assets. These templates are essentially forms that are filled out with all the information needed for the new asset.

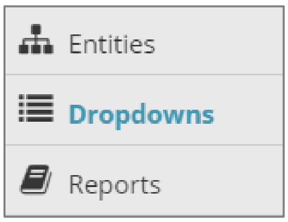
However, there are times when you will need to provide a quick way for users to add new assets to the system, as the entire blueprint entity template/form takes too much time to fill out.

This is where Blueprint Forms come in. This option allows you to create custom forms for an entity including only the information fields that are absolutely necessary for all new asset records. These forms can be added to the "Blueprint Form" widget on the Command Hub Dashboard. Refer to the *Blueprints Widgets* section for more information.

Access the Forms interface by clicking the arrow on the "View Data" button across from the name of the blueprint entity you wish to create a custom form for. Select the "Forms" option to be directed to the Forms page.

On this page you can:

Dropdowns



Dropdown menus are used extensively within the Blueprints application, as they are a convenient tool that provides users with a list of pre-set options to choose from. Dropdowns can also be used as their own field within an entityFor example, you can use a dropdown to determine the status of a record on or off the SimplyCast Map.

To use dropdown menus as part of an entity, you will need to create them in the "Dropdowns" section of the application. They can also be created on the fly when adding fields to an entity.

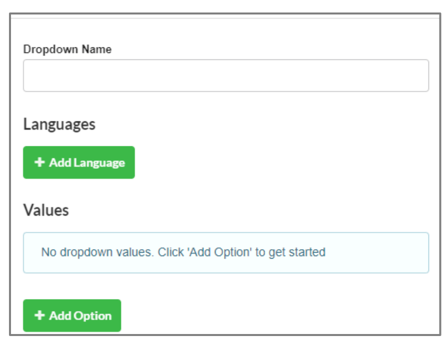
To create a new dropdown outside of an entity, locate the "Dropdowns" tab in the menu to the left of your screen.

On the Dropdowns page you can:

Create New Dropdown

Click the green "Create New Dropdown" button at the top of the "Dropdowns" page in the Blueprints application.

A pop-up window will then appear, inviting you to enter a name for the new dropdown. Click the green "Create" button to open the "Create Dropdown" drawer on 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 can:

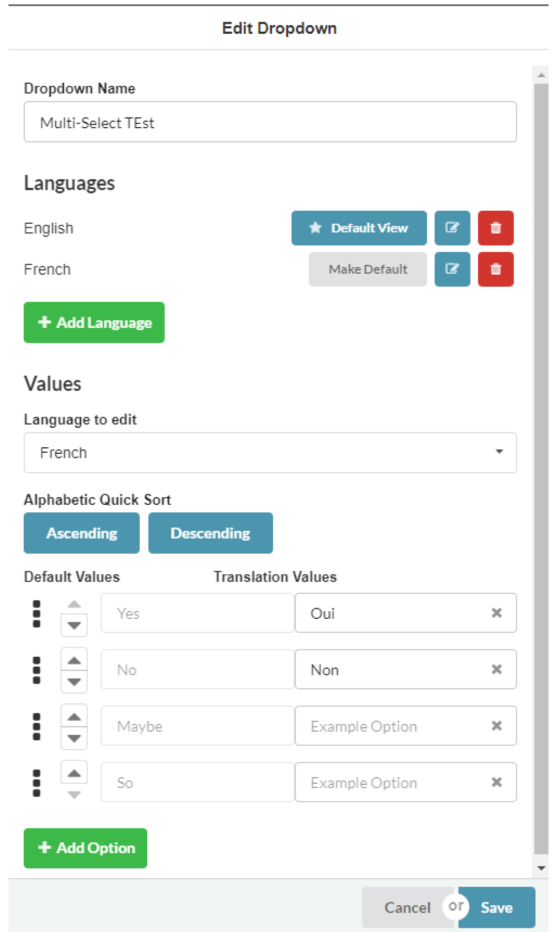
Edit the Dropdown Name

At the top of the "Create Dropdown" sidebar window is a field containing the name you have just given your dropdown.

Click this field if to modify the name of the dropdown, if desired.

Adding Dropdown Languages

After creating a dropdown click “Edit” on the right side of your screen. This will open the dropdown editing drawer on the rightIn this drawer, you can click “Add Languages” to add a new language. Once new languages have been added, you can then designate a default.



