INEIGHT

Forms Integration

Change- Creating Tasks

InEight®
COMPLIANCE

Changelog

This changelog contains only significant or other notable changes to the document revision. Editorial or minor changes that do not affect the context of the document are not included in the changelog.

Rev	Date	Description
1.0	DD-MMM-YYYY	Initial Release

Contents

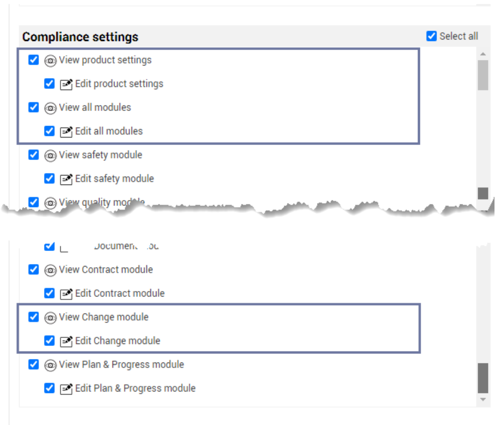
Purpose

The purpose of this document is to detail the steps to create an integration between InEight Compliance and InEight Change to use the available tasks in Change using a specific example. For more information about setting up a Compliance task to use in Change refer to the Compliance and Change knowledge libraries.

Create a task template in Compliance

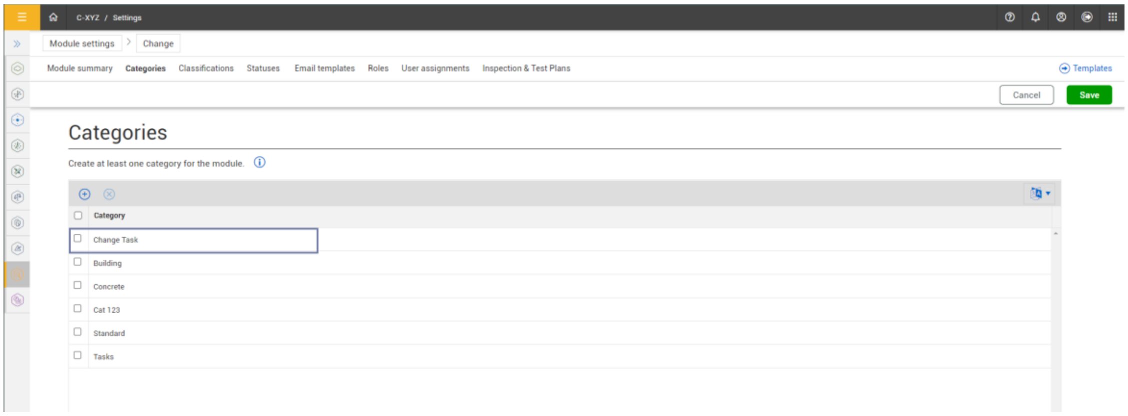
An InEight Platform Level 3 Administrator Permission or equivalent is required to access the Change Compliance module settings

- Ensure **View/Edit all modules** or **View/Edit Change module** is selected
- Ensure **View/Edit product settings** is selected

