

Create a Plan or Event Dashboard

A **plan** or **event dashboard** is an **Plan-Editor** form type that displays or collects specific information about the plan or event it's been shared to, also allowing you to create scoped relationships, using the [relationship builder](#) tool, directly from the form.

These dashboards can be accessed when working within the plan or event the form has been shared to. Note that in order for these forms to appear in additional **Plan Dashboards** or **Event Dashboards**, the form must be shared to the **Forms** folder within the applicable plan or event.

Corporate GIS Admin Help Vital Signs My Tasks My Forms Plan Dashboards EL

Corporate » Ztesters » Plans » Plan

Plan Information

General Visual Modeler Action Steps Relationships Properties

Display Name: Plan

Folder: Plans

Interruption Level: 8.0 Edge

Severity Level: Minor

Include GIS Selection:

Description: Just copy and paste the above table for each separate business function, to "emergency care and response" services required to ensure the provision of injury. Includes those emergency services needed to save lives and restore after severe trauma or an accident. Safety of Canadians –includes those essential services (including ambulance) and broader safety services (including nuclear safety, HAZM, of chemical, biological, radiological of nuclear contamination, search and public areas and public gatherings) required to maintain a life sustaining sustenance and protect the safety of the individual so as to high injury. S essential services required to maintain public order, vital communications government, the territorial integrity and sovereignty of the nation, the security of public gatherings, and the security of Canadians so as to avoid high injury – includes those essential and fundamental economic, monetary, and financial


Plan Dashboards

- [Plan Resources](#)
- [Related Contacts](#)
- [Related Documents](#)
- [Related Resources](#)
- [ResourcesOutsideofPlan](#)

The Plan Dashboards panel.

To create an plan or event dashboard:

1. Navigate to an applicable organization using the the menu at the top-left of any page.

2. Click the **Forms**  icon in the menu to the left.
3. Click **Add**.

Corporate GIS Admin Help Vital Signs My Tasks My Forms **Organizational Dashboards** EL

Corporate » New Org

Forms

Filter Add Share Forms Refresh

| Title ↑ | Type | Description | Actions |
|--------------------------|---------------------|-------------|---------|
| Events | Organization Editor | | |
| New Form | Custom Form | | |
| New Form | Custom Form | | |
| OrgRelationshipBuilder | Organization Editor | | |
| Plans | Organization Editor | | |
| Relationship Editor Form | Relationship Editor | | |
| Resources | Organization Editor | | |

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The Forms page.


4. Enter a name for the form in the **Title** field.
5. Select **Plan - Event Editor** from the **Type** dropdown menu.
6. **Optional:** If needed, select an alternate folder for the form by clicking **Choose Folder**.
7. **Optional:** Enter a description of the form.

Forms

General

Title:

Type:

Folder:  Choose Folder

Description

A new Plan - Event Editor form.

8. Click **Save & Continue**.
9. Click the **Design** tab.
10. To add a [report](#) to the form:
 - a. Click the form canvas > **Tools** > **Add Report**
 - b. Enter keywords in the **Search** field to locate the existing report, then click to select it.

Reports ✕

Search: Columns:

Add multiple controls

Settings to add a report element to a form.

- c. Use the **Columns** dropdown menu to select the fields you want to include in the report. To include all fields, skip this step.

- d. Click **Add report**.
 - e. Continue steps a. to d. above to add more reports.
11. To add the [relationship builder](#) tool to the form:
- a. Click the form canvas > **Tools > Add Relationship Builder**.
 - b. Select the object you want to create the relationship for from the dropdown menu.
 - c. Select **Yes** from the **Run Relative?** dropdown menu to allow users to only select objects from the current organization or select **No** if you want to allow users to select objects outside of the current organization. For example, if you want users to create a relationship for a document object in the organization where the form is being accessed, you'd select **Yes**, but if the user should be able to select a document from another org, you would select **No**.

The screenshot shows a dialog box titled "Relationship Builder" with a close button (X) in the top right corner. The main heading is "Step 1". Below the heading is the question "What type of object do you want to create this relationship for?". There is a dropdown menu with "Document" selected. Below that is the question "Run Relative?" with a dropdown menu showing "No". At the bottom right, there are two buttons: "Start Over" and "Step 2".

Step 1 of the Relationship Builder.

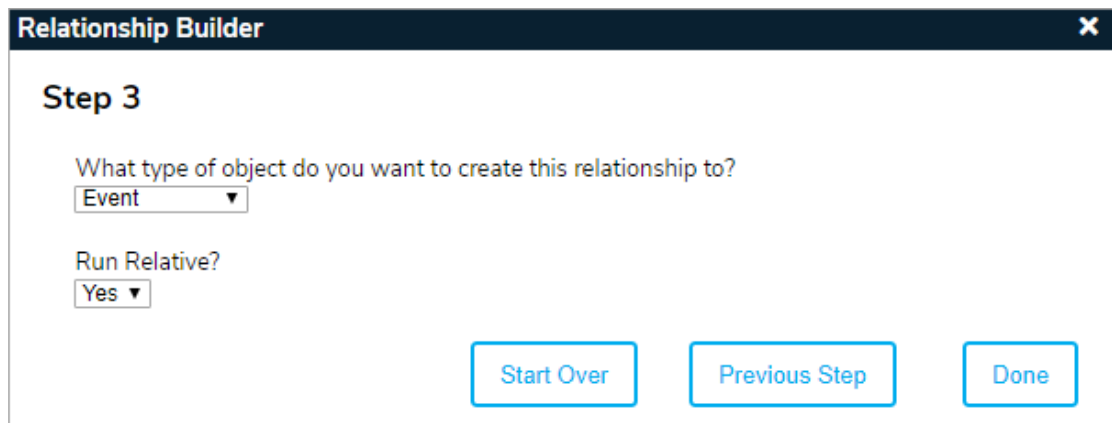
- d. Click **Step 2**.
- e. Select the relationship type(s) you want to create. Relationship types are configured in the [Referential Data Manager](#) .

