COMPLIANCE USER GUIDE



SAFETY, QUALITY &

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EXERCISES

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CHAPTER 1 – INEIGHT COMPLIANCE OVERVIEW

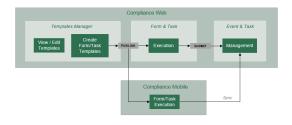
1.1 COMPLIANCE OVERVIEW

InEight Compliance is an electronic system for managing forms and tasks that allow you to capture data within your organization, send out notifications and use the information in all types of reports and dashboards. This includes:

- Creating and storing form and task templates in the Template manager
- Selecting, filling out, and submitting events and tasks
- Tracking the status of and managing data on the Events and Tasks pages

1.1.1 INEIGHT COMPLIANCE WORKFLOW

From within each of these modules, there is a workflow for creating templates, executing events and tasks, and managing them. The following diagram illustrates how forms and tasks are managed within the InEight Compliance application:



1.1.2 COMPLIANCE MODULES

Compliance is organized into the following modules by default.

				6
Safety	Environmental	Compliance	Change	Custom
Created Oct 30,2079-06/15 AMI Service Account	Greated Get 30,2019 36 15 AM Service Account	Orested Dct 30,2019 06:15 AM Service Account	Orested Aug 11,3021 08:03 AM Service Account	Created Oct 30.2975-96/15 AM Service Account.
A module to track and manage safety related business processes.	A module to track and manage environmental ordated business processes.	A module to track and manage compliance related business processes.	A module to track and manage change related business processes.	A module to track and manage custom related business processes.
EVENTS TARKS @	EVENTS TASKS @	DVDITS TASKS @	EVENTS TASKS Ø	EVENTS TARKS (D

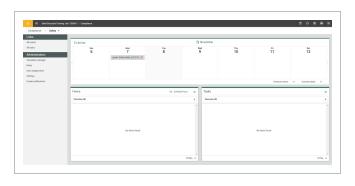
Overview - Compliance Modules

Section	Module Name	Description
1	Safety	Module within Compliance that contains standard templates for construction safety processes as well as ability to customize any other templates.
2	Environmental	Module within Compliance that contains standard templates for construction environmental processes as well as ability to customize any other templates.

Overview - Compliance Modules (continued)

Section	Module Name	Description
3	Compliance	Module within Compliance that contains standard templates for construction compliance processes as well as ability to customize any other templates.
4	Change	Module to track and manage templates for integration with InEight Change.
5	Custom	Module to track and manage custom related business processes.

Specific to the module you selected, the Module landing page is the working page where you can view or click on both events and tasks lists or access Administration functions. Depending on your role, you might have the job of creating new events or tasks, which you can also do from the Module landing page, if you have the correct permissions.



1.1.3 TEMPLATES MANAGER

Within each Compliance module, you can access the Templates Manager to manage the templates for the module you are in (i.e., the Templates Manager for the Safety module contains safetyrelated templates).

Within the Templates Manager you can view the templates already created, along with their status (published, draft, or inactive). You can also create new templates using the Form Builder or Task Builder. The creation of form or task templates is an administrative function performed using the web-based Compliance application.

1.1.4 FORM & TASK EXECUTION

1.1.4.1 MOBILE APPLICATION

In the field, users can fill out and submit inspections, forms and questionnaires, and tasks using the Compliance Mobile application. You can complete the relevant event or task offline using the mobile app and synchronize the results when connected to a network. Additional information will be reviewed in 11.5 Filling out an Event or Task - Mobile on page 200.

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Centel	Full Body Harness Inspectio	n 1/0
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Digosture .		400 characters remaining
210		
× 110	5	
Submit and complete		

1.1.4.2 WEB FORMS AND TASKS

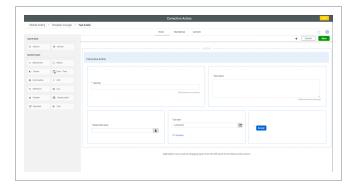
There might be times when a user needs to fill out a form or task via the web application. From one of the modules , you can select and launch the form or task you need using the Forms or Tasks dialog boxes.

Forms 🖻 Schedule fo	m q	Tasks	
Corporate Safety Forms (35)		Corporate Safety Forms (7)	•
22.6, Report a Safety Incident	☆ *	Copy_of-Ref Task	
22.8 Mobile app -Copy of -Mobile Reference - Supporting Document Bug	\$	Exception for Task	
check_mandatory	☆	large Configuration Task 22.6	
Copy of-Exception_count	☆	<u>Ref Task</u>	
Copy of -Mobile Reference - Supporting Document Bug	☆	Safety Task - Large tem	
Copy of-Non-Injury / Illness - Only access this form through the "Report a Saf	☆	Sample Task	
Copy of-regression testing	습	task with exception	
Copy of-Report a Safety Incident			
Copy of-Safety Tour Safeguards_DRAFT_DO NOT EDIT			
DATE TIME format testing			
DT/default response list			
Dupe check -EXP and RNW date and Date check			
Event Date check			
Exception of list and choice			
Fall Protection Inspection Checklists	12 ×		

1.1.4.3 FORM AND TASK BUILDERS

Compliance has both an intuitive Form builder and Task builder that allows the desired level of complexity to be built into your forms/tasks. It yields numerous question types to collect the information you need from the field and provides functional-level permissions with customizable workflows for each form/task.

Module landing	> Templates manager >	Form builder			
			BULD PROPERTIES FORM FLOWS HIST	ORY	
Layout types		All changes have been saved (12:21 PM)			🖌 Carcel Save
E Orlana	E fector				
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G Fore Sallon	II From Plow	11/01/2022	8	13.21 PM	0
4 6PS	♦ integrated list				
% Inferror	# 54				
# Series	O Pepinjukar	* Specific location of the incident		* Incident description of accident	
2 Signature	a lot		(15) characters senaring)		(30 descript synaktic)
			Add fields to your form by dragging types for	on the left panel to the blank section above	



1.1.5 ALL EVENTS AND ALL TASKS

Once forms are submitted, you can track forms as events on the Events page of the web-based Compliance application. There is an Events page within each Compliance module, where you can track the status of your event in the approval process (e.g. Pending, With Claims Manager, Complete). Due dates shown in red indicate the event form is overdue.

Safey > Events •									Clobal Events/Ta	elle View Myslew		
								81	Arpaperi. 🔻	4 D 6	0 Q	Ciear all fibers
					Automatic date filt	ter applied - to clear	use the event date column	-Mar				
	Even sile 🤤		Geogra 🗸 🖓	Evere date 🗸 🗸	Event @		Form same	🤟 Pract/Openiation 👘	Reporter		Status	
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	20pearto		Checklat	10/31/0022	202279271			(R1HD-Platform-Replacement)			Fanding	
	hillingo -		Checklist	30/31/2022	20223-023			(R1HD Platform Replacement)			Laga Apport	
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	A (2010.2)		incidents	11/01/2022	20223-023			(k1 HD Platform Replacement)			Scheduled	
	child of co		incidenta	10/31/2022	20223-023			(k1 HD Platform Replacement)			Complete	
	M2w		Checklist	30/12/2022	20113-929			(K1 HD Platform Replacement)			Lagar Approva	
	0.10		incidents	30/12/2022	20113-929			(K1 HD Platform Replacement)			Complete	
	Hef check		Checklist	10/27/2022	20223-927			(k1 HD Platform Replacement)			Fending	
	10052300		Checklist	10/25/0022	20223-027			(K1 HD Platform Replacement)			Scheduled	
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	197502.502		Checklist	10/31/0622	20223-927			(K1 HD Platfum Replacement)			Scheduled	
	tion and ch		Checklint	16/31/0622	20111927			(R1 HD Platforn Restacement)			(52+5/H)	

Once tasks are submitted, they can be tracked on the Tasks page of the web-based Compliance application. There is a Tasks page within each Compliance module, where you can track the status of your task, shown as Submitted. Due dates shown in red indicate the task is overdue.

afety > Tasks +						• • • • • • • • • • • • • • • • • • • •	Gold Events/Table View Myslew		
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	Cutegory	🕎 Due date	Traject/Organization	Responsible party	- Statue	🐺 Taskid i		Task name	
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1	Quality issue	10/31/0022	110		Inhedded	20221421			
ž 2	Quality hour	10/31/0022	110	a	Inhedded	20221431			
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A 10.51	Checkful	11/02/3022	110	a	Scheduled	20221631			
	Checkful	11/02/3022	110	a	Scheduled	20221631			
	Checkful	11/01/0002	110	a	Scheduled	20221421			
	Checkful	10/31/0012	110	a	Scheduled	20221431			
A	Checklist	10/31/0012	110	a	Scheduled	20221431			
A	Quality Issue	10/31/0022	110	a	Scheduled	20221431			
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A 2	Quality Issue	10/31/0002	110	a	Inheduled	20221021			
A 10000	Checkling	13.455/2022	12		Schebuled	20121011			

1.1.5.4 EXPORTS

Click on the **Export** icon so that you can export selected items from the All Events page or the All Tasks page. The system will generate a .ZIP file that can be extracted.



1.2 IN-APP REPORTING

As an administrator, you can configure which templates can be printed in the application. The application uses a standard report to print events and tasks for the configured templates. Event and task data is captured, and then copied to a reporting database every 15 minutes. The time of this process may vary depending on the environment. As a result, you may experience a delay before new or updated event or task data shows in the report.

For more information about configuring template print options, see **Enable print functionality** in <u>Template Properties</u>.

CHAPTER 2 – GENERAL NAVIGATION

2.1 COMPLIANCE LAUNCH

To open a project in Compliance, use the link provided to you by your manager or other source.

Click the **Main menu** icon at the top left, and then select **All projects & organizations**.

INEIGHT®				View. C	Contractor (Default)		• 🗹 🏹	0
K		🕈 Map	7 C	🖉 My links		🙆 Photo		1
Main menu FAVORITES Root Organizations SETTINGS All projects & organizations Moster data litraries All state administration Set administration	8 > > > >	Scottsdale	An Devel	Add link:			Addimage	
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⑦ Intight learning and support	,						•	

Click the **Name** hyperlink to open the project. You can use the Search function at the top right to find a specific project.

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				PRO.ECT3	ORGANIZATIONS					
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	1000	1.0.0		Res Systems						
		units from the		And Supervision 12						

If your project is not displayed, you can search by selecting the **Search** icon in the top right corner. This search function will search all terms in all columns.

		(i) <mark>Q</mark>
Created b		Search
Service A	Cedar	Q

The Project home page opens.

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Quantity sources 20 takeoff			Group work into plans and packages		Assign tasks	for your crew		
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Project Brary Plan	45 Project roles	đ	· Contains	_	Supporting of	locuments		
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Contract Bid packages Contracts	S brings				 Bid package Balan 			Court
change	Project and application settings				Rabe Anarded Drawarded In approal Related			Coun

Click Compliance on the left navigation menu.

Image: Constraint of Constraints Image: Constraints <t

The Compliance landing page opens.

NOTE In the Projects home landing page you can launch Compliance in other ways not mentioned here.

2.2 COMPLIANCE LANDING PAGE

The Compliance landing page is the home page for Compliance. It is the starting point from which you can access any of the Compliance-related modules to track and manage forms.

The landing page contains the following modules by default:

- Safety
- Environmental
- Compliance
- Change
- Custom

When you click on a tile, it opens to that module's corresponding landing page, where you can access and manage the forms or tasks related to that category.

The modules shown on the Compliance landing page depend on your assigned permissions for the selected project. You can only see the modules you have access to.

Safety Environmental Granted Oct 30,2019 00 15 AM Service Account Granted Oct 30,2019 00 15 AM Service					Compliance Created Dct 30,0013 00 15 AM Service Account			Change Orested Aug 11,2021 (81:00 AM Service Account)		Custom Created Oct 30.2019-06.15 AM Service Account.				
A module to track and manage safety related business processes.			A module to track and manage environmental related business processes.			A module to track and manage compliance related business processes.			A module to track and manage change related business processes.			A module to track and manage outom related business processes.		
DIDNES	TASKS		EVENTS	TASKS		EVENTS	TASKS		EVENTS.	TASAS		EVENTS	TASKS	0

2.3 MODULE LANDING PAGE

The Module landing page is the working page where you can look up and fill out forms or tasks related to the module you selected (e.g., Safety, Environmental, etc.). Depending on your role, you may have the job of creating new forms or tasks, which you can also do from the Module landing page, if you have the correct permissions. From the Compliance landing page, assume you select the Safety module tile. This takes you to the Safety Module landing page.

Overview - Module Landing Page

	Title	Description
1	Module navigation	Move from the current module landing page back to the Compliance landing page.
2	Left navigation menu	From this menu you can access all events (filled out forms) or tasks for the module you are in and view their status. If you have Administrator settings, you can perform additional functions by selecting any of the following Administration options: • Templates Manager - library of all forms/tasks in your

Title

Description

organization, where you can manage blank forms/tasks and build new ones

- Roles Manage roles and permissions for Compliance
- User Assignments -Assign users to organizations/projec ts, categories and roles
- Settings Edit modules, categories, statuses, roles, email templates, and user assignments
- Create Notifications

 Send email to
 users or roles with a
 personalized
 notification

3	To do list	A week's view of your current assigned and pending tasks and scheduled or pending events.
4	Forms or Tasks	To fill out a form/task, select the appropriate category from the Forms or Tasks drop down list, or search for it by its title. You can then select the form or task to fill it out. You can also

Overview - Module Landing Page (continued)

Title	Description
	schedule a form for a specific date by using the
	button in the top right corner of the Forms box.

Compliance 2 Safety •)						
nka Innili	To do list			(2 October - November			
taka		Mon	Terr	West .		81	24
deviation	5m 30	Mon 31	1	2	thu 3	4	5
replates manager				8			
les .	<			•			
er assignments							
tings							
ore notifications						Overdue events	a overheiteks a
	Forms		the Sub-	Ade torm Q. Taska			0.
	Favorites (5)			v Favorites (5)			
0							
				0			
		No items found		•		He have found	

The following Step by Step walks you through navigation of the Module landing page. It assumes you have privileges to access the Administration settings.

NAVIGATE MODULE LANDING PAGE

1. From the Compliance project landing page, select the **Safety** module tile.



- The Safety Module landing page shows.
- Click the Compliance button in the upper left of the page to go back to the Compliance landing page.

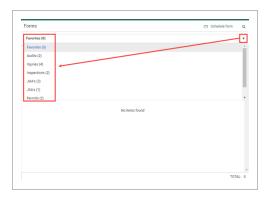


- 3. Click the other module tiles such as **Environmental**, to open their landing page.
- 4. Click the **Compliance** button to go back to the Compliance landing page.
- 5. Click the **Safety** module, and then click on **All events** on the left side bar menu.
- This opens the Events page, where you can see all filled out Safety forms and their status

•								۲	* * *
Salety > Events +						Oolul Evensitieks View	Byview		
						12 marsh 10 D	a 0	Q	
			T Automatic date Mar	applied - to dear, use the event data of	oluna fiter				
Barre Stie	dempire T	form date 🕎	forth T	famoune 🙄	Print/Provider T	hann T	555e1		
Sec.	Cleakid	10/01/2023	20221101	No			Complete		
fa:	Checklin.	MV65 9003	20021102	N/I			(CONSERV)		
<u>w</u>	Overkitet	10465-9668	20027362	No			Corplane		
Ce	Owabia	11/63/0623	200211903	Net			Cumplete		
16	Cleakid	11/03/2023	200211103	No			(Conjulia)		
14	Checklin.	Mr488 9002	20027703	N/I			(Constant)		
11	incidents	10/10/062	20021070	HC			Paning		
20	Category 8 - DO NOT EDIT	10/37/2003	20021021	N			Paning		
91	Cogo are Safety Forma	10/31/2023	20023027	N/			Parding		
	Checklin.	M/FV9002	20027301	N/I			Panding		
22	incidents	10/34/908	20023020	HC			(Schelulet)		
	Central	1/4/200	20027101	No.			(Director)		

- NOTE You can select All tasks to open the Tabs page showing all the Safety tasks and their statuses.
- 6. In the Module landing page Forms section, click the **Favorites** drop-down to view the form categories.

Compliance User Guide



7. Select a category form from the Favorites drop-down list.

Forms	E Schedule form Q
Favorites (0)	·
Favorites (0)	-
Audits (2)	
Injuries (4)	
Inspections (2)	
JHA's (3)	
JSA's (1)	
Permits (2)	*
No	items found

8. Select from the forms in the category.

Forms	🖽 Schedule form 🛛 🔍
Inspections (2)	•
Fall Protection Inspection Checklist	☆ *
Leader Safety Walk	<u>4</u>

• The form opens for you to fill out.

AREA / TASK OBSERVED			
ASK / CONSIDER THE FOLLOWING QUESTIONS:			
STEP 1: Stop and observe work, Ensure it is safe to enter by asking "Can I enter your workspace?"			
STEP 2: Introduce yourself if you are not know to the person. "Hi, I'm, the General Manager of			
Date & Time		* Propie Observed	
mentrologyper Hout Minute	= 0	Telestore	
* Activity Observed		Specific Job Taok	
	Sf characters remaining?		294 stanster emilieg
Sub-contractors involved?		If yes, which company?	
0 m			(20. sharedres. respired
0 %			
LEADER SAFETY WALK CHECKLIST			

NOTE	You can follow the same
	steps for tasks in the Tasks section.

Alexetta	To do last			f2 November			
Allaska	lat.	blue.	14	Tel	The	PH .	Let
Administration	6	7	8	9	10	11	12
Templates manager							
Foles	 						
Ober assignments							
Dartings Crawle perifications							
Ovade retifications						Orendue exercita 0	Overdue Salah
	Farms		ED Schuluk	om g. Tasks			
	Inspections (2)			* Feolos			
	Fall Protection Tespection Che	die .		0.5			
	Louder, Safety, Walk	And A					
						No items frond	
				300W/ 2			10

You can manage and create new forms or tasks for your team or organization in Templates manager. In the module landing page, click **Templates manager** on the side bar menu to open the Templates manager page.

≡ ⇔	Steel Stru	cture Trainin	g Job
Compliar	ice > Se	afety 👻	
Links			
All events			
All tasks			
Administ	ration		
Templates n	nanager		
Roles			
User assign	ments		
Settings			
Create notifi	cations		

You can create new templates and manage existing ones. You can also filter forms or tasks by Categories or Organization.

Module landing > Templates m	anager > Galet	y •			
tota tota				0 ★ 🔠 Create	new form
Filters Search @	a 1	Regulatory Agency Citation Form - Only access this form through the Reg. Contact Fo., Commit General General Contact Fo., Verview associations	Onand-Nov (6,213) (6114 MA	inan 1 Marineo	
Categories	ow Q	Contact Form - Regulatory Agency - START HERE - DRAFT Vew association	Created Nov TR202D 20 34 AM	Nexas 1 Publisheb	
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\$9		Fail Protection WP DBAFT Print determination Vew associations	Charlest Nov 18 20(2) 20 34 AM	Server 1 PuBLISHED	
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Annotative reasons and proposed Constrained and proposed and		References Vew associations	Greated Ger 20,000 (ET 12 PM)	2 Publisheb	

Wed	Thu	Fri
24	25	26
Formwork inspection	Batch plant checklist	Concrete pre-placement ch
Summit Mountain punchlist	Bridge inspection	
	🔒 Clean drain inlets	
	View all (5)	1

The following Step by Step walks you through editing a To do list item:

2.3.1 TO DO LIST

The To do list shows the events and tasks assigned to y ou that need to be completed in the current week.

You can scroll forward or backward to view events and tasks for other weeks. To scroll, click the arrow icons to the left or right of the window. To go to a specific month, click the month button. Events are shown in dark gray, and tasks are light gray. When events or tasks are overdue, their text color changes to red. You can see how many overdue events and tasks you currently at the bottom right of the To do list.

Wed 24	^{Thu} 25	Pri 26	Sat 27	
Formwork inspection	Batch plant checklist	Concrete pre-placement ch		
Summit Mountain punchlist	Bridge inspection			
	🔒 Clean drain inlets	1		
	View all (6)			

You can click **View all** to see a list of all your assigned items for that day when you have several events or tasks assigned in one day.

2.3 STEP BY STEP 1 – EDIT A TO DO LIST ITEM

- 1. In the To do list, click an event or task.
 - A box shows you the item's name and reporter, a High importance icon to mark items of importance, and the Edit icon
- 2. Click the **Edit** icon.

To do list	Leader Safety Walk Inspections Event title: Leader Safety Walk_2022110700001	Ľ		🛱 November
Sun 6	Reporter Julio Salguero Leader Safety Walk_2022110700 !	1	Tue 8	Wed 9

- The Edit item dialog box opens
- 3. You can make changes to the following fields, if necessary:
 - Event title
 - Reporter
 - Event date
- Importance

When the Importance icon is red, the item is High importance, which is also reflected in the Events or Tasks pages.

To do list		Event	title: ler Safety Walk_2022110700	001	
	Sun 6	Repo Julio	ter Salguero	1	Tue 8
			Leader Safety Walk_2022110	1700 !	

Click Save.

2.3.2 SCHEDULE A FORM

You can schedule a form to be filled out for specific event dates. If the event goes beyond the scheduled date, the event state is changed to overdue.

The following Step by Step walks you through scheduling a form from the module landing page.

2.3 STEP BY STEP 2 – SCHEDULE A FORM

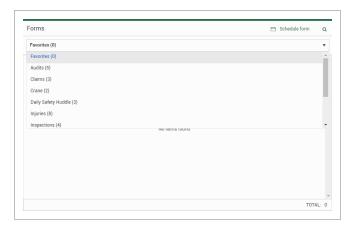
- 1. In the Forms box, click **Schedule form** in the top right corner.
 - The Schedule form dialog box opens
- 2. Fill out the required fields.
- 3. You can click the **High importance** icon to flag this event as important.
- 4. You can click **Schedule** to set this event to repeat daily, weekly, monthly, or yearly and fill out the required fields.

NOTE If you select the Exclude weekends check box, Saturdays and Sundays are greyed-out and will be excluded, even if you already selected those days.

Form name	Category
- Select one -	Select one -
- Select one -	 Select one -
Event title	Reporter
	- Select one -
[] Schedule ×	
Repeat	Start date
Weekly	 11/07/2022
1 • week(s) C Datuké week(s) End • • • • O Ather 1 • • • • O on 111/07/2822 ■ ■	tents
	Cancel Save & start new event

2.3.2.1 FORMS CATEGORIES

In the Module landing page, under Forms, you can select a category for the type of form you need. Only categories that have available templates show in the drop-down menu.The number of templates associated with the category shows next to each category title.



2.3.3 FORM AND TASK FAVORITES

When you open the module, the default view for Forms and Tasks is Favorites. In each category, you can add your favorites by selecting the **Favorite** icon next to each category title. When you add forms to your favorites, they show listed in alphabetical order. To remove from your favorites, deselect the Favorite icon.

orms	🗂 Schedule form 🛛 q,	Tasks	
fermites (5)		Permites (3)	
adis		Claims	
press of buttons	*	Jemelate Text check	*
aina		Injuries	
ssign a Task 1120am	*	Contextine Action	*
1850		Inspections	
ssign a Task 112tiam	*	Connective Action	*
	_		
	TOTAL: 5		TOTAL

2.4 UPCOMING PLANNED WORK TILE

The IWP widget tile lets you track upcoming planned and scheduled work for InEight Plan IWP components that have been mapped to Inspection and Test Plans. You can schedule events from the IWP widget panel to components that have ITP mapped. For more information, see Inspection and Test Plans. To enable the IWP widget, go to project > Module settings > Project Settings. Inspection & Test Plans and Integrate with Plan components must be enabled before you can enable the IWP widget. For more information, see <u>Project Settings</u>.

When enabled, the Upcoming Planned Work tile shows in the module landing page.

Completions Coulty •	_									
Links All events	My To Do List				C October					_
41 taoka	Sun	Mon		Tue	Wed	Thu		Fri	Sat	
All components	1	2		3	4	5		6	7	
Inspection & Test Plans										
inspection & test plan report										
Administration										
Templates manager										
lser assignments							-	Overdue events: 0	Overdue tasks	c 0
ietšings	Forms	C Schedule form	a	Tasks		٩	Upp	oming Planned Wor	Parrel	Scheduled
Treate notifications	Favorites (0)		-	Favorites (0)			1.1	h by IMP ID. IMP name, or		c
	Favorise (0)		•	Favortes (0)		•		Concrete		
							31	ete / Start Date: 08/28/2023		6 0
								WP- Steel Erection Modul	e 001	6 0
							32 Metal	s / Start Date: 08/29/2023		69 65
	No.1	erna found			No items found					
			~							

Click the IWP to show status, end date, planner, superintendent, and field engineer information.

Upcoming Planned Work Planned Search by IMP ID, IMP name, or Discipline			Scheduled
IWP-Test 61600 Concrete / Start Date //09/2023	Status : Approved End Date : 08/25/2023 Planner : Luke Mallott Superintendent : michael shaw Field Engineer : Dominic Ozzetto		×

You can schedule IWP forms from the Planned tab, and then mark them as scheduled to move them to the Scheduled tab.

Upcoming Planned Work	Planned Scheduled		
Search by IWP ID, IWP name, or Discipline			
MP-Test 61600 Concrete / Start Date: 08/09/2023	6 5		

Items marked as Scheduled are listed in the Scheduled tab. You can schedule additional items from the Scheduled tab if needed, or unschedule the item to move it back to the Planned tab.

Upcoming Planned Work	Planned Scheduled			
Search by IWP ID, IWP name, or Discipline				
IWP-Test	6			
61600 Concrete / Start Date: 08/09/2023				

2.4.1 CONSIDERATIONS

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- Components must first be associated to ITPs in InEight Plan
- IWPs must have a status of Approved or Work started.
- You must add your published template form to Required records – Compliance Forms in the ITP activity.

2.4.2 RELATED INFORMATION

InEight Plan Link activity components in Work Package Creation

2.5 PROJECT STRUCTURE

You can use the project structure hierarchy to view and filter the events performed on a project structure in the Events page. The relationships in the hierarchy list are defined in InEight Platform in Project values and Project Structure definition.

		🔯 Edit properti, 📢 📑 🚯 Q. Oker all filte									
	0	Auto	natic date filter a	ppīied	- to clear, use the	event date colu	imo filter		-		
Designation	×		Event tid 👳		Category =	Event da 🔫	Event ID, 😑	Form nai	Project/I	Reporter 👳	Status 😑
Project structure	\sim		place struct -		Building	09/20/2023	202309180	PREPARATL.	Steel Struct	Karen Loftus	Pending
	Q		This is my e-		Field Forms	09/14/2023	202309140	STRUCTUR_	Steel Struct	Michael Sh.,	Pending
			Structural c		Building	09/11/2023	202309110	PREPARATI.	Steel Struct	Karen Loftus	Pending
A Collapse all	Clear		Mike demo		Field Forms	09/11/2023	202309110	STRUCTUR_	Steel Struct	Michael Sh.,	Pending
Steel Structure Training Job (105091)	-		Mike Demo		Field Forms	09/11/2023	202309110	STRUCTUR_	Steel Struct	Michael Sh.,	Pending
↓East			PS - East		Field Forms	09/05/2023	202309070	STRUCTUR_	Steel Struct	Michael Sh.,	Pending
SEC1			PS - East -		Field Forms	09/07/2023	202309070	STRUCTUR	Steel Struct	Michael Sh.,	Pending
∽West											
~ ^{5E02}											

When the project structure feature is enabled, you can click the **Project structure** icon on the Events page to view the project structure. Component values are shown in the project structure, based on their configuration defined in InEight Plan. For more information, see InEight Plan Work Package Creation.

2.5.1 CONSIDERATIONS

 It is imperative that the Platform project definition and Plan component configuration match exactly for components to show in the structure. For example, when the project structure definition is Area = North and Segment = 1, the Plan component configuration needs to be the same. If the Plan component configuration has an area = South Area and a segment = Segment 1, the component will not show in the structure.

- Commodity and Work Classification project structure values do not exist on a component and should not be used in the project structure definition.
- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

CHAPTER 3 – COMPLIANCE SETTINGS AND ADMINISTRATIO N

3.1 SETTINGS OVERVIEW

Organization and project level settings provide the structure necessary to manage the application successfully.

At the Organization level, you can manage the following:

- Product Settings Module management and template integrations.
- Module settings Manage individual module settings and configurations.

At the Project level, you can do the following:

- View Product, Template integration and Module settings configured at the organization level.
- View and manage Roles, User assignments, and Project settings.

3.1.1 CONSIDERATIONS

- You must have Level 3 Account Admin permissions in InEight Platform, an admin role in the assigned module or modules, or an assignment to the root organization based on permission configuration.
- There are other ways to navigate to the organization or project level settings not mentioned in this document.

3.1.2 STEPS

ACCESS ORGANIZATION LEVEL SETTINGS

- From the Main menu, go to organization > Settings. The organization General Settings page opens.
- 2. Click the **Compliance** or **Completions** icon on the left navigation menu. The settings page opens to the Product Settings tab.
- You can click the Module Settings tab to open the module tiles page. Click a module to open its settings.

ACCESS PROJECT LEVEL SETTINGS

- From the project's home page, click
 Settings on the left navigation menu, and then the Compliance or Completions icon. The settings page opens to the Product Settings tab. In the Product Settings tab, you can view Module management and Template integration settings configured at the organization level.
- 2. Click the **Module Settings** tab to open the module tiles page.
- Click a module to open its settings. The Module settings page opens. You can manage roles, user assignments, and project settings.
- 4. Click the **Project Settings** tab to open the Project Settings page.

CHAPTER 3 – ORGANIZATION LEVEL SETTINGS

As an administrator, you can set up the correct settings at the organization level to manage and organize the application successfully. These settings will apply to all projects in the organization. You can view organization level settings at the project level, depending on your permissions.

Organization level settings include the following:

- Product settings
 - Module management
 - Template integrations
- Module settings
 - Module summary
 - Categories
 - Types
 - Classifications
 - Statuses
 - ° Email-templates
 - ° Roles
 - User-assignments
 - Inspection and Test Plans

3.0.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

3.0.2 STEPS

To navigate to Organization settings, go to steps to access organization level settings in <u>Settings</u> <u>overview</u>.

3.1 PRODUCT SETTINGS

At the organization level, the Product settings page contains settings that apply to the entire application in the following tabs:

- Module management Manage modules for your organization and enable Inspection and Test Plans for individual modules.
- **Template integrations** Manage templates that integrate with other InEight applications for your organization.

0 (f)	Module management Template int							۹
Ð	Module name	T Description		······································	r module name	T Inspecti	on and Test Plans	
۲	Safety	A module to track and	manage safety related business processes.	Safety		0		
8	Environmental	A module to track and	manage environmental related business processes.	Environmy	ental	0		
	Compliance	A module to track and	manage compliance related business processes.	Complian	De la companya de la	0		
٢	Change	A module to track and	manage change related business processes.	Change		0		
۲	Custom	A module to track and	manage custom related business processes.	Custom		0		
8 9 9								

3.1.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

3.1.2 STEPS

To open Product Settings, see steps to access organization level settings in Settings overview.

3.2 MODULE MANAGEMENT

In Module management you can view the list of available modules. You can filter the module's view using the **Filter** icon. You can also choose from the available columns to update your list view using the **Column chooser** icon.

In each module, you can enable the **Inspection and Test Plans** (ITP) feature. Inspection and Test Plans are disabled by default.

PRODUCT SETTINGS	MODULE SI	ETTINGS			
Module management Template	e integration				
					Q
Module name		Description	Secondary module name	Inspection and Test Plans	
Safety		A module to track and manage safety related business processes.	Safety	\odot	
Environmental		A module to track and manage environmental related business processes.	Environmental	Θ	
Compliance		A module to track and manage compliance related business processes.	Compliance	\odot	
Change		A module to track and manage change related business processes.	Change	\odot	
Custom		A module to track and manage custom related business processes.	Custom	Θ	

3.2.1 CONSIDERATIONS

- You can only view available default modules.
- You can filter and update views at the organization level only.

3.2.2 STEPS

To open Module management, see steps to access organization level settings in <u>Settings</u> overview.

3.2.3 RELATED INFORMATION

Inspection & test plans

3.3 TEMPLATE INTEGRATIONS

In Template integrations you can view, edit, and delete the list of templates created in the form builder.

		TINGS				
Mode	le management Template integrations					
	Integration title	Template name	Module	Category	Associated products	
	Change Task Integration Template	Task for Mobile	Change	Task	Change	
	Change Task Integration Template	Change Issue Creation KL NOT INTE	Change	Task	Change	
	Quality task for Change	Manager quality review	Quality	Quality review	Change	

Click on a template title to Edit the template. In the dialog box, you can edit the following:

- Integration title
- Description
- Category association
- Associated products

• Organization association

Module: Change • Created by: Karen Loftus 06/31/2022 08:50 AM		
integration fille	Organization association Show selected items only	Θ
Change Task integration Template	Search	
Description	V 🗹 C-XYZ (RootDig1) Protect Children	-
Org/Project for which the template is applied	Select al Desclert al Steel Structure Training Job (105091)	
- Category association	Steel Structure Training Job 2 (105092)	
Task	 Steel Structure Training Job 3 (105093) 	
Associated products	Steel Structure Partner Job (105094)	
Change	Training Job (Training Job)	
	 Wands Island WWTP (183850) 	
	Heavy PM Estimate (Heavy PM Estimate)	
	BMS Test (BMS Test) (BMS Test)	
	🔺 🗹 G-XYZ-ND (EO-ID) (*Titur Clides)	
	Select all Deselect all C-VYZ-6D (ED-ID-1) (*Future Children)	
	Select al. Deselect al.	v

3.3.1 CONSIDERATIONS

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- Currently template integration only integrates with InEight Change tasks.
- You can only edit and delete integration templates at the organization level.
- You cannot add new integration templates in this section.

3.3.2 STEPS

To open Template integrations, see steps to access organization level settings in <u>Settings</u> overview.

EDIT A TEMPLATE

- 1. Click the Templates Integration title. The Edit template integration dialog box opens.
- 2. Complete your edits, and then click **Save**.

3.3.3 RELATED TOPICS

Template Integration

3.4 MODULE SETTINGS

Configuring module settings at the organization level provides the structure necessary to organize and manage the application successfully. In Module settings, you can configure:

- Module summary
 - ° Configurations
- Categories
- Types
- Classifications
- Statuses
- Email templates
- Roles
- User assignments
- Inspection & Test Plans

In settings, select the **Module Settings** tab, and then a module to open its settings.

Module settings > Safety •		
Module summary Categories Types Classifications Statuses Email templates Roles User assignment	ents Inspection & Test Plans	 Temp
		Cancel Sa
Module summary	Configurations	
Module name	Alternate hierarchy	
Custori	Automatic user assignments ① Language settings ①	
Description	Module organization Approximation Reporting tags	
A module to track and manage safety related business processes.		
Email address		
InEight, Mail@INEIGHT.COM		
Activate module ?		

3.4.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

3.4.2 STEPS

To access Module settings, see steps to access organizational level settings in Settings overview.

3.5 MODULE SUMMARY

On the module summary tab, you can activate or deactivate the module, view and modify the module name and description, and edit module configurations.

Module summary	Configurations	
Module name	Alternate hierarchy	
Safety	Automatic user assignments ① Language settings ①	
Description	Module organization M Reporting tags	
A module to track and manage safety related business processes.		
Email address		
InEight.Mail@INEI0HT.COM		

The Activate module toggle can be used to activate or deactivate the module for the entire InEight product portfolio, organization, and project. Each module is self-contained and does not share information with the other modules. The changes made to a module will be shown throughout the product portfolio, module page, tabs, landing page and mobile device.

3.5.1 CONSIDERATIONS

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- To activate the module, you must select at least one module organization, a category, and a published template.
- To make the module available, you must select the **Activate module** toggle.

3.5.2 STEPS

To navigate to Module summary, go to steps to access organization level settings in <u>Settings</u> overview.

To save any changes in Module summary, click **Save**.

3.6 CONFIGURATIONS

On the Module summary tab, you can configure additional settings in Configurations. Each link shows an information dialog box you can hover over for more details.

Module summary	Configurations
Module name	Alternate hierarchy ①
Safety	Automatic user assignments Language settings
Description	Module organization ① Reporting tags ①
A module to track and manage safety related business processes.	
Email address	
InEight.Mail@INEIGHT.COM	

Configuration	Description
Alternate hierarchy	Future children assignments applied to organization level nodes on the default organization or project structure are applied to the child project per their additional relationship.
Automatic user assignments	Automatically add users from InEight Platform into Compliance/Completions.
Language settings	Select which languages you want to use in this module.
Module organization	Include or exclude organizations or project in the structure from seeing the current module.
Reporting tags	Secure information displayed in reports.

