Mapping Utility User Guide

Overview

This utility is used to map certain job values that come into our system to corresponding board values. For example, a job may come in with an industry value of "3" which is equal to "Agriculture". According to the list provided by the board, the corresponding board value is "41". This utility facilitates the mapping process. The four types of mapping typically handled by this utility are: category, industry, state, and country. eQuest values are on the left and board values are on the right.
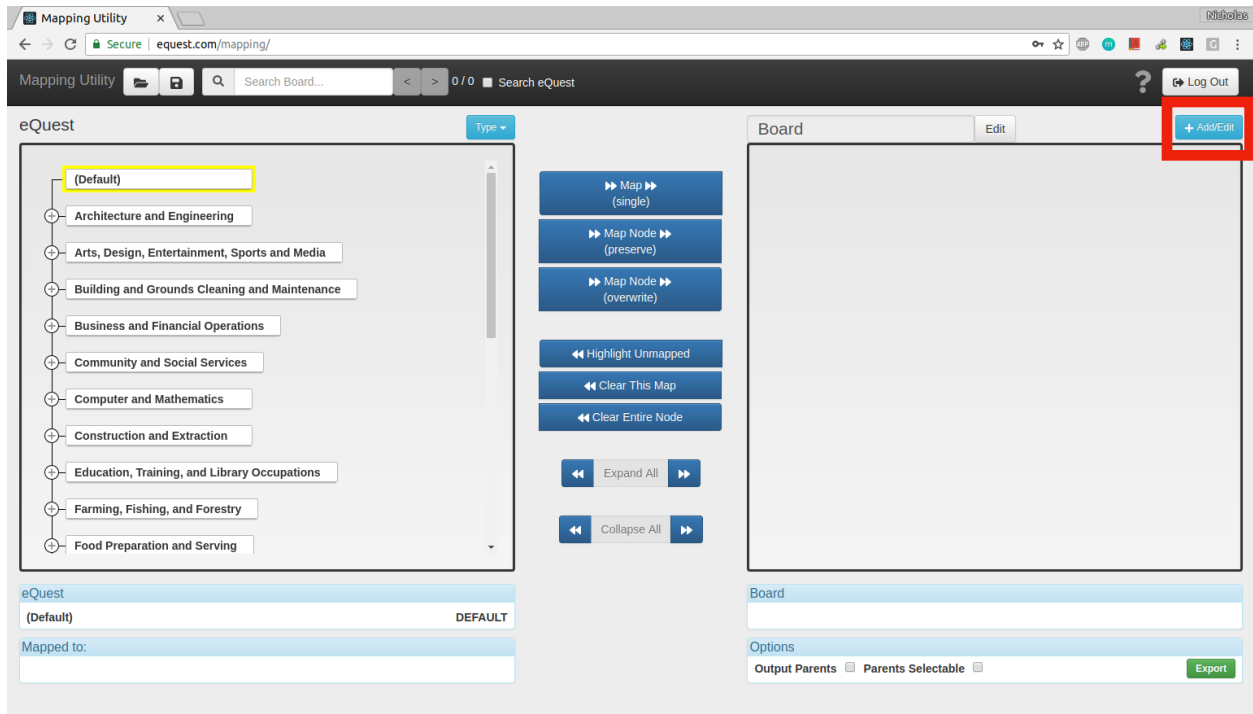
Instructions

1) To begin, visit: https://www.equest.com/mapping/ and log in.
2) Click the Type button to choose the appropriate mapping type.