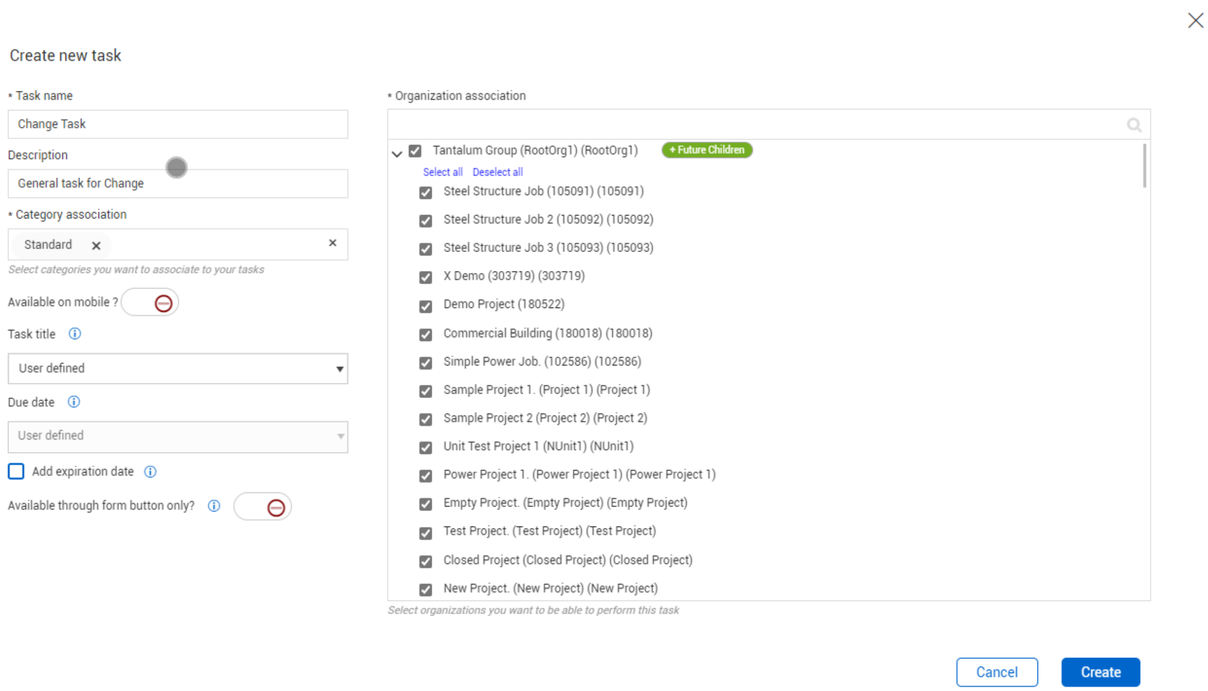


1. Ensure a category is available to be associated with the Task template that will be created if one is not already available. Categories are specific per module and can be used as permissions to drive security within the module. By creating categories, you partition the module into smaller areas that help define the module’s purpose.
    - Organization Settings > Settings > Compliance > Change > **Categories**

The category name can be general such as Standard or Tasks. Category names are unique per module.



2. Depending on the business needs, a Task template can be assigned to the entire organization or to a specific project(s). These instructions walk through setting up a task template for an entire organization.
    a. From Compliance, select the **Change** tile
    b. Select the **Template Manager** from the left navigation pane and then select the toggle to **Tasks**
    c. Click the **Create New Task** button. The Task properties page opens
    d. On the task properties page:
        - For the required “Task name”, enter **Change Task**
        - In the “Description” field add a brief description of the template business process, for example**:** General task for Change
        - In “Category association” select **Standard**
        - In “Available on mobile” ensure switch is set to **off**
        - In “Task Title” select **User defined** to allow for easy naming convention that users can modify
        - In “Due Date**”** User defined is the default and cannot be changed for tasks
        - In “Add expiration date” leave as deselected, as it is not required for this integration
        - In “Available through form button only” ensure the toggle is set off
        - In the “Organization Association” section select the check box for **the Organization** > and then click **Select all** > and **+Future Children** to apply the created template to future projects within this organization
    e. Click **Create.** The task builder opens.