3.6.1 CONSIDERATIONS

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- Configuration settings must be done at the organization level.

3.6.2 STEPS

To go to Configurations, see steps to access organization level settings in <u>Settings overview</u>.

3.7 ALTERNATE HIERARCHY

An alternate hierarchy is separate from the default organization and project hierarchy in InEight Platform. You can set up an alternate hierarchy when you need to share templates and user permissions across projects that do not follow the default hierarchy. For example, if your default hierarchy is organized into legal entities for financial reporting purposes, you can create an alternate hierarchy based on project locations. A project in the infrastructure division might need to share templates and user permissions with a project in the Energy division because both are in the Western region.

To set up an alternate hierarchy, you must perform the following steps:

- 1. Define hierarchy attributes in Platform.
- 2. Associate hierarchy attributes at the project level with other projects or organizations.
- Extend templates and user permissions between future child projects or organizations via hierarchy attributes in Completions organization settings.

3.7.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

3.7.2 STEPS

To navigate to Alternate hierarchy, see steps to access organization level settings in <u>Settings</u>

overview.

DEFINE ALTERNATE HIERARCHY ATTRIBUTES AT THE ORGANIZATION LEVEL IN PLATFORM.

- From the Main menu, go to organization > Settings. The organization's Home Page opens.
- Click the General icon on the left navigation menu, and then click the Attribute Definitions tab.
- 3. Click the **Add** icon. The Add attribute side panel opens.
- 4. Enter the required fields.
- NOTE For hierarchy purposes, the Data type field is most often set to text or data. When the type is set to Data, you must select a data source.
- NOTE In a location-based hierarchy example, an attribute might be named Region, Data type set to Data, Data source set to Organization, and Category set to Location, which lets you associate organizations with regions.

ASSOCIATE ALTERNATE HIERARCHY ATTRIBUTES AT THE PROJECT LEVEL

- 1. From the Main menu, go to All projects & organizations.
- 2. Select the check box next to the project, and then click the **Edit project** icon.
- Select the Attributes tab. For each attribute you want to associate, select an organization from its drop-down list or enter a project ID in its field, depending on the attribute's data source.
- 4. Click Save.
- NOTE In a location-based hierarchy example, you might associate an attribute named Region with an organization that represents the Western region. If you set this association in a project in the infrastructure division of your default hierarchy, you are saying that project is also part of the Western region in an alternate location-based hierarchy.

APPLY ALTERNATE HIERARCHY TO TEMPLATES AND USER PERMISSIONS

 On the Module summary tab, click Alternate hierarchy under Configurations. The Alternate hierarchy dialog box opens.

Iternate hierarchy	
Current structure	
* User permissions to extend to all future children assignments	
	×
* Template associations to extend to all future children assignments	
	×
	Cancel Sav

- Select attributes from the drop-down lists for user permissions and template associations.
 - NOTEUser permissions and
template associations are
applied to all future child
organizations or projects of
the attributes you select. If
you remove the attributes,
the associations themselves
are not removed.
- NOTE In the example of a location-based hierarchy, if you add the Region attribute to these fields, for projects that are both associated with the Western region, templates and user permissions will be automatically assigned to users in future children of the Western region organization.

3.8 AUTOMATIC USER ASSIGNMENTS

The Automatic user assignments configuration lets you save administrative setup time by automatically assigning a Compliance or Completions role and categories to all InEight Platform users. Users will need to be assigned a role and a Project assignment in Platform, and then they will automatically get the following from automatic user assignments:

- User assignments for the role and category you provide.
- Assignment into any project they are related to in Platform.

The updates run nightly.

3.8.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

Automatic user assignments will not be assigned when organization level is chosen as the assignment in InEight Platform.

3.8.2 STEPS

To navigate to Automatic user assignments, see steps to access organization level settings in <u>Settings overview</u>.

ADD AUTOMATIC USER ASSIGNMENTS

1. Click **Automatic user assignments** under Configurations. The Automatic user assignments dialog box shows.

 Select a role to auto ass 	jn users				
L2 user EP					•
• Select a category or cat	gories to auto assign users				
Corporate Safety Form	B X District / Project Forms	×			×
	en set as of 08/24/2023 by Dinesh ie and Category(ies) applied above as		updated permissions to	projects will autom	natically be
				Cancel	Save

2. Select a role and categories from the dropdown menus, and then click **Save**.

3.9 LANGUAGE SETTINGS

You can select different languages to use in modules. All user-configurable fields can be translated into the languages you select.

After you configure your languages, to translate user-configurable fields, click the **Manage Translations** icon to select a language from the drop-down list.

	() •
🔄 Eng	ish
Dut	ch (Nederlands)
🗆 Esp	añol (América Latina)
🗌 Fra	nçais (Canada)
Nor	sk (Bokmål)

To apply translations to a template, use the import function in a template's Properties tab. For more information, see Template translation.

3.9.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

3.9.2 STEPS

To navigate to Language settings, see steps to access organization level settings in <u>Settings</u> overview.

ADD A LANGUAGE

 Click Language settings under Configurations. The Language settings dialog box shows.

 Select 	which languages you would like to use	with this module		
Engli	sh			×

- Click in the Select which languages you would like to use with this module field to view the language drop-down list, and then select a language or languages.
- 3. Click Save.

3.9.3 RELATED INFORMATION

Template Translation

3.10 MODULE ORGANIZATION

The Module organization lets you exclude any organization or project from seeing the current module. By default, all organizations and projects are included. When you exclude organizations or projects, you will not see the current module in those organizations or projects. When you exclude a project, the project cannot be used in user assignments or templates.

You might want to exclude the safety module from your project, if for example, the project is using a different software to keep track of safety data.

3.10.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

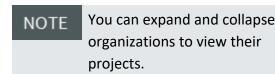
3.10.2 STEPS

To navigate to Module organization settings, see steps to access organization level settings in <u>Settings overview</u>.

EXCLUDE PROJECTS OR ORGANIZATIONS

 Click Module organization under Configurations. The Module organization dialog box opens. The hierarchy shown is your organization's operational structure.

dule organization	
Organization/Projects	
C-XYZ (ReerOrg1) (+future Children)	
iet al Georget al	
Steel Structure Training Job (105091)	
Steel Structure Training Job 2 (106092)	
Steel Structure Training Job 3 (105093)	
Steel Shuchare Partner Job (105094)	
Training Job (Training Job)	
Wards (sland WWTP (183850)	
Heavy PM Estimate (Heavy PM Estimate)	
BAAS Test (BAAS Test) (BAAS Test)	
) C-XYZ-ND (ED-ID) (* Fature Chidren)	
Select all Deselect all	
) C-XY2-5D (10-10-1) (+ Future Children)	
Select all Developt all	
) C-XYZ-050 (\$0-102) (*Falar Chiles)	
Select all Developt all	
View excluded into	Cancel Save



2. Uncheck the organization or project to exclude it from seeing the module, and then click **Save**.

To select or deselect all projects in the organization click the **Select all** or **Deselect all** buttons. You can also click the **+Future Children** button to automatically include future children projects. When selected, the button will turn green.

To view all excluded organizations or projects, enable the **View excluded jobs** toggle.

3.11 REPORTING TAGS

Within Compliance or Completions individual modules, you can configure reporting tags to secure information shown in reports. Reporting tags drive permissions when running reports. If a question is assigned a reporting tag and you are not assigned that reporting tag, you cannot see the response to the question in a report. Reporting tags are defined per module.

Reporting tags	
• 8	10
Reporting top	
) Clains	
Confidential	
Financial	
HR	
Injured Party	
Quality	
Witness	
	8 reporting t
	Cancel Save

After you add reporting tags, you can assign reporting tags to users in Module settings > User assignments.

When you build your form, you can define who can see the question reporting data in Template manager > Form builder > **Access** section.

3.11.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

3.11.2 STEPS

To navigate to Reporting tags, see steps to access organization level settings in <u>Settings overview</u>.

ADD A REPORTING TAG

- 1. Click the Add tag icon.
- 2. Enter the reporting tag name, and then click **Save**.

DELETE A REPORTING TAG

- 1. Select a tag or tags.
- 2. Click the Delete tag icon.

3.12 CATEGORIES

You can create and manage categories in your organization to divide your templates into topics that have shared characteristics. Categories are module specific and can be applied as another layer of permissions to drive security within the module.

Each template must be associated with at least one category. You can associate categories to a template in Template Properties > **Category association**. In the Templates manager page, under **Filters**, you can also filter your templates by categories.

In User assignments, you must designate categories as part of the assignment. For more information, see <u>User assignments</u>.

By creating categories, you can partition the module into smaller areas that can help define the module's purpose.

For example, you could break your module down into four different categories, such as:

- Work types
- Disciplines
- Processes
- Subcontractors

Categories can be created for anything you need based on your company's business processes.

		ettings > Quality -		
	Module su	mmary Categories Types Classifications Statuses Email templates Roles User assignments Inspection & Test Plans		 Templat
۲			Cancel	Save
\odot	0	ategories		
۲	_	-		_
8	Crea	te at least one category for the module.		
 • •<	0) 🛞	(ā •	
()		Category		
<u> </u>	0	Checkist		•
	0	Checklist O		
(g)	0	Quality I		
6	0	Quality Process		
6	0	Quality review		
	0	Safety Category 1		
		Safety Category 2		

3.12.1 CONSIDERATIONS

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- To activate the module, you must add at least one category created, in addition to a published template.
- You cannot delete categories that are designated in user assignments or used in published templates.

3.12.2 STEPS

To navigate to Categories, see steps to access organization level settings in <u>Settings overview</u>.

ADD A CATEGORY

- 1. Click the Add category icon.
- 2. Enter the category name, and then click **Save**.

DELETE A CATEGORY

- 1. Select a category or categories.
- 2. Click the Delete category icon.

3.13 **TYPES**

3.13.1 SUMMARY

Type values can be used to classify an event or task for association to filters and reporting. They allow you to add identifiers to a template to further define the activity. These are typically associated with identifying the risk of the event or task. Defining types lets you bring awareness to those risks during the closing of a phase in your project.

Types can be defined and added in the Module settings > **Types** tab. They can then be used in the Template Managers properties section, and on the reference question type.

ти	200				
Тy	pes				
Create	any desired	number o	of types for the m	odule. 🛈	
÷					
	Types				
	Туре А				
	Type B				
0	Type C				

In Templates manager, when creating a new form, the Types option is available to select or deselect in the Create new form page. Select the option to associate types to the template. When selected, the Types drop-down menu shows where you can then select from the list of defined types and make them available to use in the template form.

* Form name		* Organization association
Types template form		
Description		C-XYZ (RootOrg1) (+ Future Children)
Form to use Types feature		Select all Deselect all
Category association		
Select categories	×	
Select categories you want to associate to your forms Types		
	×	
Type A		
Type B		
Type C		Select organizations you want to be able to perform this form

When building the form, Types is automatically populated as a section header.

Like other question types, you can create a chain of associated events, setup default values,

associate classifications, add form details, among other options, depending on your business process. After the template form is created, you can enable or disable the Type option in the template properties tab.

When filling in the form, the types option shows as a question. You can select from the predefined list.

3.13.2 CONSIDERATIONS

You must have permission Create and edit types.

3.13.3 STEPS

To navigate to Types, see steps to access organization level settings in Settings.

To add a Type value:

- 1. Click the Add icon.
- 2. Enter the Type name.
- 3. Click Save.

To delete a Type value:

- 1. Select a type or types.
- 2. Click the **Delete** icon.

3.14 CLASSIFICATIONS

Classifications are used to further classify forms and associate them to filters and reporting, as well as facilitate logic within a form. You can use classifications on any template in the module.

	Module s	ettings > Quality •	
	Module su	nmary Categories Types Classifications Statuses Email templates Roles User assignments Inspection & Test Plans	
			Cancel Save
	Cl	assifications	
0	Crea	e any desired number of classifications for the module.	
•	œ	• ⊗	(1) -
		Classification	
2		Classification	^
		Final Walkdown	
0		Initial Walkdown	
Ð,	0	Quality Classification 1	
Ð		Quality Classification 2	

You can use classifications to apply logic to template headers.

Section	×	BUILD PROPERTIES HISTORY	ß
	*	Cancel	Sav
Details	^	ilite dance	-
* Label		•	
Finalize quality review process			
Associate task			
Enable copy section			
 Add supporting text (1) 		Finalize quality review process	
Access	~		
Logic	^	* Due date	
Show this section for the following cla		07/11/2023	8
Show this section for the following cla Select one	x		
Integration tag			
		* Name of person conducting the next quality review Date of upcoming quality review	
		Annu construction construction in the metal quarky review 07/11/2023	8
		* Quality step	

Go to Template creation > Form and Task Builder – Build Tab > **Classifications** section for more information.

3.14.1 CONSIDERATIONS

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- You cannot delete classifications used in published templates.

3.14.2 STEPS

To navigate to Classifications, see steps to access organization level settings in <u>Settings overview</u>.

ADD A CATEGORY

- 1. Click the Add Classification icon.
- 2. Enter a name, and then click Save.

DELETE A CATEGORY

- 1. Select a Classification or Classifications.
- 2. Click the Delete classification icon.

3.15 STATUSES

Statuses represent the condition of a form or task. Default statuses of complete, pending, scheduled, and canceled are applied to each module. New sub statuses can be created under Complete, Pending, and Canceled statuses to facilitate your business processes. You can also change or add background and text colors to statuses to customize your view.

»	Module setting	gs	Quality •						
	Module summar	ry	Categories Types Classifications Statuses Email templates Roles User assignments Inspection & Test Plans			 Template 			
۲					Cancel	Save			
۲	Stat		99						
۲						-			
8	Create an	iy ada	itional statuses for the module.						
۲	•				0 0 -				
0	i ⊗ Sys	sten/I	ser-defined status	Background	Text				
۲	Comple	Complete							
 (*) (*)	V Per	nding							
Ð			uality manager review	•					
9	0		neview						
	C		inal review						
	Schedu	uled		٠					
	🗸 Ca	ncele							
	0		eid .						
					-				

You can apply statuses to a template, and when used as an option on the perform form, either through a button or form flow, it will show on the Events and Tasks pages.

=			KS Incz / Com	president										0	æ	8 6) :
\$	iafety > Eve	ints -						•	Globa	l Events/Taski	Viev	v: My view					•
) 🛞 🎙	r.							2	dit properti	[3 🍵	1	Q	C	lear all fi	Iters
					① Aut	omatic date filter app	lied - to clear, us	e the event date	colum	in filter							
	Event title 😑	8	Category =	Event date 📒 👳	Event ID 👘	Form name	Reporter 😑	Status		State		Classifications		Types			
	Safety Conve		District / Pr	08/29/2023	202303310	Safety Conversa	Randall Ross	Scheduled		Overdue							
	Safety Conve		District / Pr	08/29/2023	202303310	Safety Conversa	Matthew Eld	Scheduled		Overdue							
	Parent Form	8	Bridge Cate	08/29/2023	202308280	Parent Form wit	Suchith Ma	Complete		Complete							
0	Child Form w-		Bridge Cate	08/29/2023	202308290	Child Form with	Suchith Ma	Complete		Complete							
	Child Form 2		Bridge Cate	08/29/2023	202308290	Child Form 25 J	Suchith Ma	Pending		In Process							
	Child Form 2-		Bridge Cate	08/29/2023	202308290	Child Form 25 J	Suchith Ma	Pending		In Process							
	Parent Form_		Bridge Cate	08/29/2023	202308290	Parent Form wit	Suchith Ma	Complete		Complete							
	Child Form w		Bridge Cate	08/29/2023	202308290	Child Form with	Suchith Ma	Pending		In Process							
	Parent Form		Bridge Cate	08/29/2023	202308290	Parent Form wit	Suchith Ma	Pending		In Process							
	Child Form w		Bridge Cate	08/29/2023	202308290	Child Form with	Suchith Ma	Pending		In Process							
	Child Form 2		Bridge Cate	08/29/2023	202308290	Child Form 25 J	Suchith Ma	Pending		In Process							
	Child Form w_		Bridge Cate	08/29/2023	202308290	Child Form with	Suchith Ma	Pending		In Process							
0	Parent Form		Bridge Cate	08/29/2023	202308290	Parent Form wit	Suchith Ma	Pending		In Process							
	Parent Form -		Bridge Cate	08/29/2023	202308290	Parent Form wit	Suchith Ma	Pending		In Process							
	Parent Form_		Bridge Cate	08/29/2023	202308290	Parent Form wit	Suchith Ma	Complete		Complete							
	Child form		## QA Perf	08/30/2023	202308300	Child Form - Mahi	Mahendra V	Pending		In Process				Mahi 4			
	Reference va-	8	III QA Perf	08/30/2023	202308300	Mobile 236 For	Mahendra V	Complete		Complete		2nd - Shot					
0	Chid reference		III QA Perf	08/30/2023	202308300	Child Form - Mahi	Mahendra V	Pending		In Process				Mahi 5			
	Reference on-		## QA Perf	08/30/2023	202308300	Mobile 236 For	Mahendra V	Complete		Complete							
	Safety Tour_		Corporate	08/30/2023	202209150	Safety Tour	Anthony Hu	Scheduled		Overdue							

The following table provides more information on the default statuses.

Statu s	Notes when:	Custo mizabl e	Permi ssion s	Can Be Ove rdu e	Edita ble
Com plete	Form or Task is compl eted, and workfl ow is done.	Yes	It has permi ssions tied to it such as when compl eted form or task locks and canno	No	Perm ission base d

Statu s	Notes when:	Custo mizabl e	Permi ssion s t be reope ned	Can Be Ove rdu e	Edita ble	Statu s d	Notes when: Even t or Task	Custo mizabl e	Permi ssion s have permi ssion	Can Be Ove rdu e	Edita ble
			by certai n roles.				was start ed but		to this statu s.		
Pen ding	Form or Task is start ed and is in this statu s until comp leted.	Yes	All roles have permi ssion to this statu s.	Yes	X	BET\ STAT	VEEN TUS	IFFERI A STA	TE AN	ID A	
Sche dule d	An Event or Task has been sched uled.	No	All roles have permi ssion to this statu s.	Yes	x	their cc Unlinke custom forms c that a v status i	ondition t e statuses ized. Stat or tasks. F vork item n your wo	rm or task hat is diffe , states ca ces are driv for exampl i is overdu orkflow or ble provid	erent fror nnot be o ven actio le, they le e regardl process.	n a stat change ns you et you k ess of i	tus. d or take in tnow ts
Can cele	An	Yes	All roles	No	X	about s	tates:				

State	Notes when:	Work item types
In Process	Form or Task is pending.	Forms and tasks.
Complete	Form or Task is complete.	Tasks only.
Overdue	Form or task workflow or due date has passed.	Forms and tasks.
Saved	Task is not yet assigned.	Tasks only.
Scheduled	Form or task has been scheduled.	Forms and tasks.
Canceled	Form or task was started but there is no intent to complete it.	Forms and tasks.

3.15.1 CONSIDERATIONS

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- The standard statuses cannot be renamed or deleted.

3.15.2 STEPS

To navigate to Statuses, see steps to access organization level settings in <u>Settings overview</u>.

3.16 EMAIL TEMPLATES

You can apply system generated email templates to send to responsible parties when events and tasks are assigned, overdue, or reversed, and to send reminders of upcoming events and tasks before they are due.

»	Module settings > Field	f Forms 🔹				
	Module summary Categorie	rs Types Classifications Sta	tuses Email templates Roles	User assignments Inspection	& Test Plans	 Templates
۲						Q
•	Name	Description	Created by	Created on	Last updated on	Last updated by 👘
۲	Assigned event	Assigned event template	Ineight Service Account	06/12/2020	08/14/2020	Ineight Service Account
	Assigned task	Assigned task template	Ineight Service Account	06/12/2020	08/14/2020	Ineight Service Account
8	Overdue event	Overdue event template	Ineight Service Account	06/12/2020	06/14/2020	Ineight Service Account
۲	Overdue Event workflow step	Overdue Event workflow step tern	Ineight Service Account	06/12/2020	06/14/2020	Ineight Service Account
۲	Overdue task	Overdue task template	Ineight Service Account	06/12/2020	06/14/2020	Ineight Service Account
	Reminder of upcoming event	Reminder of upcoming event tem	Ineight Service Account	06/27/2023	06/27/2023	Ineight Service Account
۲	Reminder of upcoming task	Reminder of upcoming task templ	Ineight Service Account	06/27/2023	06/27/2023	Ineight Service Account
	Reversed Event Workflow Notifica	Reversed Event Workflow notifica	Ineight Service Account	06/12/2020	06/14/2020	Ineight Service Account

The system-generated emails leverage predefined templates that are configurable by module administrators.

Template	Description
Assigned eventAssigned task	Emails are sent to responsible parties when you assign a task or event.
 Overdue event Overdue Event workflow step Overdue task. 	Emails are sent to responsible parties when their assigned event, task, or workflow step has passed its due date.
 Reminder of upcoming event Reminder of 	Emails are sent to responsible parties prior to the

upcoming taskevent or task due dates.• Reversed Event Workflow NotificationEmails are sent to responsible parties when a workflow is reversed back to a step already completed by the responsible party.	Template	Description
WorkflowresponsibleNotificationparties when aworkflow isreversed back toa step alreadycompleted by the	upcoming task	
	Workflow	responsible parties when a workflow is reversed back to a step already completed by the

You can edit the following items in the email templates:

- Template name.
- The body of the email, including the font.
- Change the email language.
- Add variables so that users can enter information such as reporter names or event titles into emails. To add a variable, type @, and then select an option from the drop-down list.
- Click the **Restore default template** button to restore a template to its original state.

Decketask	×	
TRUTH DUTCH MODRUMOD DIRVÉOL (MÁRCH LATINE) HAMQAD (DANICH) HOROL (BONICE)		
Insiduit D	Cuptor Da	
Angles new Tender Becker	COLUMN TWO IS NOT	
Overduer task	tors in such	
Overdue Task - [Task name] - Overdue as of [Due date]	and an owner.	
Overdue rask – [rask name] – Overdue as dr [Lue date]	and largest	
875	and the second	
Presentation and	11000	
in a science of add in our sourcher.	and the second	
Do Down		
Der der Der det		
Lot to any Lot tool		
have a fear and		
Asipar 2		
(mpy)		
Company Compan		
Uut toti form Flow (kep keppenduk Huny		
Link new seg negotiate new		
Unit in get Kak		
Nature	_	
Reserve Cose Restore default template	Seve	
Rense Connext		
Requisite party		

Click the **Restore default template** button to restore a template to its original state.

3.16.0.1 ASSIGNED, OVERDUE, AND REVERSED EVENT WORKFLOW TEMPLATES

When building your template, you can use Email templates in the following form questions:

- Button
- Form Button
- Form Flows
- Number
- People picker
- Text questions

Question types that support email notifications can be configured by selecting the question and expanding the Email option on the question property panel.

Form Flow	×	BUILD	PROPERTIES	FORM FLOWS	HISTORY
	*			u have not saved your	
Details	^		w n	id have not saved your	emplate for to
* Button text Manager Approval				← STEP 1	Reversal fo
Add supporting text ①		Manager Approval (Manager Approval - Step 1)	•		Purchasing
Mandatory		*		for Order (Manager Ap	proval - Step 2)
Question display ID:	506			×	
Access	~				
Logic	^				
Defining conditional logic rules al questions based on another ques	lows you to show or hide tions response.				
Leading questions					
Integration tag ()		Submit to Purchasing (No MGR Approval Needed -	→ Step 1)		
Email	^	*			
Adding an email allows a c to be sent once a question	onfigured email message response is triggered.				
Add email					

3.16.0.2 REMINDER OF UPCOMING EVENT AND UPCOMING TASK

The feature can be enabled on a template-bytemplate basis when creating a new form or in existing templates.

When creating a new form, select **Enable** reminder notifications, and then enter the number of days of the reminder prior to the due date.

* Form name	Organization association
Description	Select all Deselect a
Category association	
Select categories ×	
Select categories you want to associate to your forms	
Types	
Available on mobile ?	
Event title ①	
System default	
Event date (1)	
System default	
Add expiration date (i)	
Available through form button only? (1)	
Enable dynamic headers?	
Z Enable reminder notifications	
* Send reminder notification: 7 day(s) prior to the due date	

For existing templates, you can enable the feature in template properties, under **Options**. Select **Enable reminder notifications**, and then enter the number of days prior to the due date.

Available on mobile ?	Event title 🛈 E	ivent date (1)		
Θ	System default 🔹	System default 🔹	Add expiration date (
and the strength from t	utten only? Integration tag	Chable reminder r	otifications (II)	
Available through form I	sutton only? U Integration tag U	_		
Θ		 Send reminder notif 	fication: 7 day(s) prior to the due date	
Enable print functionalit	y 🚯 • Report to run		Enable dynamic headers?	
	General Forms and Tasks - Prin	Marries .	0	Add template integration
0				

NOTE The default reminder notification is 7 days, and the maximum number of days allowed is 99. You will not receive a reminder when the number of notification days is past the due date.

3.16.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

3.16.2 STEPS

To navigate to Email templates, see steps to access organization level settings in <u>Settings</u> overview.

3.17 ROLES OVERVIEW

Roles and permissions are maintained in both InEight Platform and the Compliance or Completions applications respectively.

In Compliance or Completions, you can configure roles and permissions in the Roles tab. You can add, copy, delete, and edit roles.

When creating or updating a role, you can configure permissions for the following items:

- Module
- Events
- Roles/Users

- Templates
- Project Settings

The History tab shows in existing roles.

3.17.0.1 ORGANIZATION AND PROJECT'S HOME PAGE ACCESS TO APPLICATION

The Compliance and Completions icons show in your home's landing page left navigation menu and tiles regardless of permissions.

When you click to open Compliance or Completions and do not have the applicable permissions assigned, a message shows requesting you to coordinate permissions setup with your administrator.

3.17.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

3.17.2 STEPS

To navigate to Roles, see steps to access organization level settings in <u>Settings overview</u>.

3.17.3 RELATED INFORMATION

InEight Platform Roles and permissions

3.18 INEIGHT PLATFORM PERMISSIONS

InEight Platform account administrators must have Level 3 – Account Admin permissions and full access to all modules to manage and set up Compliance or Completions roles and permissions. By default, these permissions are assigned to the Account Administrator and Dev/Ops roles. These roles should be assigned with discretion.

In Platform, you can access permissions by navigating to Main menu > Suite administration > **Roles and permissions**. Permissions for Compliance and Completions are found in the **Organization and project** drop-down menu.

NOTE There is no drop-down menu for the Compliance or Completions application in Platform Permissions.

During initial setup, a Platform role lower than level 3 will not have access to Compliance or Completions. Other permissions to access Compliance or Completions outside of the Level 3 role need to be configured and obtained within Compliance or Completions.

Platform level 3 roles are set up to edit all modules. These settings override all other Compliance or Completions level permissions. There are no settings or permissions in Platform that will allow a level lower than a Level 3 to access Compliance or Completions as an administrator. A level 3 user must be the first user to log into the application to set up users and configure the module or modules or set up a module administrator in the application to perform these tasks. It is common practice for level 3 administrators to set up additional administrative roles in Compliance or Completions.

The following table shows examples of InEight Platform's user roles and definitions:

Role	Definition	Example
Platform account administrat ors	Level 3 - Account Admin - with edit and view permission s of all modules - Highest level access.	 Account administrat or
Complianc e or Completion s product Administrat or	Level 3 - Responsib le for creating or modifying the roles for Complianc e or Completio ns Admins within each module.	 Quality Dept Administr ator Complian ce or Completio ns Product Administr ator

3.18.1 CONSIDERATIONS

- In general, the average Compliance or Completions user does not need Platform permissions to access the product. Users (other than a level 3 user) are maintained directly in Compliance or Completions. A level 3 user assignment overrides all Compliance and Completions-level assignments.
- The level 3 role must be maintained correctly in Platform to add subsequent users in Compliance or Completions.

3.18.2 RELATED INFORMATION

InEight Platform Roles and permissions

3.19 ROLES

The setup and design of Compliance and Completions roles and permissions are different than any other of the InEight cloud platform applications. A Level 3 – Account Admin role, with full permissions of all modules must be present and maintained correctly in Platform for subsequent users to get added to the Compliance and Completions application. The level 3 administrator can set up module administrators and configure modules according to business needs.

The image below shows the default seated roles:

»	Module settings > Quality •								-		
	м	odule summary Categorie	s Types Classifications	Statuses Email templ	ates Roles Use	ar assigni	ments Inspection & Test F	lans	•	Templa	tes
۲	œ) 🖬 🛞								8	Q
٠		Name †	Description	Created by	Created on		Last updated on	Last update	ed by		1
۲	0	Module administrator	Module administrator - Pr.,	Service Account	11/04/2019		06/26/2023	Julio			Т
		Read-only	Read-only - Allows users r	Service Account	11/04/2019		11/04/2019	Service Acc	ount		1
8		Reporter	Reporter - Allows performi	Service Account	11/04/2019		11/04/2019	Service Acc	ount		Т
۲											1
0											
8											

Name	Definition
Module administrator	Full access to all the permissions.
Reporter	A general role that allows the execution of forms in any category or project assigned. It does not allow manipulation of other users, role creation, or template creation.
Read-only	A general role that allows the viewing of events and tasks in assigned categories or projects. It does not allow manipulation of other users, roles, templates, events, or tasks.

Role permissions are module specific. They are comprised of permissions that you can perform in a specific module. You can create different roles with specific permissions as needed to facilitate any process you plan to do in a module. When you create a new role, it will default to Reporter role permissions. After you create a role, you can update its permissions.

The following table shows examples of user roles and definitions:

Role	Definition	Example names
Module Administrat or	Responsible for administerin g Compliance or Completion s daily per the organization al assignment s.	Complian ce or Completio ns Module administra tor
Other general roles	Specific job roles with limited access.	 Form Creator Crane Manager

NOTE In User assignments, you must designate roles as part of the assignment. The users in the assignment will inherit the permissions in the designated role. For more information, see <u>User</u> <u>assignments</u>.

The roles tab page shows the following role columns:

- Name
- Description
- Created by
- Created on
- Last Updated on
- Last updated by

You can filter the columns and use the Column chooser to customize your view.

3.19.1 STEPS

To navigate to Roles, see steps to access organization level settings in Settings overview.

ADD A NEW ROLE

- 1. Click the **Add role** icon. The Add role dialog box opens.
- 2. Fill in the required role name and optional description.
- 3. Select the designated permissions, and then click **Save**.

COPY OR DELETE A ROLE OR ROLES

- 1. Select the checkbox next to the role or roles.
- 2. Click the **Copy role** icon to copy or the **Delete role** icon to delete.

EDIT A ROLE

- 1. Click the role name link. The Edit role dialog box opens.
- 2. Edit the role, and then click **Save**.

3.19.2 RELATED LINKS

InEight Platform <u>Roles and permissions</u>

3.20 MODULE PERMISSIONS

Within Compliance or Completions individual modules, you can configure permissions for the module. To go to Module permissions, go to Module settings > **Roles**. Select **Add role** or click an existing role to edit the role, and then select the **Module** tab.

* Name	Description	
Module administrator		ministrator - Provides access to all administration features
MODULE EVENTS ROLES/	JSERS TEMPLATES PROJECT SETTINGS HISTORY	
Z Edit module summary	Create and edit categories	Create and edit statuses
Z Edit email templates	Manage module organization exclusions	Create and edit classifications
Create notifications	Create and edit types	
Make this role read only (1)		

The following table is a summary of permissions in the Module tab:

Permissi on	Location	Allowed actions
Edit module summary	Module settings > Module summary tab.	 Edit Module name and descript ion. Activate and deactiv ate module toggle.

Permissi on	Location	Allowed actions	Permissi on	Location	Allowed actions
	Compliance/Co mpletions landing page.	 Manag e Configu rations. View module tiles 			s, roles, and users in your assign ments.
		Accordi ng to your assign ments. Module landing • View		Module settings > Categories tab.	 Add and delete categor ies.
	Module landing page.			User assignments.	 Design ate catego ries.
Edit email template	ditModule settings• Editmail> Emailemailemplatetemplates tab.template	 Edit email 		Template properties.	 Associa te categor ies.
S		Manage module organizat ion exclusio ns	Module settings > Module summary > Configurations > Module organization.	 Exclud e or include organiz ations or project s. 	
Create notificati ons	Events and tasks lists (Project level).	Create notifica tions for project	Create and edit types	Module settings > Types tab .	 Add and delete types.

Permissi on	Location	Allowed actions	Permissi on	Location	Allowed actions
	Template manager > Create new form.	 Select or desele ct Type drop- down option. 		Template manager > Form builder or Task builder .	ns. Select classification s in template headers under the Logic drop-
	Template manager > Form builder > Properties tab.	 Select or deselec t Types option. 		CONSIDERA	
Create and edit statuses	Module settings > Statuses tab.	 Add statuse s. Edit statuse backgr ound and text color. Delete a status. 	 You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions. The Make this role read-only option is available in all tabs, except for the History tab. For more information, see <u>Read only role</u>. 3.20.2 STEPS To navigate to Module permissions, see steps to access organization level settings in <u>Settings overview</u>. 		
		performing an event.		VENTS ISSIONS	
Create and edit classifica tions	Module settings > Classifications tab.	Add classification s. Delete Classificatio	modules, you Events. To go	bliance or Completion u can configure perm o to Events permissio ings > Roles . Select A	iissions for ons, go to

an existing role to edit the role, and then select the **Events** tab.

Name	1	Description
Module administrator		Module administrator - Provides access to all administration features
MODULE EVENTS ROLES/	JSERS TEMPLATES PROJECT SETTIN	IGS HISTORY
✓ Edit completed events/tasks ①	Delete events/tasks	View deleted categories in the event/task list
Edit event/task properties (1)	Copy events/tasks from event	/task list
Edit event/task proj/org		
 Edit event/task category 		
Z Edit event/due date		
Edit event/task status		
 Edit event/task Reporter/Respons 	ble party	
 Edit event/task title 	, ,	
Only provide access to own forms/task	on the event their list	
Categories	on the event took hat	
Allow access to event/task history		
+For the following categories		

The following table is a summary of permissions in the Events tab:

Permission	Location	Allowed actions
Edit completed events/tasks	Events and Tasks lists	 Reopen a complete d event/tas k to pending status.
	Event (inside) Task (inside)	Use the Complet e button after a closed event or task is edited.

Permission	Location	Allowed actions
Edit event/task properties (The sub- permissions below can be selected and deselected after Edit event/task properties is selected.)	Events list Task list Event (inside) Task (inside)	 Edit and event or task in your assignm ents using the Informati on slide- out panel.
	Form flow panel for event.	 Edit user on the current active step.
Edit event/task proj/org	Events list Tasks list Event (inside) Task (inside)	 Edit the project and organizat ion field of any event or task in your assignm ents using the Informati on slide- out panel.
Edit event/task category	Events list	 Edit the Categor

Permission	Location	Allowed actions	Permission	Location	Allowed actions
	Tasks list Event (inside) Task (inside)	y field of any event or task in your assignm ents			assignm ents using the Informati on slide- out panel.
		using the Informati on slide- out panel.	Edit event/task Reporter/Respo nsible party	Events list Task list Event (inside)	 Edit the Reporter and Responsi ble party
Edit event/task due date	Events list Tasks list Event (inside) Task (inside)	 Edit the Event date and Due date fields of any event or task in your assignm ents using the 		Task (inside)	fields of any event or task in your assignm ents using the Informati on slide- out panel.
		Informati on slide- out panel.	Edit event/task title	Events list Task list Event	 Edit the title field of any event or
Edit event/task status	Events list Task list Event (inside) Task (inside)	 Edit the Status field of any event or task in your 		(inside) Task (inside)	task in your assignm ents using the Informati on slide-

Permission	Location	Allowed actions	Permission	Location	Allowed actions	
Delete events/tasks	Events list Task list	out panel. • Delete any event in the assignm ents	Allow access to	Event	other events or tasks you did not initiate as a reporter.	
Copy events/tasks from event/task list	Events list Task list	area. • Copy an event or task. You cannot copy an event with form flow.	Allow access to event/task history (Select one or more categories from the drop- down list) The Make this role in all tabs, except for	and task informati on panel read-only o	history of the event or task.	
View deleted categories in the event/task list	Events list Task list	 Filter to show inactive categorie s. 	only role for more information. Considerations You must have Level 3 – Account Accou			
Only provide access to own forms/tasks on the event/task list (Select one or more categories from the drop- down list)	Event list Task list	 View only events where you are a reporter. You cannot see any 	applicable pe • The Make thi available in al	rmissions. s role read-o l tabs, excep information PS ule permissi	only option is ot for the History n, see <u>Read-only</u> ons, see steps to	

3.22 ROLES AND USERS PERMISSIONS

Within any Compliance or Completions individual modules, you can configure roles and user permissions. To go to Roles/Users permissions, go to Module settings > **Roles**. Select **Add role** or click an existing role to edit the role, and then select the **Roles/Users** tab.