3) Enter the board name into the form on the right by clicking on Edit.
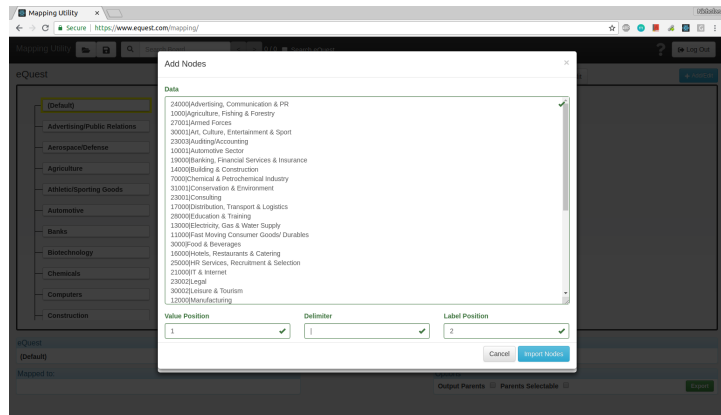
4) Click the Add/Edit button in the top right.
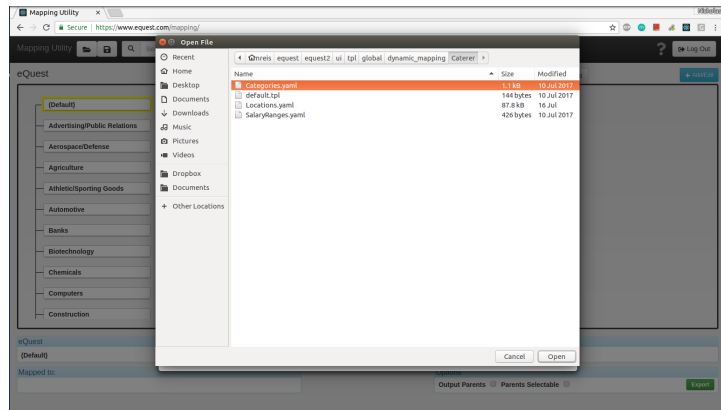