The screenshot shows a dialog box titled "Relationship Builder" with a close button (X) in the top right corner. The main heading is "Step 2". Below the heading is the question "What type of relationship do you want to create?". There are two buttons: "Check All" and "UnCheck All". Below these are five checkboxes: "Not Specified", "A Display Name" (which is checked), "Adjacent to", "Component of", and "Depends on". At the bottom right, there are three buttons: "Start Over", "Previous Step", and "Step 3".

Step 2 of the Relationship Builder.

- f. Click **Step 3**.
- g. Select the type of object you want to create the relationship to from the dropdown menu.

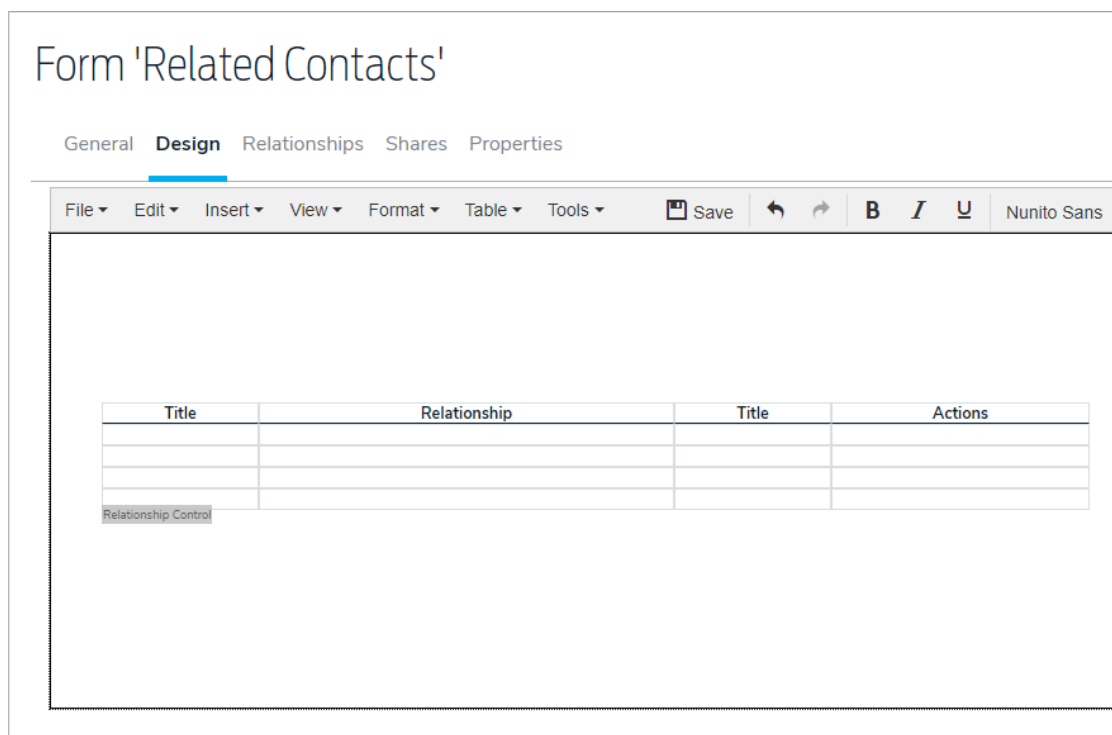
- h. Select **Yes** from the **Run Relative?** dropdown menu to allow users to only select objects from the current organization or select **No** if you want to allow users to select objects outside of the current organization. For example, if you want users to create a relationship to an event object within the current organization, you'd select **Yes**, but if the user should be able to select an event from another org, you would select **No**.



The screenshot shows a dialog box titled "Relationship Builder" with a close button (X) in the top right corner. The dialog is at "Step 3" and asks "What type of object do you want to create this relationship to?". A dropdown menu shows "Event" selected. Below that, it asks "Run Relative?" with a dropdown menu showing "Yes" selected. At the bottom, there are three buttons: "Start Over", "Previous Step", and "Done".

Step 3 of the Relationship Builder.

- i. Click **Done**.



The screenshot shows a form titled "Form 'Related Contacts'" with tabs for "General", "Design", "Relationships", "Shares", and "Properties". The "Design" tab is active. A toolbar at the top includes "File", "Edit", "Insert", "View", "Format", "Table", "Tools", "Save", and icons for undo, redo, bold, italic, and underline. The font is "Nunito Sans". The main content area contains a table with four columns: "Title", "Relationship", "Title", and "Actions". There are four empty rows below the header. A "Relationship Control" button is visible at the bottom left of the table area.

The relationship builder tool added to a form.

- j. Repeat steps a. to i. above to continue adding more relationship builders to the form.
12. Continue designing the form, adding any elements to collect data, if required. See the [Forms](#) section for more information.
13. [Share the form](#) to other plans or events to add it to their **Plan Dashboards** or **Event Dashboards** panels.