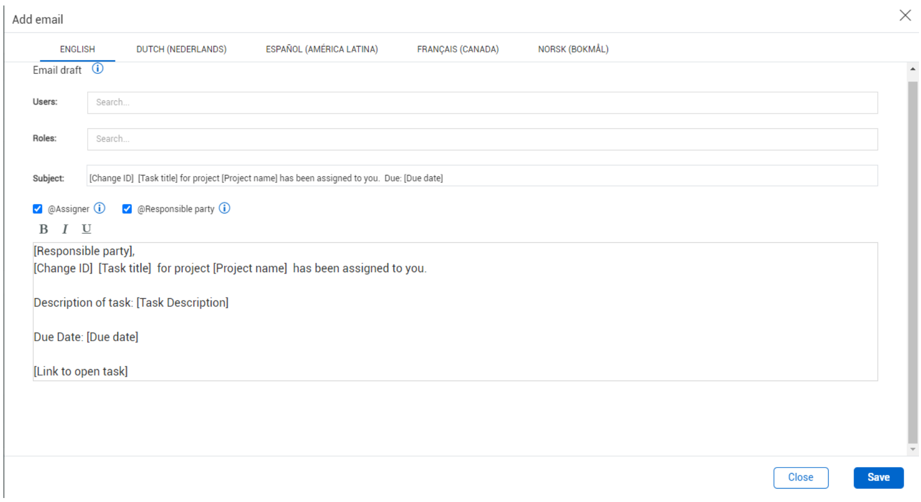


3. Create the Change Task template
    a. Task templates have general questions related to task populated by default. You must rename some of these questions and add new questions:
        - Section Header – rename to **Task Details**
        - Task Title – Text field short (250 characters) – leave as Default
        - Add a **Text** type > **"Text field" > Short** > **Mandatory**; rename to **Change ID**
        - Description – Required – "**Text field" > Long** > **Mandatory** - Default
        - Task person – Required rename to **Responsible party**
        - Due Date – Required User Defined - Default
        - Assign Button – Required Ensure 'Change status to' is set to **Scheduled** - Default
        - Add a **Text** type > **"Text field" > Long**; rename to **Notes**
        - Add a **Button** type > Adjust "Change status to" **Complete**; rename to **Complete**
        - Add a **Button** type > Adjust "Change status to" **Canceled**; rename to **Cancel Task**

4. Configure the ASSIGN button to send email notifications to the assignee:
    a. Click on the **Assign** button
    b. Expand the Email section in the left properties panel and click **Add email**
    c. In the dialog box, adjust the settings to the following:
        - Users – Leave blank, not required for Change task configuration
        - Roles – Leave blank, not required for Change task configuration
        - Subject – Input email subject - use the @ symbol to select variable fields for example, @project name for [Project Name]

- **[Change ID] [Task title] for project [Project name] has been assigned to you. Due: [Due date]**
- @Assigner – select **check box** to send email
- @Responsbile party (task person) – select **check box** to send email
- Body (Must use the @ symbol to select fields)
    - **[Responsible party],**
    - **[Change ID] [Task title] for project [Project name] has been assigned to you.**
    - **Description of Task: [Task Description]**
    - **Due date: [Due date]**
    - **[Link to open task]**

5. Click **Save**



6. Return to the complete button to send email notifications to the assignee.
    a. Click on the Complete button
    b. Ensure ‘Change status to’ is set to Complete
    c. Expand the Email section in the left properties panel and click Add email
    d. In the pop-up adjust the settings to:
        - Users – Leave blank, not required for Change Task configuration
        - Roles – Leave blank, not required for Change Task configuration
        - Subject – [Change ID] [Task title] for project [Project name] has been completed
        - @Assigner – select check box to send email
        - @Responsible party – select check box to send email
        - Body (Must use the @ symbol to select fields)
            - **[Assigner],**
            - **[Task title] for project [Project name] – [Change ID] has been completed.**
            - **[Notes]**
            - **[Link to open task]**
7. Click **Save**

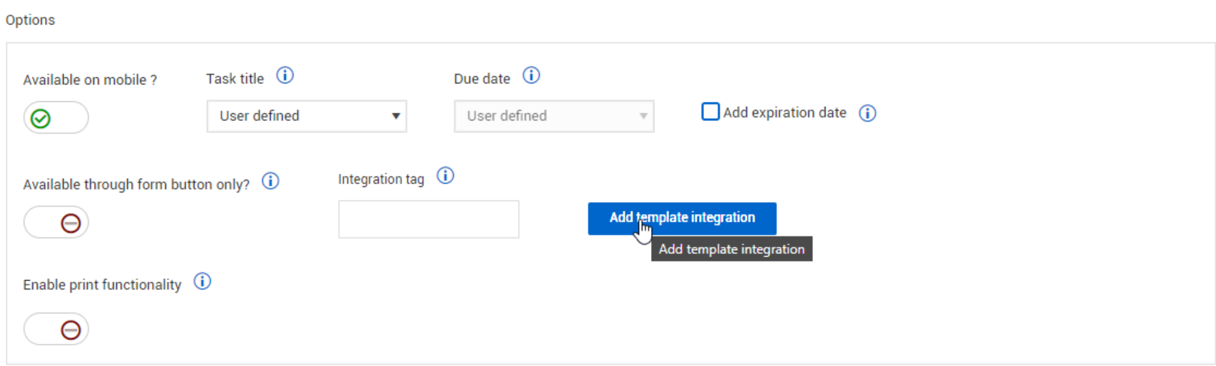
Return to the Cancel button to send email notifications to the assignee.