Any languages added to the dropdown can be edited under “Values”. You can also create default values and translation values for each dropdown option. For example, the default value in the pictured form is English, and the secondary language is French (Canada’s second national language). When I select the non-default language, it displays the default language on the left and asks me to put translations on the right.

Add/Remove Dropdown Values

The “Create Dropdown” sidebar contains a green “Add Option” button below the “Dropdown Name” field. This button allows you to add the choices available to users who interact with the dropdown as part of a blueprint entity. When the “Add Option” button is clicked, a field will appear above it where you can type in an option for the dropdown menu. Continue adding options this way until you have as many as you require.

Delete an option by clicking the “X” located to the right of its name.

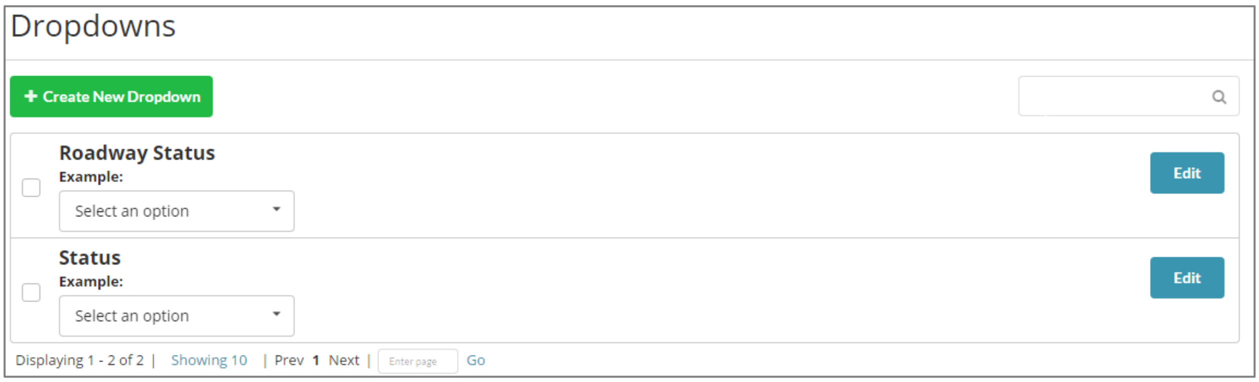
Click the blue “Save” button at the bottom of the sidebar to save your new dropdown menu or click “Cancel” to close the sidebar without creating one. Your dropdown menu is now ready to be used as a field in a new or existing blueprint entity.

View the List of Dropdowns

Below the “Create New Dropdown” button you will see a list of all 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:

- **Dropdown Name:** The name the creator gave the dropdown menu.
- **Dropdown Choices:** A dropdown selector that shows all available options created for that specific dropdown.

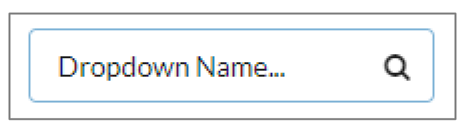


Navigate Multiple Pages of Dropdowns

To navigate through multiple pages of dropdown menus:

- Locate the page numbers at the bottom of your screen.
- Click a page number to visit that page of dropdowns or click the “Next” button to navigate to the next page of dropdowns. Alternatively, enter the page number (if known) in the field to the right of the “Next” button and click “Go” to proceed directly to that page.
- 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.

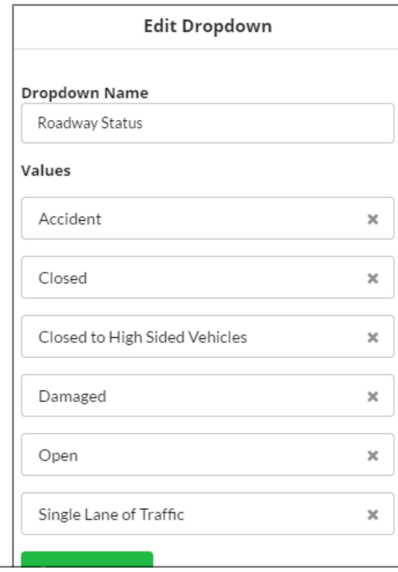
Search for Dropdowns



To search for an existing dropdown menu:

- Select the search box in the top right-hand corner of the page above the list of dropdowns.
- Type in the text to search for.
- The list of dropdowns will automatically filter to match the text.