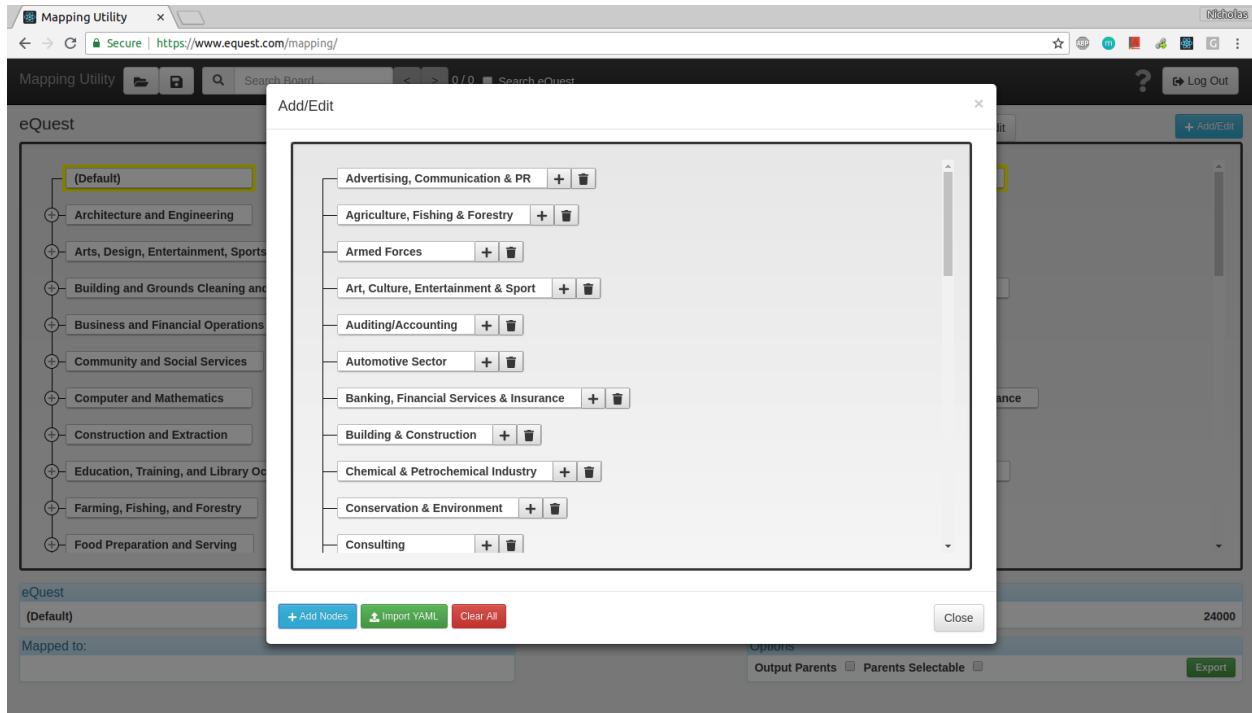5) There are a couple ways to add the board data:
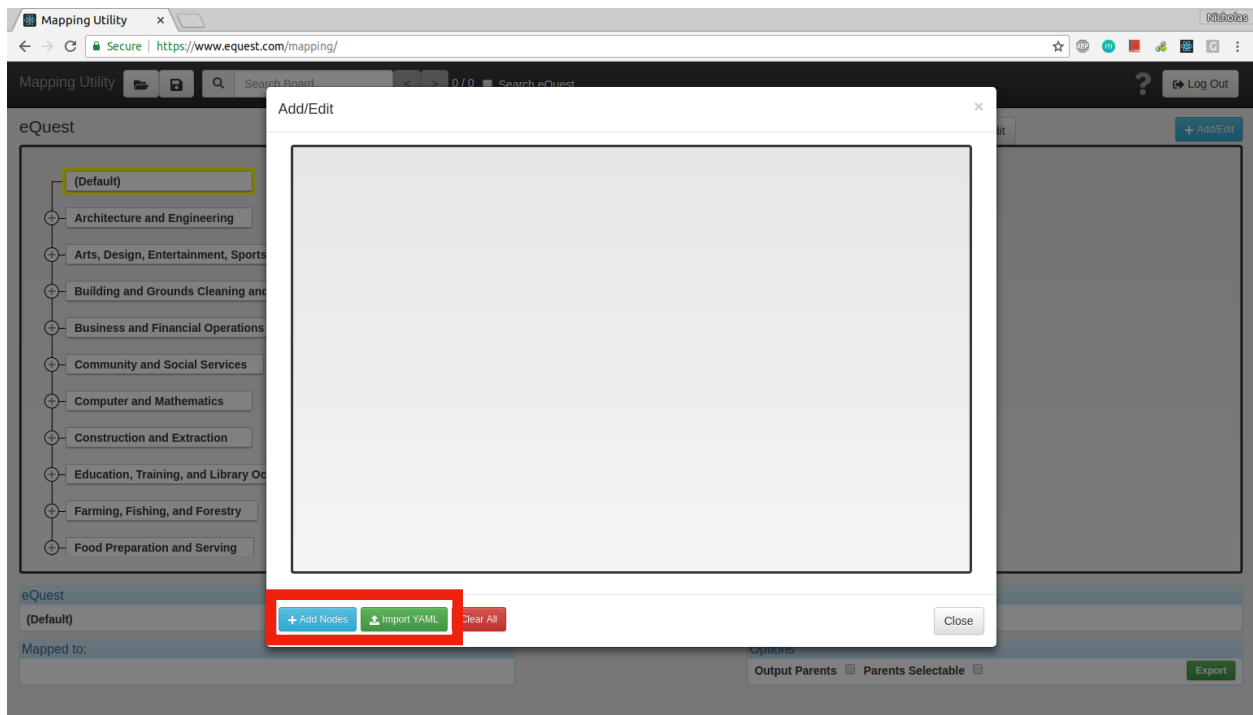
a) Using the Add Nodes button (for a