QUICK GUIDE

ISSUE CREATION AND SETUP

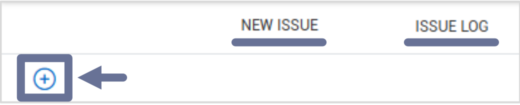
InEight® CHANGE

GETTING STARTED

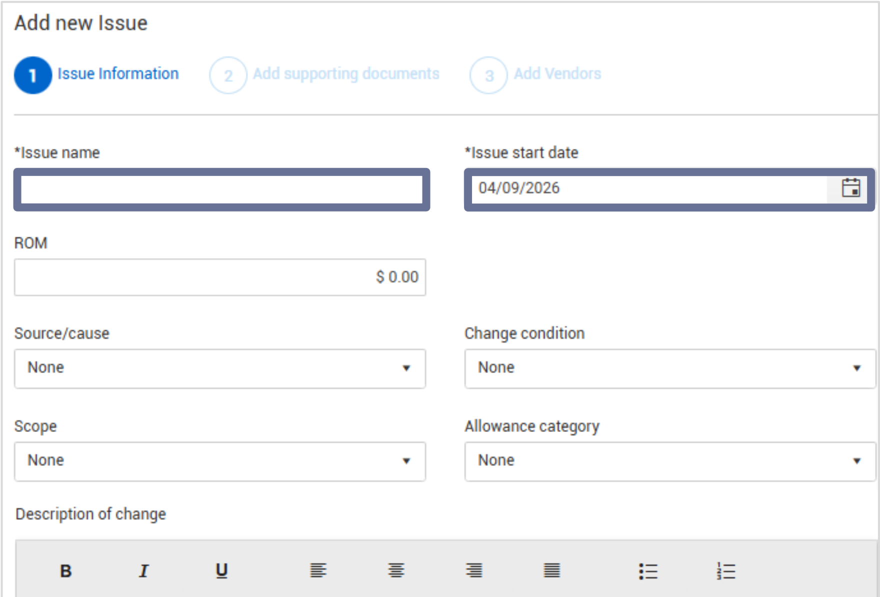
- Issues document potential changes and are the first step in the change management process.
- Issues are created from the New Issue page or Issue Log using a guided wizard that allows you to add supporting documents, vendors, and approval workflow details.

ISSUE CREATION

1. From the New Issue page or the Issue Log, click the **Add issue icon**.

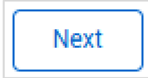


2. The Add new issue wizard opens to the Issue Information step. Enter the **issue name** and **issue start date**. You can optionally enter a description and other high-level information.



ADD SUPPORTING DOCUMENTS (OPTIONAL)

3. If you have supporting documents to add, click **Next** to continue through the wizard to the Add supporting documents step.



4. Add a **Title** and choose a **Document type**.

Note: you may need to select an additional subtype depending on your document type selection.

5. Click **Select file** and choose the document to add.

6. You can optionally enter notes about the document.

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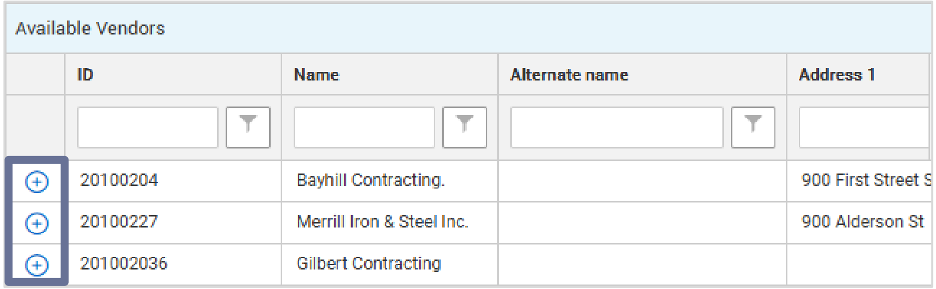
ADD VENDORS (OPTIONAL)

7. If you have vendors to associate to the issue, click **Next** to continue to the add vendors step.

8. From the list of available vendors, click the **Add vendor icon** to associate a vendor with the issue.



Available Vendors

	ID	Name	Alternate name	Address 1
⊕	20100204	Bayhill Contracting.		900 First Street S
⊕	20100227	Merrill Iron & Steel Inc.		900 Alderson St
⊕	201002036	Gilbert Contracting		

Note: If supporting documents or vendor information are not available, these steps can be completed later.

SUBMIT OR ADD THE ISSUE

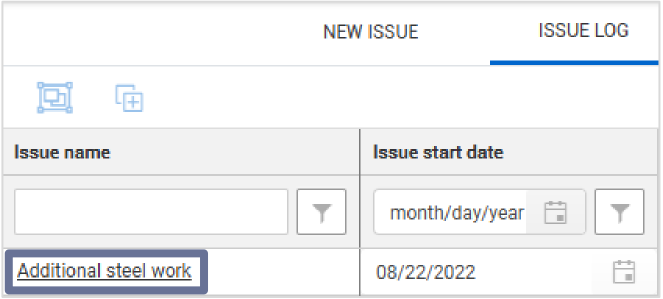
How you finalize the issue depends on whether an approval workflow is configured for your project.

9. If workflow is not configured, click **Add** to create the issue, or **Add and New** to create another issue.

If workflow is configured, click **Submit for approval** to route the issue through the approval process, or **Add and New** to continue adding issues.

COMPLETE ISSUE SETUP

After the issue is created, open the issue record from the **Issue Log** to complete additional setup.



On the **Details** tab, you can enter and manage key information used throughout the issue lifecycle, including:

- Issue details and description
- Source or cause of the issue
- Scope and classification fields
- Vendors and assigned WBS codes

Fields marked with an asterisk (*) are required for PCO/CCO associations or budget moves.

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