8. Click the **Cancel task** button
9. Ensure 'Change status to' is set to *Canceled.*
10. Expand the Email section in the left properties panel and then click **Add email.**
    a. In the dialog box adjust the settings to the following values:
        - Users – Leave blank, not required for Change Task configuration
        - Roles – Leave blank, not required for Change Task configuration
        - Subject – **[Change ID] [Task title] for project [Project name] has been canceled**
        - @Assigner party – select **check box** to send email
        - @Responsible party – select **check box** to send email
        - Body (Must use the @ symbol to select fields)
            - **[Assigner],**
            - **[Change ID] [Task title] for project [Project name] has been canceled.**
            - **Description of Task: [Task Description]**
            - **[Link to open task]**
11. Click **Save**
12. **Save** and **Publish** the template.

Forms integration

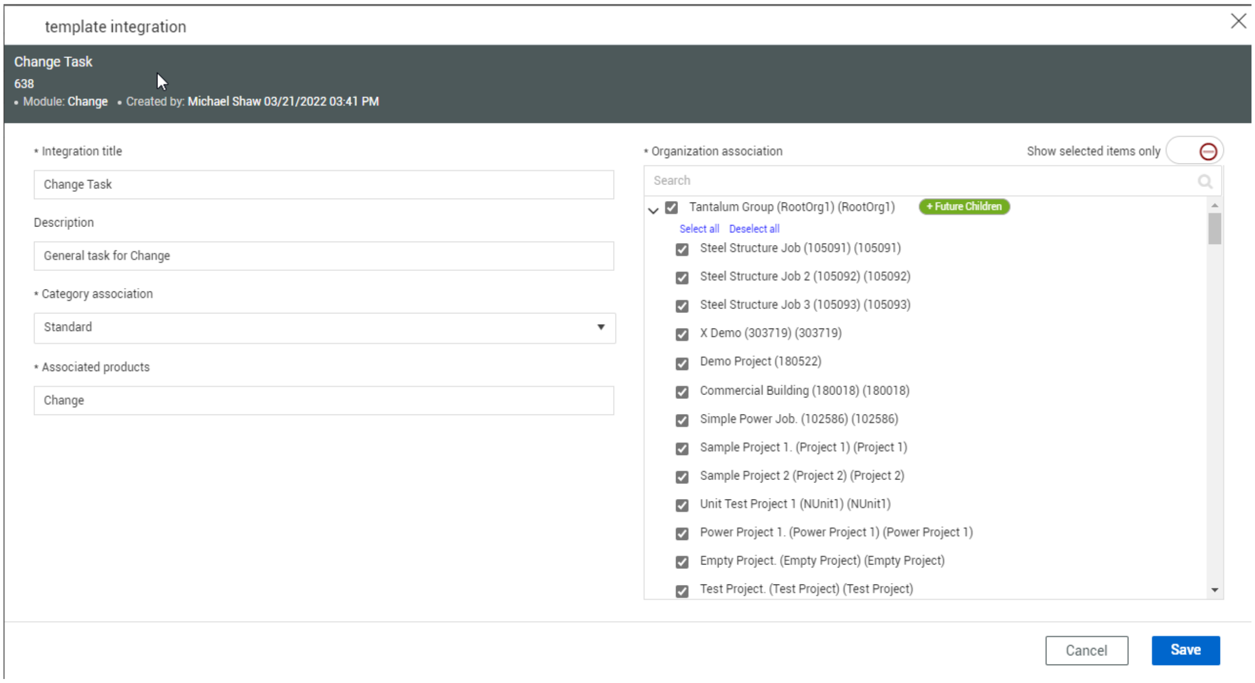
After the template has been published, you must make it available to the other products through the forms integration.

1. Select the Change Task template again and navigate to the **PROPERTIES** tab.
2. Select **Add template integration** and provide the following inputs.



- Integration title – **Change Task**
- Description – **General task for Change**
- Category association – **Standard**
- Associated products – **Change**
- Ensure the **root organization, sub organizations and projects** are selected along with the **+Future Children** are selected