single tier list). Copy and paste the data into the text box. The fields below allow you to change the order of the value and label.
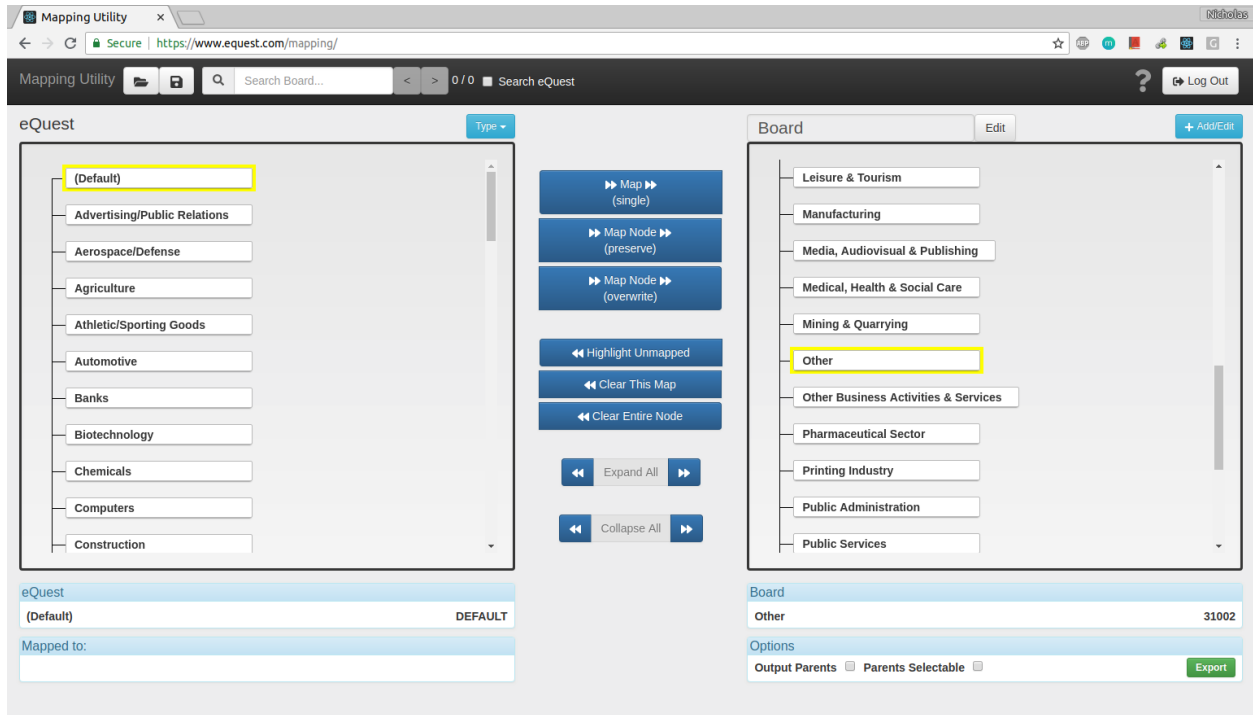

