InEight Document-Platform

Application Integrations

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	16-JUL-2024	Initial Release

Contents

Setup InEight cloud platform integrations

The process described below is required for the following InEight product integrations:

- Change – Link supporting documents and create forms in Document.
- Contract – Link supporting documents.
- Document – Create issues from form in Change issue log.
- Plan – Link documents to IWPs, create packages in Document, and upload IWP report to Document.
- Platform – Enable the product navigation from the Main menu.

Prerequisites

- Confirm with your InEight representative that the Document admin and standard APIs are activated on required projects. Your InEight representative should have the ability to activate via the project service portal.
- A service account is created in Document, which has access to projects that will be mapped and require integrations in Document.

Add Document server

To setup the Document mappings, in the Main menu go to Suite Administration > Applications integrations > **Document**.
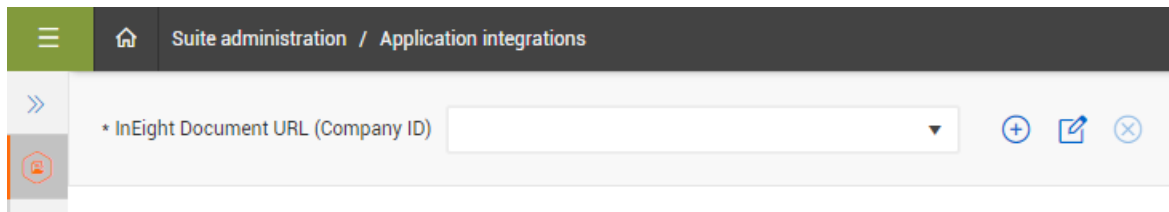
Click the **Add** icon. In the Add server slide-out panel, complete the following fields:

- URL – Enter the Document server URL.
- Company ID, Username, and Password – Enter the credentials of the Document service account.
- SSO Domain – If the client has SSO enabled for Document, enter the domain. The domain typically matches the client's email address format.

Click **Save**.

Map Document to InEight cloud platform projects

Locate the Suite project from the project list, and then select the applicable URL from InEight Document URL field.

Select the Document project from the InEight Document project ID column, which is a list of available projects based on URL selected and the access of the service account. The Document project name is automatically populated.

Document/Change issue integration setup

The following section provides information for enabling the integration to create and link an issue from a form in Document to the issue log in Change.
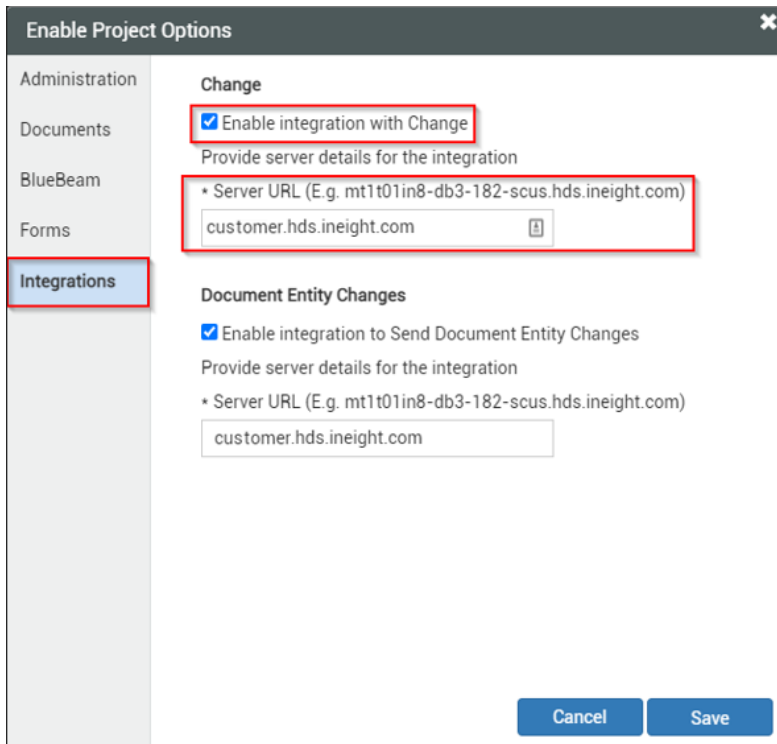
Prerequisites

The project must be mapped in Application integrations in Platform, see Setup InEight cloud platform integrations.