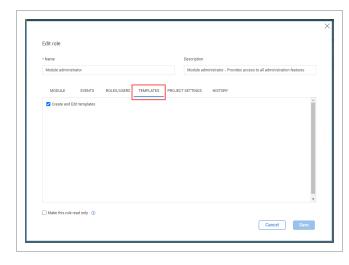
Name Module administrator	Description Module administrator - Provides access to all administration features
MODULE EVENTS ROLES/USERS TEMPLA	TES PROJECT SETTINGS HISTORY
Create and edit user assignments Restrict the ability to assign users to the following role Roles	
Restrict the ability to assign users to only the followin Reporting tags	reporting tags:

The following table is a summary of permissions in the Roles/Users tab:

Permissi on	Location	Allowed actions
Create and edit roles	Roles	 Add, edit, copy, and delete roles.
	Add and edit role dialog box	 Add and edit name.

Permissi on	Location	Allowed actions
	Compliance/Co	 Add and edit descrip tion. Add and edit all permis sions. View
	mpletions Landing page	tiles accordi ng to your assign ments.
Create and edit user assignm ents (The sub- permissi ons below can be selected and deselect ed after Edit event/tas k	User assignments	 Add, remove and transfer user assign ments. Add reporti ng tags.

Permissi on	Location	Allowed actions	Permissi on	Location	Allowed actions
propertie s is selected)	Compliance/Co mpletions landing page	 View module tiles accordi 	the ability to assign users to only the following reporting tags:	tags dialog box in User assignments	assign the selected reporting tags to users.
	Module landing page	ng to your assign ments. • View side menu User assign ments link.	You must ha permissions or Completic permissions. The Make th in all tabs, ex information,	his role read-only opt xcept for the History . see <u>Read-only role</u> .	Admin r a Compliance licable tion is available
Restrict the ability to assign users to the following roles:	Add user assignments wizard	Restrict roles available to create and edit user assignments.	access orgar overview.	STEPS to Module permissio nization level settings	in <u>Settings</u>
	Remove user assignments	Remove icon is available only from roles list associated with the permissions.	Within any C modules, yo permissions to Module se	ISSIONS Compliance or Compl u can configure temp . To go to Templates ettings > Roles . Selec	blate permissions, go t Add role or
Restrict	Add reporting	Can only		ing role to edit the ro mplates tab.	ole, and then



The following table is a summary of permissions in the Templates tab:

Permiss ion	Location	Allowed actions
Create and edit templat es	Templates manager forms	 Create, edit, copy, deactiv ate and delete forms.
	Templates manager tasks	 Create, edit, copy, deactiv ate and delete forms.
	Form builder	 Use all function s includin g form flows.

Permiss ion	Location	Allowed actions
	Task builder	Use all functio ns.
	Compliance/Com pletions landing page	 View module tiles accordi ng to your assign ments.
	Module landing page	 View side menu Templa tes manag er link.

3.23.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

The **Make this role read-only** option is available in all tabs, except for the History tab. For more information, see <u>Read only role</u>.

3.23.2 STEPS

To navigate to Module permissions, see steps to access organization level settings in <u>Settings</u> overview.

3.24 PROJECT SETTINGS PERMISSIONS

You can configure project settings permissions within the individual Compliance modules or in Completions that can be associated to roles.

Project Settings permissions are in Module settings > **Roles**. Select **Add role**, or click an existing role to edit the role, and then select the **Project Settings** tab.

age Project User Groups	
reate and edit User groups	

The following table is a summary of permissions in the Project Settings tab:

Permission	Description
Enable/ Disable Project Structure	Enable or disables the ability to manage, add, and edit project structure header templates, and add them to forms, based on user assignments at the project level. When selected, the Edit header template checkbox is automatically

	Permission	Description
		selected.
	Edit header template	Enable the ability to edit header templates associated with the project structure process at the project level.
× ×	Manage Project Inspection and Test Plans	Enable the ability to manage, add, and edit Inspection and Test Plans (ITPs), and edit ITP header templates in Module settings > Inspection and Test Plans tab at the project level. You can access the Inspection and Test plan report in the module landing page in the left navigation menu. When enabled, the Create and edit Inspection and Test Plans and Edit header template check boxes are automatically selected.
ld	Create and edit Inspection and Test Plans	Enable the ability to create and edit Inspection and Test Plans (ITPs) at the project level in Module settings > Project Settings > Inspection and Test Plans section. You can access the Inspection and Test plan report in the module landing page

Permission	Description	Permission	Description
Edit header template	in the left navigation menu. Enables the ability to edit the header template	Setup Automapping criteria	Enable the toggle to manage Setup Automapping criteria in Project settings.
	associated with the Inspection and Test Plan process at the project level.	Perform Automapping	Enable the toggle to allow users with permission to run automapping. The toggle ability is associated
Manage Project User Groups	Enable the toggle to manage, create and edit User Groups at the project level in the Module		with the Manage Automapping option that you can enable at the project level.
	settings > Project Settings > User Groups section. When selected, the Create and edit User groups check box is automatically selected.	You must have a Le	NSIDERATIONS evel 3 – Account Admin role in a Compliance or Completions cable permissions.
Create and edit User groups	Enable the ability to manage, create and edit user groups in the project settings.		e read-only option is available or the History tab. For more <u>ead-only role</u> .
Manage Automapping	Enable the ability to manage, setup criteria for, and perform automapping at the project level in the Module settings > Project Settings > Automapping	3.24.2 STE To navigate to Mod instructions in <u>Sett</u> 3.25 HIS	dule permissions, follow the ings Overview.
	section. When selected, the Setup Automapping criteria and Perform Automapping check boxes are automatically selected.	modules, you can y performed in a role go to Module setti	ance or Completions individual view the history of any changes e. To go to the history of a role, ngs > Roles . Click an existing e, and then select the History

tab.

The History tab provides a list of changes made to a role. You can also edit the role's **Name** and **Description** fields. As with other InEight features, data in these columns can be filtered or sorted.

Each time a role is updated and saved a new entry is created. Each change constitutes a new line item on the History tab.

For auditing purposes and to meet ISO requirements, changes to roles are recorded with date and version history.

The following is a summary of the contents in the History tab:

Column name	Description
Permission category	Name of the category where the change occurred. Module, Events, Roles/Users, Templates, or Project Settings.
Permission	Specific permission in the category that was changed.
Action	The action that was performed.
Change date	The date the change took place.
Changed by	The name of the user responsible for the change.

3.25.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

3.25.2 STEPS

To navigate to Module permissions, see steps to access organization level settings in <u>Settings</u> overview.

3.26 READ-ONLY ROLE

Within Compliance or Completions individual modules, you can configure roles with read-only permissions. To enable **Make this role read only**, go to Module settings > **Roles**. Select **Add role** or click an existing role to edit the role, and then select **Make this role read only**. You can select the option in the Module, Events, Roles/Users, Templates, or Project Settings tab.

The Make this role read-only option allows you to only view events and tasks based on their user assignments.

Edit module summary	Create and edit categories	Create and edit statuses
Edit email templates	Manage module organization exclusions	Create notifications
Create and edit User groups	Create and edit classifications	Create and edit Inspection and Test Plans
Create and edit types		

The following table is a summary of the read-only role:

Location	Description
Compliance or Completions landing page	 View module tiles according to your assignments.
Module	• View links, forms,

Location	Description
landing page	 and tasks To-do list is not shown because forms and tasks cannot be assigned.
Events page	 View events according to your assignments. View information side panel. Cannot enter information in fields.
Tasks page	 View tasks according to your assignments. View information side panel. Cannot enter information in fields.

3.26.1 CONSIDERATIONS

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- When you select Make this role read only option, any other permissions previously selected will be automatically deselected.

3.26.2 STEPS

To navigate to Module permissions, see steps to access organization level settings in <u>Settings</u> overview.

3.27 USER ASSIGNMENTS

You can use user assignments to assign any InEight Platform user to a Compliance or Completions organization, project, category, and role. The user will have access to manage Compliance or Completions, according to their assignment.

The User assignments tab page shows all users from InEight Platform. The user's name, email, and status are pulled from their profiles in Platform. The designated Roles, Reporting tags, and Last updated information from their assignments are also shown.

=	<u>ہ</u>	C-XYZ / Settings							D 4 8 (٥
»	Modu	le settings 📄 Qualit	у •							
	Module	summary Categories	Types Classificati	ons Statuses Emai	il templates Roles	User assignments	Ins	pection & Test Plans	⊕ Ter	nplate
(e)	۰.					e) Ren	nove reporting tags	Q Reset	view
• »		Name =	Roles I	Email 👘	Active/Inactive	Reporting tags		Last updated on	Last updated by	
		tem Lefter	Reporter, Module adm.	tare thugs age .	Active			00-11-2023	Karen Loffun	
		Michael Davellowight	Reporter, Mudule adm.	michael shaw [insigh.	Active			00-00-0113	Michael (here]its	494
8	0	band influention in	Reporter	band heffine proop.	Active			00-00-0123	Michael Davejine	-
۲	D	Julio Saliyama	Module advancements.	plo salparoficiajt.	Active			08-14-2023	Karen Loftus	
0	D	Jonatan Mendez		pratas nandec@rail.	Active					
8	D	Define, Tassie		starting participants.	Active					
		unel.unel		une " (insight con	4,014					
0		ineline1		une (firmple con	Ac10+#					
		usedused		une Spraight com	Ac1014					
6	D	Used Used		une tij onget om	Active					
	D	used used		userfightinght com	Active					
		used.comb		unertificangle com	Active					
		unelune!		une " (insight con	Active					
	0	Used Used		unarfu@inaight.com	Active					

User assignments are added by designating users to organizations, projects, categories, and roles. You can also assign Reporting tags to users. For more information about reporting tags, see <u>Reporting tags</u>.

• •				🕞 Ren	nove reporting tags
Add user assignments	Roles -	Email	Active/Inactive 😇	Reporting tags	Last updated on
Add reporting tags	Reporter, Module adm	karen loftunginnight.	Active		09-11-2023

NOTE Automatic user assignments can be configured to assign roles and categories to InEight Platform users. For more information see <u>Automatic</u> <u>user assignments</u>.

After user assignments have been designated, they can be removed or transferred to other users.

ASSIGNMENTS HISTORY				
€				
Irganization/Project		Role 1	Category =	
BC Mining Group (ABC-W1),BMS Test (BMS	Test),	Module administr_	Checklist, Checklist Q, Quality I, Quality Process, Quality review, Safety Category 1, Safety Category	Θ
BC Mining Group (ABC-W1),BMS Test (BMS	Test),	Read-only	Checklist, Checklist Q, Quality I, Quality Process, Quality review, Safety Category 1, Safety Category	Θ
BC Mining Group (ABC-W1),BMS Test (BMS	Test)	Reporter	Checklist, Checklist Q, Quality I, Quality Process, Quality review, Safety Category 1, Safety Category	Θ

In the Add user assignment wizard an assignment consists of one or more users, organizations, projects, categories, and roles.

3.27.0.1 ASSIGNMENTS AND HISTORY

When viewing a user assignment, the user assignment page shows the Assignments and History tabs. The Assignments tab lists all user assignments. You can filter them by Organization/Project, Role, or Category. The History tab lists the history of all assignment's changes. You can filter them by Change type, Role, Category, Organization/Projects, Reporting tags, Change date, and Changed by.

3.27.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

3.27.2 STEPS

To navigate to User assignments, see steps to access organization level settings in <u>Settings</u> overview.

ADD A USER ASSIGNMENT

- Click the Add icon, and then select Add user assignments from the drop-down list.
- 2. Select users to add assignments to, and then click **Next**.

NOTE When you add multiple users, the assignment is listed individually for each user.

 Select the organizations, projects, categories, and roles to designate for the selected users, and then click **Done**.

> NOTE You can be assigned multiple assignments. Assignments do not affect existing Platform roles.

TRANSFER USER ASSIGNMENTS

 Click a user's name. The user assignment window opens that shows all user's assignments.

- 2. Click the **Transfer assignment** icon next to the role you want to transfer.
- In the assignment wizard, select the user, categories, organizations and projects to transfer the assignment to, and then click Next.
- In the Confirmation step, click Transfer. You can click the Transfer drop-down, and select Transfer and select next user, or Transfer and close.

NOTE

You can only transfer one role's assignment at a time.

REMOVE USER ASSIGNMENTS

- Click a user's name, and then click the **Remove assignment** icon next to the role. The Remove user assignment wizard opens.
- 2. Select organizations, projects, and categories to remove, and then click **Done**.
- NOTE Email notifications are sent when adding, transferring, and removing assignments.

VIEW USER'S ASSIGNMENT HISTORY

- Click a user's name, and then select the History tab.
- 2. Click **Close** to close the window.

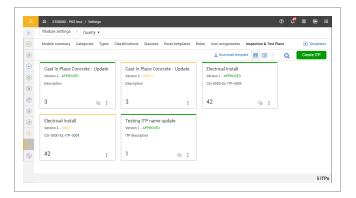
ADD REPORTING TAGS

- 1. Click the **Add** icon, and then select Add reporting tags.
- 2. Select users to add reporting tags to, and then click **Next**.
- 3. Select reporting tags to include, and then click **Save**.

NOTE To create reporting tags, see <u>Reporting tags</u>.

3.28 INSPECTION AND TEST PLANS

You can manage Inspection and Test Plans (ITP) in the Inspection & Test Plans tab. You can create, edit, copy, create new versions, and import ITPs at the organization level.



For more information about managing ITPs, see Inspection & Test Plans.

3.28.1 CONSIDERATIONS

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- To access Inspection & Test Plans, it must be enabled for the module in org > Product Settings > Module management. For more information, see <u>Module management</u>.

3.28.2 STEPS

To navigate to the Inspection and Test Plans tab, see steps to access organization level settings in <u>Settings overview</u>.

For more information about creating ITPs at the organization level, see <u>Create ITPs At The</u> Organization Level.

CHAPTER 4 – PROJECT LEVEL SETTINGS

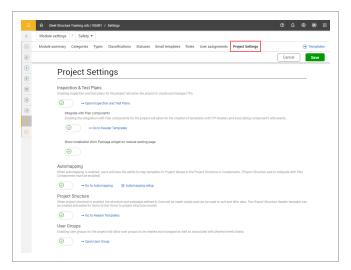
4.1 PROJECT LEVEL SETTINGS

You can enable project-level settings in either the individual Compliance modules or in Completions to successfully manage projects' business processes. The settings are applied throughout the project.

In Project Settings, you can manage the projects' ability to use the following features:

- Inspection & Test Plans
 - Integrate with Plan components
 - Show Installation Work Package (IWP) widget on the module landing page
- Automapping
- Project Structure
- User Groups

These functions can be enabled on a project-byproject basis.



At the project level, administrators can manage roles and user assignments. For more information about managing role, see <u>Roles</u>. For more information about managing user assignments, see <u>User assignments</u>.

4.1.1 CONSIDERATIONS

- You must have a Level 3 Account Admin role in InEight Platform or a Compliance or Completions role with the applicable permissions.
- You are only allowed to view and not manage other product and module settings that have been configured at the organization level. To manage, click the Modify at the root level organization icon at the top of the page.

	1	=
»	PRODUCT SETTINGS MODULE SETTINGS	
	Module management Template integrations	t
٩		Q

 For more information about the project settings at the organization level, see <u>Project settings permissions</u>.

4.1.2 STEPS

To navigate to Project settings, follow the instructions in <u>Settings overview</u>, and then click the **Project settings** tab.

4.2 INSPECTION & TEST PLANS

You can enable and manage the following Inspection and Test Plans settings and related features in either the individual Compliance modules or in Completions. The settings are applied throughout the project:

- Inspection & Test Plans (ITP) Create and manage ITP's for your project. For more information, see Inspection & Test Plans.
- Integrate with Plan components Create templates with ITP headers and associate InEight Plan components with events. For more information, see ITP header template.
- Show Installation Work Package (IWP) widget on module landing page – You can view and manage IWP's from the module landing page in the Upcoming Planned Work tile. For more information, see

Upcoming Planned Work tile.

M	dule summary Categories Types Classifications Statuses Email templates Roles User assignments Project Settings
•	Cancel Sav
•	Project Settings
۲	Troject Settings
8 8 9 8	Inspection & Test Plans
(3)	Enabling inspection and test plans for the project will allow the project to create and manage ITPs.
(R)	Open Inspection and Test Plans
0	Integrate with Plan components Enabling the integration with Plan components for the project will allow for the creation of templates with ITP headers and associating components with events.
0	Oo to Header Templates
	Show Installation Work Package widget on module landing page
	Drow Installation Wav Pacage widget on module landing page

4.2.1 CONSIDERATIONS

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- To integrate with Plan, you must enable ITP mapping between Completions and Plan in InEight Plan project settings.

4.2.2 STEPS

To navigate to Project settings, see steps to navigate to project level settings in <u>Settings</u> <u>overview</u>, and then click the **Project settings** tab.

4.3 AUTOMAPPING

You can enable the Automapping setting for your project in either the individual Compliance modules or in Completions. The setting is applied throughout the project.

When enabled, you can map templates to project values in the project structure or components and

create a series of checklists for project structure levels (nodes) or inspection and test plans.

Automapping is enabled on a project by project basis in project> Settings> Project Settings> Automapping. This enables the Go to Automapping and Automapping setup links.

	Ω Steel Structure Training Job 105091 / Settings ⑦ Ω ⑧ 🛞
»	Module settings 🗧 Safety 💌
	Module summary Categories Types Classifications Statuses Email templates Roles User assignments Project Settings 💿 Template
Ð	Cancel Save
٢	Project Settings
۲	
8	Inspection & Text Plans
8	
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0	have to repair at the report to be part of the to be safe chapter at the safe or an any report of and
¢.	House have
	New consister that for age on prior is seen as the expe
	Automapping When extensions by sensitive, serve will have the ability to map templates to Project Values in the Project Structure or Components, (Project Structure and/or Integrate with Print Components and the ended) Image: Im
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When enabled, you can configure automapping in Go to Automapping, Automapping setup, Map project structure, and Map templates. For more information, see Automapping <u>Overview</u>.

4.3.1 CONSIDERATIONS

- You must have a Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- The setting Project structure or Integrate with Plan components must be enabled in addition to published templates.
- ITP or Project Structure associations must be configured.
- A project structure and values must be set up in InEight Platform.

4.3.2 STEPS

To navigate to Project settings, follow the instructions in <u>Settings overview</u>, and then click the **Project settings** tab.

4.4 PROJECT STRUCTURE

You can enable the Project Structure setting in either the individual Compliance modules or in Completions. The settings are applied throughout the project.

When enabled, a Project Structure Header is created in the Headers tab and the structure and metadata defined in InEight Platform shows in the header template. You can use the structure to sort and filter data.

To do this, enable the **Project Structure** toggle. This will enable the **Go to Header Templates** link to access the Headers page.

	🐼 Steel Structure Training Job 105091 / Settings 🛛 🗘 🛞 🕞
»	Module settings 🖒 Safety 💌
	Module summary Categories Types Classifications Statuses Email templates Roles User assignments Project Settings
Ð	Cancel Save
Ð	Project Settings
e e	Inspector & Set Pape
6	0
3	Staple of the country
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	The constants from foreign engine in terms and a program
	Advances of the second s
	C
	Project Structure When project structure is easied; the structure and metadata defined in Core will be made visible and can be used to sort and filter data. The Project Structure Header template can be created addated to forms to low forms to project absorbance records.
	Go to Header Templates
	the Tropp
	0

In the Headers page, you can oversee and manage Project Structure Headers for projects.

For more information, see <u>Project structure</u> <u>header template</u>.

4.4.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

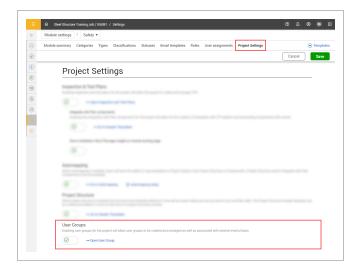
4.4.2 STEPS

To navigate to Project settings, follow the instructions to access project level settings in <u>Settings overview</u>, and then click the **Project settings** tab.

4.5 USER GROUPS

You can enable user groups to be created and managed for your project in either the individual Compliance modules or in Completions. The settings are applied throughout the project.

User groups provide access to events and tasks that may be beyond the usual permissions.



You can use a user group to give access to events and tasks to members of that group, even if they would normally not have permission to view events or tasks in selected categories. User groups can also be used in a template's From Flow option as responsible parties.

After you create a user group, you can assign the user group to individual forms or tasks when you fill them out or when you open an event or task after it has been started.

For example, when a subcontractor is performing work on a project, and another entity is doing quality assurance, the subcontractor will not be part of the project's NCR process and will not be assigned the category for the form. However, if a piece of the subcontractor's work was nonconforming, users from the subcontractor can be associated to a specific user group, and the user group associated with the events (NCRs) to address them.

Click **Open User Group** to open the User groups page tab. In User Groups you can create, edit, copy, deactivate, and delete user groups.

		USER GROUPS	INSPECTION & TEST PLA	NS	
				۹	Create user grou
TW InEight Created Jan 27,2023 07:34 AM Julio Salg InEight group	uero	Quality tour viewers Created Jan 27,2023 07:35 AM. Viewers of quality forms	Julio Salguero	Inspection viewers Created Jan 27,2023 07;36 AM Julio Salgu Viewers of inspection forms	610
2 28	:	2 28	:	7 🕾	:

4.5.1 CONSIDERATIONS

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- To delete a user group, you must deactivate it first, and then remove all users from the group.
- Only users with assignments to the project are shown on the list of Available users. For more information, see User assignments.

4.5.2 STEPS

To navigate to User Groups, follow the instructions to access project level settings in <u>Settings overview</u>, and then click **Open User Group**.

CREATE USER GROUPS

- Click the Create user group button, and then fill in the User group name, Description, and select users from Available users to include in the group. You can use the search box and select users or use the Select all option.
- Click Save. The new group tile will show. The tile will show the group name, date and creator name, description, and number of users in the group.

VIEW, EDIT, OR COPY A GROUP

- Click a group tile. The group opens and shows the Detail and History tab. In the history tab, you can view the history of changes, names, change dates, and changed by information.
- In the Details tab, make your changes, and then click Save. Select the Show selected users only toggle to view the selected users only.
- To copy, click the ellipses in the group tile, and then select Copy. A copy of the group is created.

DEACTIVATE AND ACTIVATE A GROUP

- Click the ellipses in the group tile, and then select **Deactivate**. The group tile will turn gray when deactivated.
- 2. Click the ellipses in the group tile, and then select **Activate** to activate the group.

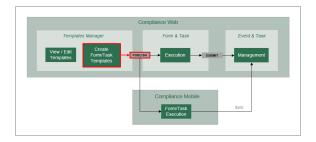
DELETE A GROUP

- You must first deactivate the group, and then remove all users from the group by editing the group.
- 2. Click the ellipses, and then select Delete.

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CHAPTER 5 – TEMPLATE MANAGEMENT

5.1 TEMPLATE OVERVIEW



A template is a task or a form (or checklist) set up in advance for inspections and other tasks that require documentation during the life cycle of your projects.

You can use templates to standardize your organization's form and data capturing process. For example, if your projects always require a safety tour, you can create a safety tour template, so the same safety tour form is used for every project. This leads to capturing the same data from project to project, and to reporting that is clear, concise and meaningful. At the same time, should your project have unique requirements for a safety tour, you can customize your template for your specific project needs.

The Templates Manager is the storehouse for all your template forms. You access the Templates Manager from any of your Module landing pages.

Links	
All events	To do list
All tasks	
Templates manager	<
Administration	
Roles	
User assignments	

NOTE Depending on your permissions, you may not have access to edit or create new template forms/tasks, but you will still have access to copy them.

Overview - Templates Manager

	Title	Description
1	Filters	Search for a template by keyword or filter down your templates by selecting the appropriate category and/or organization.
2	Form/Task toggle	Toggles between each the Form and Task templates, per module.
3	Template status	Each template has a status: Published - available to fill out via web or mobile device Draft - being built and not yet available for use to fill out Inactive - not drafts, but available to

Overview - Templates Manager (continued)

	Title	Description
		activate when needed Selecting a status option filters to only templates with that status.
4	Template form	Provides key information about the template, including: form name and ID, associations, creation date, time and author, and version. When hovered over, options appear to delete the form (if it is a draft) or to edit, copy, or deactivate the form (if it is published).
5	Available on mobile	This option visually identifies if a template is available on a mobile device. [Shown as the column

	Title	Description
		"Mobile" when in the List View for Tasks.]
6	Favorites	This option filters to templates tagged as favorites.
7	Create new form/task	Click this button to launch the Form Builder/Task Builder page, where you can create a new template form or task.

Module landare > Templates ma	ager > Sat	······································	0.0	0
Former Tax	PUBL	SHOT RACTINE		Create new rorr
Filters 🚹 🗆	ISAPULO)	Project Manager Safety Walk	Created Jun 12,2020 01-49 PM	Vetago
Search (1)	٩	View associations	Created Aur 122820 01.49 PM	
Categories	Crear	Leader Safety Walk Leader Safety Walk	Created Jun 08.2023 09.23 AM	Vesion 1 ☆
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Crane				
Daily Safety Huddle				
🗋 Injuries				
Inspections				
Organization	Clear			
	Q			
× □ c-xvz				
Steel Structure Training Job				
 Steel Structure Training Job 3 Heavy PM Estimate 				
 BMS Test (BMS Test) 				
	_			2 Forms

5.1.0.1 TEMPLATES MANAGER PAGE VIEW

Each template form or task shows key information about the form or task, including:

• Name and Description of the form/task

Created Mar 24,2020 11:57 AM Karen Loftus

3

- Associations
- · Availability on Mobile
- Creation date, time, and author
- Version
- Status

To be completed by the Lead/Supvr in charge

Incident Form



For published templates, options appear to either edit, copy, or deactivate the form/task.

		+		
Created Oct 09,2019 09:41 AM Karen Loftus	1	1 PUBLISI	HED	*

5.1.0.2 VERSIONING

A new version is created when a draft is published. Even if no information has changed on the template. Once it enters a draft status and that draft is published it will move to the next version.

5.1.0.3 FAVORITES

You can select the **star** at the right-end of the card to mark the template as a favorite.



5.1.0.4 ADDITIONAL OPTIONS

When you hover over the card, additional options appear for the form/task. For draft templates, a delete option appears.

5.1.1 FILTERS

The left panel of the Templates Manager contains a search bar to look up templates by keyword, as well as filtering lists to narrow down your template list.

There are two filtering categories: Categories and Organization. Checking the box for one of the filter options filters the view to just the templates associated with that filter.

Module landing > Templates	manager > Si	afety -		
Forma Taska ALL STAT	LERS PLE	LISHED DIAJT INACTIVE	a ★ 🗉	Create new
Filters Search ()		Template check	Circuited Jul 01,2022 07:58 AM Do	Version 1 PUBLISHED
Categories	Q Chow Q	Project Manager Safety Walk	Created May 31,2022 12:32 PM N.	Version 2 PUBLISHED
Audits Claims Crane	1	Safety Walk Safety Walk View associations	Created May 31.2022 12:25 PM N	Version 1 PUBLISHED
Daily Safety Huddle Injuries Inspections JHA's		Form Flow Button Independence View associations	Created Jul 20.2021 11:03 AM Karen Lottus	Version 4 PUBLISHED
JSA's	-	Order Safety Item	Created May 20,2021 03 02 AM Nell Stein	Version 7
Organization C-XYZ (RootOrg1) Steel Structure Training Job	Clear Q (105091)	Notification View associations	Created Mar 23,2021 12:34 PM Karen Lothus	Version 1 PUBLISHED
Steel Structure Training Job Steel Structure Training Job Steel Structure Partner Job Training Job (Training Job)	3 (105093)	multi-level View associations	Created Mar 15,2021 09.46 AM Karen Lottus	Version 4 PUBLISHED
Wards Island WWTP (18385 Heavy PM Estimate (Heavy BMS Test (BMS Test) (BMS	PM Estimate)	Hide Form as Standalone	Created Mar 15:2021 08:16 AM K.	Version 3 PUBLISHED

- NOTE The only items that appear as choices within the Filters side panel are the ones that have templates associated to them. In other words, you can have more categories or projects in the system, but they won't display in the Filters panel unless you have created a template that uses them.
- TIP All the filters work together. If you are not seeing what you need, clear all the filters and start with a fresh search.

5.1.2 FAVORITES

Selecting the **Favorites** icon filters down your view to just the templates you tagged as favorites. This is a quick way to narrow down to only the templates you use most often.



5.2 TEMPLATE CREATION

With the correct permissions, you can create new form and task templates in the Templates manager.

From the Templates manager page, to create a new template, click the **Create new form** or **Create new task** button.

🚺 🔹 Create new form		or	۵	*		Create new task	
---------------------	--	----	---	---	--	-----------------	--

This launches a two-step process:

- 1. Creates a dialog box, which leads to:
- 2. The Form builder or Task builder

5.2.1 CREATE A FORM OR TASK DIALOG BOX

On the Create a form or Create a task dialog box, fill out basic information and settings for the form or task.

NOTE You only have the options to create templates for organizations, projects and categories for which you already have assignments.

Each new form or task requires these initial entries:

Overview - Create a Form Dialog Box

	Title	Description
1	Form or task	The name or title

	Title	Description
	name and Description	you give to the template. An optional description can also be added.
2	Category and Organization associations	Associating the form or task with categories and organizations makes it easy to find the form or task using the category and organization filters on the Templates manager page. Categories also determine who can use the forms or tasks. If you do not have assignments to that category, you will not be able to view the form or task to fill it out.
3	Availability on mobile devices	A switch you can turn on to make it available on iOS mobile devices.
4	Event title and date settings	These settings indicate whether the date and title will be filled out automatically with the system default or if they will be filled out with a

Overview - Create a Form Dialog Box (continued)

Title	Description
	custom title and date by the person filling out the form or task. An expiration date can also be added if the check box is selected.

Form name	Organization association
	۹.
Description	C-XYZ + Future Children Select all Deselect all
* Category association Select categories ×	0
Select categories you want to associate to your for	9
Available on mobile ?	=
Event title (U	=
System default	•
Event date ①	
System default	•
Add expiration date (i)	
Available through form button only?	
]
	Select organizations you want to be able to perform this form

After being filled out, clicking **Create** creates a new template form or task and the system automatically progresses to the appropriate Form builder or Task builder page. You can continue building your form or task or come back later.

The following steps walk you through creating a new template form.

5.2 STEP BY STEP 1 – CREATE A TEMPLATE FORM

1. From the Project home landing page, select **Compliance** from the left navigation menu.

Add project image Minimum of Folips x 356px	Organization Learn Infight Infight University	Manage budgets and for	ecasts	Build components an quantities
Steel Structure Training Job 166091 @	Project InEight University		Launch	
Progress Duily planning		Work packaging		8 Daily planning
Weekly time sheet		Group work into plans ar packages	ıd	Assign tasks for you
Bid packages Contracts			Launch	
Charge				
Compliance	🖳 Project notes 🛛 🗹	Contracts		③ Supporting documents
S Report		Status	Count	In appro Rejected
(in Explore		Cancelled		0 0
Deshboards		braft	3	
API documentation		Executed In review	1	
Project home				
Project details		Out for vendor signature		
Setings	Settings	Terminated		Bid packages
Workflows		In approval Rejected		Status
Assigned users •	Project and application settings			Aniarded Unawarded

2. Select the Safety module.

Safety		
Created Jun 2	5.2018 04:05 PM Service A	scount
	rack and manage safety cesses update	related
EVENTS	TASKS	6

3. Select **Templates manager** from the side menu.

Compliance > Safety	
Links	
All events	To do list
All tasks	
Administration	
Templates manager	<
Roles	
User assignments	
Settings	

4. From the Templates Manager page, select **Create new form**.



- On the Create a form dialog box, type
 Project Manager Safety Walk in the Form name field.
- For Category association, select an appropriate item from the drop-down list.
- Under Available on mobile, switch to the green check mark to indicate it will be available on a mobile device.
- 8. Change Event title and Event date to **User** defined.
 - TIP Selecting User defined allows the user to add a future or past date. If you want to control this, consider the option to use.
- For Organization association, select the check box for the highest organization level to make the template available for the entire association.
- Click Create. The Form builder opens with a section already created and Event title and Event date already populated on the form.



5.2 STEP BY STEP 2 – BUILD A TEMPLATE TASK

- 1. Select the **Safety** module.
- 2. Select **Templates manager** from the side menu.
- 3. Select the Tasks item type in the upper-left.

Tarra Salar	23 P.M.	SAG SAAT SACTOR		Center
Filters teach ()		TaskReport27 taskepurter View associations	Channel Got 27 2022 26 25 MM	2 PUBLIND
Categories	4 6	Task - version update check - 1494972 - V3 View associations	Construction 27, 2002 (or easily	Vesso 6 Published
Calegory A - D0 NOT EDIT Checklat Corporate Safety Forms	Î	Exception for Task Choice and list type questions text View associations	Desired On 27 2022 33 39 Apr	Versen 69 Pulliconto
Orivio (Confidential) District / Project Parms Organization		Ref Task Art Separation doc test View associations	Convertion Decision of DOCTOR DOCTOR	Trainin 7 PuBLISHED
Prestry1 (\$10000 - PK5 Inc) Compliance Form Repository ()	Q. Complance	Copy of Ref Task Ref loganize do rear View associations	Conserved Core 30, 2000 00 10 PM	Vesan 2 Deart
DNU - 199999 (KT2 Pepering) DNU - 109027 (MSS-1853 / MS-8 DNU-109027 (MSS-1853 / MS-8 D19990 / MSS)		Copy of-Ref Task Art leasening doc test	Created Con 03,2022 02 06 PM	Vesa 1 Publication

- 4. From the Templates manager page, select Create new task.
- Add a Description if needed. On the Create a new task dialog box, type Finalize Safety Walk Process in the Task name field.
- For Category association, select an appropriate item from the drop-down list.
- Under Available on mobile, switch to the green check mark to indicate it will be available on a mobile device.
- 8. Set Task title to System Default.
 - The Due date field provides a mandatory date question on the template where the user can provide a date that will become the due date

- 9. Select the Add expiration date check box.
- 10. For Organization association, select the check box for the highest organization level to make the template available for the entire association.
- 11. Select the + Future Children button.
- 12. Click Create.
 - The Task builder opens in the appropriate Category, in a section already created and with Description, Responsible party, Due date and Assign fields already populated on the task
- 13. In the Description field, change the Question text to **Identify steps in the process**.
- Change the Assign button text to become Assigned, keeping the status as Scheduled.
- 15. Click Save.
- 16. Click the **Publish** icon.



5.2.2 ACTIVATE, DEACTIVATE, AND COPY PUBLISHED TASKS AND FORMS

Both tasks and forms can be deactivated, reactivated, and copied after being published. The following step-by-steps use a specific task to walk through the processes.

5.2 STEP BY STEP 3 – DEACTIVATE A TASK

- From the Templates manager, hover your cursor over your desired published task.
- 2. Click the **Deactivate** icon.

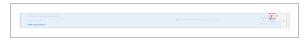


 The task remains visible in the Templates manager, but shows as Inactive in the Status column.



5.2 STEP BY STEP 4 – ACTIVATE A TASK

- 1. From the Templates manager, locate your desired inactive task.
- 2. Select the check box to the left of the ID.
 - After being clicked, two additional icons are shown: Activate and Delete tasks
- 3. Click the Activate icon.



The task is shown in Draft mode in the Status column

5.2 STEP BY STEP 5 – COPY A PUBLISHED TASK

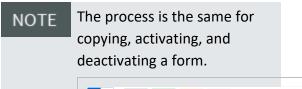
- 1. From the Templates manager, locate a published task.
- In Tile view, hover over the task. On the right side of the tile, three icons are available: Edit, Copy, and Deactivate tasks.
- 3. Click the **Copy task** icon.