3. Click **Save.**

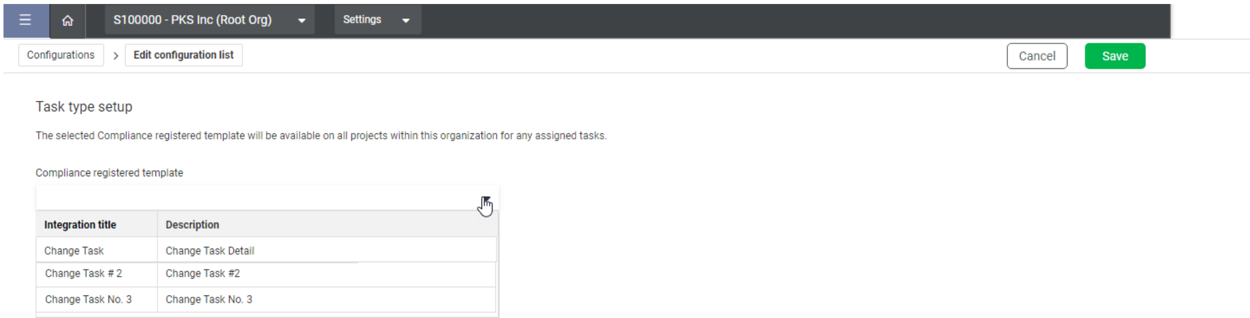


The Change Task template is now ready to be linked within the Change project settings, configurations tab.

Change configuration

Task Type Setup Page

- Integration title – Template named by user
- Description – Template description
- Save



NOTE:	Change users can not see the template created in Compliance if the Roles and Permission were not setup correctly and/or if the Template is not published. To choose a template for the user's to create tasks with Project settings > Configurations > Task type setup > choose template from Compliance register template drop-down list

Accessing the task

Users must have access in Compliance to complete the tasks within Change. That can be achieved with automatic user assignments or adding users individually.

Automatic user assignments

The Automatic user assignments configuration lets you save administrative setup time and automatically assign a Compliance role and categories to all users from InEight Platform.

To automatically assign a role, select a role from the drop-down menu.

To automatically assign categories, start typing a category name in the field or click inside the field and then select one from the drop-down list.

When you are done assigning roles and categories, click **Save**.

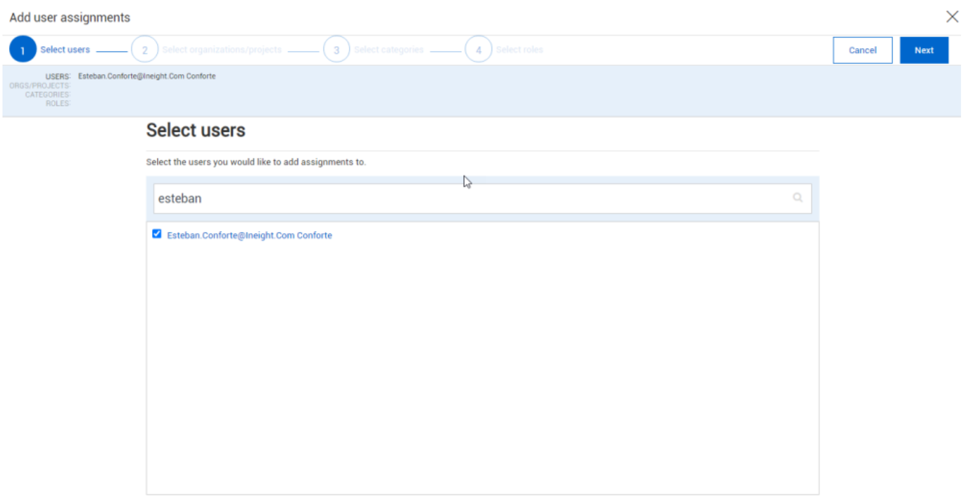
You must have a Level 3 access role to see and change this configuration.

More information on Compliance settings here.

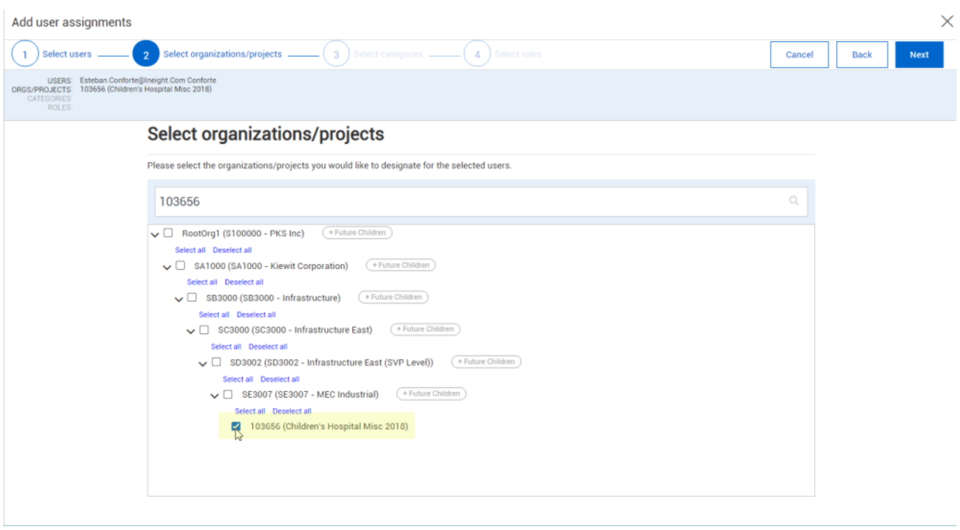
Adding users as a one off

To allow access to the specific Category and Template navigate to Project settings > Compliance > User assignments > **Add user assignments**.