Project service portal setup

You can use the Project Service Portal to activate the Change integration on the required projects. You need to know the URL details related to the server InEight cloud platform is hosted on to complete the setup.

1. In the Project Service Portal, select the project from the list.
2. Open Enable Project Options, and then select **Integrations**.
3. Select the **Enable integration with Change** check box, and then enter the InEight cloud platform tenant URL.
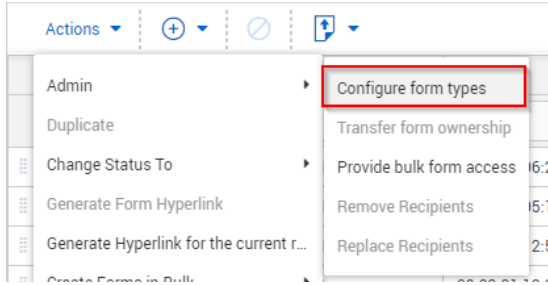4. Click **Save**.

Add issue control via Form builder

After the integration has been activated, the issue control needs to be added via the form builder.

1. Go to the project in Document, and then open the Forms module.
2. In the Actions menu, select Admin > **Configure form types**.

3. Click the link for the form type that requires the create issue control. In the Edit Form Type dialog box, click **Add Controls**.
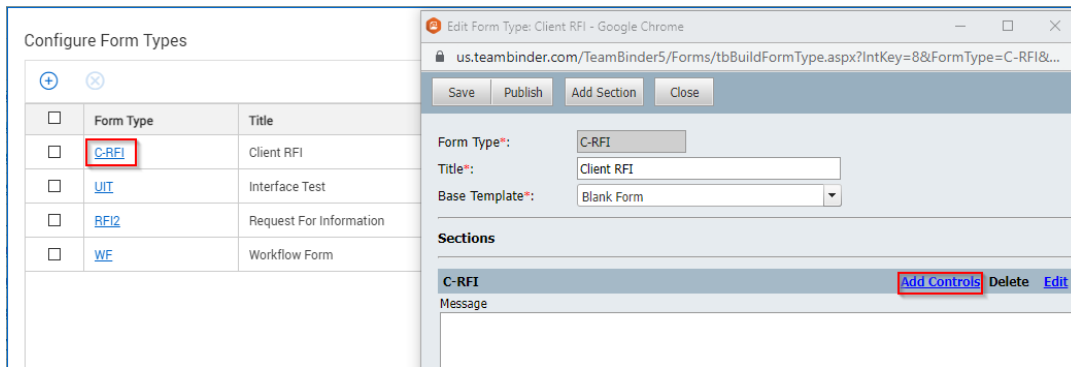
4. In the Add Controls to Section dialog box, select **Create Issue** for the control to add, and then click **Add Control**.
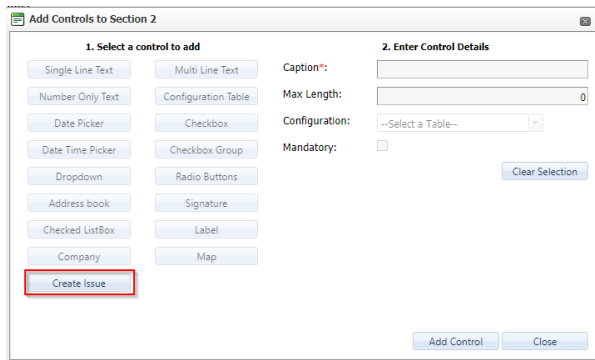
5. Publish the form with the changes.

Create issue from form

After the control is added, open the form type. In the section where the control is added, click the **Create issue** icon.

NOTE: The control is only enabled when the section of the form is active and is only available to the reviewers of that section.

Reviewers can enter the issue name, issue date, and description.