4. In the dialog box, edit all fields.

Copy a task	
* Task name	* Organization association
Finalize Safety Walk Process NEW	
Description	Stloudou - PKS Inc Future Children Select all
Category association	
Incidents ×	×
Select categories you want to associate to your to	zsks
Available on mobile ?	
\bigcirc	
Task title (1)	
System default	 Select organizations you want to be able to perform this task

- After all fields are filled out, the Copy button change colors. Click Copy. The Task builder opens for further edits.
- 6. Save if edits are made, and then click the **Publish** icon.
- 7. After being published, the Templates manager opens with the copied task shown.



5.2.3 FORM AND TASK BUILDER - BUILD TAB

The form builder and task builder consist of the following tabs:

- Build
- Properties

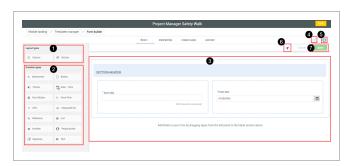
- Form flows (forms only)
- History

This section focuses on the Build tab.

Overview - Form and Task Builder: Build Tab

	Title	Description
1	Layout types	Drag and drop columns and sections onto your form or task.
2	Question types	Drag and drop attachments, buttons, dates, times, form buttons, form flows, GPS, integrated lists, references, lists, numbers, people, signatures, and text fields to your form or task.
3	Building area	The blank area you drag your sections and questions onto. It represents the template you are creating.
4	Edit	For existing templates, allows you to edit the existing template.
5	Publish	When finished building the template, click this button to make the template available for use.
6	Section	Lists each section on the form or task.

	Title	Description
7	Save	Saves the form or task in its current state. If not yet published, it is saved as a draft.



NOTE	If you click Cancel, all changes are
_	deleted since your last save. The
	system does not automatically save.

5.2.3.1 LAYOUT TYPES

Layout types let you divide your form or task into sections. Perhaps your form or task covers different topics or areas and you want to organize the form or task accordingly.

When you first drag a section onto the form or task, it creates a section that extends the width of the form or task.



You can let users copy sections when filling out a form or task. This feature lets users determine if duplicate sections are needed, instead of creating templates with duplicate sections in advance.

To let users copy a section, click the section header, and then select the **Enable copy section** check box in the side panel.

You can change the text of the button. By default, it is named Copy section.

NOTE You can enable the copy section option only for sections without mandatory questions, form buttons, or associated tasks.

Section	BUILD PROPERTIES FORM FLOWS HISTORY	Z
Details	^	Cancel
Lubel Crew Information Associate task Copy leastion Copy existion Copy	Cos Cos	
Access	· · · · · · · · · · · · · · · · · · ·	
Logic	* (
	Crew Information	C Copy action

5.2.3.2 QUESTION TYPES

In the sections you create, you have different types of questions you can drag onto your form or task.

			BULD	PROPERTIES FOR	W FLOWS HISTOR	n/		ି 🕻 🕻
ayout types							4 Cancel	Same
E Column	I letin							
Juertion types								
% Alabred	O Mon	SECTION HEADER						
C Onior	Cone - Time	* Devel 10fe				" Dant date		
D Formitiution	TI Families	* Event title				10/10/2002		
÷ 6P5	de Integrate/Test				active remaining?			
% Advance	10 UK							
# Noter	O Propingular	Call to term pathing	at.					
(2 Signature	B Terl						(31) characters	

The following is a brief overview of each question type and its key characteristics.

Overview - Question Types

		51
Question Type	Image	Description
Attachment	Product products them the true Image: Contract of the true of trags and data	Enables an attachment (for example, photos, documents) to be added to the form or task. You can include additional text with this question if needed (for example, for instructions.) Attachments can be marked as Mandatory. If integration with InEight Document is set up, attachments can be supporting documents from the Document application.
Button	Submit the completed tour	Adds a button to the form or

Overview - Question Types (continued)			Question		
Question			Туре	Image	Description
Туре	Image	Description task. You can set the button to close and/or change the status of the form or task. The button type	Date - Time	Cikit In Spor puor quantitati 14/30/2019 64.22 PM	Adds a field to fill out either date and time, just the date, or just the time. Dates can be marked as Mandatory.
		can also be marked as single-use or multi-use. Buttons can be marked as Mandatory.	Form Button	Click to type your button text	Adds a button that opens another template from within your form or task. It can be
Choice	Dd you recopice any safety wins?	Adds a question with two options. Settings include icons and predefined text answers (e.g., yes/no, pass/fail, and accept/reject) or you can customize your own. Choices can be marked as mandatory. You can mark answers as			designated as single-use or multi-use. Form buttons can be marked as Mandatory. You can set this button to change the form or task's status when it is clicked. Status change does not affect the form or task that is opened by the button.
		exceptions.	Form Flow Button	Submit to manager for approval	Adds a button that facilitates

Overview - Question Types (continued)			Question		
Question			Туре	Image	Description
Туре	Image	Description a specific step in a form flow. Form flow buttons can also go back			pertinent information. References cannot be marked as Mandatory.
		to a previous step.	List	Indicate the quality of this section Very Good Good Fair Poor	Adds a multiple-
GPS	Please provide location in CPS Latitude Example:41.257900 Longitude Example:-96.080500 Elevation Example:100 m / 328 ft Clear GPS	Lets users enter their location coordinates. Coordinates can be entered manually or by clicking the button.		Very Poor	choice question to the form or task. Answer options include radio buttons, check boxes, drop- down lists, or multi-level drop-down
Integrated list	reparts - Interest - *	Adds the integrated list question type to your form that integrates with InEight Platform Master data list resources.			lists. You can select answers from predefined lists or create your own. Lists can be marked as Mandatory. You can set
Reference	% Reference	Adds a supporting document attachment, event or task, or a hyperlink to other			default values for radio buttons, check boxes, and drop-down lists. Default values are

Overview - Question Types (continued) Question Question Туре Image Description selected when a user opens People a form or task Picker and requires the user to manually select a different value. You can mark

answers as exceptions. For more information

about multilevel drop-down lists, see <u>Multilevel</u> Drop-Down

Lists.

Adds a

can be

currency, decimal, \$, %,

or phone number.

Numbers can

formatted to be

question that requires a numerical answer to the form or task. The number

Туре	Image	Description
		be marked as Mandatory.
ople ker		Adds a question that must be answered by selecting users from the drop-down list. People pickers can be marked as Mandatory. You can let end users select multiple users or none. You can also select whether end users can choose from only assigned users, who have a Compliance role, or all project-level operational resource, which includes users who do not have Compliance roles. You can
		also show

Number

Overview - Question Types (continued)

0		· · · · · · · · · · · · · · · · · · ·
Question Type	Image	Description
		users' employee IDs with their names and set up an email to send when a user is selected. Operational resources are managed in project home page > Assigned operational resources.
Signature	Cike to type your question	Adds a signature block to the form or task. Signatures can be marked as Mandatory.
Text	Kow many unit? (130 clausetra remaining)	Adds a question that requires text for the answer. The field can be short or long text, or you can use this question type to only be a

Question Type	Image	Description
		label with no text field. Text can be marked as Mandatory.

5.2.3.3 QUESTION SETTINGS

After a question is added, you can click the question in the section.

Click to type your question	
	(200 characters remaining)

A slide-out panel is shown on the left. You can type your question and define the settings related to the question. As you type the question, the question populates into your template.



TIP You can also click on the text within the question type on the form or task and it will enter the text on the slide-out panel.

All question settings include the option to make the question mandatory. This means the person filling out the form or task is not able to submit the form or task until the question is answered. You can mark responses to list and choice questions as exceptions. This feature is useful to indicate responses that are undesired or outside of normal business processes in some way and have those exceptions show in reporting. To set a response as an exception in the form or task builder, select a response to a list or choice question. In the Details side panel, select the **Exception** check box. An Exception icon is added to the right of the response. This icon is visible only in the builder.

	×	BUILD PROPERTIES FORM FLOWS HISTORY	2 (
Details	*	T Cancel	Save
Details			
* Option text		SECTION	
No			
Type your option		SECTION HEADER	
Add supporting text			
Exception (j)			
		* Where is the safety walk being performed? * Event date	
Logic	~	05/31/2022	<u></u>
Email	~	(250 characters remaining)	
		Is PPE being warn correctly?	
		O Yes	
		No	٢

5.2.3.4 ACCESS

Settings for each question and section also include an Access section with a Manage access button. In the Manage access dialog box, you can control which users or roles can view or answer each individual question or entire sections when filling out the form or task. If they do not have access, they do not see the question on the form or task.

View and edit permissions are set separately from each other. You can manage access for all sections and questions in a template in the dialog box. It does not matter which section you choose when you click the **Manage access** button. To control who can see data in reports on question responses, add reporting tags in the Access section. Users with the same reporting tags that you set here are able to see this data when using reports.

5.2.3.5 LOGIC

The Logic setting lets you show or hide a question based on the response from another question on the form or task. For example, you are creating template for a safety tour, and have added the Choice question "Did you recognize any safety wins?"

Did yo	ou recognize any safety wins?	
0	Yes	
\bigcirc	No	

Following this question, you add a Text question for them to indicate the wins they had, but you only want this question to show up if they answered yes to the previous question (did you recognize any safety wins?).

Under the Logic section of the Text question's properties, you select **Leading questions**.

* Question text		Location of Safety Tour
Safety wins: explanation		
Type your question		(2
Type Short O Long O Label only (1)		
Supporting text (1)		Did you recognize any safety wins?
	_	Yes
Mandatory		O No
Access	~	
Logic	^	
Defining conditional logic rules allows you to show o hide questions based on another questions response	r 2.	Safety wins: explanation
Leading questions		

A Leading questions dialog box opens, where you set the Text question to show when the user answers Yes to the "Did you recognize any safety wins?" question.

_		Project Manager Safety Walk	
Notale In Los	gic rules		×
	Add logic set		2.
Denails 1	<u>SHOW</u> , Safety wire, explanation when <u>ANY</u> of the following sules match		* * **
Guession box	Did you recognize any safety wins? Drivel a question	IS Yes doing a requester	• •
Alba Con Inne Gran			Add logic sule

- TIP Depending on the form or task, you can show or hide the question depending on how the other question is answered.
- TIP If there is a form flow button that can be reversed, you can apply separate leading logic sets to the reverse form flow button and the form flow button that advances to the next step.

5.2.3.6 CLASSIFICATIONS

You can use classifications to apply logic in your forms in List and Choice questions. For more information, see <u>Classifications</u>.

5.2.3.7 COPYING, DELETING AND MOVING QUESTIONS

When hovering over a question on your template, three options are shown:

- Copy creates a duplicate question in the same section.
- Delete removes the question from the template.
- Move lets you drag and drop the question to a different area on your template.



TIP You can move questions by clicking and holding anywhere on the question and dragging it into place.

5.2.3.8 USING THE FORM AND TASK BUILDER - BUILD TAB

The following Step by Steps walk you through building out a template using the Task builder and Form builder.

5.2 STEP BY STEP 6 – BUILD A TEMPLATE USING THE TASK BUILDER

 From the Task builder page of the Finalize Safety Walk Process template you created in the previous Step by Step, confirm your form mirrors this design:

Finalize Safet	ty Walk Process	Deal)		88.0	PROPORTIES	HETONY	2 O
Lond Spec		0	All changes have been saved (530 AM)				🖌 Greet 🛛 🖬
G Olem	# 5cm		Inalize Safety Walk Process				
Duration Speet							
A instruct	C Arms		* sheatly shops in the process				
e this	Con-tine						
C Pres Baller	4.05						(NUC) damates anatomy
A falses							
# Ante	O Pepkpole						
Of System	8.14		* feeperable party				۵
			10 cm date 13 53 5979				
			E schelute				0

- 2. Drag and drop the **People Picker** question type into the existing section underneath the Due date question.
- Click on the question and type Name of person conducting the next Safety Walk in the Question text field.
- 4. Select the Mandatory check box.

- 5. Click the **People Picker X** to close the settings slide-out panel.
- Drag and drop the Date Time question type to the right edge of the Name of person conducting the next Safety Walk question, so it becomes a second column on the same row.
- Make the title of the Date-Time field,
 Date of upcoming Safety Walk.
- On the Details panel, change the Type to Date so the answer selection will only be for a date, not a time.
- 9. Close the settings slide-out panel.
- Click the Assigned button and notice the "Close task upon the button selection" is selected and grayed out. Ensure that Change status to is Scheduled.
- 11. In the upper-right corner, click **Save** to save your new template task. A notification is shown indicating the time the change was saved.
- 12. To make the template available for use, click the **Publish** icon.

5.2 STEP BY STEP 7 – BUILD A TEMPLATE USING THE FORM BUILDER

 From the Form builder page of the Project Manager Safety Walk template you created in the previous Step by Step, confirm your form mirrors this design:

Location of Safety Tour		Safety Tour date
	(200 characters remaining)	03/24/2020
Ves		
O Yes		

- 2. As needed, close a settings slide-out panel.
- Drag and drop the People Picker question type into the existing section underneath the Location and Date questions.

uestion types		SECTION HEADER	
% Attachment	Button		
C Choice	Date - Time	" Location of Safety Tour	* Safety Tour date
Form Button	II Form Flow	Electron of safety four	01/28/2021
© GPS	% Reference	(250 characters remain	ing)
I List	# Number	O People picker	
O People picker	🕼 Signature	Did you recognize any safety wins?	
E Text		O Yes	

- Click on the question and type Who is leading the tour? in the Question text field.
- 5. Close the People Picker settings slide-out panel.
- Drag and drop the Date Time question type to the right edge of the "Who is leading the tour" question, so it becomes a second column on the same row.

 ho is leading the tour?		Date - Tin
	4	

- Click on the Date Time question and type
 Time of tour in the Question text field.
- 8. Under Type, select **Time** so the answer selection will only be for a time, not a date.

Details	^
* Question text	
Time of tour	
Type your question	
Туре	
🔘 Date - Time 🔵 Date 🖳 Time	

- 9. Close the **Date Time** settings slide-out panel.
- 10. Drag and drop the **Text** question below these two questions.
- 11. Click on the question and type **Explain the agenda for the tour** in the Question text field.

12. Under Type, select **Long** so the user has more room (4000 characters) to enter a response when filling out the form.

* Question	text		
Explain th	ne agenda fo	or the tour	
Type your q	uestion		
Type 🔿 Short	Long	O Label only	()

- 13. Close the **Text** settings slide-out panel.
- 14. Drag and drop the **Choice** question type into the existing section underneath the agenda question.
- Click on the question and type Did you find any unsafe items? in the Question text field.
- 16. Under Predefined lists, select **Yes/No** from the drop-down list.

Details	
* Question text	
Did you find any unsafe items?	
Type your question	
Display	
Text O Icons	
0	1
-	- :
Option2	I I
Predefined lists	
Select one	
Select one	
Yes/No	
Pass/Fail	
Accept/Reject	

17. Select the Mandatory check box.

Supporting text	(j)
Mandatory	

- 18. Close the **Choice** settings slide-out panel.
- 19. Drag and drop the **Text** question type into the existing section underneath the safety win question.
- 20. Click on the question and type **Explain the unsafe items** in the Question text field.
- 21. Under Type, select **Long**. You want to only show this question if the user answered **Yes** to the previous question (Did you find any unsafe items?).
- 22. Expand the Logic section and select Leading questions.



The Logic rules dialog box is shown



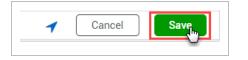
- 23. Switch the Show/Hide toggle to **Show**.
- 24. From the Select a question drop-down list, select **Did you find any unsafe items?**.
- 25. From the Select a response drop-down list, select **Yes**.
- 26. Click **Save** to close the Logic rules dialog box.
- 27. Close the Text settings slide-out panel.
 - The "Explain the unsafe items" question now only shows if the user answers Yes to the "Did you find any unsafe items?" question
- Drag and drop the Attachment question type into the existing section underneath the existing questions.
- Click on the question and type Provide photos from the tour in the Question text field.
- 30. Close the **Attachment** settings slide-out panel.
- Drag and drop the **Button** question type into the existing section underneath the existing questions.
- 32. Click on the question and type **Submit the completed tour** in the Button text field.
- 33. Select the close the form upon the button selection box.

Details	^
* Button text	
Submit the completed tour	
Close form upon the button selection	
Single-use	

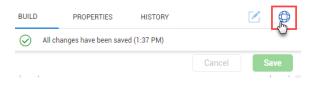
- 34. Under Change status to, select **Complete** from the drop-down list.
- 35. Expand the Email section, and select Add email.
- 36. From the dialog box, add a Subject line such as "Tour has been completed"; select role and/or user; and add content to the body of the email such as "Please review at your convenience." Select the @Reporter if desired.



- 37. Click Save.
- 38. In the upper-right corner, click **Save** to save your new template form.



- A dialog box is shown indicating the time the change was saved.
- 39. To make the template available for use, click the **Publish** icon.



MULTI-LEVEL DROP-DOWN LISTS

Using the **List** question type, you can build branching questions using a multilevel drop-down list. For more information, see <u>Multilevel Drop-</u> <u>Down Lists</u>.

REFERENCED FORMS AND TASKS

When you create a task or an event from another task or event, you see the referenced item in both associated tasks or events, letting you see which events and tasks are associated. For more information, see <u>Referenced Forms and Tasks</u>.

5.3 CLASSIFICATIONS

You can use classifications to drive logic in your forms in List and Choice questions. Classifications provide the following benefits:

- You can apply logic at a section level so that when the classifications are selected on a form question in the template, only that section with the classification is shown.
- In the events and tasks lists, you can sort and filter by classification.

The entire section of questions is hidden in the event or task until the classification question or choice entry is selected so that you do not have to apply question level logic to each question in the section.

To create classifications, see <u>Classifications</u> in Module settings.

Two steps are required to use classifications in logic as shown in the Steps section below.

5.3.1 STEPS

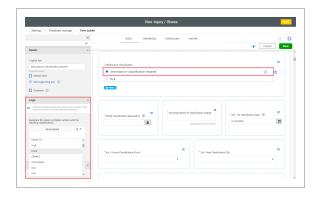
APPLY CLASSIFICATION LOGIC TO A LIST OR CHOICE QUESTION

1.

In the Form builder, select an entry from the List or Choice question.

2.

In the Logic section in the left panel, click the Designate the following classifications field, and then select from the list of classifications. You can select more than one.



3.

Save the form.

APPLY CLASSIFICATIONS LOGIC TO A SECTION

1.

After the classifications are assigned to the list or choice entry, select the section you want to be shown by clicking the section header text.

2.

On the left panel, in the Logic section, click Show this section for the following classifications field, and then select from the list of classifications. You can select more than one.

Section	×	BUILD PROPERTIES FORM FLOWS HISTORY	e 🗘
	A	1 Ca	
Details	~	·	
* Label	- C	S(CIDN	
RE-OPENED INCIDENT INFORMATION			
Associate task		RE-OPENED INCIDENT INFORMATION	
Enable copy section ()			
Add supporting text		The classification take (I)	
			m
Access	~	£ 0/24/2024	
Logic	~		
Show this section for the following classif			
Work helated	××	* Current Classification (Fron) * New Classification (To)	
Totane		•	
tst - Slot			
2nd - Shot			
2nd Observation			
Accessitgress		* Additional re-classification	
Act of Nature Anchorage Plates		 Secondary re-classification required () 	۰
		O N/A	

3.

Save the form.

5.4 MULTILEVEL DROP-DOWN LISTS

Using the List question type, you can build branching questions using a multilevel drop-down list. When you make a selection from a list of question options, your response branches off to another question. This functionality helps you manage list items better for greater control of data in the database.

A multilevel drop-down list can be nested at several levels. For example, this type can be useful for showing a complicated organizational structure.

In the List side panel, there are options to make features of a multilevel drop-down list mandatory:

- Mandatory The multilevel drop-down list question must be answered.
- Mandatory terminal response The user must go all the way to the last level of the list to make a selection, instead of just clicking through without expanding the list beyond the first level. If you select this option, you cannot select Mandatory required level.
- Mandatory required level You must select a mandatory required level from a dropdown list that determines how many levels down users must expand the list to make a selection, instead of clicking through without expanding the list beyond the first level. If you select this option, you cannot select Mandatory terminal response.

When you click **Manage list options**, the List options dialog box lets you organize list options manually or through Excel import.

In the dialog box, there are buttons to add and remove options, as well as move them up and down in the list, and in and out of other options to create a hierarchy.

Import	List	
Drag and drop the file here or browse		
Browse	× List options	
File must not exceed 5 MB	Option1	*
Download multi-level list starter template	Option2	
	Dption3	
		¥

NOTE There can be up to a maximum of 10,000 items in the complete list, including all items in the levels.

5.4 STEP BY STEP 1 – ADD A MANUAL MULTILEVEL LIST QUESTION

- 1. In a form, drag the **List** question type onto the form or task.
- 2. In the Question text field, type in the question.
- In the Type drop-down list, select the Multi-level drop-down option.

- TIP When a check box to the left of an option is selected, the up and down arrows are shown to let you move that question response up or down in the listing.
- NOTE If available, indenting can be done with the **Move List in to** and **Move List Out of** arrows.

Add list option and Delete list option icons are available for you to use.

- Select the check box of the second list item, and then select the indent or the Move list option in to icon.
 - That option now falls below, or within, the item above it.
- 5. Unselect the second list item.
- 6. Select the third list item.
- 7. Indent the third list option using the **Move list option in to** icon.
 - Your List option dialog box should look similar to this example:

Ð	↑ ↓ ↦ ← ⊗	
	* List options	
	✓ Yes	
	Yes, absolutely	

- 8. Add three more list options, using the Add List Item icon.
- 9. With the final two items, use the **Move list option in to** icon to indent them.

• Your List option dialog box should look similar to this example:

÷	↑ ↓ ↦ ← ⊗	
	∀ List options	
	✓ Yes	
	Yes, absolutely	
	Yes, but with concern	
	∽No	
	No, though I have a question	
	No, no questions asked	

10. Click Save.

- 11. Click Publish.
 - As a result, when the form or task is opened, the first question can be answered, which then leads to branched options for the second question.

🏝 Yes		
	Hame (Roat)	
Yes No		
0 100		
		Cancel
Are you comfortable with this chang	e?	Cancel S
	e?	Cancel
Are you comfortable with this chang	e?	Cancel 8
Yes / Yes, but with concern		Carcel
Yos / Yes, but with concern < Back		Cancel

To create a multilevel drop-down question using the template from Excel, first click the **Download multi-level list starter template**. The template has one Example sheet with instructions on how to use it. You can then fill out the Import sheet with list options for as many levels as necessary.

This step-by-step walks you through adding items through the multilevel list start template.

5.4 STEP BY STEP 2 – ADD A MULTILEVEL LIST USING THE LIST STARTER TEMPLATE

- 1. In a form, drag the **List** question type onto the form or task.
- 2. In the Question text field, type in the question.
- 3. In the Type drop-down list, select the **Multi-level drop-down** option.
- 4. Click on Manage List Options.
- Click the Download multi-level list starter template. The Excel file downloads.
- 6. Click Enable Editing if needed.
- 7. Save the template file to your desired location.
 - There are two tabs, the Example tab, and Import, the latter of which you use to create your multilevel branching template.
- 8. Open the Import tab.
- Create a Level 1 item in Column A, PMH1 in the example.
- 10. In Column B, create the **Level 2** item, Segment 1 in the example.
- In Column C, create the Level 3 items, or decision points, Roadway, Structure, and Walls in the example.

- This means that when a user selects a Column B segment, they will have three additional choices from Column C in the next dropdown list
- 12. In column D, add Level 4 options.
 - In the example shown, there are only Level 5 options in Column E for Hwy 1, Eastbound and Hwy 1, Westbound

🖌 🔺				
1 Level 1	Level 2	Level 3	Level 4	Level 5
2 PMH1				
3 PMH1	Segment 1			
4 PMH1	Segment 1	Roadway		
5 PMH1	Segment 1	Roadway	Hwy 1, Eastbound	
6 PMH1	Segment 1	Roadway	Hwy 1, Eastbound	Hwy 1 EB to Phoenix exit
7 PMH1	Segment 1	Roadway	Hwy 1, Eastbound	Hwy 1 EB to Central Ave
8 PMH1	Segment 1	Roadway	Hwy 1, Westbound	
9 PMH1	Segment 1	Roadway	Hwy 1, Westbound	Hwy 1 WB to 101
10 PMH1	Segment 1	Roadway	Hwy 1, Westbound	Hwy 1 WB to Scottsdale Rd
11 PMH1	Segment 1	Structure Segment 1		
12 PMH1	Segment 1	Structure Segment 1	1st Ave	
13 PMH1	Segment 1	Structure Segment 1	TUC #2 overpass	
14 PMH1	Segment 1	Structure Segment 1	101 WB overpass	
15 PMH1	Segment 1	Walls Segment 1		
16 PMH1	Segment 1	Walls Segment 1	TUC A0	
17 PMH1	Segment 1	Walls Segment 1	TUC A1	

- 13. Save the Excel file.
- 14. Go to Compliance, and then click **Browse**.
- 15. Navigate to the folder where your Excel file is located.
- 16. Select the file, and then click **Open**.
- 17. The Excel data populates. Click Save.

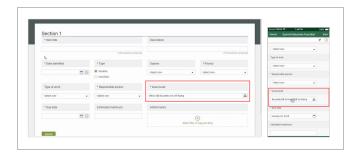
Import	List		
Drag and drop the file here or browse	۲	↑ ↓ ↦ ↩ ⊗	
Browse		∀ List options	
File must not exceed 5 MB		Y PMH1	
$\underline{1}$ Download multi-level list starter template		✓ Segment 1	_
		✓ Readway	
		✓ Hwy 1, Eastbound	
		Haw 1 EB to Phoenix exit	*

TIP	There are no limits on how many levels can be added. Many levels down might not be the best when using the list.
TIP	There is a maximum of 10,000 items in the complete list including all items in the levels.
TIP	There is a maximum of 200 characters, including spaces, for each item. Items that exceed 200 characters are truncated.
_	

In a form, a multilevel list option looks similar in either the web or mobile versions:

ſe	Summit Mountain Punchlist					Cancel Save		
							Canod Summit Mour	a na 100 Main Punchiles
	Section 1							1
-	* Item Stie		Description				* Priority	
							- Select one -	
		(152 characters ren	aning		(15	Edwarders remaining)	True of each	
-								
	* Date identified	* Type	System		* Priority		- Select one -	
-	0	(c) · wokist	- Select one -		- Select one -		* Responsible person	
		O Panchilitt					- Select use-	
	Type of work	* Responsible person	* Area/Level				* Amailand	
	1304 or work	- westowners he en	- 3000 0000				* ARECOR	
	- Select one -	• Select one -	· Select one ·			44		
							* Due date	
	* Due date	Estimated manhours	Aflachments				January 22, 2918	
	0	0		(
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		R.						

			X	Canod	
Area/Level					ment 2 / Roadway / Hwy 1 00 Hwy 1 00 Sec 1
				< box	
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C BHOK	Hwy 1 EB Seg 2				
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Brunette Ave SB to Hwy 1 EB On Ra	⊸ ⊳			W8 to 58 Br	unefiz Ave Off Ramp
O Brunette NB to Hwy 1 EB On Ramp	12		therp re		
WB to SB Brunette Ave Off Ramp					
		Cancel Save			
		Cancel Save			



5.5 REFERENCED FORMS AND TASKS

When you create a task or an event from another task or event, you see the referenced item in both associated tasks or events, letting you see which events and tasks are associated.

When you create a new event, you can select the **Associate Task** check box.

Module landing > Template	manager > Form builder	
Section	× aft ≽	BUILD PROPERTIES FORM FLOW
Details	^	
* Label	SECTION HEADE	ER
SECTION HEADER		
Associate task	* Location of Sa	afety Tour
Supporting text (i)		(250 characters res

When you do that, two things occur. First, the Task Button is shown, in this case in the Section Header. Second, a number of changes in the Details panel occur, including:

- The Task Button Text area shows up where you can modify the name of the button
- The Type lets you choose from Single-Use or Multi-use
- The Template to Open Upon Button Selection drop-down list requires you to select a Task template
- · And the Associated Categories drop-

down list requires a selection

	Form builder	
Module landing > Templates manager	> Form builder	
	BUILD PROPERTIES FORM FLOWS HISTORY	
Details	·	
*Label	50010N	
SECTION HEADER		•
🛃 Associate task	SECTION HEADER	
 Task button text. 		
Task button		
Type	* Location of Safety Tour * Safety Tour	+
O Single-use 🛞 Multi-use	06/12/2020	•
	(10 sharestive sension)	
 Template to open upon button selection 		
Corrective Action	•	
Associated categories	Click to trave your ourstion	
inspections	e marin (Da Joss feasier)	۵
Supporting text		

After any other changes are made, select Save.

TIP You are also able to start a task from the Section area of an event, not just a question, which is useful for reporting purposes.

5.6 INTEGRATED LIST

5.6.1 SUMMARY

When building your template form, the Integrated list question lets you build lists that integrate with InEight Platform master data library. The Integrated list question lets you add resource column fields in a series of cascading questions. You can use cascading questions to narrow down the selection of a resource. For example, you can add Vendor Region, Vendor Country, and Vendor City column fields of cascading questions to narrow the selection down to a city. The list pulls data from Platform's resources in Main menu > **Master data library**.

NOTE Currently, the Integrated list feature is only available for Operational resources equipment and Vendors master data.

After you add the integrated list question, select the question, and then click the **Configure** button to choose from your selected resource's column headings to add to the list.

The series of selected column headings fields show as a hierarchy and can be modified in any order.

Integrated list	Configure					×	
Details			Add to list	1	> ↓ ⊗		cel Save
	Equipment I	st options		0	V Equipment list		Gal Save
* Master data lists	Equipment I				✓ Equipment Location		×
Equipment	Equipment 0	lisplay			✓ Equipment Category		
Configure	Equipment 0	lescription			✓ Equipment Manufacturer		
	Equipment 0	onstruction Year			🗸 Equipment Model Type		
	Equipment 0	lost Center			V Equipment ID		
	Equipment 0	urrency			 Equipment Description 		
Access	Equipment 0	IoT Regulated			🗸 Equipment Serial Number		
Logic	Equipment S	itatus			Equipment Status		
	Equipment P	fodel Type					
	🖸 Equipment L	ocation					
	Equipment P	lanufacturer					
	Equipment 0	Iwnership					
	Equipment 8	erial Number					
	Equipment U	Init Cost					on above
	Equipment U						
	Equipment \	'endor		L			
	Equipment 0	ategory					

After saving your integrated list configuration, each column heading option in the hierarchy shows as a series of cascading questions in your template form. You can add multiple series of lists to your integrated list.

		BUILD	PROPERTIES FORM FLOWS F	ISTORY	E 🗘
Layout types			② You have not saved your templa	te for 10 minutes. Please consider saving.	×
Column	E Section				Cancel Save
Question types				SECTION	
% Attachment	D Button	SECTION HEADER			
C Choice	Date - Time				
Form Button	11 Form Flow				
e ops					
% Reference	II List	Equipment Location	Equipment Category Select one •	Equipment Manufacturer	Equipment Model Type Select one •
# Number	People picker	Equipment 1-1	Equipment 1-2	Equipment 1-3	Equipment 1-4
(2 Signature	🗈 Text				1
		Equipment ID	Equipment Description	Equipment Serial Number	Equipment Status
		Select one •	Select one ·	Select one +	Select one ·
		Equipment 1-5	Equipment 1-6	Equipment 1-7	Equipment 1-6
		L] []

5.6.2 STEPS

To add and configure an integrated list:

- 1. In a new or unpublished form, drag the **Integrated list** question into the form.
- 2. Click the Integrated list question.
- 3. In the left slide-out panel, select from the **Master data lists** drop-down resources.

- 4. Click the **Configure** icon, and then select the fields to add to the list.
- 5. Click Add to list.

Each field becomes a drop-down question in the form or task template and shows in a cascading manner. You can use the **Move up** and **Move down** arrows to modify the columns in a logical order according to your business process.

6. Click Save.

You can reorder, add, and delete from your list by clicking on any of the list column attributes, and then clicking **Configure**.

5.6.3 RELATED INFORMATION

InEight Platform Master Data Libraries

5.7 TEMPLATE PROPERTIES

On the appropriate Form builder or Task builder page, the Properties tab contains the basic information entered when the form was created (on the Create a form or Create a task dialog box). This includes a header section containing the following:

- Form or Task ID (this is automatically assigned when the form or task is created)
- Version
- Status
- Module
- Creation date
- Creation time
- Created by



The Properties tab also includes the following fields, which you can edit at any time with the right permissions:

- Form or Task name
- Description

- Category association with + Future Children functionality
- Organization association
- Options

5.7.0.1 TASK AND FORM BUILDER OPTIONS

In Form builder, both the Event title and Event date fields have the option of being System defined or User defined. Both can be used strategically to personalize your form.

Available on mobile ?	Event title (1)	Event date (1)		
Θ	System default	 System default 	 Add expiration date (1) 	
Available through form b	integra	tion tag 🕕		
	atton only?	oundy C		
Θ				
Enable print functionality				

Form Builder: Event Options

	System Default	User Defined
Event title	The event title defaults to the "name of the form_event ID" and is presented on the event list as the event title.	This provides a mandatory text question on the form where the user can provide a title that is presented on the events list as the event title.

Form Builde	er: Event Op tinued)	otions (con-
	System Default	User Defined
Event date	The event date defaults to the date the form was started.	This provides a mandatory date question on the form where the user can provide a date that is presented on the events list as the event date.

	System Default	User Defined
		presented on the task list as the task title.
Due date	Not applicable	This provides a mandatory date question on the template where the user can provide a date that is presented on the task list as the due date.

In Task builder, both Task title and Due date can be used strategically to personalize your task.

Task Builder: Task and Due Date Options

	System Default	User Defined
Task title	The task title defaults to the "name of the task_ task ID" and is presented on the task list as the task title.	This provides a mandatory text question on the template where the user can provide a title that is

5.7.0.2 EXPIRATION DATE

Notice that when the Add expiration date check box is selected, the Add renewal date option is shown.

Selecting Add expiration date makes this a mandatory field on the form. If selected, the Add renewal date also provides a mandatory question on the form.

Form Builder: Date Options

	Definition
Add expiration date	This

Form Builder: Date Options (continued)

NOTE After the form is published, only certain fields in the properties may be changed without putting the form into a draft status.

5.7.0.3 TEMPLATE AVAILABILITY

To hide a template from being started as a standalone form or task, turn on the **Available through form button only?** toggle. When hidden, these templates can be used only through association with the Form Button.

5.7.0.4 INTEGRATION TAG

You can add an integration tag to a template to include the form in reporting. Specific questions in that form with the same integration tag are then reported on. This applies only to standard reports.

5.7.0.5 TEMPLATE INTEGRATION

Template integration is helpful when you need to use a task in InEight Change. For more information about template integration, see <u>Template Integration</u>.

5.7.0.6 ENABLE PRINT FUNCTIONALITY

You can enable a template to be printable from the Events or Tasks page, and from the event or task detail page.

NOTE Pay special attention when enabling the print feature. This feature does not contain any permissions associated with the event or task. If you have access to the work item and can print it, you can print all questions and answers in the work item.

To enable a template to be printable, turn on **Enable print functionality**, and then select which report to run. Currently, only the Compliance General Forms Integration is available.

5.7.0.7 TEMPLATE LANGUAGE SETTINGS

Template language settings let you import translations for each question and section in a Microsoft Excel spreadsheet. For more information about how to import translations, see <u>Template Translation</u>.

5.7.0.8 ORGANIZATION ASSOCIATION

On the Properties tab, selecting a project is as simple as selecting the check box next to the project name.

In any parent level, you can click the **Select all** or **Deselect all** option, if appropriate.

Projects not available to you are grayed out.

Clicking the **+ Future Children** button in a parent organization allows you to associate templates and users with that parent organization and all its children with just one click. The association can also persist through any new children (projects) that get associated after the original selection, so you do not have to manually add each project.

TIP After the **+ Future Children** button is selected, it changes color.

SELECT ONLY THE PARENT ORGANIZATION

When you select a parent organization, only that organization is selected. If the parent organization has child suborganizations or projects, those children are not automatically selected when you select their parent. This change gives you the flexibility to fine-tune which children to associate.

SELECT OR DESELECT ALL CHILD ORGANIZATIONS OR PROJECTS

The **Select all** and **Deselect all** buttons are available for each parent organization with children. When you use these buttons, only the children are selected or deselected. The parent organization is not affected.

XYZ Inc + Future Children
Select all Deselect all
▲ XYZ Infrastructure (+ Future Children)
Select all Deselect all
North Bridge Project
City Street Improvements Project
Metro Line Improvement Project

NOTE When you select all, only existing children are selected. New projects are not automatically selected unless you use the + Future Children option. See the next section for more information.