b) Using the Import YAML button (for a multi tier list). Select the desired YAML file.


6) Once added, a preview of the data is presented. Click Close.

8) To begin mapping, select a node from each side that represents the closest match.
   Note: If no adequate board value is available, the default mapping will be used

9) Press space bar to map the node. Alternatively, click the "Map (single)" button.
   Note: If there are multiple children to map with the same board value, modifiers can be used to apply the value to the parent and its children (Ctrl + Space = Overwrite all, Shift + Space = Preserve existing)
   Note: Mapped nodes will appear blue
10) Once mapping is complete, click on the Export button.
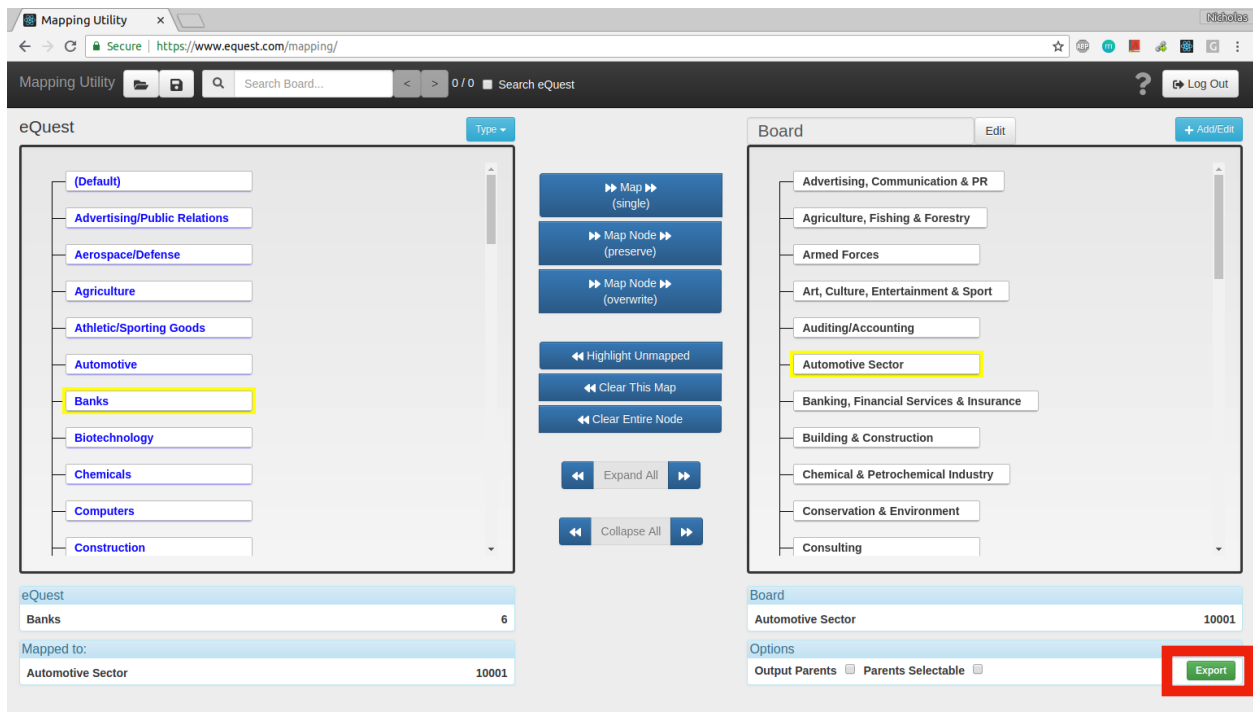
11) Click the Download button.
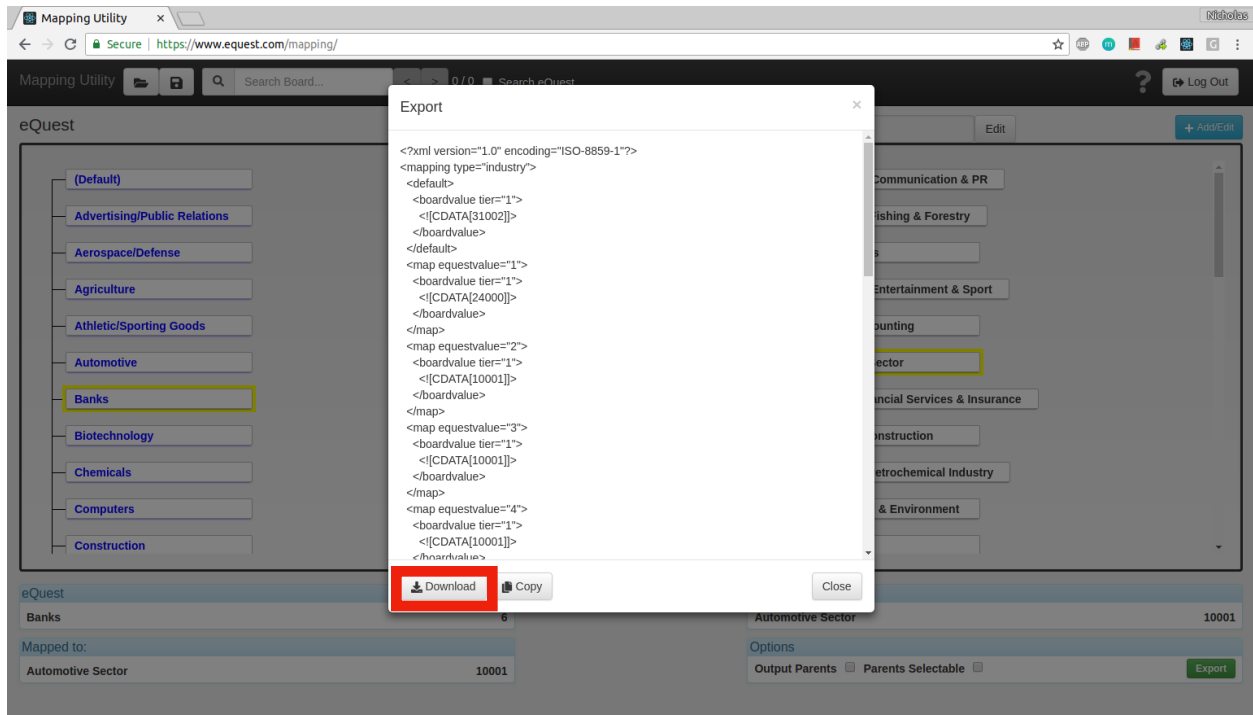
12) Provide this file to the board integration team.

Options
• Output Parents: Export all parent tier values including the child
• Parents Selectable: Values with children can be mapped

Saving/Loading
• To save your progress at any time, click the Save icon in the top left nav bar.
• To restore your saved progress, click the Open icon in the top left nav bar.

Notes
• There are keyboard shortcuts for all the mapping functions. For more info, click on the ? icon.
• Ctrl + F populates the search field with the current active node title.
• Tested on Google Chrome and Mozilla Firefox
• Your progress is automatically saved with every change if your browser supports local storage. If you reload the browser, your session should be preserved. If you need to start over, use the Clear All button in the Add/Edit window or log out.