Sync issue data

The issue is now created in Change. The Issue No., Issue status, and Change project Id fields are synced back to the form in Document. The issue status will continue to sync back to Document whenever it is updated in Change.

The form also shows in the Supporting Documents tab for the issue that was created in Change.

Document/Compliance issue integration setup

The process described below is for enabling the integration to transfer and upload the PDF version of Compliance forms to Document.

Prerequisites

Document APIs must be activated for the required projects. The project does not require mapping in Platform because it is handled in the middleware.

A Service account is created in InEight Document projects that require mapping. The service account is used for uploading the PDF forms to the register and require the following permissions:

- Access to upload rules to document register
- Full access to document module

For current state of the middleware, a non-production project for the client must be identified for the middleware to be uploaded to. This is uploaded as a document to the register and located where users access to update and manage the project mappings.
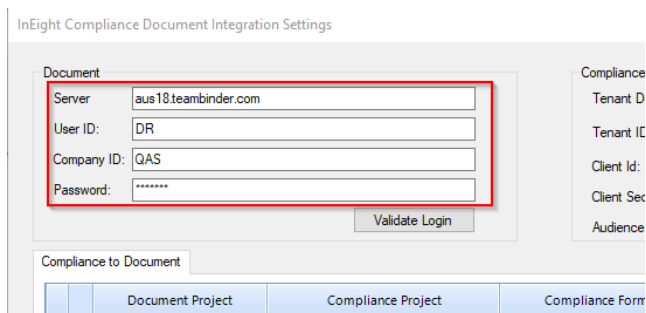
Determine the following with the client:

- Which Forms are required for transfer?
- For each form type, what status should start the transfer?
- For each form type, what fields need to have data mapped and stored in Document?
- For fields being mapped for each Form type, validate those fields exist in Document?

Connecting to Document/Compliance environments

Access the Compliance middleware from the location as described in Prerequisites, and then complete the following information in the Document section.

- URL – Enter the Document server URL.
- Company ID, Username, and Password – Enter the credentials for service account used to connect and upload forms into Document.

In the Compliance section, enter the information for Tenant Domain, Tenant ID, Client ID, Client Secret, and Audience. This information needs to be provided by your InEight representative.

Mapping projects

To start a new mapping for a form type for a specific project, select the project from the list in the Document Project column, and then enter the corresponding project number in the Compliance Project column.

To define the Compliance status that starts the transfer of the form to Document, enter the InspectActivityStatus value from Compliance into the Compliance Form Status column.

If a custom report template is required, enter the template in the Report Template column. If no custom report is required, you can leave it empty, and the general compliance form report will be used.

To setup specific users to receive notifications for errors regarding the mapping, enter the user's email address in the Notify Email column.

Mapping form data

After the project information has been entered, you can begin map the fields. Select a value from the Mapping Type field. There are three mapping types to choose from:

- Direct – Takes the value exactly as is from Compliance and is input into Document.
- Translate – Allows mapping of a Compliance value to a specific Document value.
- Fixed – Ignores the Compliance value and inputs the specified value.

Select from the list in the Document Field column.

For the Compliance Attribute column, the field from the form needs to be entered manually with the backend name. For example, Title would be FormTitle.

If the mapping type selected is either Translate or Fixed, the Document Value field needs to be entered.

Common Issues

General

Problem: Incorrect projects are shown for the project list in Application integrations in Platform.

- Solution: Service account used in the URL setup either has too much or not enough access to InEight Document projects.
- Solution: Document APIs are not activated.

Problem: Integration is not working for linking supporting documents, creating document packages, etc.

Solution: Document APIs are not activated.

Compliance

Problem: Forms are failing to transfer.

- Solution: Not all mandatory Document fields are mapped. This could be due to changes made by the project team to mandatory fields after mapping is complete.
- Solution: Mapped values are incorrect between Compliance and Document. For example, if the mapping type is Direct and the value from Compliance is Civil, but the value in Document is CIV.

Change

Problem: The user is unable to create forms from issue.

Solution: The user does not have correct access to the Forms module in Document.