PERSISTENTLY ASSOCIATE FUTURE CHILDREN

The + Future Children button is available for each parent organization. If you enable this option, all new children of that parent are automatically selected. This option prevents having to constantly select each new project when you create one.



NOTE The + Future Children option works independently of the Select all option. For example, if you want to select all future new projects, but not necessarily all existing ones, you could select a few existing projects, or none, and still enable + Future Children.

5.7.0.9 MANAGE CUSTOM IDS

Custom IDs let you sort and filter forms and tasks for better management of your events and tasks. You can also assign multiple custom IDs to one template and add or remove properties for existing custom IDs.

NOTE Once a custom ID is configured on a template, it will be associated with any new forms or tasks that are created. Custom IDs do not need a published template to start appearing on events or tasks. However, please note that custom IDs are not applied to scheduled events or tasks. Once a scheduled event or task is performed and saved, the next available custom ID will be used for that event or task. The following Step by Step shows you how to create a custom ID.

5.7 STEP BY STEP 1 – ADD A CUSTOM ID

 Click Actions > Manage custom IDs in the upper-left of the Form or Task builder's Properties tab.

		BUILD	PROPERTIES
Actions 👻			
Manage custom IDs _ fm			
Manage template integrations	Properties		

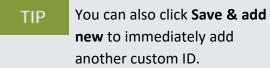
- The Manage custom IDs dialog box opens
- 2. Click the **Add** icon to open the Add custom ID wizard.



3. Enter values in the Prefix, Starting number, and Suffix fields, and then click **Next**.

NOTE You must fill out at least one of the fields, but you are not required to fill out all of them.

- NOTE Each of the fields can be up to 10 characters long. Prefix and Suffix are alphanumeric, and Starting number is only numeric.
- 4. Select the organizations and projects you want the custom ID associated with.
- 5. Optionally, select **Apply this custom ID to** each selected project.
 - When this option is selected, NOTE the custom ID number increases independently for each project. For example, if the custom ID starts at CUS-200-ID and this option is selected, when you perform the form or task twice in Org/Project 1, the ID increases from CUS-200-ID to CUS-201-ID. If you then perform the same form or task twice in Org/Project 2, the ID also increases from CUS-200-ID to CUS-201-ID independently from the ID numbering in Org/Project 1.
- 6. Click Next.
- 7. Select the categories you want the custom ID associated with.
- 8. Click Save & close.



5.8 TEMPLATE

Template integration lets you make tasks available for use with InEight Change. For example, you might need to complete a task associated with a change issue.

NOTE

Template integration works only with InEight Change tasks.

The functionality to add an integration is in the template Properties tab. To add a template integration to a template, you must have a level 3 admin role, and the template must have already been published. If you do not have a level 3 admin role, you can see the Add template integration button, but you cannot use it.

The following steps explain how to add an integration to a template.

5.8 STEP BY STEP 1 – ADD A TEMPLATE INTEGRATION

 On the Properties tab of the task builder, under Options, click Add template integration. The Add template integration dialog box opens.

	BUILD PROPERTIES	FORM FLOWS HISTORY	
Category association			
	x x ^		
	×		
	×		
	*		
Select categories you want to associate to this form	*	0	
		0	
Select categories you want to associate to this from	v Event date		
Options Available on mobile ? Event title ①	Event date ①	in the second se	
2ptions			
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plans Available on mobile ? Drevet tole ① Pystem default Available through form butten only? ① IIII O	Event date ① System default	Index explosion of the solution of the form	

- 2. Fill out the required fields:
 - Integration title
 - Category association One category associated with this integration. For more information about categories, see <u>Categories</u>.
 - Associated products Text-only field that indicates which InEight application this integration is for.
 - Organization association -Organizations and projects that this integration is associated with. For more information about organization association, see <u>Template Properties</u> - <u>Organization Association</u>.
 - You can also optionally fill out the Description field.

ne onder 4 dule: Salety - Crusted by: 05/11/2021 06:31 AM		
integration title	Coganization association	Show selected items only
	Search	
regariation	Proof Departmentions (ReofDeg1) (Induct Children Defect all	
	Select all Deselect all	
Category association		
Select one	•	
Associated products		

3. Click Save.

information about product settings, see <u>Product</u> <u>Settings</u>.

5.8.1 MANAGE TEMPLATE INTEGRATIONS

There are several ways to view existing integrations for a single template and for all your organization's templates

After at least one integration has been added for a template, the number of integrations is shown to the right of the Add template integration button. To view the current template's integrations, click the number next to the button. The Template integrations dialog box shows all integrations for the current template.

Manage custom IDs	x x*
-	* ^
Manage template integrations	×
	×
	·
	Select categories you want to associate to this form
	Select organizations you want to be able to pe
	Options
	Available on mobile ? Event fitle (1) Event date (1)
	⊖ System default ▼ Add expiration date
	Available through form button only?
	O Add template integration 1
	Enable print functionality

To view or edit all existing integrations for your organization, click the **Actions** button in the upper left of the Properties tab, and then select **Manage template integrations** in the drop-down menu. The Template integrations page opens. On this page, you can edit or delete integrations.

	DOUCT SETTINGS MODULE SETTINGS				
dule r	unopment Template integrations				
	Integration title	Template name	Module	Category	Associated products
	Change issue form	Online order	Change	Tasks	Change
	Sharon Task	Charge - Task	Change	Tecks	Change

You can also access the Template integrations page from the Product Settings page. For more

5.9 TEMPLATE TRANSLATION

Templates can be translated into multiple languages with a Microsoft Excel template. When a template has translations applied, users can change the language in their user profile and view events and tasks in their selected language. Translation requires language setup in Module summary settings and Excel template export and import in Template properties. The export functionality gives you a template spreadsheet file with all of the questions and sections to fill out and import back into the form or task template.

5.9.1 MODULE SUMMARY SETUP

To make a language available in a module, go to Settings > Compliance > Module > **Module summary**, and then select the language in the Module language settings section. See <u>Language</u> <u>settings</u> for more information.

5.9.2 TEMPLATE LANGUAGE SETTINGS

You can export and import the translations Excel file in the template Properties tab under Template language settings.

		BUILD	PROPERTIES	FORM FLOWS HISTORY	ß	
Control of the second best of the form Control Control	ions 👻				Cancel	Sav
Available on mobile ? Event tils ① Event date ① O Pytem default • System default • Molt expiration date ① Available through time botton only? ① through time botton only? ① through time botton only? ② through time botton only? ③ through time botton only? ④ through time botton only? ④ through time botton only? ④ through time botton only? ⑤ through time botton only? ⑤ through time botton only? ⑤ 	Select categories you want to associate to this form		5	Select all Deselect all		
	System def	-				

NOTE You must publish the template before exporting the Excel file. The Export and Import buttons are enabled only after you publish a template.

The following Step by Step shows you how to import translations.

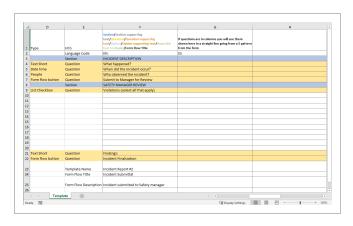
5.9 STEP BY STEP 1 – IMPORT TEMPLATE TRANSLATIONS

- 1. In the Template language settings, select a language from the drop-down menu.
 - NOTE If you do not see the language you want, go to Settings > Compliance > Module > Module summary, and then select the language in the Module language settings section.
- 2. Click Export.

- A Microsoft Excel spreadsheet file is downloaded with all of the template questions and sections in rows
- NOTE After you export the Excel template, do not edit the published template until after you import translations. If the template is edited, you must publish the new version, and then export the Excel file again. If you try to import the old version of the Excel file, it results in an error.
- Under the column for your chosen language, enter translations for each question and section.
 - NOTE See the section below for more detailed information about translation template columns.
- 4. Save the file.
- In the Template language settings, click Import, and then select the saved spreadsheet file.
- TIP If you make any further changes to the template, you must publish the template again, and then repeat the steps above.

5.9.3 TRANSLATION EXCEL TEMPLATE

The translation template Excel file is created from the current published version of the form or task template.



The Excel file consists of the following columns:

- A. (hidden) Object ID Do not edit this column. These are specific IDs for form or task items. The numbers change between published versions of the form or task.
- B. (hidden) Characteristic type Do not edit this column. This is the question type and is required for the migration path of information used in the import.
- C. (hidden) **Object type** Do not edit this column. This is the type of form or task item and is used in the import process. The types are section, section supporting text, question, question supporting text, option, option supporting text, hyperlink text to display, and form flow title.
- D. **Type** Do not edit this column. This shows each type of question.

- E. Info Do not edit this column. This shows what object type and part of the template the row refers to. The object types are section, section supporting text, question, question supporting text, option, option supporting text, hyperlink text to display, and form flow title.
- F. Section/Section supporting text/Question/Question supporting text/Option/Option supporting text/Hyperlink text to display/Form Flow Title – This is the English version of entered text for each object type.
 - NOTE Language Code of EN indicates English. Do not change the language code for any column.
- G. All columns following F are for other languages. Enter your translations for each object in these columns for each language.
 - TIP You can apply HTML formatting such as bold, highlighted, and underlined to supporting text. HTML code is shown in column F. If you want to apply the same formatting to other language columns, you must manually enter or copy the HTML code to the other columns. If you do not enter or copy the code in the translated columns, the translation is shown as plain text.

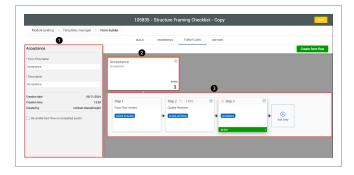
CHAPTER 5 – FORM FLOWS

5.1 FORM FLOWS OVERVIEW

The Form Flows tab of the Form builder lets you manage all the form flows associated with a form template. A form flow adds workflow functionality to your form so that responsible parties can be actively engaged in an event's process life cycle. Including a form flow can be helpful if your business process needs to be handed off from the reporter to another individual or department. Each step of a form flow has an associated form flow button in the template that you, as a responsible party, can click to complete your part.

You can add multiple form flows to a form to suit your specific business processes. For example, when filling out a form, a manager's approval may or may not be required to proceed. In this case, you can use a form flow for when manager approval is required, and another form flow when it is not required. Each form flow's steps are independent of each other but contained in the same form.

The following image and table show the Form Flows tab sections:



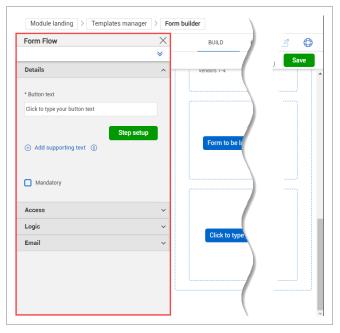
Form flow overview

- 1 The side panel lets you edit fields associated with the selected form flow or step.
- 2 Each form flow is shown as its own card with a description and number of steps.
- 3 When a form flow is selected, each of its steps is shown as a card with information like the associated button, the responsible party, and the number of days until the step is overdue. You can click the Add Step button to add additional steps.

In the Form builder, you can add Form Flow questions as shown in the following image.

		BUILD PROPERTIES FORM FLOWS HISTORY
Layout types		T Cancel Sav
🖽 Column	Section	Vendert I-9
Question types		
% Attachment	Button	
Choice	Date - Time	Form to be launched
Form Button	tt Form Flow	
⊕ GPS		
% Reference	🗰 List	
# Number	People picker	Click to type your button text 🔿
🕼 Signature	🖿 Text	

You can set up the Form Flow question details by selecting the Form Flow question, and then configure the details on the left panel as shown in the following image.



5.1.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

5.2 CREATE A FORM FLOW

To create a form flow, you must use both the Build and Form Flows tabs to associate form flow questions with a form flow and its steps. To plan and create a form flow efficiently, you can build your form with its form flow questions before moving to the Form Flows tab and associate those questions with steps. You can create a form flow from the Build tab or the Form Flows tab.

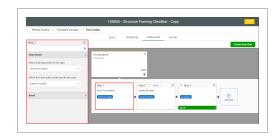
- Build tab In the Form Flow Button's side panel under Details, click Step setup, and then click Next when you see a dialog box that says no form flows exist. When there are existing form flows, the Form Flows tab opens.
- Form Flows tab Click the Create form flow button.

5.2.1 STEPS

CREATE A FORM FLOW FROM THE BUILD TAB

- 1. Add a Form Flow question.
- Select the new form flow button question, and then on the left panel, under Details, fill in the Button text name.
- Click Step setup. The No form flows exist dialog box shows. If you have existing form flows, you will automatically land in the Form Flows tab.
- In the No form flows exist dialog box, click Next. The Create form flow dialog box shows.
- In the Create form flow dialog box, enter the Form flow name and Description, and then click Create. A new form flow shows with Step 1 as the first default card.
- 6. Select the Step 1 card.
- 7. On the left panel under Step 1, in Step details, select the following:

- Which form flow button will be used for this step – The buttons that are available have been added and configured in the Build tab in step 1 and 2.



- 8. Optionally, if you want to send an email notification to the responsible party for this step, click Add email in the Email section and complete the dialog box. The email notification indicates the start of the step after clicking its form flow button, not the completion of the step.
- NOTE Access configuration is not available in Step 1. You can configure access for each individual step thereafter.

5.2.2 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

5.3 SETUP ADDITIONAL FORM FLOW STEPS

Add additional steps to your form flow using the Add Step button in the Form Flows tab.

		BUILD PROPE	IRTIES FORM FLOWS HISTORY		
Julios				Creat	e form flow
* Form Flow Name Julios	_	Acceptance Acceptance	Sample form flow	8	
* Description Sample form flow			511F5 2	sturs 1	
Creation date	05/12/2024	▲ Step 1			
Creation time Created by	9:32 Julio Salguero	Original Reporter			
 Re-enable form flow on corr 	spleted events		Add Step		

You must have form flow buttons on the form's Build tab available before you add a step. You can configure each step independent of each other.

The Add Step wizard has the following 5 configurable options:

	Option	Description
1	Step details	 Select who is responsible for this step. The options are dependent on who is selected. Who will be responsible for this step? Select the role responsible for this step. Allow the opportunity to choose a single user from this group when the button is

	Option	Description
		selected. • When can this step move to the next step ? When you select Users, you must select a specific user. When you select Role, you must select which role and whether the user can choose an individual from the selected role to be responsible.
2	Email	You can select to add an email notification that notifies responsible recipients each time this step is reached. When selected, you can configure your email notification contents. The email notification indicates the start of the step after clicking its form flow button, not the step's completion. You can also add variables so that users can enter information such as reporter names or event titles into emails. To add a variable, type @, and then select an option from the drop-down list.
3	Actions	 What should the status be when in this

• What should the status be when in this step?

	Option	Description		Option	Description
		 How many days until this step become overdue from initiated date or from previous step.? Make this step reversible - The make this step reversible option allows users to reverse to a previous step. Select which step to go back to, whether to cc recipients to the email, and whether to require a comment when reversing. When you make a step reversible year 			<text><image/></text>
		step reversible, you must go back to the Build tab after the step setup to edit the text of the new button, which is named Reversal form flow button by default. The reverse form flow button can have leading logic applied to it independently from the button that advances to the next	select	-	 What form flow button will be used to advance to the next step? Will this button complete the form flow ? The Button details is available after step 1.
4	Step access	step. You can set view or edit access by role for each form question or section			

5.3.1 STEPS

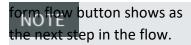
CONFIGURE ADDITIONAL FORM FLOW STEPS FROM THE BUILD TAB

- NOTE To configure additional form flow steps from the Build tab, you must have at least one form flow question or a form flow set up.
- 1. In the Build tab, add a new form flow question.
- Select the new form flow button question, and then on the left panel, under Details, fill in the Button text name and other optional items.
- 3. Click **Step setup**. You will automatically land in the Form Flows tab.
- 4. The form flow step shows with a green link named **SETUP**. When there are multiple form flows, choose a form flow to add the step to.

▲ Step 2	\otimes
Decline	
SETUP	>

5. Select the new form flow button, and then configure the Step details on the left panel.

NOTE When you start the Add Step wizard from the Build tab, the



5.3.2 CONSIDERATIONS

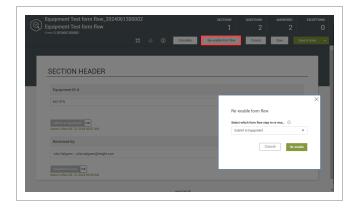
You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

5.4 RE-ENABLE FORM FLOW

You can let users re-enable the form flow of a completed event by selecting a form flow, and then selecting the **Re-enable form flow on completed events** check box in the side panel.

Acceptance			BUILD	
Acceptance	Acceptance			
Acceptance	* Form Flow Name		Acceptanc	
Acceptance Creation date 05/29/2024 Creation time 5:14 Step 1 Form Created by michael shaw@ineight Form Codent	Acceptance			
Creation date 05/29/2024 Creation time 5:14 Created by michael shaw@ineight	* Description			
Created by michael shaw@ineight Form	Acceptance			
Created by michael shaw@ineight Form				
Created by michael shaw@ineight Form			Church 1	
Re-enable form flow on completed events	Created by	michael shaw@ineight	Form	
	Re-enable form flow on com	pleted events	Submit L	

When executing a form, click the **Re-enable form flow** button.



When you re-enable a form flow, you can move it back to the step of their choice. All the completed form flow step data is saved unless you change an answer in a way that leads to different questions based on logic. Only the selected form flow is reenabled, not all form flows associated with the template. If a re-enabled form flow leads to another form flow that is not re-enabled, the user cannot see the other form flow.

5.4.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

5.5 TEMPLATE HISTORY

The History tab provides a listing by date of changes made to a form or task.

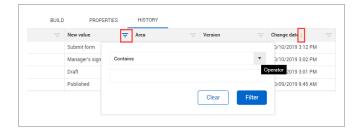
Not all changes made to a template are shown in the history.

					Form builder					
Module landing >	Templates manager >	Form builder								
Accident Forn	n			BUILD	PROPERTIES	HISTORY				0
Change type 👘	Question/Option	Section	- Ok	a volve 👳	Now value	Area 👳	Version	Change date 🛔 👘 👻	Changed by	
Question Added	Button - Submit form	SECTION HEADER			Submit form	Builder	2	18/10/2019 3.12 PM	Karen Lohus	
Question Added	Manager's signature	SECTION HEADER			Manager's signature	Builder	2	18/10/2019 3:02 PM	Karen Loftus	
Status	Not applicable	Not applicable	Pu	bished	Draft	Properties	2	10/10/2019 2:01 PM	Keen Lohus	
Status	Not applicable	Not applicable	Dis	att	Published	Properties	1	18/09/2019 9.45 AM	Karen Lottus	

Each time a form or task is updated and saved, a new Change date entry is created. Each of these changes constitute a new line item on the History tab.

				Form builder					
Notule landing >	Templates manager >	Form builder							
Accident Forn	n		801.0	PROPERTIES	HISTORY				0
Change type	Question/Option	Section 🔍 🗸	06 value 👘 👳	Nev solve 👘 🐨	Aes 🛫	Yesion 🛫	Change date 1	Changed by	
Deeption Added	Button - Submit form	SECTION HEADER		Submit form	Builder	2	10/10/2019 3:12 PM	Karen Laftus	
5549.0	nding > Templates mar	ager > Form builder			_				
stees Accident	t Form			BUILD DOWNER	TES HISTORY				⊻ Ф
Levout types		Al ch	anges have been saved (3.12 P	v)					Sine
Accident	t Form	@ All the	inges have been saved (3.12 P		IES HISTORY				Stret

As with other InEight features, data in these columns can be filtered or sorted on this tab.



For auditing purposes and to meet ISO requirements changes to both Form and Task templates are recorded with date and version history.

5.5 STEP BY STEP 1 – VIEW USER HISTORY ON TEMPLATES

- From module landing page, select
 Templates Manager, and then determine if you need to look at an event or a task.
- 2. Switch the toggle in the proper direction, in this case, **Forms**.



- 3. Click on your preferred form.
- 4. Open the **History** tab.

				Form builde				
Module landi	ng > Template	s manager > Fi	orm builder					
Activate &	InActivate		BUILD	PROPERTIES	HISTORY			
Change type 👘	Question/Opti 👳	Section =	Old value 👘 👳	New value 👘 😇	Area 😇	Version =	Change date_ =	Changed by 👘
Status	Not applicable	Not applicable	Draft	Published	Properties	2	01/07/2020 7:57 AM	Karen Loftus
Property Option	Not applicable	Not applicable	Not available for mobile	Available for mobile	Properties	2	01/07/2020 7:57 AM	Karen Loftus
Status	Not applicable	Not applicable	Published	Draft	Properties	2	01/07/2020 7:56 AM	Karen Loftus
Status	Not applicable	Not applicable	Draft	Published	Properties	1	01/05/2020 8:02 AM	Karen Loftus

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CHAPTER 6 – AUTOMAPPING

6.1 OVERVIEW

Automapping is a feature that lets you create a series of events in bulk for project structure levels (nodes) or components associated with inspection and test plans. Automapping is enabled on a project-by-project basis.

By leveraging mapped values, you can associate them with project structure nodes and templates. Leveraging values sets the mapping of templates and the quantities for each template to be created for each project structure level or component value, which eliminates the need to manually create and schedule processes.

When enabled, you can configure automapping in the following areas:

 Automapping setup - Create map values to associate to the project structure. The map values serve as tags to associate them to the project structure node levels and templates.



 Map project structure - Associate map values to the project structure nodes such as areas, subsystems, and commodities. This creates a relationship between the tag values and the project structure levels. You can map multiple values to a project structure node.

					: Map templati	89	C7	C	Q	0		icel	
A 8	Paoje	st st	w	<i>n</i> 7	Map value								4
~ 1	Calc	asie	Pa	ts LND - EPCM and 8OP (103989)	Project can		iave map i	slat					
	^	011	N	5 General Liquefaction/Jetty	Pumps :	×	Shucture	×	Dectrio	al ×			×
		^	1		Pumps)	×	Electrical	×					×
				GDN	Pumps >	×	Electrical	×					×
		^	11		Pumps)	×							×
				0DN	Sub-System	m	×						×
		^	2		System :	×							×
					Sup System		~			\sim	~~~	~~	~~

 Map templates – From the list of published templates, you can select mapped values, associating them to the template. This creates a relationship between the tag values and the templates. You can map multiple values to a template.

		CC Map proj	ect structure 🛛 🛞 Mana	ge associations 🔰 🚺 🔍 🕦 Cancel	
Template name	Default quantity 🗢	Celeptry 👻	Types $=$	Map volve	$\overline{\mathbf{v}}$
105622 - PKS-FRM-PIPE-5.06.06 - Pressure Test Re	1.1	Checklist		Electrical X PIPING TESTP. X Pumps X	×
105622- PKS-CHE-PIPE-5.07.01 -Flange Bolt Tighte	- 1	Checklist		Electrical × FLANSE × Pumps ×	×
105622-PKS-PRM-PIPE-5.02.01, Piping Installation		Checklist		FLANGE × FLANGE INSU. ×	×
~~~~~	~~~~	~~~~	~~~~	****	~~~
~~~~~~		$\sim$	$\sim$		$\sim \sim$
KD Test From flow	1	Checklist	Type 1		×
KD Test From flow ORT-PR& ORT (21 12 12) - Wet Pipe Fire Sprinkler Sy	1	Checklist Facilities Commissioni.	Tipe 1	CLEAN DUT X	×

 Go to Automapping – To run the mappings configured in Project Settings, click Go to Automapping. Select a mapped value, category, project structure nodes, templates, and default quantities to create forms (events) for each level. You can filter by type to narrow list results.

Map Value Ciew @ Set	10 I	Calcasieu Pass LNG - EPCM and BOP (103989)			
Electrical	•			© Manage associa	tions Rus
		Template name	Header associations	Ŧ	Default que 🐨
Category Ce	. e	105622 - PKS-FRM-PIPE-5.06.06 - Pressure Test Report	ITP: Project Structure		1
Checklist	•	105522- PKS-CHE-PIPE-5.07.01 -Flange Bolt Tightening Record	ITP: Project Structure		1
Туре см	e 6	Care, Maintenance, & Prevention	ITP; Project Structure		1
- Select one -		CHPE-FRM-ELEC-07.01.05, Duct Bank Cleaning & Testing Report	ITP, Project Structure		1
Project Structure		CHPE-FRM-ELEC-07.04.03, Orounding & Bonding Installation Checklist - Op	ITP, Project Structure		1
Search	a	CHIPE-FRM-ELEC-07.04.05 Ground Systems Test Record	ITP, Project Structure		1
Colorest Proc UNE - DPCAL and EXP (D2199) Colorest Ligations (Light Extend Light Extend					
 Cvir Usines 					6 templ

When you run the selected automapping items, a dialog box opens to confirm the creation of the activities. An email confirmation is sent to you

with a Microsoft Excel file showing a summary of the new forms.

The new events show in the Events list in a *Scheduled* status where you can add an event date, and a reporter. As soon as a reporter and event date are provided, the user is notified.

You can view events associated to the project structure in Events > **Project structure**.

					🕑 Ed	it properti. 🛛 🦉	1 🗗	e (1)	۹ 🛛	Clear all filters	
	(D) Auto	ornatic date filter	applied	I - to clear, use th	e event date cols	rnn filter					
×		Event titl 👘		Category 👳	Event dal 🐺		Form nar	Project/C	Reporter :	Status	
		Public Inter-		Public Inter	01/29/2024	202401250	Public Inter	Calcasieu P.	Kori Dooley	Schedu	
Q		CHPE-E-		Checklist	01/01/2024	202312180	CHPE-FRM	Calcasieu P.	Michael Sha	schedu	
ear											
^											
	697		Q i à Créssion NY		Q D 82555 Oakis	Q D X 2555 ORONA 300/2011	Q D 2025.5. @eekar Diductra 20201316.	Q D 20222 Oxelia: 2010/023 2223212. Over-Hu.	Q D & 0.052.6. Orielan Did 2021 2021216. Orieland. Catalog P.	Q D 8.0552.6 Okakis 0.005234 0201118. 099.5%. Catalog P. Mobulos	Q D 2 2322. Overhal Coll239 203118. 096-794- Colleve P. Monard Bu. 2004

6.1.1 CONSIDERATIONS

- The setting Project structure or Integrate with Plan components must be enabled to use the Automapping feature. For more information, see Project level settings.
- You can enable Automapping at the project level in Project settings. For more information, see <u>Automapping</u> in Project Settings.

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CHAPTER 7 – HEADERS

7.1 HEADERS OVERVIEW

You can create Inspection and Test Plan (ITP) and Project Structure templates headers in the Headers tab. When you enable the project's header feature in Project settings, the headers are automatically created. The header templates ensures that the data captured remains consistent through the use of question types.

7.2 ITP HEADER TEMPLATE

When you enable Inspection & Test Plans for the project, you can also enable the ability for the form to seamlessly integrate InEight Plan components using a template header. This ensures that component data captured from Plan remains consistent through the use of question types.

To do this, enable the **Integrate with Plan components** toggle. This will enable the Go to Header Templates link to access the Headers page.

Mod	ule settings > Duality •	
Modu	le summary Categories Types Classifications Statuses Email templates Roles User assignments Project Settings	 Templa
		Save
	Project Settings	_
	Inspection & Test Plans Evadory approximative for the project will allow the project to create and manage FPs.	
	Open Imspection and Test Plans	
	Integrate with Plan components Enabling the integration with Plan components for the project will allow for the oreation of templates with IP headers and associating components with events.	
	O to the Header Templates	
	Project Structure When paper bitchers methods, the structure and methodis defined in Core will be made visible and can be used to sort and fitter data. The Project Diructure Header benefate can be created and added to forms to inst formal paper project Structure method.	
	Co to Header Templates	
	User Groups Enabling user prouse for the project will allow user prouse to be created and managed as well as associated with desired events/tasks.	
	C	

Click the **Go to Header Templates** link to open the Headers page. You can oversee and manage ITP Headers for projects.

Settings > Templates manager	Quality •		
Forms Tasks Headers			
Organization		Steel Structure Training Job (105091)	Manage associations
Search		Project Structure Header Created Jul 12.2023 12.29 PM Karen Leftus	Verson
+ Collapse all	Clear	Steel Bructure Training Job (105091)	PUBLISHED
C-XYZ (RootOrg1) Steel Structure Training Job (166011)		ITP Header Created Jun 27.2023 11.31 AM Karen Loftus Steel Structure Training Job (105991)	Verson 3 PUBLISHED
Training Job (Training Job)		construction and have (constrained	
Wards Island WWTP (183850) BMS Test (BMS Test)			
BMS Test (BMS Test)			
			2 Headers

7.2.0.1 ALL COMPONENTS GRID

View all component activities and their status in the All components option. You can track the work performed against a component in the module landing page, under **Links**.

☰ 🏠 Steel Structure Training Job	105091 / Completions
Completions > Quality -	
Links	
All events	My To Do List
All tasks	Su
All components	25
Inspection & Test Plans	
Inspection & test plan report	
Administration	
Templates manager	
User assignments	
Settings	France
Create notifications	Forms
	Favorites (2)
	Our The L

The All components option groups events by component.



7.3 PROJECT STRUCTURE HEADER TEMPLATE

You can use a Project structure template header to seamlessly integrate with InEight Platform master data. The project structure configured in Platform is shown in the header template. This ensures data consistency and provides a single source for InEight Platform data.

To do this, enable the **Project Structure toggle** in Project settings. This will enable the **Go to Header Templates** link to access the Headers page. For more information, see **Project structure** under **Project level settings**.

In the Headers page, you can oversee and manage Project Structure Headers for projects.

Settings > Templates manage	r 🔰 Quality •		
Forms Tasks Headers			
Organization		Steel Structure Training Job (105091)	Manage associatio
Search	Q. Clear	Project Structure Header Created Aug 30,2023 06/22 AM Michael Sha Steel Structure Training Job (105091)	Version 2 DRAFT
C - XYZ (RootOrg1) Steel Structure Training Job (106091)		Project Structure Header Created Aug 16,2022 03:45 PM Kaves Lattus Steel Structure Training Job (105091)	Version 1 PUBLISHED
Steel Structure Training Job 2 (1050) Training Job (Training Job)	(2)	ITP Header Created Aug 16,2022 03:45 PM Kaven Lattus Steel Structure Training Job (105091)	Version 1 PUBLISHED
			3 Headers

Under Organization, you can view the list of projects that have the Project Structure processes enabled. Select a project to view the associated template headers.You can click a project structure header to open and manage it.

To use a Project structure header in a template, you must associate it to the template. Click

Manage associations to associate the template. For more information, see Manage associations.

7.3.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

To integrate Project Structure header with Platform, all Project Structure values and definitions for your project must first be made in InEight Platform.

7.3.2 STEPS

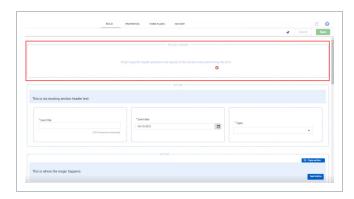
To navigate to Project settings, see steps to navigate to project level settings in <u>Settings</u> <u>overview</u>, and then click the **Project settings** tab. Click the **Go to Header Templates** link.

7.4 DYNAMIC HEADERS TOGGLE

ITP and Project Structure dynamic template headers are used to enhance your template forms. You can enable and disable the use of header templates created for your project using the **Enable dynamic headers?** toggle feature in your template properties.

	BUILD PROPERTIES FORM FLOWS HISTORY
Actions 🔻	Cancel Sav
	Mahi 4 🗙 👻
	Options
	a protona
	Available on mobile ? Event title ① Event date ①
	System default System default Add expiration date
	Available through form button only?
	O Add template integration
	Enable print functionality ① Enable dynamic headers? ①
	Θ

When enabled, the Project Header space will dynamically show to serve as a placeholder at the top of the form and the form will show in the Manage associations page to associate headers to your form.



7.5 MANAGE ASSOCIATIONS

You can associate published header templates with template forms in the Manage associations page. In the Headers page, click **Manage associations**.

Forma Taska Headers				
Organization		Steel Structure Training Job (105091)		Manage association
Search	Q.	Project Structure Header Steel Structure Training Job (105091)	Created Jul 11,2023 12:25 PM Karen Leftus	Verson 3 PUBLISHED
C-XYZ (RootOrg1) Steel Structure Training Job (165091)		ITP Header Steel Structure Training Job (105091)	Created Jun 272023 11:11 AM Karen Loftus	Version 3 PUBLISHED
Training Job (Training Job) Wards Island WWTP (183850) BMS Test (BMS Test)				

On the Manage associations page, you can view templates with dynamic headers that meet specific conditions. In the header associations column, you can select which header templates to associate with each template. If both header templates are selected, you can choose the header template that shows when filling out the form. If the header association is not set, the header templates will not show in the form.

Ste	el Structure Training Job (105091)				
Ac	tions v				
	Template name	Header associations		Default hender	
	Incident Form	Project structure x ITP x	×	ITP	
	Quality review - Dynamic Header Enabled	Project structure x ITP x	×	ITP	
	test KL Dynamic Header	Select header associations		Not set	

CHAPTER 8 – INSPECTION AND TEST PLANS

8.1 INSPECTION AND TEST PLANS OVERVIEW

Inspection and Test Plans (ITP) is a feature that can be activated for templates to let you gather ITP information for a project. They can also integrate with InEight Plan. You can collect information to understand where you stand from a project perspective. At the organization level, administrators have the option to enable Inspection and Test plans for any given module.

At the project level, with the applicable permissions, you can enable Inspection and Test plans on a project by project basis.

8.2 CONFIGURE ITPS AT THE ORGANIZATION LEVEL

You can enable and disable Inspection and Test plans for a given module at the organization level in Product Settings.

To enable and disable ITPs, in the Organizations home page, click **Settings** on the left navigation panel, and then click the **Compliance** or **Completions** icon.

Use the toggles to enable and disable ITPs for the module. When you enable ITPs, its related functions will show throughout the module. ITPs are disabled by default.

*	PRODUCT SETTINGS MODULE SETTINGS						
	Module management Template integrations						
۲	Ð						
۲	Module name		Description	T Secondary module name	T Inspection and Test Plans ()		
۲	Safety		A module to track and manage safety related business processes.	Safety	0		
8	Environmental		A module to track and manage environmental related business processes.	Environmental	0		
	Compliance		A module to track and manage compliance related business processes.	Compliance	0		
۲	Change		A module to track and manage change related business processes.	Change	0		
۲	Custom		A module to track and manage custom related business processes.	Custom	0		
۲							
6							

8.2.1 CONFIGURE PROJECT SETTINGS ITP PERMISSIONS IN ROLES

When Inspection and Test Plans are enabled for a given module, you can then enable Project Settings ITP permissions in Roles.

						×
	Add role					
	- Name		Description			Contraction (1997)
6	MODULE EVENTS ROLES/USERS TEM	IPLATES PROJECT SETTINGS				
	Enable/ Disable Project Structure	Manage Project Inspectio	n and Test Plans	Manage Project User Groups	A	
1	Edit header template	Create and edit inspect	ion and Test Plans	Create and edit User groups		
		🗋 Edit header template				
					•	
	Make this role read only (1)					
				Cancel	Save	

You can select the following options:

- Manage Project Inspection and Test Plans When selected, this option includes Create and edit Inspection and Test Plans and Edit header template options.
- Create and edit Inspection and Test Plans Lets you create and edit ITPs at the organization level.
- Edit header template Lets you access and edit ITP header templates.

8.2.2 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

8.3 CONFIGURE ITPS AT THE PROJECT LEVEL

In the project's module settings > **Project Settings** tab, you can enable Inspection & Test Plans for the project to create and manage ITPs. This will also enable the **Open Inspection and Test Plans** link to open the Inspection and Test Plans page where you oversee and manage ITPs.

Control and control a

To integrate ITPs with InEight Plan, enable the Integrate with Plan components toggle. This will allow you to create templates with ITP headers and associate components with events. For more information see the Header templates topic.

8.3.1 CONSIDERATIONS

- To integrate with Plan, you must enable ITP mapping between Compliance and Plan option at the project level in InEight Plan settings.
- You must have Level 3 Account Admin permissions in InEight Platform or a

Compliance or Completions role with the applicable permissions.

8.4 CREATE ITPS AT THE ORGANIZATION LEVEL

After Inspection and Test Plans have been enabled for the module, you can create and manage ITPs at the organization level. Create new ITPs manually or import them using a template. The template is available to download from the **Download template** link.