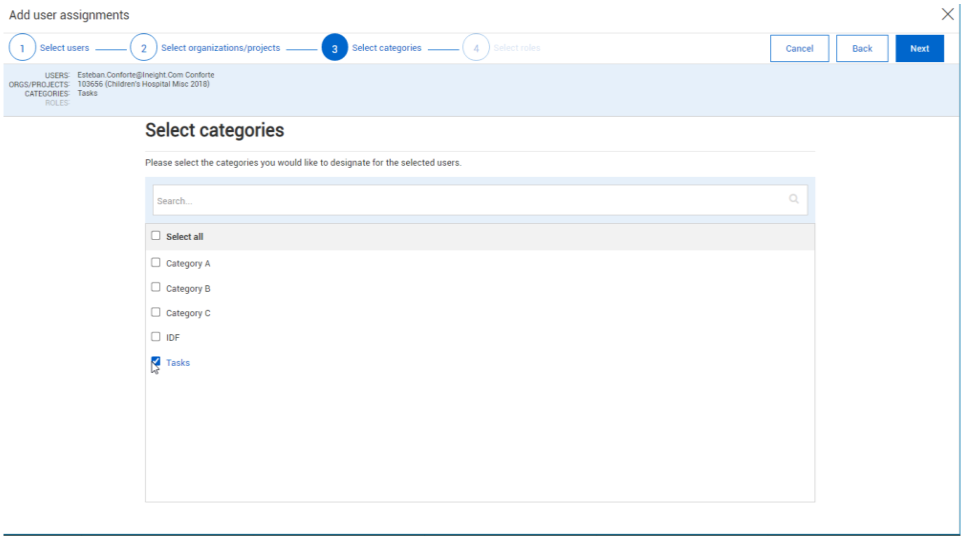
1. Select the user.



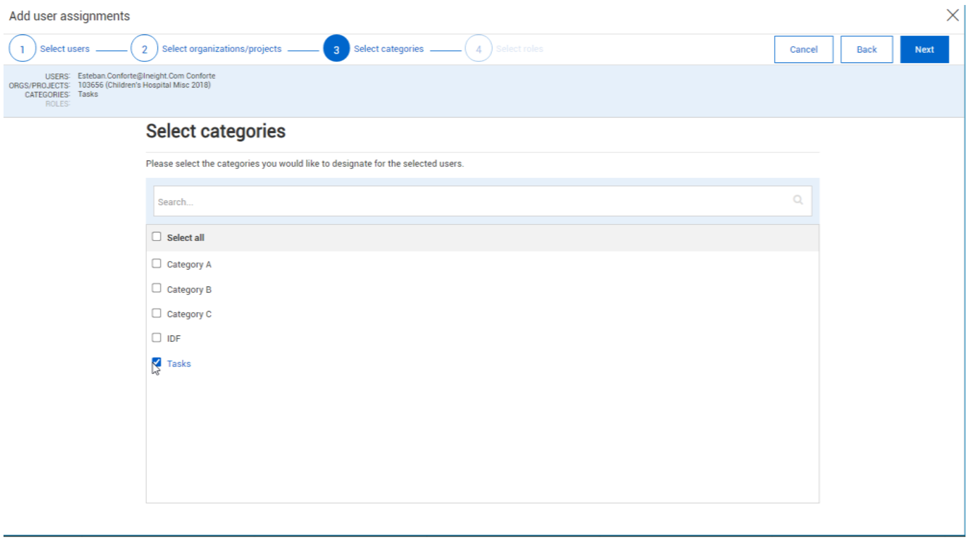
2. Select the Project/Organization for the user.



3. Select the category created for the template the organization will use.



4. Select a role (general user's use the Reporter role that allows you to create and edit tasks).



NOTE:	Anyone who will be creating a Template must have Compliance Module Administrator permissions.