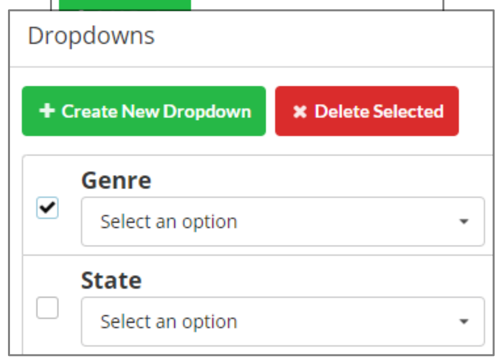
Edit a Dropdown



To edit the values of any dropdown in the table:

- On the Dropdowns page, click the blue "Edit" button to the right of any dropdown in the list .
- Use the sidebar that opens to add or remove any of the dropdown's options or change the dropdown's name.
- Refer to the *Create New Dropdown* section for more information about these options.
- 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.

Delete a Dropdown



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

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

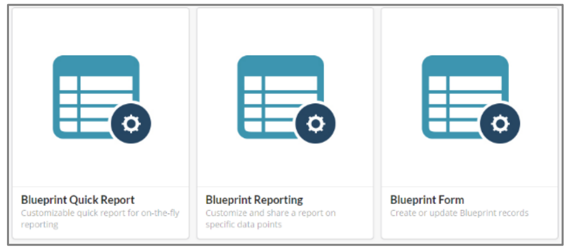
Blueprints Dashboard

You can add Blueprint reports to your custom or event dashboards in Command Hub. The report widgets will be expanded on in the Blueprint Reports User Guide.

Command Hub is the application's main operations dashboard interface and is used to view reports from all communications sent and received during specific incidents. For example, if you had separate reports for multiple entities, and all these reports needed to be monitored in relation to a single event, then having each of these reports on a single Command Hub dashboard would allow you to monitor them concurrently without having to switch back and forth between the various reports in the Blueprints application. Refer to the *SimplyCast Command Hub & Event User Guide* to learn more about this application.

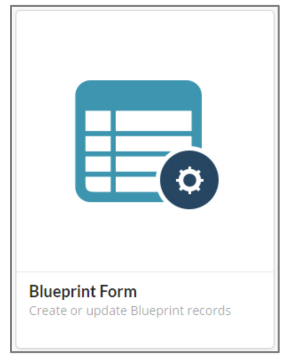
Proceed to the Command Hub Dashboard by clicking the logo at the top left of the screen, then click the blue “Add Widgets” button at the top right of the screen to add a report to a Command Hub dashboard.

There are three different types of Blueprints widgets you can add to your dashboard:



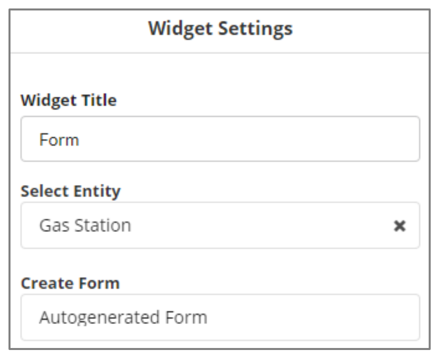
- Blueprint Quick Report
- Blueprint Reporting
- Blueprint Form

Blueprint Form Widget



After accessing Command Hub, use the gear button underneath the logo at the top left of the screen to select the custom/ event dashboard you want to add a widget to. Refer to the *SimplyCast Command Hub & Event User Guide* for more information about the various Command Hub dashboards.

Click the blue “Add Widgets” button at the top right of your screen to be directed to the “Add Widgets” screen. The third Blueprints widget you will see after accessing the “Add Widgets” screen is the “Blueprint Form” widget. This widget allows you to select a pre-created blueprint form to display on your dashboard to facilitate the creation of new records for a chosen entity. Select this option by hovering over the widget and click the “Add to Dashboard” button that appears. A sidebar will be brought up asking you to name the new form widget. Enter the name into the field provided.



In the sidebar’s second field, use the dropdown menu to choose the blueprint entity whose form you wish to display on the Command Hub Dashboard. Once you have selected an entity, the “Create Form” field will appear. By default, the “Autogenerated Form” that was made upon the entity’s creation will be selected. However, if you created any custom forms for the entity, they will appear in the dropdown field. Refer to the *Create a New Form* section for more information about forms.