NAVIGATE TO INSPECTION AND TEST PLANS AT THE ORGANIZATION LEVEL

- From your organization home page click Settings, and then select Compliance or Completions. The Module management page shows the available modules under Product Settings.
 - NOTE The Inspection and Test Plans toggle must be enabled for the module.
- 2. In the Product Settings landing page select the **Module Settings** tab, and then select a module. The Module settings landing page shows.
- 3. Select Inspection & Test Plans.

Module settings > Quality •						
Module summary Categories Types (Classifications Statuses	Email templates Roles	User assignments	Inspection & Test Plans		 Templa
				1 Download template	H II -	Q Create ITP
Cast In Place Concrete						
Version 1 - APPROVED						
CP-						
9 0.1						
	Cast in Place Concrete Version 1 - APPROVED CIP	Cast In Place Concrete Vesion 1 - APRICED CP	Cast In Place Concrete Version - APPEortD op	Cast in Place Concrete www.sit.ummoto or	Cast In Place Concrete www.si	L Instantinger II

CREATE AN INSPECTION AND TEST PLAN

1. Click **Create ITP**. The create ITP dialog box opens.

* ITP name		
Account code		
Assign account code.		
Discipline		
Select one		•
 Description 		

2. Enter the ITP information, and then click **Save**.

IMPORT ITP

 In the Inspection & Test Plans page, click the **Download template** link. The Inspection and Test Plan Import Template is downloaded to your downloads folder.

- 2. Fill in the ITP information. Included in the template are the Instruction and Example sheets.
- 3. Click **Create ITP**. The Create ITP dialog box shows.
- 4. Enter the required fields, and then click **Select file to Import**.
- Select the ITP template, and then click
 Open. The ITPs will show in the Inspection & Test Plan page.

8.4.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

8.5 CREATE ITPS AT THE PROJECT LEVEL

At the project level, you can create new ITPs manually from scratch, copy ITPs created at the organization level, or import them using a template. The template is available to download from the Download template button.

NAVIGATE TO INSPECTION AND TEST PLANS AT THE PROJECT LEVEL

- From your project home page click Settings, and then select the Compliance or Completions icon. The Module management page shows the available modules under Product Settings.
 - NOTE The Inspection and Test Plans toggle must be enabled for the module.
- 2. In the Product Settings landing page select the **Module Settings** tab, and then select a module. The Module settings landing page shows.
- Select the Project settings tab, and then click the Open Inspection and Test Plans link. The Inspection & Test Plans page opens.

>	Quality > Project setti	ngs							
			US	SER GROUPS INSPECTION &	TEST PLANS				
۲	Copy ITPs from Org				1 Download template	⊞ ⊞	Q	Cre	ate ITP
 (*) (*)	Copy - Cast In Place C Version 2 - APPROVED CIP 9	oncrete	Owner Required I Version 1 - INACTIVE Owner Requested Insp 0						
() ()									21

MANUALLY CREATE A NEW ITP

- In the Inspection & Test Plans page, click Create ITP. The Create ITP dialog box shows.
- 2. Enter the ITP information, and then click **Save**.

COPY ITP FROM ORGANIZATION

- 1. Click **Copy ITPs from Org**. The Copy ITPs from Org dialog box opens.
- Select ITPs from the list and then click Copy. You can select up to 20 ITPs at a time.
- 3. The ITPs now show in draft mode in your projects Inspection & Test Plans page.

IMPORT ITPS

 In the Inspection & Test Plans page, click the **Download template** link. The Inspection and Test Plan Import Template is downloaded to the downloads folder. 2. Fill in the ITP information.



Included in the template are the Instruction and Example sheets.

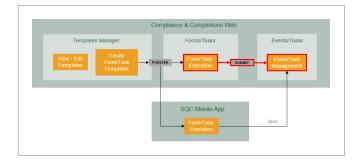
- 3. Click **Create ITP**. The Create ITP dialog box shows.
- 4. Enter the required fields, and then click **Select file to Import**.
- Select the ITP template, and then click
 Open. The ITPs will show in the Inspection & Test Plan page.

8.5.1 CONSIDERATIONS

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

CHAPTER 9 – FORM AND TASK EXECUTION AND MANAGEMENT (WEB)

9.1 FORMS AND TASKS



9.1.1 LAUNCHING A FORM OR TASK

You can launch a form or task by navigating to the Compliance landing page, and then choosing a category in the Forms or Tasks window.

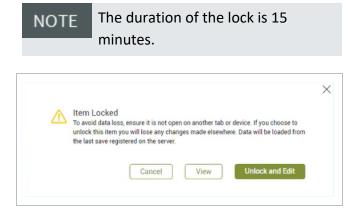
Links March							
	To do list			(2 Octob	er		
All beins	0.n 10	11	12	ned 13	14	15	0er 16
Administration			16	10		10	10
Templates manager							
Roka							
User assignments							
Gettings						(units contr	0 Overductation 0
Onexte notifications							
	Forms			5 Schedule term	ks		
	Tabley (Confidential)			• Med	and (Confidential)		
				Q, 2440	13 1464		
		No items hand		_		No items found	
				_			
				_			
				_			

In the Forms and Tasks windows you can select the Favorites drop-down list, and then a category associated with the module needs to be selected. A category contains the forms or tasks that are associated with Compliance. If you do not see a category that applies, it means you do not have Compliance assignments to that category for that project.

9.1.1.1 LOCKED FORMS OR TASKS

An Item Locked message shows when the application detects that you or another user has the same form or task open on another device or browser instance or when the system did not remove the lock.

When the application detects that you have the same form or task open, the Unlock and Edit option shows in the Item Locked message. The message warns you that if you choose to unlock and edit the form or task, any changes made to the form or task in other devices or instances will be lost, and the application will load the form or task data from the last save performed on the server.



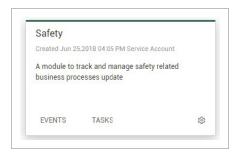
You can choose from the following options:

- Cancel Returns you to the previous page.
 Clicking the Close icon to close also returns you to the previous page.
- View Opens the form to see the last saved form data in View mode.

 Unlock and Edit – Unlocks the form or task for further editing. Any changes to the previous form or task are discarded upon saving or submitting. This option shows when the application detects the same user has the form or task open elsewhere.

LAUNCH A FORM

- 1. Open the InEight project portfolio web application.
- 2. Navigate to the **Compliance** Landing page module.
- 3. Select the **Safety** module card.



- On the Module landing page find the Forms box, and then select a category from the drop-down menu.
 - A list of forms appears on the screen associated to the category

selected

Forms	😁 Schedule form
Inspections	
Search forms	(
Leader Safety Walk	
J	
- M	
2 M	
- Lin	

5. Select a form.

A new window opens showing the selected form

Leader Safety Walk				3	18	
				Cancel	Silve	Sinchel
AREA / TASK OBSERVED						_
ASK / CONSIDER THE FOLLOWING QUESTIONS:						
STEP 1: Stop and observe work. Ensure it is safe to enter by asking	"Can Lenter your workspace?"					
$\rm STSP \Sigma$ introduce yourself if you are not know to the person. "H, for						
878P 2. Introduce yourself if you are not know to the person. "H, fr Date & Time		* People Observved				
	• the General Manager of					
Date & Time						

You can close the form by selecting **Cancel** on the top right corner

NOTE Selecting Cancel results in the loss of any data you have entered since the last time you saved. The system does not autosave your work.

TIP

Launching a Task follows a very similar process. After selecting the appropriate tile (Safety in this case), you select the Task from the Task dialogue, selecting the appropriate category and then task.

Tasks	
Safety	
Search tasks	
Finalize Safety Walk Process	
0	

9.2 FILLING OUT A FORM AND TASK -WEB

After selecting the desired form from the Module landing page, it is now time to fill out the form and submit it. A task might also need to be completed.

There are many types of question formats which can include different types of fields: free text fields, calendar fields, time drop-downs, and more. Short free text fields have a 250 character limit. Long free text fields have a 4000 character limit.

NOTE Form and task types can vary depending on the module type, and what is required to complete prior to submitting. The below overview is only an example of what a typical form might require.

Overview - Forms or Tasks Page

	Title	Description
1	Form name	Name of the template.
2	Quick info	The number of sections, questions, questions answered, and answers considered exceptions. If you click the number of sections or exceptions, a table

	Title	Description
		of contents opens for easy navigation.
3	User groups	Select what user groups have access to this form or task. This button is available only at the project level.
4	Print	Print a PDF of the form or task.
5	Information	The number of questions that have been answered. It also shows you several details pertaining to the form or task.
6	Cancel and Save	Cancels the form or task. Any changes made since the last time you saved are lost. Saves the form or task in its current state, and you can continue to fill it out if necessary. You can also save and close to exit the form. For tasks, you can choose to save and start a new task.
7	Question types	Various ways of asking questions within a form or task. Examples include: • Attachments • Choice

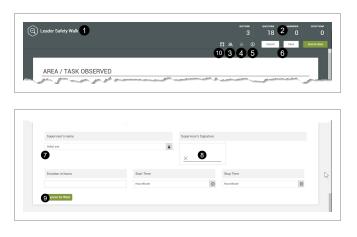
Overview - Forms or Tasks Page (continued)

	,			
	Title	Description		
		Date-timeForm buttonForm FlowPeople picker		
8	Signature block	Some forms or tasks might require a user to sign off prior to submitting it.		
9	Button	The outcome of clicking on a form or task button vary depending on the button's configuration. The name of the button is defined by the administrator who created it (for example, Submit the form).		
10	View active form flow	Lets you view which step and status in the form flow you are in. This only shows active after a form flow has started. If a form flow		

has not been started,

the option is disabled.

Form example:



Task example:

			Cancel	O Save Save & C
		85	Cancel	Save Save & C
Corrective Action				
* Task title				
			-	250 characters remaining)
* Description				
			P	000 characters remaining)
Attach any documents, files or photographs				
	(+)			

9.2.1 HEADER INFORMATION

Most forms contain basic identifying information such as date, time, and location of the event, or free text fields asking for details about the event. The header information is higher-level material needed to complete a form. Not all forms have header information, however, as this is determined by the person creating the template of the form. Filling out the required information accurately is important for workflow and reporting reasons. Tasks might also have header information as, at minimum, the Description, Responsible party and Due date are programmed fields.

Description of the accident	* Date of incident	Time the incident occurred	
	month/day/year	hours-minutes	e
(200 characters rem			
Specific location where the accident occur	red		
		(4	1000 characters remainin
Please add any pertinent photos			

9.2.2 COPY A SECTION

Depending on how the form or task template is set up, you might be able to copy a section. If the copy option is enabled, use the Copy section button in the section header to copy the section below the current section.

- NOTE The Copy section button might have a different name, depending on how the form or task template was set up.
- NOTE On the web, the Copy section button is shown in both the upperright and lower-right of the header.

You can also click the **Remove** icon to remove a copied section.

Copy section	
۵.	
Copy section	

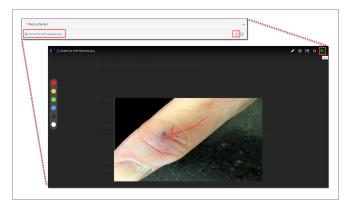
9.2.3 ATTACHMENTS

Some forms or tasks might include an option to include attachments such as photos. You can also include any annotations to describe the attachment in greater detail. Annotations help clarify what the photo represents.

Please add any pertinent photos		
r lease and any permiting protos		
	Select files or drag and drop	
1 file(s) attached		~

For example, you can include an attachment photo for an incident showing an injured thumb. After you click **Save**, it is saved in the form or task. You can also annotate the photo by drawing a red arrow to the specific injured mark on the thumb or adding descriptive text.

On mobile devices, a time stamp updates when edits are made.



If integration with InEight Document is set up, you can attach supporting documents from the Document application. Click **Select files or drag and drop**, and then click **InEight Document** in the dialog box.



A new window opens where you can sign into Document, and then enter search criteria. Click **Search**. Results are shown according to your Document user permissions. Select one or more documents, and then click **OK**.

Register View:	All	•	
	Documents that I can download		
Status:	All	•	
Discipline:	All	•	
Type:	All	•	
Document No.:	Contains	2	
Title:	Contains	2	
Category:	All	•	
Date Recorded:	Between And And Within the last days		
Date Released:	Between And And Within the last days		
			÷

Docume	nt No. 🔺	Rev	Version	Sts	Title	Disc	Cat	PDF				
ABC-123		A	A.01	IFR	TEST_Document	ADMIN	GEN					
ABC-124		Α	A.01	IFI	Referential removal validation	ADMIN	GEN					
AUDIT-0	0001-ABC	A	A.01	IFI	Audit response	CP	ALL					
	ANCE_VALIDATION_D	(A	A.01	AB	Validation check	ADMIN	ALL					
COMPLE	ANCE_VALIDATION_D	(A	A.02	AB	Validation check	ADMIN	ALL					
	ANCE_VALIDATION_D	(A	A.03	AB	Validation check	ADMIN	ALL					
DC-AUD	T-00001-ABC	A	A.01	IFI	Audit doc	CP						
DOC2AA		A	A.01	AB	Documentation check	ADMIN	ALL					
DOC2AA		A	A.02	AB	Documentation check	ADMIN	ALL					
DOC2AA		A	A.03	AB	Documentation check	ADMIN	ALL					
DOCUME	ENT1	A	A.01	AB	QADoc1	CIV						
	ENT2	в	B.01	IFC	QADoc2	ARCH						
XYZ-123	-ABC		01	IFI	House drawings for customer	ADMIN	GEN					
XYZ-123	-ABC		02	IFI	House drawings for customer	ADMIN	GEN					
XYZ-123	-ABC	-	03	IFI	House drawings for customer	ADMIN	GEN					
XYZ-123	-ABC	A	A.01	IFI	House drawings for customer	ADMIN	GEN					
H < 1	▶ ▶ Page siz	e: 10	0 -								16 item	s in 1 page

Document links are shown in the list of attachments in orange with the document version numbers. If you click a Document attachment, a new window opens to the Document application where you can see the details of an attached document and see it in the File Viewer.



If integration with Document is not set up, you cannot click the InEight Document button. If you are a level 3 administrator, you can click the **Set up InEight Document integration** icon. On the Application integrations page, add your InEight Document URL if it not already added. In the table, select your InEight Document URL and project ID in the same row as your project, and then click **Save**.

InEight Document URL	https://	.com	• 🕑 🖻 🛞			
				Last synced on:	03/28/2022 7:30 AM C Sync all pr	ojects Cancel Save
Suite project ID		Suite project name	Suite organization	InEight Document URL	InEight Document project ID 👘 👳	InEight Document project nome
1000		1000 Control 1000		https:// com	PLANTEST	Plan Test Project

9.2.4 FORM AND TASK DETAILS

The form might require you to fill out additional details. For example, for an incident-related form you may need to determine if the incident required any first aid or if it was a near miss.

			* Did the injure	d party	receive any kind of medical treat	ment?
 First aid Lost time 			⊖ Yes ⊖ No			
Restricted duty Other rec. Non-work related Near miss Auto / Equipment Utility strike Fatality						
What is the job type of th	ne injured party?	What was the cause	of the injury?		What is the type of injury?	
		Select one		~	Select one	~

Other form questions might include determining if the injured party received any medical attention, or what caused the injury.

Incident classification			* Did the injured	d part	y receive any kind of medical treatme	nt?
 First aid 			O Yes			
Lost time			0 N0			
 Restricted duty 						
Other rec.						
 Non-work related 						
 Near miss 						
 Auto / Equipment 						
 Utility strike 						
Fatality						
What is the job type of t	ne injured party?	What was the cause	e of the injury?		What is the type of injury?	
Select one	~	Select one		~	Select one	v
What was the injured pa	rty doing just before t	he incident occurred?				

TIP

Tasks might also require you to fill out additional details.

9.2.5 SMART FORMS AND TASKS

Smart forms and smart tasks generate additional questions based on how the original question was answered. For example, the below image is showing that only if the question "Was anyone injured during the accident" is answered Yes, is the following question, "Did the injured party receive any kind of medical treatment?," shown.

Did the injured party receive any kind of media	cal treatment?			
Show this question when the follo	owing question is answered:			
Was anyone injured during this incident?	¥	is Yes		× 😣
Select a question		Select a re	ponse	
Add leading question				

9.2.6 FORM WITHIN A FORM OR TASK

There might be a need to open a new form from within the existing form or task you are working in. For example, while working on an Incident form you might need to start a Worker's compensation claim report.

CLOSU	If you believe that a claim is required on this incident, please start the process by clicking h	
Click here to	ere o start a workers comp claim report (i)	

By selecting the Workmans comp claim report form button, a new form generates, and you follow the steps of that form to fill it out. After filling out the required information, you submit the form, which returns you to the original form or task you were working in.

When you click a form or task button, the status of the current form or task might change, depending on how it is set up by your administrator.

					õ O o	ancel Same
Initial Information						
Date of incident being referenced		Safety manager at	site of incident		Phone number of manager	
month/day/year HourMinute	m 0	Select one		۵		
Has the incident been fully investig	ated and completed?		Reconstru	ction photos wer	e added to the incident	
⊖ ves			\odot			
O No			\otimes			
Submit for review						
			INEIGHT®			

9.2.7 FORM FLOWS

When the form you are filling out has a form flow associated with it, there are special buttons to complete each step in the flow. These form flow buttons appear similar to other form buttons but have an arrow icon next to them.

Form flow buttons that move the flow to the next step have a right arrow. Form flow buttons with a left arrow revert to a previous step.

When you click a form flow button after filling out all mandatory information, the form saves and closes.

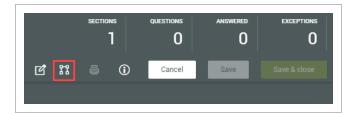
Some form flows can be re-enabled after an event is completed, depending on the form flow's setup. Click the **Re-enable form flow** button in the upper-right of the page, if it is shown. When you re-enable a form flow, you can move it back to the step of your choice. All step data is saved from previously completing the form flow unless you change an answer in a way that leads to different questions based on logic.

If you re-enable a form flow, only the selected form flow is re-enabled, not all form flows associated with the template. If a re-enabled form flow leads to another form flow that is not re-enabled, you cannot see the other form flow.

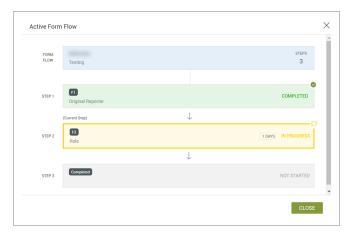
NOTE You must have permission to edit completed events to re-enable a form flow.

9.2.8 VIEW ACTIVE FORM FLOW

When you open an event from the Events page, and the event has a form flow that has been started, you can click the View active form flow icon at the top of the page. The Active Form Flow dialog box opens.



At the top of the dialog box is the name and description of the form flow and the number of steps. Below them, each step is shown with its status and responsible party.



NOTE	If a form flow is not started, this
_	option is disabled.

9.2.9 GPS QUESTIONS

A GPS question lets you provide your location by clicking **GPS** or by entering your coordinates directly in the fields. You can also click **Clear GPS** to remove information if you need to enter a different location.

NOTE

If you enter GPS coordinates automatically, you cannot manually edit the coordinates.

9.2.10 COMPLETE A FORM OR TASK

For more information on how to save and submit a form or task, see <u>Complete a Form or Task</u>.

9.2 STEP BY STEP 1 – FILL OUT A FORM

1. From the Compliance landing page, select a card module, Safety in this case.

Safety		
Created Jun 2	5.2018 04:05 PM Service A	ccount
	rack and manage safety cesses update	related
EVENTS	TASKS	F

2. From the Module landing page, select a category from the drop-down menu under Forms.

3. Under the category, select a form.

Incident	
Search forms	
Accident Form	
Project Manager Safety Walk	

 Complete all fields in the form, paying particular attention to those with an asterisk, which are mandatory fields, as they preclude you from moving ahead.



Some items require free-form data entry such as Description of the accident. Others require selecting a time or date.

Accident Information	
Description of the accident	* Date of incident
	month/day/year
(200 characters remaining)	

Other question types may require attaching documents. Use the annotation feature to add text or drawing to an image. In this case, you could draw an arrow showing the direct location of an injury.



Some questions require selecting from radio buttons or icon type questions.

Has the incident been fully investigated and completed?	Reconstruction photos were added to the incident
○ Yes ○ No	\bigotimes

- 5. To update the photograph's annotations, Select the **Save** check mark.
- On the top right of the form, select the Information button to see form information.

Cancel Save Save & Lobest Workers Comp Claim X Base file Opparation/Paper Opparation/Paper Opparation/Paper Company Claims Company Claims Enter file Opparation/Paper Company Claims Company Claims Enter file Opparation/Paper Company Claims Company Claims Develop Opparation/Paper Over file Opparation/Paper <

7. Forms most often have a button at the end to move the form along in its process. In this case, the Click here to start a workers comp claim report button initiates the form within a form feature, where the system branches to another form, in this case the Workers Comp claim form.

CLOSURE OF INVESTIGATION
Click here to start a workers comp claim report
Signature of Safety Manager
<u>×</u>
Close and complete this incident

NOTE

The process for completing a task is very similar to filling out a form.

The process is similar whether checking the status of a form or task.

9.3 COMPLETE A FORM OR TASK ON THE WEB

There are several ways to finish filling out a form or task depending on how it is set up by your administrator and what the next steps are.

9.3.1 SAVE A FORM OR TASK

There might be times when you do not have enough time to complete a form or task in its entirety. When you do not have enough time to complete a form or task, or not all information about the event is readily available, you can save your work and continue or save and close and come back later to complete and submit it.

> You can use the Button question type to facilitate a simple workflow outside of using the form flow feature.

If you are filling out a task and want to start a new task immediately after saving the current task, click the **Save & close drop-down** button, and then select **Save and start new task**.



NOTE

When the form or task is locked, an Item Locked message shows. For more information about locked forms or tasks, see **Locked forms or tasks** in <u>Forms and Tasks</u>.

9.3.2 ASSIGN A TASK

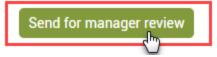
As part of filling out a task, you might have to assign it to someone else to complete a portion of it. To assign a task, click the **Assign** button. If you want to start a new task immediately after assigning the current task, click **Assign and start new task**.



9.3.3 SUBMIT A FORM OR TASK

When you have all the needed information in the form or task, you are ready to submit it or send for manager review. This is the end of what you need to complete. An email notification, if applied, is typically sent to the manager.

NOTE You can use the Button question type to facilitate a simple workflow outside of using the form flow feature.



As part of closing out the form or task, you might need to sign it, and the button varies depending on what type of form or task it is.

CLOSURE OF INVESTIGATION



Before submitting the form or task, you can click the **Information** icon to see if there are any other questions left to be answered.

Event Title
VXCVXV
Organization/Project
Steel Structure Job (105091)
Module Safety
Salety
Category
Incidents
Event Date
06/01/2021
Start Date
06/01/2021
Status
Pending
Reporter
Version
3
5
Attachments History
References

NOTE	If there are mandatory questions on the form or task, you are not able to submit it until they are answered.
TIP	The Edit button is only visible to

those with authority to edit forms.

9.4 EVENT AND TASK MANAGEMENT

A Compliance event is an occurrence that has already happened; it therefore refers to forms that have already been filled out. Because events are part of a workflow, you can add more information to events, review existing data in the event, or move the event through the workflow.

The Events page shows a repository of forms in various statuses such as pending, with claims manager, manager review, and complete. The Task page is also a repository of forms that provides the same functionality as the Events.

The following are common column headings and their descriptions:

Quality > Events	-	@ Gotal Events/Tasks: VSeut: My view
⊕ ⊗ ▼		😒 telt properti. 🔀 💩 🕕 🔍 Cherr all Uber
	Automatic date filter applied - to clear, use the event date column filter	
F Event ID	\mp hejeld/galation \mp Category \mp Fernance \mp Eventile \mp Repote \mp Edus	🐺 Brentidatej 🌳 Location 🙄
20230104000		01/04/2023 On Web Z Attachment
0 0	8 6 6 0 6 0	A Second Se

	Title	Description
1	Attachment	Indicates whether an event or task has attachments. Click the icon to see the

	Title	Description
		attachments.
2	Event or Task ID	The unique value assigned to each event or task.
3	Project/Organization	The project or organization associated with the event or task.
4	Category	The category associated with the event or task. It is specific per module and defined by the organization. Allows the module to be partitioned into smaller areas and assigned permissions.
5	Form or Task name	The name of the form or task template.
6	Event or Task title	The title given to the event or task by the user or generated by the system.

(continued)

	Title	Description
7	Reporter or Responsible party	For events, the user who initially submitted the form. For tasks, the responsible individual.
8	Event date or Due date	Date the event occurred or the due date of a task.
9	Status	Four default statuses are provided, Complete, Pending, Scheduled, and Canceled. Admins can create sub statuses under each that best align with their business processes.
10	Location	Shows whether the event or task location is On web or On mobile. When an event or task is



You can access events or tasks by going to the module landing page, and then selecting **All** events or **All tasks**.

The event ID, Event title are shown on the Events page. The Event status is also shown, and changes based on the state of the event.

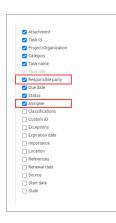
 Dect D
 Period/D
 Dect May
 From some
 Dect May
 Dect May

The Tasks page also shows columns such as Task ID, Project/Organization, Category, and Status. Columns unique to the Tasks page include Task name, Responsible party, and Due date. Tasks automatically become overdue when the assigned due date expires. The tasks page shows a visual indication of overdue states. Sorting and filtering capability in the lists lets you to quickly associate tasks to individuals, categories, status, etc.

Qualit	Quality > Tasks +						@ Global Events/Tacks Vienz: Myslew				*			
	T									C)	8	۲	Q 000	r all filters
						① Automatic data fiber applied - to do	ear, use the due date column	(Rar						
	Taok M		Project/Organization	- Geogra		Text rane	Tank Side	- Responsible parts 1	The first section			Status		
	29230113		\$100000 - PK3 Inc (Rootbrg/)	Appearant		Report photo	Brighton .	Julia	01/25/2823			Fende	9	
	2020011		Ver Non North Platform (1999)	11 GA Performance 11		Integrated list question - Do not edit	Reference	Antheney	001729823			Funds		

In the Tasks page, like the Events page, you can update columns by clicking the Column chooser icon, and then selecting or deselecting the check boxes for columns you want to add or remove.





You are now able to sort or filter these columns.

NOTE When a task is assigned, the responsible party receives an email with a link to complete the task.

NOTE Sorting or filtering by the Assigner and/or Responsible party, may be helpful.

9.4 STEP BY STEP 1 – ADD ADDITIONAL COLUMNS TO THE LIST OF ALL EVENTS OR ALL TASKS

- 1. In the module landing page click **All events** or **All tasks**.
- 2. Click the **Column chooser** icon.
- 3. Select Assigner and Responsible party.

9.4.1 ADDITIONAL EVENT OR TASK FUNCTIONS

You can use the following functions in the All events and All Tasks pages:



	lcon	Description
1	Edit properties	Edit properties of one or many selected events or tasks. All the selected events or tasks must be from the same template and you must have permission to edit them.
2	Notifications	Send notifications with messages to specific users, and roles for the specific

	lcon	Description
		project. This is available only at the project level.
3	Export events or tasks	Export data from the Events or Tasks list to Excel, with an email generated once the file export is completed.
4	Print	Print a PDF report of the selected event or task. The ability to print is based on template configuration.
5	Information	Open a slide-out panel to the right that outlines data about a specific EventID or TaskID. You can also see the history of changes to the event or task.
6	Search	Open a slide-out panel to search all columns in your view for specific terms.
7	Clear all filters	Revert the listing to its unfiltered state if filters have been used.

9.4.1.1 EDIT PROPERTIES

9.4 STEP BY STEP 2 – EDIT AN EVENT OR TASK PROPERTIES

- 1. In the All events or All tasks list page, select events or tasks by clicking the check boxes.
- 2. Click the Edit properties button.

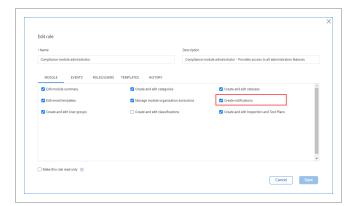
The Edit properties dialog box opens.

	Edit pro 3 select	perties ed items will be updated wi	th the f	ollowing			×B	0	Q (10)
Event title 👳	8	* Property		Value				Status	
Safetre	۲	- Select one - 🛛 💌	-			8		Pendin	5
	8	- Select one -						Comple	
LSA A:	8 🕤	Category	-			8		Comple	
		Event date						Comple	
Safety.	8 💿	Organization/Project	-			8		Comple	
Safety.		Reporter						Comple	
LSA AL	•	Status	-			8		Comple	
Safety.		Add new field						Contra	
LSAA	8	Add new held						Comp	
Safety.	8							Comp	
Safety.	8						-	Care	
					Cancel	Save			

3. After making your changes, click Save.

9.4.1.2 NOTIFICATIONS

As an administrator at the system level, you can control the ability to send notifications to roles and user in Organization home > Settings > Compliance > Module > **Roles** tab. You can also restrict users to send notifications to their assigned projects only.

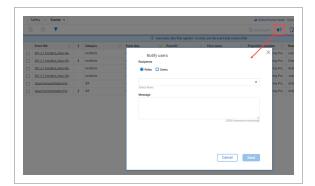


9.4 STEP BY STEP 3 – SEND NOTIFICATIONS

1. At the project level, click the **Notifications** icon.

The Notify users dialog box shows.

2. Select **Roles** or **Users** recipients, and then use the drop-down lists to select recipients.



- 3. Enter your message in the Message box. Messages can be up to 2000 characters.
- 4. Click Send when complete.

9.4.1.3 EXPORT EVENTS AND TASKS

9.4 STEP BY STEP 4 – EXPORT EVENTS OR TASKS

1. In the **All events** or **All tasks** list page, click the **Export** icon.

The Export dialog box opens.

2. Select Export to export all items.

The export contains the filtered grid set that shows in your view. You can also export selected events or tasks by checking each item's check box, and then clicking the Export icon.



9.4.1.4 PRINT

You can print a report of an event or task that has been enabled to be printed. Print functionality can be enabled in the template's Properties tab. See <u>Template Properties</u> for more information.

9.4 STEP BY STEP 5 – PRINT AN EVENT OR TASK

1. In the **All events** or **All tasks** list page, select an event or task.

Click the **Print** icon to print the event or task.

۲						🛿 att propert. 🛛 🔯	 Q Dear al litera
bette T	Gegry T	Eucles T	Ever B I	for one T	Print/Paprinter	hquite	7. Mar.
8 Sec. Intern. (Bren, 202102, 2020	incidents eng	0910/301	202 N/H 200001	Non-Injury / Bress			(Advelated)
Non-Disco (Three, 202105/202002	Incidents-ang	06/05/2021	20210000000	Non-Injury / Biness			Pending
1171306_2023061200008	Incidents-eng	06100001	202 YOM 200000	117080			Pending
Bootadeley bodes, 202308088	Incidents-ang	16199/2021	202300000004	Report a Substylincident			Aundreg

A PDF of the report will open for the selected item in a new browser tab.

NOTE The Print feature only works for one event or task at a time. To print in bulk, you can use InEight Report.

9.4.1.5 FORM AND TASK INFORMATION

You can view data, references, and history changes of an event or task and edit their properties in the Form information slide-out panel.

9.4 STEP BY STEP 6 – NAVIGATE TO EVENT OR TASK INFORMATION SLIDE-OUT

 In the All events or All tasks list page select an event or task, and then click the Form information icon.

The Form information slide-out opens where you can view the form data.

2. Click Edit properties.

The editable fields show so you can edit them.

	ouestions Answered 1/2
	Edit properties
Proj/org	S100000 - 🗸 🗸
Category	IIII QA Performance IIII 💌
Event date	02/01/2023 🗒
Status	Pending 🗸
Reporter	Meghana 🔤 🔻
Event title	23.2 Template quality _20230201
Date started	02/01/2023
Module	Quality
Version	1
Attachments	
 References History 	
mistoly	

- 3. After editing any fields, click Save.
- NOTE You must have permission to open the Form information panel.

ADDITIONAL FORM INFORMATION PANEL OPTIONS

You can also view attachments, references, and form history using the buttons at the bottom of the slide-out.



ATTACHMENTS

You can view and edit attachments other events and tasks referenced in a certain event or task.

9.4 STEP BY STEP 7 – VIEW AND DOWNLOAD ATTACHMENTS

1. In the Form information slide-out, click **Attachments**.

The attachments dialog box opens.



2. Click an attachment to view.



- 3. You can zoom in or out using the **Zoom** icons.
- You can click the **Download** icon in the upper right to download the attachment to your computer.
- 5. To close the attachment, click the **Close** icon in the upper right.
- 6. Click **Close** to close the Attachments dialog box.
- NOTE The Attachments button is greyed out when there are no attachments in the form.

NOTE You can also view an event or task's attachments by clicking the attachment icon in the Attachment column on the Events or Tasks pages.

REFERENCES

You can view other events and tasks referenced in a certain event or task.

9.4 STEP BY STEP 8 – VIEW AND EDIT REFERENCES

1. In the Form information slide-out, click **References**.

The References dialog box opens where you can view and add references.

) 🛞	EVENTS	TASKS									Add References
	Taok title	Event ID		Event title		Reporter		Event Date	Status		State	0 =
	COPY OF Add y							references				
	COPY OF Repla						ND evers	tetetences				
	COPY OF SWP											
	SWPPPinseed											
	i Beplace bro											
	i Add yellow a											
	🚊 Glean drain											
		يغر العراسا	and a		and a	sum.		-	 	Sec.		and a second
Ĭ.		1										

2. To add a reference, select Events, Tasks, or other available tabs, and then click the Add References icon.



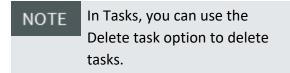
NOTE Integration is available with InEight Change, InEight Contracts, and InEight Document.

The Add References dialog box opens.

 Select the Events or Tasks or other available tabs, and then select events or tasks to be referenced.

E١	/ENTS TASK	(S					
	Task ID 👘	Category	Task name	Task title	Responsible pr	Due date	Project/Organi
•	2023032400001	Subcontractor Iss	Task test for SUB	SDAAsdASD			Steel Structure Tr
	2022090200001	Inspections			Karen	09/02/2022	C-XYZ (RootOrg1)
Π	2022090100009	Inspections		100	Karen	09/02/2022	C-XYZ (RootOrg1)

- 4. To remove references, select the reference, and then click the **Remove references** icon.
- 5. After editing references, select Close.



In the References dialog box, a column named **Reference type** will show information on the reference association.

-									
EA	IENTS TASKS	CHANGE ISSI	JES CONTRACT	S DOCUMENT	ITEMS				
•									
	Event ID	Event title 👘 😇	Form name 👘	Reporter 📃	Event date	Project/Organiz	Status 📃	State 📃	Reference type 😇
	2023032700009	From Floor, GLID-1	Form Flow - SUB u	Karen	03/27/2023	Steel Structure Tra	Pandino	InProcess	External reference

The Reference type column can have the following values:

- Associated form Started from a form or task button from within the form or task.
- Internal reference Associated with a reference question.

• External reference – Associated by using the Add References button in the reference dialog box.

HISTORY FOR EVENTS AND TASKS

You can view the history of changes for events or tasks. You can sort and filter the list view.

9.4 STEP BY STEP 9 – VIEW FORM HISTORY

1. In the Form information slide-out, click **History**.

The history page opens where you can view changes made to the event or task.

Change type	Question/Option	Section -	Old value	New value	Change date	Changed by
Answer	Did the tour result in a next step?	TOUR INFORMATION		No, there is no next step needed.	03/27/2023 11:21 AM	Karen
Answer	Update	TOUR INFORMATION		Karen 27/03/2028 11.21 AM	03/27/2023 11 21 AM	Karen
Answer	Who gave the tour	TOUR INFORMATION		Karen	03/27/2023 11:21 AM	Karen
Answer	Date & Time of the tour	TOUR INFORMATION		03/27/2023 12:00 AM	03/27/2023 11:21 AM	Karen
Answer	Name(s) of non-employees on the tour:	TOUR INFORMATION		John	03/27/2023 11:21 AM	Karen
Answer	Name of Company that was given the tour.	TOUR INFORMATION		JT Company	03/27/2023 11:21 AM	Karen
Status	Not applicable	Not applicable		Manager Review	03/27/2023 11:21 AM	Karen

- 2. Click Close when done viewing.
- NOTE You must have permission to view the History dialog box.

9.4.1.6 DELETE AN EVENT OR TASK

To delete an event or task, select events or tasks, and then click the **Delete** icon.

Environmental > Events -		
⊞ ⊗ ▼		
Delete form		
Event title	0	Category
Renew WWDP - Janitorial	0	Matrix
MB 535 - Rental Barge Weekly Inspec		Forms

NOTE

Your role must contain permission to delete.

9.4.1.7 COPY AN EVENT OR TASK

The ability to copy a task, or an event, along with its associated tasks and attachments, is useful when you have many tasks and attachments that mimic the last event, such as an environmental permit event. You can copy one event at a time or multiple tasks at the same time.

9.4 STEP BY STEP 10 – COPY EVENT OR TASK

 In the All events or All tasks list page select an event or tasks to be copied, and then click the Copy form icon.

E	nvironmental > Events	•			
Ē	⊗ ▼				
	Event title		8		
				Category	
	Above Ground Storage Tank Ins	spec		Forms	

When you copy one or multiple items from All tasks, the copied tasks are created with *COPY OF* in front of the task title.

When you copy an event from All events, the Copy event page opens to edit form details, attachments, and tasks.

Details			
Event title	Organization/Project		
Copy of Above Ground Storage Tank Inspection_20210	30 Crossing	*	
Category			
Forms			
Reporter	Event date		
	03/29/2023	m	

- 2. In the Details page, you can edit the copied event, and then click **Next**.
- In the Attachments page, you can uncheck any existing attachments to remove them, and then click Next.
- In the Tasks page, you can uncheck any existing tasks to remove them, and then click Next.
- 5. Click **Copy** to create a copy of the form.

9.4.1.8 QUERY BUILDER

The Query builder feature can be used on event and task list pages. It provides a more granular filtering and querying option for events and tasks. These filtering options are an alternative to the options found in the grid page columns.

9.4 STEP BY STEP 11 – USING THE QUERY BUILDER

Click the Query Builder icon.
 The query builder dialog box shows.

Environmental > Events -	
₩ 8 ▼	
Event title 📃 🖗	Category
Safety > Events -	
Queries	×
⊕ ⊠ ⊗ ⊲	Search Q
My Query	
Shared queries	
	Cancel Update Results

In the query builder you can add, edit, delete, and share queries. Your saved queries are listed under the My Query menu, and your shared queries are listed under the Shared queries menu.

NOTE Queries can only be shared with users in the same project.

- 2. Click the **Add** icon to add a new query, and then enter the conditions to your query.
- 3. Click Apply.

You can then use the Reset, Cancel, and Save Query buttons at the bottom of the query window. If you update an existing query, you can save the new query using the Save Query As

button.

Query builder column condition choices are dependent on events or tasks. For example, if you

select Events, you see column choices that are related to events.

	Column	Operator	Value	
⊕ <u>And</u>	- Select one -	- Select one -		\otimes
⊕ And	- Select one -	- Select one -		\otimes
And	- Select one -	- Select one - 🔹 🔻		\otimes
And	- Select one -	- Select one - 🔹		\otimes
+ And	- Select one -	- Select one - 🔹		\otimes
And	- Select one -	- Select one -		\otimes
⊕ <u>And</u>	- Select one -	- Select one - 🛛 🔻		\otimes

NOTE You can enter up to seven conditions in a query.

9.4.1.9 VIEWS

For more information on how to save and send views and use the Global Events/Tasks option, see Event and Task Views.

9.4.2 MANAGING EVENTS AND TASKS

9.4 STEP BY STEP 12 – MANAGE AN EVENT

- From the Compliance landing page, select a module card.
- 2. Select the All events link.

All events and tasks links are shown under Links in the upper left side of the page.

Links	
All events	
All tasks	

- On the Events page, select an event or task that requires additional review based on business process requirements. For example, an event with a pending status.
- 4. Advance the event or task to the next form flow step, as required.

 Event ID1
 Image: Project/Organizati Image: Category
 Image: Prominance
 Event title
 Reporter

 2019101100004
 \$100000 - PKS Inc
 Incident
 Project Manager Safe.
 Johnson Branch Safe.
 Karen Loftus

 The status of the event will update depending on how your form workflow is setup.

Managing tasks follow a very similar process, as shown below.

9.4 STEP BY STEP 13 – MANAGE TASKS

1. Select the **All Tasks** link on the left side of the page.



- 2. Select a task by clicking on a Task title.
- 3. Advance the task to the next form flow step, as required.

9.4.2.10 MONITOR DUE DATES, OVERDUE STATES AND STATUSES

You can monitor the events or tasks due dates, states, and status, and their adherence.

9.4 STEP BY STEP 14 – VIEW DUE DATES, OVERDUE STATES AND STATUSES

- From a module landing page, click All tasks.
 You can also go to All events.
- 2. In the tasks page, find the Due date (or Event date for events), Status, and State columns.

Click the **Column chooser** icon to add the columns if they are not in the view.

		_		-
	Sta	ıte	Ŧ	
Atta	chment			
Z Tasl				
	ect/Organ	ization		
Cate				
Z Tas				
Tas	k title			
Res	ponsible p	arty		
Due		,		-
🛃 Stat	us			
🗹 Ass	igner			
Clas	sifications	s		
🗌 Cus	tom ID			
Exce	ptions			
🗌 Expi	ration dat	e		
🗌 Imp	ortance			
Loc	ation			
🗌 Refe	rences			
🗌 Ren	ewal date			
🗌 Sou	rce			
0	t date			
🗹 Stat	e			

3. Click the Column chooser again to close.

An overdue event or task will make the Due date and State columns turn red. An

overdue email is also automatically triggered.

Due date	T Status	State
02/01/2023	Scheduled	Overdue
02/23/2023	Scheduled	In Process
03/01/2023	Scheduled	In Process
02/17/2023	Scheduled	In Process
01/31/2023	Scheduled	Overdue
02/24/2023	Scheduled	In Process
02/28/2023	Scheduled	In Process
02/08/2023	Scheduled	Overdue
02/08/2023	Scheduled	Overdue
02/09/2023	Pending	Saved
03/07/2023	Scheduled	In Process
02/07/2023	Pending	Saved
01/25/2023	Pending	Saved



The State column changes to Overdue after the due date.

9.4.2.11 MONITOR FORM FLOW STATUS

When an event has an active form flow, you can click its Status column to open a dialog box with detailed information about the current status of the form flow.

The current status box has the following areas:

Step 2	1. Form Initiated Start date: 10/31/2018	2. Quality Review Due date: 11/13/2018	3. Client Concurrence Due date: 11/19/2018	4. Close and complete workflow Due date: 11/21/2018
Quality Review	Abby Carter Original Reporter	Karl Jensen Site Auditor	Amy Peterson Project Engineer	Sarah Montgomery Administrator
Pending		Jimmy Crammer Site Auditor	Jeff Singleton Project Engineer	Steven Taylor Administrator
In Process		Jennifer Bard Site Auditor	Donald Thorton Project Engineer	Monica Bremmer Administrator
DAYS UNTIL OVERDUE		Michael Lowe Site Auditor		Jamie Conner Administrator
4 5		Sondra Keppler Site Auditor	1	
TOTAL DAY'S OPEN		Louis Brown Site Auditor	1	
ESTIMATED COMPLETION DATE		Mary Johansen Site Auditor		

	Description
1	Current step.
2	Current status.
3	Current state.
4	Number of days until the form flow step becomes overdue.
5	Total days the form has been open.
6	Estimated form completion date.
7	All steps and their responsible parties.

For each step you will see the step name, start date, responsible parties, and their roles.

Responsible parties have colored bars according to their sign-off status for each step:

Color	Description
Green	Complete
Yellow	Pending
Red	Overdue
Grey	Step not started

You can select different users to be responsible parties, depending on how a step is set up. The ability to select different responsible parties allows for updating users who no longer participate in the project, their roles have changed, etc.

	2. Quality Review Due date: 11/13/2018		3. Clie Due d
	Karl Jensen		A
		c	Pro
~	Karl Jensen	18	
	Jimmy Crammer		Je
	Jennifer Bard		Pro
	Michael Lowe		
	Sondra Keppler		Do
	Louis Brown		Pro
	Mary Johansen		-
	Mike White		
	Site Auditor	- 11	

9.4.2.12 ASSIGN USER GROUPS

At the project level, you can give user groups permission to view events or tasks. User groups must first be set up for the project. For information on setting up User Groups, see <u>User</u> <u>Groups</u>.

9.4 STEP BY STEP 15 – ASSIGN USER GROUPS TO AN EVENT OR TASK

 Open the event or task, and then click the User groups icon in the upper-right of the page.



- 2. In the **User groups** side panel, select the groups you want to give permission to.
- 3. Click Save.

9.5 EVENT AND TASK VIEWS

You can filter, sort, and arrange columns in the Events and Tasks pages. The updated view can be saved for quick access. Views can also be sent to other users to view outside the current organization and project. In the module landing page, you can access the All events or All tasks pages links, under Links in the upper left of the page.

9.5.1 SAVE VIEWS

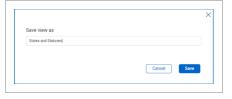
After you filter, sort, or arrange your view, you can save the updated view to easily access it in the View list.

9.5 STEP BY STEP 1 – SAVE YOUR VIEW

 Click the My view drop-down, and then select Save view as....

View:	Julios Saved View	•
B	My view	
orter	Julios Saved View	
Shaw	Save view	
Shav	Save view as	
Shav	Rename view	
Shav	Delete view	
Shav		
	Send view	

2. In the **Save view as** dialog box, enter the view name, and then click **Save**.



You can access the saved view in the My view list.

liew:	States and Statuses 🔻
B	My view
-	Julios Saved View
Form n	States and Statuses
	Save view
	Save view as
	Rename view
	Delete view
	Restore to default view
-	Send view

When a saved view is created, it is also available under Links at the top left of the module landing page.

Compliance > Safety	
Links	
All events	
All tasks	
All components	
Julios Saved View	
States and Statuses	

9.5.2 SEND A VIEW

You can send your saved view to others. When you send a view, you are sending the organization, project, and applied filters defined by the view, not the exact same forms and tasks that you can see.

What receiving users see depends on their permissions. If they do not have permission to view forms or tasks within the parameters, they cannot see them.

9.5 STEP BY STEP 2 – SEND VIEW TO ANOTHER USER

- 1. Click the **My view** drop-down menu, and then select your saved view.
- 2. Click the **My view** drop-down, and then select **Send view**.

States and Statuses	
My view	
Julios Saved View	
States and Statuses	
Save view	
Save view as	
Rename view	
Delete view	
Restore to default view	
Send view	

 In the dialog box, select the users and roles to whom you want to send the view, and then click Send.

end view (States and Statuses) to	
Users	Remove all
Chris X Mandy X Paul X	
Roles	Remove all
District Manager ×	
	Cancel Send

9.5.3 RENAME VIEW

9.5 STEP BY STEP 3 – RENAME VIEW

- 1. Click the **My view** drop-down menu, and then select your saved view.
- 2. Click the **My view** drop-down again, and then select **Rename view**.

States and Statuses	
My view	
Julios Saved View	
States and Statuses	
Save view	
Save view as	
Rename view	
Delete view	
Restore to default view	
Send view	

3. In the dialog box, rename your view and then click **Save**.

Rename view	
States and Statuses	
	Cancel

9.5.4 DELETE VIEW

- 1. Click the **My view** drop-down menu, and then select your saved view.
- 2. Click the **My view** drop-down again, and then select **Delete** view.

States and Statuses	•
My view	
Julios Saved View	
States and Statuses	
Save view	
Save view as	
Rename view	
Delete view	
Restore to default view	
Send view	

3. In the dialog box, click Yes to delete view.

						>
⚠	Are you s	ure you want	to delete this v	iew?		
				Yes	No	

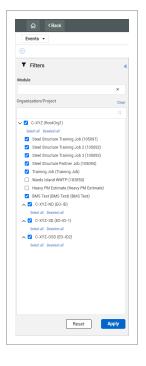
9.5.5 GLOBAL VIEW

Global Events/Tasks view lets you see events and tasks outside of the organization or project you

are currently viewing. To show the Events or Tasks page in global view, click **Global Events/Tasks** at the top-right of the page.

builty > Tasks +						Globel Events/Tacks Victor, JS - Task	rs Dalvses	
0 T						😢 tele properti . 🔀 🚳	① Q	One all liters
Due date	State 👳	Satur 🖓	Responsible party 1	Aniper 🖓	Text II	Taok name 👘	Tesktille	
42/47/2823	Overdue	(Scheduled)	(Latitya	Ebilija IIII	20230121	23.2 lask		-
43,23,2823	In Process	(bitebile)	tanya	Meghana IIII	20230201000	23.2 liek	100	
43/47/5823	In Process	Grendel	Cabbys	Meghana	30038301	23.2 task	1000	

In the global events and tasks page, you can narrow or expand your view using the query builder in the side panel. You can narrow or expand according to module, organizations, and projects you are assigned to.



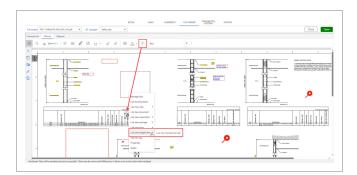
10.1 PINNED TASKS

10.2 PINNED TASKS OVERVIEW

The pinned task feature integrates InEight Document's Pinned links feature and Compliance tasks. Oftentimes, project members need to mark on a file or drawing to fix or address a finding and assign it to the right team member for action. The pinned task feature lets users create and pin a new task from the Document viewer and sync it with the Compliance application.

NOTE Although Compliance is referred to throughout the topic, the Pin Task feature is available for both Compliance and Completions.

As an administrator, you can use the pinned task feature between both applications by configuring the feature in Document and Compliance. After you configure the integration, you can go to Document > File Viewer > **Markup** and place a pin on a drawing. From the pin, you can link it to a task in Compliance based on configuration. To do this, right- click the pin, and then select Link new InEight item > **Link new Compliance task** from the menu.



You can also create a new task in Links > Add > Link new InEight item.

			DETAIL	LINKS	COMMENT
Mail (2)	⊙ - ⊖				
	Link items	Subject			Mailbox
Document (2)	Link new InEight item	Add new Compliance task	ucture		Inbox
	HCC-00003	ATTAC	HMENT - 2023-11-20		Inbox

When you select **Link new Compliance task**, a dialog box shows to enter details for the task.

* Task Name		
Replace ceiling tile in o	office 4A	
Task due date		
12-22-23		8
User contact		
Tyler Ellerbeck		•
Description		
Ceiling tile is damaged	i and needs to be replaced	

After saving the task, and then saving the markup in File Viewer, a link is saved in the Links tab that is associated with the task created in Compliance.

The following image shows the link in the Document > Links tab:

		DETHL LINKS	COMMENTS FLEVERER	TRANSMITTAL HISTORY		
Compliance Tasks (31)	0.0					Close
Compliance Takes (31)	Task Name	Task Due Date	Task Start Date	Ansporable User	Status	Completion Date
	+ Paptace ceiling the in affice 44.					
	D Beslace collegible in affine Ad	10-00-00		Tyler Ellerbeck	Scheduled	
	The set field					
	C Decare. Deb.3	101708		Sepi Balana	Schebuled	
	- Days checked					
	O Desidential	121823		topi Balana	Schubled	
	+ Dage check 4 - Deadle click					
	Desided 4. Deale dia	10-05-23		Grapi Badana	Schubled	
	- dage checkli					
	D Annubali	12/05/21		Cost Balance	Marked .	

You can launch the task by clicking the link in the Document Links page after the task has been created. When you click the link, the task opens in the Compliance web application. When the task has not been completed, a dialog box shows to create the task.

The following image shows the associated task created in Compliance:

-	D Project We (1997)	-							Mailer	n Tarlo View			° • •
	8 7									*1 0	Ø	Q	Over all times
						T Advants for the agend -	the or he is in the						
	Task title		ŧ.	Calegory	Due date 🕎	Project/Organization	Thesperable party	Balan	Task 1d		Tank	name	
	Reslace celloy tile in office AB			Checkful	12/22/2023	Project 44 (100000)	Tyler Ellerbesk	(Scheduled)	2023120	000024	Pince	d Task	
0	Advantable Tank and inc. Tank			Category & - 35 NOT EDIT	12/06/2023	Population (1999)	Sophistra Balara	(Braking)	-	-	-	e facti	
	Strik lask assignment. Tal			Geographic Street EDIT	1210.003	Pages 40.700003	Explorative Badara	(Shakan)	-		-	1748	
	Advantation Test and an Intelligence			Campon & - DO NOT THAT	12-18-2927	Pages 49.7 (1998)	Copilicative Reduce	(STARLAR	-		-	1.44	

Assigned tasks will be available to complete in Compliance web or the SQC mobile application as shown in the following images:

Pinned Task			 	
* Issue name				
Replace ceiling tile in office 4A				
				(217 characters remain
* Issue due date		* Responsible user		
12/22/2023	m	Tyler Ellerbeck - tyler.ellerbeck@ineight.com		
C Schedule				
Issue number		* Description		
		Ceiling tile is damaged and needs to be replaced.		
Not Applicable				
				(1951 characters remain
Addight Tyler Ellerbeck 12/06/2023 8:43 PM				
Notes:				

15:28		+ ≎ 100
Cancel	Pinned Task	Save
Sections Q	2 Answered E	0
Pinned Task		
* Issue name		
Replace ceiling	tile in office 4A	
* Issue due date		ters remaining
12/22/2023		m
Schedule		
* Responsible us	ser	
Tyler Ellerbeck		۵.
Issue number		
Not Applica	able	
* Description		
Ceiling tile is da	amaged and needs to b	e replaced.

Any updates to task values, such as task start date, issue date, and responsible user are synced with the pinned task in the Document links page.

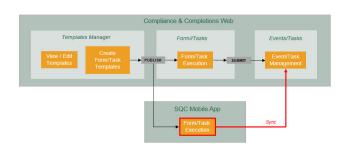
10.2.1 CONSIDERATIONS

- Although Compliance is referred to in the topic, the Pin Task feature is available for both Compliance and Completions.
- In Document, you must configure the integration in Address book > Companies > <company> > InEight Integrations tab.
- In Compliance, you must configure a module template that integrates with

Document. For more information, see the Pinned task setup guide in <u>Integrated</u> <u>Solutions</u>.

CHAPTER 11 – SQC MOBILE

11.1 OVERVIEW



The InEight SQC mobile app lets you incorporate technology when completing inspections and tasks instead of a traditional method of using a paper form. The SQC mobile app is available to download from the Apple App Store.

You can perform inspections and complete tasks using the forms, questionnaires, and tasks created in the Compliance or Completions web application. You can complete them while connected online or complete them offline, and then synchronize the results when online using your iPhone or iPad. You can also easily locate your forms or tasks based on your project assignment.

and the second se	2:57 PM Thu Aug 20	Menu	🗢 86% 🔳)
	((Compliance	
	🗘 Sync Status		>
	Settings		>
	Submission History		>
	Kissk Mode		>
	😝 Sign Out		
	豪 Projects	🖗 To Da Lat 🔗 Natifications	≡ Menu

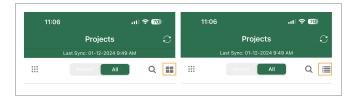
For more information about mobile device requirements, see <u>Client System and Mobile</u> <u>Device Requirements Specification</u>.

11.2 NAVIGATION

In the mobile application you can view your project assignments, use notifications, and navigate to your forms or tasks. After opening a project, you can then select a module, category, and then choose your assigned forms or tasks in the Templates page.

11.2.1 LIST VIEW

You can view listed items as a list or tiles. Switch by tapping the List or Tiles icon at the top right of the page. This option is available on every list page, such as the Projects and Modules page.



You can also tap the **Sync** icon at the top of any list page to manually sync the data when you are in a connected environment. For more information, see <u>Sync</u>.

11.2.2 BOTTOM MENU

You can navigate to the Projects, To-Do List, Notifications, and the Menu pages from the buttons at the bottom of the page. The following image and table show the bottom navigation buttons and descriptions:



Bottom navigation buttons

Name	Description
Projects	View and select projects for which you have permission.
To-Do List	View forms and tasks under the Saved or Assigned tabs that need attention. Forms and tasks are listed within organizations and projects you have been assigned to.
Notifications	Send notifications with messages to specific users, roles, projects, or organizations.
Menu	Go to Sync Status, Settings, Submission History, Kiosk Mode, and Sign Out.

11.2.3 NAVIGATE TO FORMS AND TASKS

From the Projects window, you can navigate to your forms and tasks. <u>Read more</u>

GO TO YOUR ASSIGNED FORMS OR TASKS.

1. In Projects, select from the list of projects assigned to you.

	11:06 .ul 🗢	70
	Projects	\mathcal{C}
	Last Sync: 01-12-2024 9:49 AM	
	Recent All	Q III
	BMS Test (BMS Test) (BMS Test) (BMS Test)	>
	C-XYZ (RootOrg1) (RootOrg1)	>
	C-XYZ-ND (EO-ID) (EO-ID)	>
	C-XYZ-ND-BC (EO-ID4) (EO-ID4)	>
	C-XYZ-ND-HC (EO-ID3) (EO-ID3)	>
	C-XYZ-ND-M (EO-ID5) (EO-ID5)	>
	C-XYZ-OSD (EO-ID2) (EO-ID2)	>
	C-XYZ-OSD-M (EO-ID9) (EO-ID9)	>
Pro	C-XYZ-SD (EO-ID-1)	Menu

The Modules page opens.

2. In Modules, select from the modules assigned to you.

9:34		лI 🗢 90)
〈 Projects	Modules	\mathcal{O}
Last S	Sync: 01-12-2024 9:33	
		Q 🔳
ි <u>ි</u> Compliance	(@) Chang	e
Projects To-	Do List Notificatio	Dns Menu

The Categories page opens.

3. In Categories, select from the list of categories.



The Templates page opens.

4. In Templates, select templates from the Forms or Tasks tab.

9:35		ul \$ 90
〈 Categories	Templates	\mathcal{C}
Last S	Sync: 01-12-2024 9:33	AM
Complianc	Forms Tasks	Q 🔳
Site Safety Observation		
Projects To	-Do List Notification	ns Menu

The form or task opens on your mobile device.

5. Complete the form or task.

9:35	ul 🗢 🗐
Cancel Site Safet	y Observation Save
Sections Questions <u>2</u> 9	Answered Exceptions 0 0
INSPECTION	
* Event Date	
	É
* Event Time	
	Θ
* Who conducted the Saf	ety Observation? (i)
	Ĕ
Safety Category	
Select one	-
Location	
O Warehouse	
O Construction area	
Contractor	
Steel Contractor	
O Mechanical Contra	ctor
<u> </u>	

11.2.4 CONSIDERATIONS

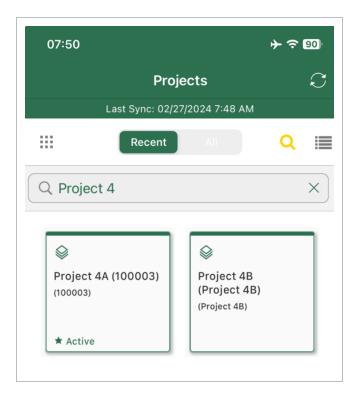
All projects, modules, and categories are assigned by your administrator through permissions on the Compliance or Completions web application.

11.3 PROJECTS

On the Projects page, you can view all projects or the two most recent downloaded projects using the All or Recent tabs at the top of the page. You can also tap the **Search** icon to find a specific project.

	11:06			ııl 奈 7 0) ,
		Proj	ects		\mathcal{O}
	La	ist Sync: 01-1	2-2024 9:49	AM	
			All	Q	
	BMS Test (BMS Test)	(BMS Test)	(BMS Test)		>
	C-XYZ (Re (RootOrg1)	ootOrg1)			>
	C-XYZ-NI (EO-ID)	D (EO-ID)			>
	C-XYZ-NI (EO-ID4)	D-BC (EO-ID4	4)		>
	C-XYZ-NI (EO-ID3)	D-HC (EO-ID	3)		>
	C-XYZ-NI (EO-ID5)	D-M (EO-ID5)		>
	C-XYZ-OS (EO-ID2)	SD (EO-ID2)			>
	C-XYZ-OS (EO-ID9)	SD-M (EO-ID	9)		>
\bigcirc	C-XYZ-SE) (EO-ID-1)			>
Pro) jects	To-Do List	L. Notification	is Mer	nu

You can have one active project at a time. In the Recent tab, the current open project shows as *Active*.

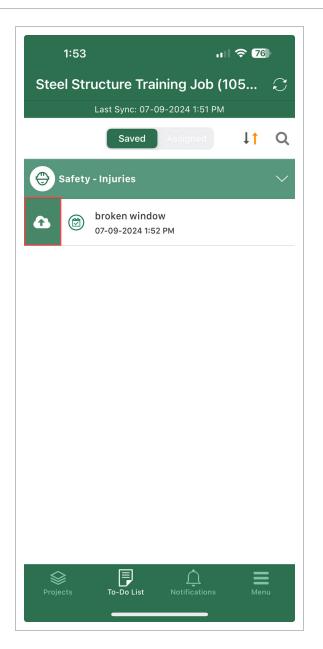


11.3.0.1 OPENING A PROJECT WITH PENDING PROJECT CHANGES

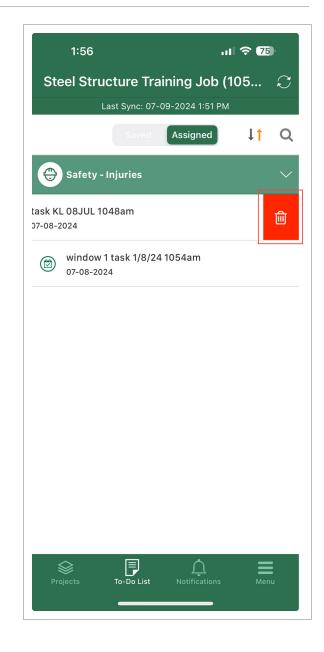
Any project changes must be synced prior to opening another project. When you have an active (open) project with pending saved forms or tasks, and select to open another project, an alert message prompts you to go to your To-Do List Saved tab to sync, submit, or delete the items in the list prior to opening a new project:

14:10	┝ ╤ 724					
Pro	ojects 🤇					
Last Sync: 06	/20/2024 1:10 PM					
Recent	AII Q					
Q Calc X						
(103930)	(103313)					
Action	Required!					
At least one or more forms and/or tasks are saved to your To-Do List. Please sync, submit, or delete them prior to downloading a new project.						
Open T	o-Do List					
104000 (Calcasieu Pass Client Billing) (104000)	Normal State Solution Solut					
♦ 104094 (Calcasieu Pass LNG - Site Prep - CB)	Water State Not State Network State Netw					
Projects To-Do List	Notifications					

• Sync – Swipe right on the form or task, and then tap the Sync icon.



- Submit Open the form or task and complete a workflow or complete the form or task to submit to the web.
- **Delete** Swipe left on the form or task, and then tap the **Delete** icon.



11.3.1 CONSIDERATIONS

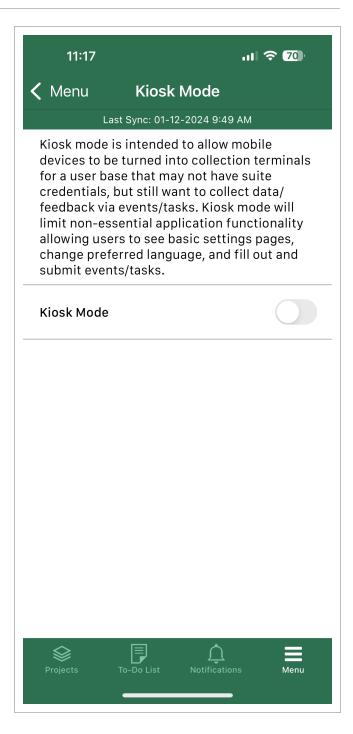
- In the Recent tab, you can remove the project by tapping the screen and holding it until you see the Delete icon. Select to delete the project.
- The Recent tab shows the current and previous active project. When you switch back to the previous active project, the

existing data is updated, improving the sync performance.

11.4 KIOSK MODE

Kiosk mode limits mobile functionality to filling out and submitting forms or tasks without requiring users to sign in. Kiosk mode is useful if your project has subcontractors who are not users in your system, but who need to report information.

To enable kiosk mode, go to Menu > **Kiosk mode**, and then switch the toggle to *On*.



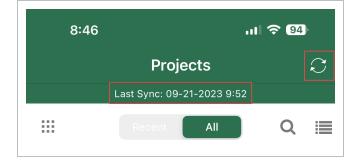
If you want to limit kiosk mode to a default project, module, or category, you can set those in Menu > **Settings** when kiosk mode is off. After you set defaults, and then enable kiosk mode, you can only see forms within the default settings.

CHAPTER 11 -SYNC

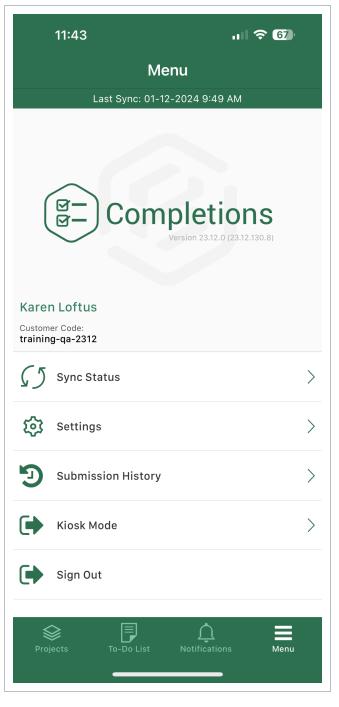
11.1 SYNC

The application must be synced to get the most recent updates from the web application, such as the latest template revisions, permissions, or access to newly assigned projects.

When you are in a connected environment, tap the **Sync** icon at the top of any list page to manually sync the data. A banner at the top of the application informs you when the last sync took place.

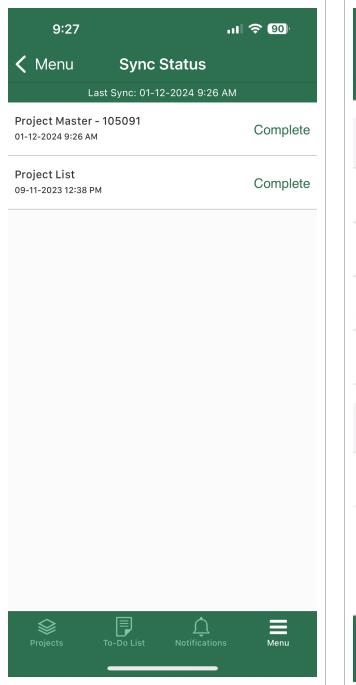


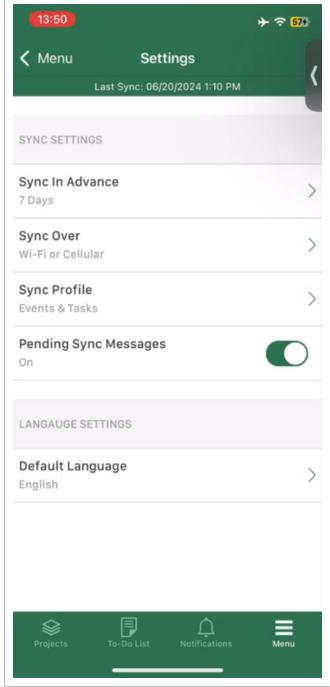
You can access Sync Status and Sync Settings from the Menu page.



11.2 SYNC STATUS

You can check the status of your syncs in Menu > **Sync Status**.





11.3 SETTINGS

You can customize how the mobile application syncs with the web application in Menu > Settings > Sync Settings. Sync in advance - Syncing in advance lets you choose whether to sync items from the web in 7, 14, or 21 days in the future. <u>Read</u> more

As events and tasks are assigned, they need to be available on your mobile device days

ahead of the due date so that they can be done on time.

12:00	.ı.I 奈 🚳
〈 Settings Sync In Advanc	;e
7 Days	۲
14 Days	0
21 Days	0
Choose the number of days synchror place in the future.	nization will take
Projects To-Do List Notificat	ions Menu

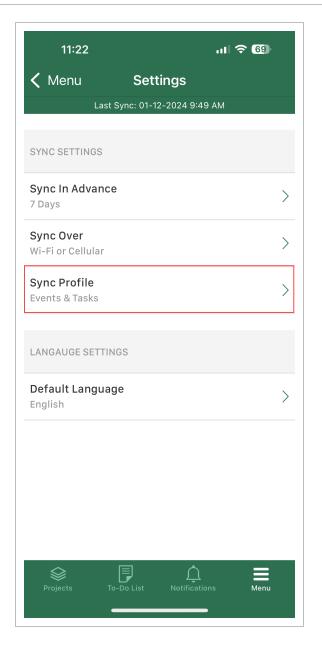
 Sync over - You can choose whether to allow syncing only over Wi-Fi or over both Wi-Fi and Cellular. <u>Read more</u>

This gives you the flexibility of choosing the most reliable connection available in your

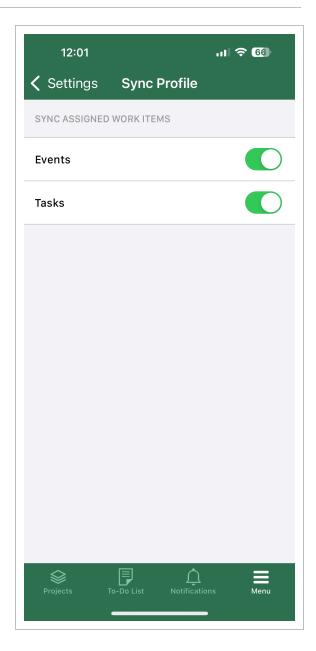
location.

12:01		ul 🗢 🙃
〈 Settings	Sync Over	
Wi-Fi		
Wi-Fi or Cellular		\checkmark
~ <u> </u>		
Projects To	p-Do List Notifica	tions Menu

 Sync profile - The Sync Profile settings lets you sync assigned work items to your device. <u>Read more</u>



You can select to enable syncing for events and tasks. Both are disabled by default.



When you have assigned work items on your device, and then disable one of the sync toggles, you are asked to confirm whether you want to remove the work items from your assignments and unlock them on the web.

• Pending sync messages - You can receive pending sync alert messages when you launch the SQC application. <u>Read more</u>

The Pending Records alert messages remind you that there are submitted events or tasks that have not synced to the web. You can manage the setting in Menu > Settings > **Pending Sync Messages**.

(13:54)	♪ ^今 601
✓ Menu Settings	,
Last Sync: 06/20/2024 1:10 PM	,
SYNC SETTINGS	
Sync In Advance 7 Days	>
Sync Over Wi-Fi or Cellular	>
Sync Profile Events & Tasks	>
Pending Sync Messages On	
LANGAUGE SETTINGS	
Default Language English	>
Projects To-Do List Notifications	Menu

You can manage the feature by setting the toggle to *On* or *Off*. The feature is set to *On* by default.

When you open the SQC application and have pending forms or tasks that need to be synced, a **Pending Records** message prompts you to perform a sync.

13:55	÷≎ 61≁
	oday Edit 😶
Last Sync: 06	6/20/2024 1:10 PM
Recent	
\$	I
-DNU (-DNU) (-DNU)	-DNU- (-DNU-) (-DNU-)
Pendin	g Records
	ecords pending. erform a sync.
Don't show this m	essage again
L	ок
*DNU- (*DNU-) (*DNU-)	`1992 (247 Testing) (`1992)
	E

To perform a sync, you must open the SQC application in a connected environment, and the application must remain active in the foreground until the sync is complete.

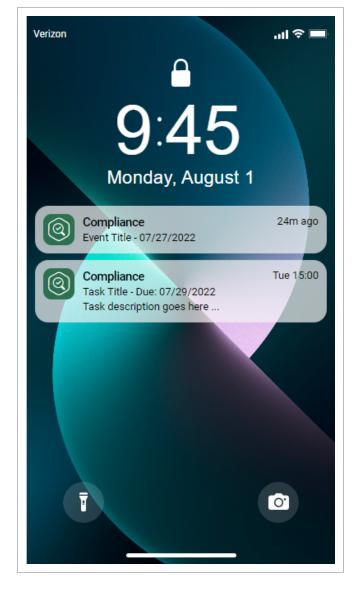
You can choose to not show the message again by setting the toggle to *On*, and then tapping **OK**.

11.4 PUSH NOTIFICATIONS

You can setup push notifications on your iOS mobile device to alert you of any updates of assigned events and tasks. Use the iOS notification settings to control notification alerts.

16:21 🕫	
Compliance Notifica	tions
Allow Notifications	
NOTIFICATION DELIVERY	
A Immediate Delivery	v 🗸
Scheduled Summa Deliver at 08:00, 12:00, 1	
Notifications are delivered im	mediately.
09:41	
Lock Screen Notification	Center Banners
Banner Style	Temporary >
Sounds	
Badges	
ANNOUNCE	
Announce Notifications	Off >

When an assigned item is set up, you receive a notification on your mobile device.



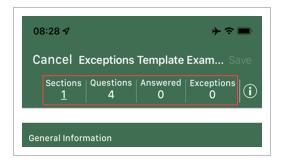
You can tap on the notification to launch the application automatically. If you are logged in, it takes you directly to the item in the To do list. You must be logged into the application to receive notifications.

11.5 FILLING OUT AN EVENT OR TASK -MOBILE

TIP Mobile tasks have all the same abilities as using tasks on the web with the added ease and efficiency of offline use.

When filling out a form or task, the top of the page shows the following information:

- Sections The number of sections. Tap this number to open a slide-out panel of sections that you can navigate to without scrolling.
- Questions The total number of questions.
- Answered The number of questions answered.
- Exceptions The number of answers flagged as exceptions. Tap this number to open a slide-out panel of questions answered with exceptions. You can go to those questions by tapping them in the panel.



Next to the header numbers is the Information icon. When you tap this icon, a slideout panel opens that provides more information about this event, which functions the same way with a task.

In the below example, there are four questions on this event, three of which are answered.

	Accident Fo	
Can	Accident Form	×
Accide	312	
neena e		-
Descri		
	ANSV	/4
* Date	Breil/Org	
* Date Janua	Proj/Org	Appomattox Topsides
	Category	Incident
	Category Event date	
Janua	Category Event date Status	Incident 01/16/2020
Janua Time c	Category Event date Status Reporter	incident 01/16/2020 Karen Loftus
Janua Time c 1:18 P	Category Event date Status	Incident 01/16/2020
Janua Time c 1:18 P Specif	Category Event date Status Reporter	incident 01/16/2020 Karen Loftus
Janua Time c 1:18 P Specif	Category Event date Status Reporter Event title	Incident 01/16/2020 Karen Loftus Accident Form

This page also provides you with the project and organization information, the category, event date, status, reporter, event title, start date, module and version. To close this, click the **Information** icon again or click the **Close** icon at the top right of the page.

In the same manner as on the web for a task, the **Information** icon shows the project/organization, category, due date, status, responsible party, task title, date started, module, and version number.

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Can	Finalize Safety	Walk Process ×
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Kare	Category	S100000 - PKS Inc Safety
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* Due « Janua	Category Due date Status Responsible party	S100000 - PKS Inc Safety 01/07/2020 Pending Karen Loftus
* Due « Januz * Nam	Category Due date Status	S100000 - PKS Inc Safety 01/07/2020 Pending
* Due « Janua	Category Due date Status Responsible party Task title	S100000 - PKS Inc Safety 01/07/2020 Pending Karen Loftus Finalize Safety Walk Proces
* Due « Januz * Nam	Category Due date Status Responsible party Task title Date started	S100000 - PKS inc Safey 01/07/000 Karen Loftus Finalize Safety Walk Proces 01/07/2020
Kare * Due (Januz * Nam- Safet	Category Due date Status Responsible party Task title	S100000 - PKS Inc Safety 01/07/2020 Pending Karen Loftus Finalize Safety Walk Proces

Some questions on an event or task might be mandatory. They are denoted with an asterisk (*). On some occasions, an Information icon provides more information. When selected, they provide information such as cautions or general information to help you complete the event or task.

VZW Wi-Fi 🗢	2:44 PM	74%	ati VZW Wi-Fi 🗢	🖾 2:42 PM	🖵 74% 🚞
	Accident Form	1 ①	< Back	Details	
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Accident Inforr	nation		Please do not inc this field	ludes individuals na	imes in
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* Date of incide		ters remaining			
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Time the incide	ent occurred	0			
		U			
Specific locatio	on where the accident of	curred			
	4000 characters r				
	4000 characters r	emaining 🖌	1		

You can use voice dictation within the Compliance mobile application. Select the microphone from the keyboard on the screen and speak.



The dictation will be transferred to the area you selected, making it convenient to fill out the event or task without the keypad.

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escription of t	ne accident	(i)
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		ters remaining
Date of incider	nt	
	nt occurred	
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me the incider		
me the incider		
		-11
me the incider		

11.5.1 COPY A SECTION

Depending on how the form or task template is set up, you might be able to copy a section. If the copy option is enabled, use the Copy section button in the section header to copy the section below the current section.

NOTE The Copy section button might have a different name, depending on how the form or task template was set up.

You can also tap the **Remove** icon to remove a copied section.

Select crew member	
	2
	Copy section
Crew Information	
Select crew member	

11.5.2 QUESTION TYPES

11.5.2.1 DATE - TIME

Your event or task might include a field to indicate the date and time and allows for collection of date and time either together or separately.

Select a date field, in this case the **Date the incident occurred**. Scroll to the date you want, and it is shown under the date of the incident.

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Cancel				Save
Accident Inform	ation			
* Date of inciden	t			
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Augus Septer	t nber e r	12 13 14	2017 2017 2018	; 3 9
Augus Septer Octobe	t nber er	13 13 14 15	2017 2018 2018	, 3 9 0

The Time question defaults to the time at your current location. Use the scroll bar to move to the time in AM or PM for your selection.

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	Accident F	⁼orm	1 (i)
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Accident Informa	ation		
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	10	Fabaracto	's remaining
Date of inciden		5 character	's remaining
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October 15, 2015	9		
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Fime the inciden 2:00 PM 12 12	t occurred 58 59 2 00		0

11.5.2.2 CHOICE

This is used for options like yes/no, pass/fail, accept/reject. These questions are a radio button or icon.

Cancel	Save
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COMPRESSIVE STR	ENGTH MEETS, OR WILL MEET, STRENGTH
\otimes	
	CE: FLATNESS; HI/LO; SLOPE; ION FOR GROUT: CLEANLINESS

11.5.2.3 TEXT

Areas in the event or task that capture free text in short (250 characters) or long form (4,000). For example, this can be used for descriptions, short descriptions, explanations, names of subcontractors, and locations.

There are also large text fields. In this example, it's the **Description of the incident**. Clicking on

the double arrows expands the box for you to continue typing or use the microphone to dictate.



TIP On free text fields, the mobile application opens a full page for efficiency.

11.5.2.4 PEOPLE PICKER

A people picker is available to use to select those users that have access to the module at the organization level in which the event or task is being performed against.

To access the names, begin typing the name or select the **People Picker** icon. Depending on how the administrator sets up the question, you can select multiple users or none, and the list of users can include either only users with Compliance roles or all users in the project.

A new page is shown with the names of users. Select the name and it appears in the indicated field on the event or task.

Depending on how the question is set up, the selected user can receive an email notification.

Cancel		
Incident Information		
Tipped and fell or a rock bed while carrying a load of hardware.		
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1005 characters remaining 🖌		
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a photo(c) attached	Susan Cappellani	
	Sveen.CeppellonipINDIDHT.COM	
Incident Cutalis		
incident classification		
First Aid		
O Lost Time		
O Restricted Duty		

NOTE The people who show in the list are the users who have a Compliance assignment to the project for which the event or task is being filled out.

11.5.2.5 ATTACH PHOTOS

The Compliance mobile application lets you attach photographs, or Microsoft Word and Excel files, or PDF documents. You can also annotate the areas of focus while filling out the event or task. Select Attach photos to add photos to the form or task. After tapping attach photos, it will open a page from which you can select an option from the Photo Library, Take Photo or Choose File

For example, you might attach location photos of buildings or objects, or a picture of a letter or certification.



After the picture is taken, you can edit the photo by selecting the **Edit** button on the top right of the page. This opens editing and annotation options. There are colors, widths, and text options available. A time stamp is added when edits are made, and the stamp can be moved around the screen for optimal viewing. You can also edit the name of the image file to be more meaningful than the default name given by your device.

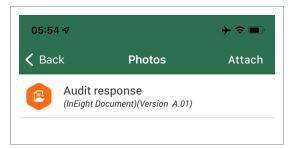


Prior to the image being saved, the Undo icon in the lower left removes edits.

When finished, tap **Done** and return to the event or task page. Here you see the photos you included. If you want to view the photo, select the image and it takes you back to the photos. Alternatively, if you want to include more photos, tap **Attach photos** again.

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1	Accident Form	1 (1)
Cancel		Save
Accident Inform	ation	
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	rast.	
	ĨO'	
	Attach photos	
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0		
Submit form		

If you have set up integration with InEight Document, you can also see if supporting documents from the Document application are attached when performing a form or task. Document links are shown in the list of attachments with the Document icon and document version numbers.



To remove an attachment, swipe left, and then tap the **Remove** icon.



11.5.2.6 FORM FLOW

A form flow button can complete the first step of a form flow from the mobile application. Additional steps must be completed by responsible parties in the Compliance web application.

Form flow buttons have a right arrow next to them.

all Verizon 🗢	4:42 PM	-
	Incident Form	1 (i)
Cancel		Save
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Date of Birth		
		Ê
Date of hire		
		Ê
-		
Cond for Mon	ager Review 🔿	

11.5.2.7 GPS

A GPS question lets you provide your location by tapping **GPS** or by entering your coordinates directly in the fields. You can also tap **Clear GPS** to remove the information if you need to enter a different location.

To use the GPS button on your mobile device, you must allow the Compliance app to access your location when prompted.

NOTE If you enter GPS coordinates automatically, you cannot manually edit the coordinates.

11.5.2.8 REFERENCE AND INTEGRATION QUESTION TYPES

Integrated list questions are lists that integrate with the InEight Platform master data library. The Integrated list question includes resource column fields in a series of cascading questions. You can use cascading questions to narrow down the selection of a resource. For example, you can add Vendor Region, Vendor Country, and Vendor City column fields of cascading questions to narrow the selection down to a city. When you are connected to the internet, the list pulls data from Platform's resources. For more information on Integrated lists, see Integrated List.

11.5.3 COMPLETE A FORM OR TASK

For more information on how to save and submit a form or task, see <u>Complete a Form or Task</u>.

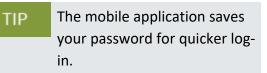
The following steps walk you through performing an event on a mobile device.

11.5 STEP BY STEP 1 – FILL OUT AN EVENT - MOBILE

- Open the Compliance mobile application by tapping the InEight SQC icon on your mobile device. and log in.
- 2. Log in and select Compliance if selection is shown (You may be directly taken to the

Compliance projects screen).

3. The Projects screen is shown.



4. Open a project for which there is a report.

If your access allows, select the project 105091 – Steel Structure Job

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	Projects	Ø		
	Recent All	۹ 🖬		
Account Root Organization (RootOrg1)		>		
Steel Structure Job		>		

5. Select a module, in this case **Safety**.

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〈 Projects	Modules	\mathcal{C}
		Q 🏢
ے Safety	کَلَٰک Compliance	
(2) Change		
Projects To	o-Do List Notifications	Menu

6. Find and select a Safety category, in this case, **Incident**, from the Categories screen.

✓ Modules	Categories	\mathcal{C}
Safety		Q II
ACME Construction		>
🖶 Audits		>
🕀 Claims		>
Corrective Actions		>
🕀 Crane Group		>
🐣 Crane Rigging		>
🕂 Incident		>
🕀 Observations		>

7. Select an event from the templates list, in this case, **Incident form**.

🕻 Categories	Templates	<i>c</i>
ncident		Q 🏢
₽		
Incident form		

8. Fill in the form.





9. Complete all fields as required. In this example, select **Send for manager review**.

Address of injured party	
2224 W Evergreen Anytown, USA	
	3971 characters remaining
Gender of injured party	
Male	
Female	
Date of birth	
February 27, 1990	Ë
Date of hire	
August 14, 2018	<u> </u>
Send for manager reveiw	

11.6 COMPLETE A FORM OR TASK ON MOBILE

There are several ways to finish filling out a form or task depending on how it is set up by your administrator and what the next steps are.

11.6.1 SAVE A FORM OR TASK

If you do not have enough time to complete a form or task, or not all information about the event is readily available, you can tap **Save** to save your work. You can then continue or close the form or task, and then come back later to complete and submit it.

	Safety Task	√ (i)
Cancel		Save
Caller		Save
SAFETY TASK INFORMATION		

11.6.2 ASSIGN A TASK

As part of filling out a task, you might have to assign it to someone else to complete some of it. To assign a task, tap the **Assign** button. If you want to start a new task immediately after assigning the current task, tap **Assign and start new task**.



11.6.3 SUBMIT A FORM OR TASK

After you have completed your event or task, tap the button to submit it. In this example, the button is labeled **Submit form**. This syncs with the Compliance web application for manager approval.



- TIP If you have not completed your event or task, you can tap **Save**, and it goes to the to-do list, where you can retrieve it when you are ready to complete it.
- NOTE After you sync the event or task to the web, it is removed from your device.

For the event used in this example to be completed, open it in the Compliance web application under Safety > **Events**. In this example, the status for your event is **With Claims Manager**.



The manager can now sign off on the event in the web application. Click the event title to open the event to the closure of investigation section. This is where the manager signs and taps on the Close and complete this incident button to complete the form.

Send for mana-			×	
	Signature			
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After the event is signed and completed, the status of the event on the Events page changes to Complete.

	🗿 105091 (S	_							_	8
1	AFETY 2-HVT >	Even	ts				1	/iew: All		٣
								3 (i)	Q Clear all fiber	
	Event ID I		Project/Organizatio	Category -	Form name	Event title 👘 👳	Reporter	Event date	- Status	7 0
8	2019082709003		Steel Training Job	Incident	Incident Report form	Hammer hit thumb - J.S	Karen Loftus	08/27/2019		
Ξ	2019082700002		Steel Training Job	Incident	Workers Comp Claim	Workers Comp Claim_20	Karen Loftus	08/27/2019	With Claims Manager	5
Ξ	2019082700001		Steel Training Job	Incident	Incident Report form	Hammer hit thumb - J.D.	Karen Loftus	08/27/2019	With Claims Manager	
8	2019082600002		Steel Training Job	Incident	Incident Report form	Incident Report form 20.	Karen Loftus	08/26/2019	Pending	

The following steps walk you through performing an event on a mobile device.

11.7 LOCKED EVENTS AND TASKS

When working through a task or event on a mobile device, a locking mechanism is in place to ensure your completion of the task or event. This means another individual cannot open your task or event as long they are synced to the mobile device and the list shows the item as locked.

	> Events +						View	Nyven			*
) (8)							3	1	Q	Clear all filters
8	Event ID 1	Project/Organization	Category	Form name 🛛 👻	Event title	Reporter	Event date		Status		
8	2019112700063	ionart	ionart.cot	Al_DuesFore_Dot_15	Testing tax 27	Krishna Phasad	11/27/2019		Fund	12	1
	2019112700060	iOnart	iSmart_001	Al_Duestions_Oct_15	Etating for web lock	Krishna Prasad	11/27/2019		Comp	lata	
8	2019112700055	Gmart	iSmart,001	All_Durations_Oct_15	Easting for checking do list	Krishna Prasad	11/27/2019		Feed	9	
	2019112700047	Gmart	Gmart 001	Al_Ouestions_Oct_15	Testing for email associated	Pradeep Kamar	11/27/2019		Com	and an a	

If the Event title of a locked item is tapped, the event opens, but will be unavailable for edits or saving as long as the Locked icon is shown.

A Cancel Save

NOTE

If the Information icon is selected, edit properties are also unavailable.



11.7.0.1 UNLOCK

If you prefer to complete a task on the web rather than on mobile, you can delete the task from your To-Do List.

To delete a task, go to To-Do List > **Assigned**. Swipe to the left on the task, and then tap the trash can icon that is shown to the right.

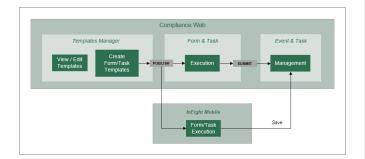


NOTE When you remove a task from the To-Do List, you must be connected to the internet via Wi-Fi or cellular. If you remove when not connected, the task is removed but not unlocked on the web. In this case, you must resync when connected, and then remove again.

After you remove a task from the To-Do List, it is recommended that you not sync your device until the assigned task's status is changed from Scheduled to Pending in the web application. To update the status, you can start the task on the web or, if you have permission to edit properties, you can bulk update unlocked tasks. NOTE If the task status remains Scheduled the next time you sync, the task is locked and downloaded to your device.

11.8 INEIGHT MOBILE

11.9 INEIGHT MOBILE OVERVIEW



The InEight mobile application lets you incorporate technology when completing inspections and tasks instead of using a paper form. It can be downloaded from the Apple App Store for iPhone or iPad devices.

Like the SQC mobile application, you can perform inspections and complete tasks using the forms, questionnaires, and tasks created in the Compliance or Completions web application. However, you must have an active connection to the Internet to use the InEight mobile application. You can access forms or tasks based on your project assignment and permissions, including forms with active form flow.

The application offers a Live (online only) and Remote apps option, where you can select the connection that best suits your environment. The Remote apps option references the existing SQC mobile application.

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For more information about mobile device requirements, see <u>Client System and Mobile</u> <u>Device Requirements Specification</u>.

11.10 NAVIGATION

In the InEight mobile application, the Live (online only) option will display Completions and/or Compliance based on your permissions and assignments. Once you have selected the desired application, a list of projects for which you have assignments will be provided. After opening a project, you can then choose a module. The Forms and Tasks screen provide quick access to your overdue, scheduled, and in-progress items. The All Items option will display all events or tasks for the project based on your permissions. The perform form option will display your favorite forms and categories for the project to which you have access.

11.10.1 HAMBURGER MENU

The available options under the hamburger menu let you to navigate between the Completions and Compliance applications. There is also an option to choose a different connectivity mode based on your environment and whether internet connectivity or stability is questionable. The Reset customer code option is available to access a different customer code. If the user no longer requires access to the InEight application or if a device is shared device between users, the *Sign out* option is available.

÷≎50
×

Sign out

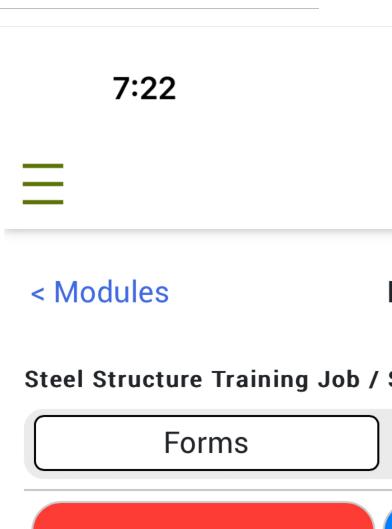
INEIGHT App version: 24.9.141.1 Environment:

Hamburger navigation options

Name	Description
Completions	Select this option to access Completions
Compliance	Select this option to access Compliance
Connectivity mode	Choose the connectivity mode based on your environment and internet connectivity
Reset customer code	Reset to access different customer codes

11.10.2 NAVIGATE TO FORMS AND TASKS

From the Events/Tasks screen, you can navigate to your forms and tasks. Read more

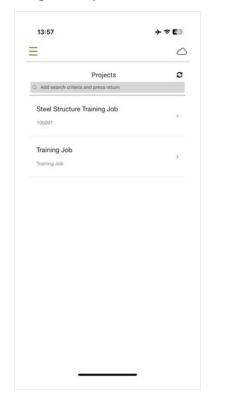




Page 213 of 230

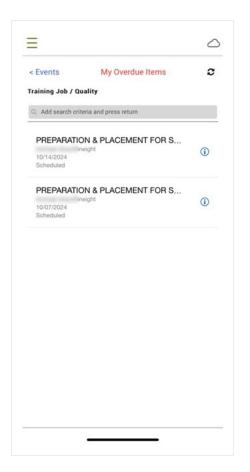
GO TO YOUR ASSIGNED FORMS OR TASKS.

1. In Projects, select from the projects assigned to you.

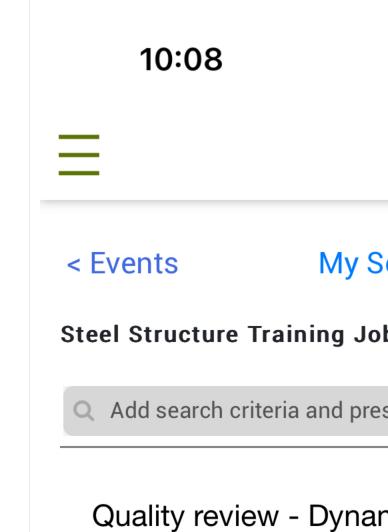


,
>
>
>
>

- 3. In Forms or Tasks, select 'My Overdue Items' from the list of options available to you.
- 2. In Modules, select from the modules assigned to you



4. In Forms or Tasks, select 'My Scheduled Items' from the list of options available to you.



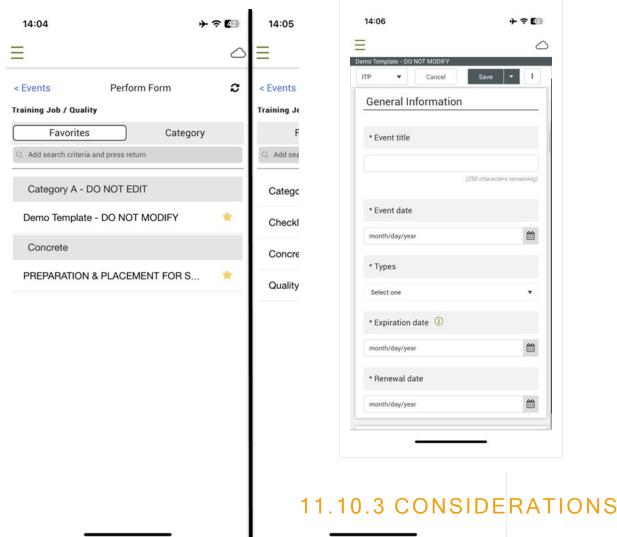
Karen Loftus 10-07-2024 Scheduled In Forms or Tasks, select 'My Opened Items' from the list of options available to you.

=		2
< Events	My Opened Items	3
Training Job / Q	uality	
Q Add search crit	teria and press return	
	ON & PLACEMENT FOR S.	
Gir 10/17/2024 Pending	neight	()

6. In Forms or Tasks, select 'All Items' from the list of options available to you.

Events	All Items	
raining Job / Quali	ty	
Add search criteria	and press return	
	& PLACEMENT FOR S.	
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Scheduled		
	& PLACEMENT FOR S.	
@ineigl 10/17/2024	nt	(i
Pending		
	& PLACEMENT FOR S.	
10/07/2024	n.	(
Scheduled		

7. In Forms or Tasks, select 'Perform Form' from the list of options available to you.



Select a form from your 'Favorites' tab or select a category that corresponds with the form you will be filling out

8. Complete the form or task.

Your administrator assigns all projects, modules, and categories through permissions on the Compliance or Completions web application. You must have an assignment on an organization or project for them to show in the InEight application.

11.11 PROJECTS

You can select any projects you have permission for on the Projects page. You can also use the Search bar to enter specific text characters and hit enter to filter down to a particular project.

13:57	≁ ≎ 🕼
1	\sim
Projects	c
Add search criteria and press return	
Steel Structure Training Job	
	>
Steel Structure Training Job	>

You can select any project to which you have access. The InEight mobile application makes live calls and displays the content. No project data is loaded onto the device, so the information displayed is near real-time, from the last refresh or loading of the screen.

11.12 INTERNET CONNECTION

11.12.1 CONNECTION

To work properly, the InEight mobile application requires an active internet connection, either through Wi-Fi or cellular data. The application does not store or sync any data outside of the content currently displayed on the screen. There may be situations where the internet connection is interrupted. While the mobile application will try to protect any progress made on forms and tasks, an interruption in connectivity could affect loading fields that require it and may even impact saving or submissions. Therefore, it's important to ensure a reliable internet connection in the area where the device will be used for a seamless experience. If internet connectivity is not available or if connection stability is a concern, the SQC mobile application is better suited to handle offline scenarios.

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8	Live (online only)	۵
	Remote Apps	Ø
→ real ti	ect directly with the web ap ime. Requires connection vi ie network.	
C5 with s	s work without an internet o saved data on the device. S I when online.	

11.13 FILLING OUT AN EVENT OR TASK

When filling out a form or task, the top of the form or task shows the following information:

			Nar	ne	Description
13:48			÷ 1		questions by tapping them in the panel.
Report a Safety Incident SECTIONS	QUESTIONS	answered	excrombers opensith	. When at provi	icon is next to the header you tap it, a slide-out panel des more information about this tions the same way.
C	ancel	Save			elow, there are 1 od 11 red on this event.
* Incident date					
month/day/year	Ð				
* Incident time	D				

Name	Description
Sections	The number of sections. Tap this number to open a slide- out panel of sections that you can navigate to without scrolling.
Questions	The total number of questions.
Answered	The number of questions answered.
Exceptions	The number of answers flagged as exceptions. Tap this number to open a slide- out panel of questions answered with exceptions. You can go to those

13:49 + 🗢 783	Mandatory questions on an event or task are ^{13:49} denoted with an asterisk (*). Sometimes, the
bort a Safety Incident SECTIONS QUESTIONS ANSWERED EXCEPTIONS 4 11 1 0	Information icon provides more information, suchReport a Sales incautions or general information, to help youcomplete there we now complete there we now complete there we now complete there we now complete there we not solve the second
Cancel Save T : The image is a constraint of the image is a constraint of	Report a Safety Incident X Report a Safety Incident X Event Title Report a Safety Incident Organization/Project X
* Incident time (i) Hour:Minute	Module Safety Category Incidents
* Date & Time that the Incident was reported	Event Date 10/08/2024
10/08/2024 01:48 PM	Start Date 10/08/2024
* Select the name of the individual that the incident was initially reported to. (i)	Status Pending Reporter
Select one	Mohaol Shar
Click if	Version 129
Name was not available in the list.	C

The slide-out also provides you with the project and organization information, category, event date, status, reporter, event title, start date, module, and version. To close the slide-out, tap the

Close icon at the top right of the page.

NOTE

Using tasks will follow the same process.

14:10	┝ ╤ 883	14:	15					÷ +	91 7
≡	\bigtriangleup	\equiv							\bigtriangleup
	EXCEPTIONS			Ca	ncel	Ş	Save	•	i
4 11 1	0	De	etaileo	lssue	Infor	mati	on		
Cancel Save	•	*	ssue Na	ame / Tit	le				
INITIAL INCIDENT INFORMATI REQUIRED WITHIN 24 HOURS		Ι							
						(250 d	characte	ers rema	ining)
*Incident date		* [Date Iss	ue Occu	red				
month/day/year		ma	onth/day/	year					
* Incident time (i)		~	\sim					[Done
Hour:Minute	0		I		The			ľm	1
* Date & Time that the Incident was rep	oorted	Q	WE	R	Ţ	γl	ſ) P
First level of supervision notified.		А	S	DF	G	Н	J	К	L
Search by Last name as multiple people go by differ names and may not appear.	rent first		Z	хс	V	В	Ν	М	$\langle \! \times \!$
incident was initially reported to. 🛈		12	3		space	e		re	turn
Select one	*							Γ	<u>Q</u>
							-	L	Ŧ

You can use voice dictation in the Completions mobile application. Tap the microphone on the keyboard and speak. The dictation will be transferred to the area you selected, making it convenient to fill out the event or task without the keypad.

11.13.1 COPY A SECTION

You can copy sections of a form or task when the template sections have been set up to allow it. If the copy option is enabled, you can use the Copy section button in the section header to copy the section below the current section.

NOTE The Copy section button might have a different name depending on how the form or task template was set up.

You can also tap the **Remove** icon to remove a copied section.

	Cancel	Save -	section G
Crew infor	mation		
* Crew had n hand?	ecessary too	ls and supplies	s on
O Yes			
O No			
Not Applicab	le		
Work details			

11.13.2 QUESTION TYPES

11.13.2.1 DATE AND TIME

Your event or task might include a field to indicate the date and time and lets you collect the date and time together or separately.

Select a date field. Select the date you want, which is then displayed in the date field.

								\bigcirc	button or icon.
pper Te	emplat	e - DO		10DIF) ncel	(Sa	ve 🔽	:	Choice
Dat	e ai	nd T	ime	è				_	Choice - Text
Date	e anc	l Tim	e						Option1
10/1	5/202	4 02:5	6 PM				m	0	Option2
									Not Applicable
Date	е								Choice - Icons - checkmark and cross
10/1	5/202	4						#	Choice - icons - checkmark and cross
•		осто)BER 2	2024		•			
Su	Мо	Tu	We	Th	Fr	Sa			\otimes
29	30	1	2	3	4	5		0	
6	7	8	9	10	11	12			Choice - Icons - Slider
13	14	15	16	17	18	19		_	$\overline{\Theta}$
20	21	22	23	24	25	26			
27	28	29	30	31	1	2	on		
3	4	5	6	7	8	9			11.13.2.3 TEXT
	TUESI	DAY, O	стов	ER 15,	2024				

The Time question defaults to the time at your current location. Choose from presented times or input your own time in AM or PM for your selection.

11.13.2.2 CHOICE

Choice questions are used for options like yes/no, pass/fail, and accept/reject. They use a radio

Text questions are areas in the event or task that capture free text in short (250 characters) or long form (4,000 characters). For example, this can be used for descriptions, short descriptions, explanations, names of subcontractors, and locations. In the short or long text fields, you can type or use the microphone to dictate.

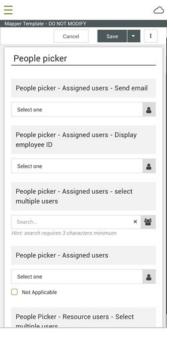
per Template - I	DO NOT MODIFY	2
Text	Cancel Save -	
ſext - Labo	el only	-
Text - Long	J - with default text	9
This is default	t value for long text question	; ; ; ; ;
	(3956 characters remaining)	
Text - Shor	t	:
This is the defa	ault value for long text question	
This is the defa	ault value for long text question (202 characters remaining)	
	(202 characters remaining)	
This is the defa Form but	(202 characters remaining)	
Form but	(202 characters remaining)	
Form but	(202 characters remaining)	

11.13.2.4 PEOPLE PICKER

A people picker question is available to use to select those users that have access to the module at the organization level in which the event or task is being performed against.

To access the names, begin typing the name or select the People Picker icon. Depending on how the administrator sets up the question, you can select multiple users or none, and the list of users can include only users with Completions roles or all users in the project. A new page is shown with the names of users. Select the name and it appears in the indicated field on the event or task.

Depending on how the question is set up, the selected user can receive an email notification.



NOTE The people who show in the list are the users who have a Completions web/Compliance assignment to the project for which the event or task is being filled out.

11.13.2.5 ATTACH PHOTOS

The Completions mobile application lets you take photographs and annotate the areas of focus while filling out the event or task. Select Attach photos to add photos to the form or task. After tapping attach photos, it will open a page from which you can select an option from the Photo Library or Take Photo using your device.

For example, you might attach location photos of buildings or objects, or a picture of a letter or certification.

	Cancel	ave 💌	1
Atta	chment		
	+ Select files		
Selec	ct files from		×
	Local system		
	Photo Library	œ.	
	Take Photo	Ô	
O 0F	Choose Files	8	
0 No	t Applicable		
Choic	e - Icons - checkmark and	d cross	
٣			

After the picture is taken, you can edit the photo by selecting the Edit button at the top right of the page. This opens editing and annotation options. There are colors, widths, and text options available. A time stamp is added when edits are made, and the stamp can be moved around the screen for optimal viewing. You can also edit the name of the image file to be more meaningful than the default name given by your device.



Before the image is saved, the undo icon in the menu bar above can remove edits.

When finished, tap the disc icon to save and return to the event or task page. You will see the included photo attachment links. If you want to view a photo, tap the attachment link to open it. If you want to include more photos, tap Attach photos again.

(+)	
Select files	
1 file(s) attached	^
🗟 image000002.jpeg	rª 🛛

If integration with InEight Document is configured, you can also see if supporting documents from the Document application are attached when performing a form or task. Document links are shown in the list of attachments with the Document icon and document version numbers.

0	
(+)	
Select files	
2 file(s) attached	^
🖬 image000002.jpeg	$\mathbb{C} \otimes$

To remove an attachment, tap the Remove icon.

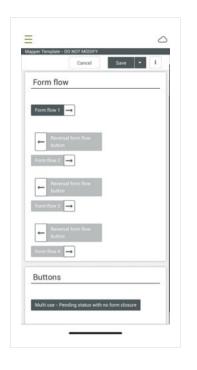
11.13.2.6 FORM FLOW

Users can access events with form flow in any step. The ability to advance or reverse the steps is based on the template configuration and still must be completed by responsible parties.

Form flow buttons have arrows next to them.

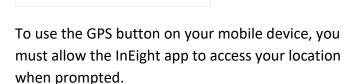
 \bigtriangleup

Save -



11.13.2.7 GPS

A GPS question lets you provide your location by tapping GPS or by entering your coordinates directly in the fields. You can also tap Clear GPS to remove the information if you need to enter a different location.



Ξ

GPS

Latitude : Longitude

entry

Latitude

Longitude

Reset

entry with elevation

Mapper Template - DO NOT MODIFY

Cancel

Please provide location information

Please provide location information - Manual

Please provide location information - manual

NOTE If you enter GPS coordinates automatically, you cannot manually edit the coordinates.

11.13.3 FORM AND TASK STATUS

You can check the status of your forms and tasks in the respective Form or Tasks options: My Scheduled Items, My Opened Items, or All Items. All saved or submitted forms or tasks will be saved directly to the web server.

0	uality > Events +							😸 Chibal Drents/Tasks	View, My	iex.	
	⊙ ▼ ▲							🔀 tati yayota 🛛 📢	0.0	0 Q	Clear all filters
					C Automatic date filter appl	ied - to clean, use 😭 event dete column litter					
	Event Side 👘		Category	Trent date	Event ID 1	Tennere T	Project/Orga	intio 🐺 Reputer		U Stela	
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11.14 COMPLETE A FORM OR TASK

There are several ways to complete a form or task depending on how it is set up by your administrator and what the next steps are.

11.14.1 SAVE A FORM OR TASK

If you do not have enough time to complete a form or task, or not all information about the event is readily available, you can tap Save to save your work. You can then continue or close the form or task, and then come back later to complete and submit it.

14:59		+ ≈ 28
Ξ		\bigtriangleup
Mapper Template -	DO NOT MODIFY	
	Cancel	Save 🗸 🚦
Text		
Text - Lab	el only	

11.14.2 ASSIGN A TASK

As part of filling out a task, you might have to assign it to someone else to complete part of the task. To assign a task, tap the Assign button. If you want to start a new task immediately after assigning the current task, tap Assign and start new task.

11.14.3 SUBMIT A FORM OR TASK

After you complete your event or task, tap the **Submit** button to submit it. The buttons may have other labels depending on how the form or task is configured. In this example, the button is labeled **Submit and Complete the form.**

EPARATION & PLA	Cancel	Save -	
Date			
10/17/2024			
Signature			
9æ x	South		
Name			
Joe Smith			
	(24	11 characters re	maining)
Date			
10/17/2024			
Submit and Co	mplete the form	D	
	IEIGH		1

Once saved or submitted, the event or task will be available for others to access on the web via Completions web, Compliance, or the InEight mobile application. not impacted or overwritten. This means another user cannot open your task or event. Additionally, events and tasks synced to the SQC mobile application will show a locked icon.

12:15		┝ゔᡚ
≡		\bigtriangleup
< Events	All Items	2
Training Job / Quality		
Q Add search criteria and	press return	
PREPARATION 10/14/2024 Scheduled	& PLACEMENT FO	(j)
PREPARATION 10/07/2024 Scheduled	& PLACEMENT FO	(j)

Events or tasks that are locked can be opened for viewing but may not be edited. If the same user has an event or task locked, the user could see an option to unlock the item. This option will load the last saved responses from the server.

11.15 LOCKED EVENTS AND TASKS

When you are completing a task or event on a mobile device via the InEight mobile application, a locking mechanism ensures your completion is



11.16 PUSH NOTIFICATIONS

Push notifications are unavailable on the InEight mobile application and cannot be configured currently. SQC mobile users who have set up push notifications on their devices may see notifications related to that application while using the InEight mobile app. If you no longer want notifications for the SQC mobile application, you can control notification alerts using the iOS notification settings.

5:21 -7	. ?.
Compliance Notifical	tions
Allow Notifications	
NOTIFICATION DELIVERY	
Immediate Delivery Deliver right away	 ✓
Scheduled Summa Deliver at 08:00, 12:00, 1	
Notifications are delivered ine	modiately.
Lock Screen Notification	Center Banners
Banner Style	e
	Temporary >
Sounds	
Sounds Badges	