Compliance and Completions to Change Integration

Setup Guide

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	21-MAY-2020	Initial Release
2.0	01-NOV-2023	Updated to show both Compliance and Completions (web) with current images and paths.

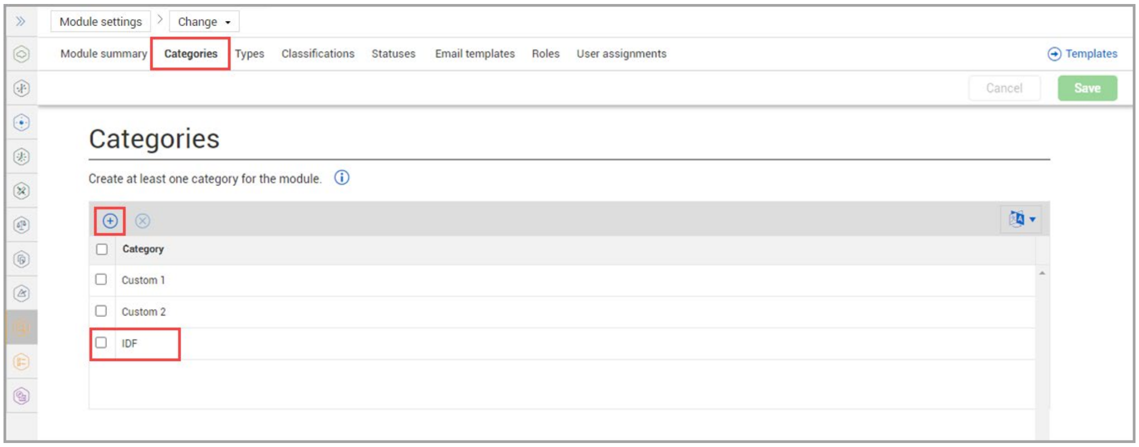
Contents

Introduction

This document describes how you can set up a form to create an issue from InEight Compliance or InEight Completions and integrate that information to create an issue line item in InEight Change. Tags define the information that is sent to Change to fill in the issue details.

Set up organization settings

1. Go to organization > Settings > Compliance or Completions > **Module Settings**, and then select the **Change** module. For Completions, select the **Quality** module.
2. Click the **Categories** tab.
3. Click the **Add category** icon. Add a new category and name it **IDF** (Issue Documentation Form).
4. Click **Save**.

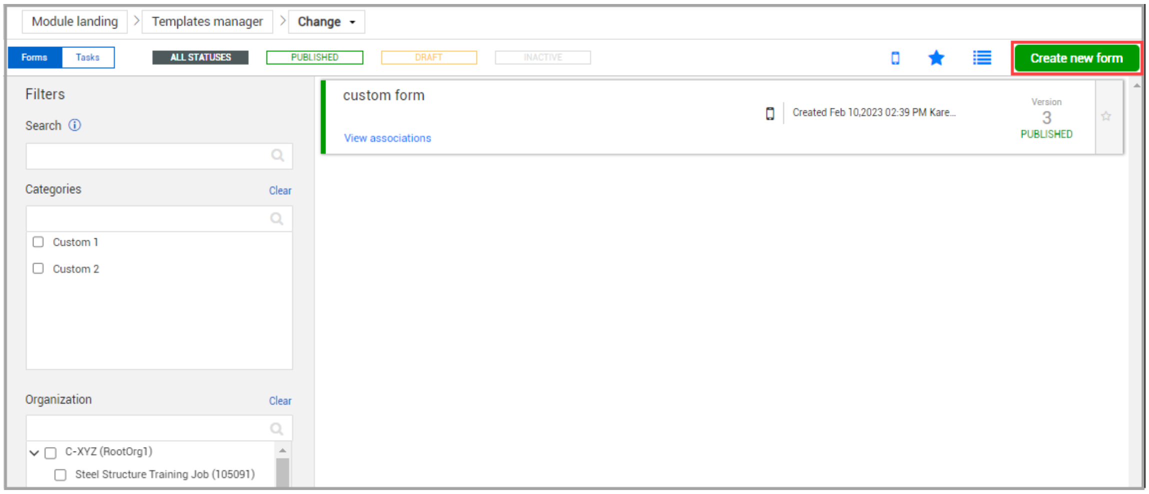


NOTE:	To add the category to an existing form, go to the template's properties tab.

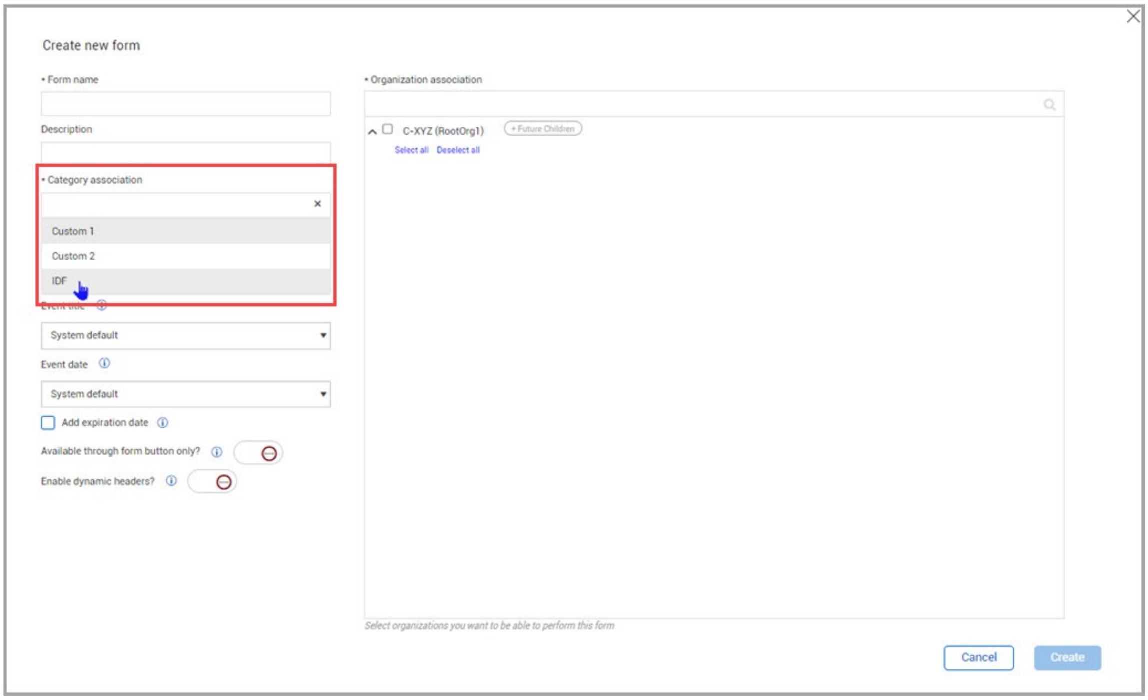
5. Go to the **User assignments** tab. Verify at least one user has administrator roles for the project or organization in the Change module, specifically for the IDF category.

Create form

1. On the module landing page, go to **Templates manager**.
2. Click **Create new form**.



3. In Category association, select **IDF**.



Map IDF codes

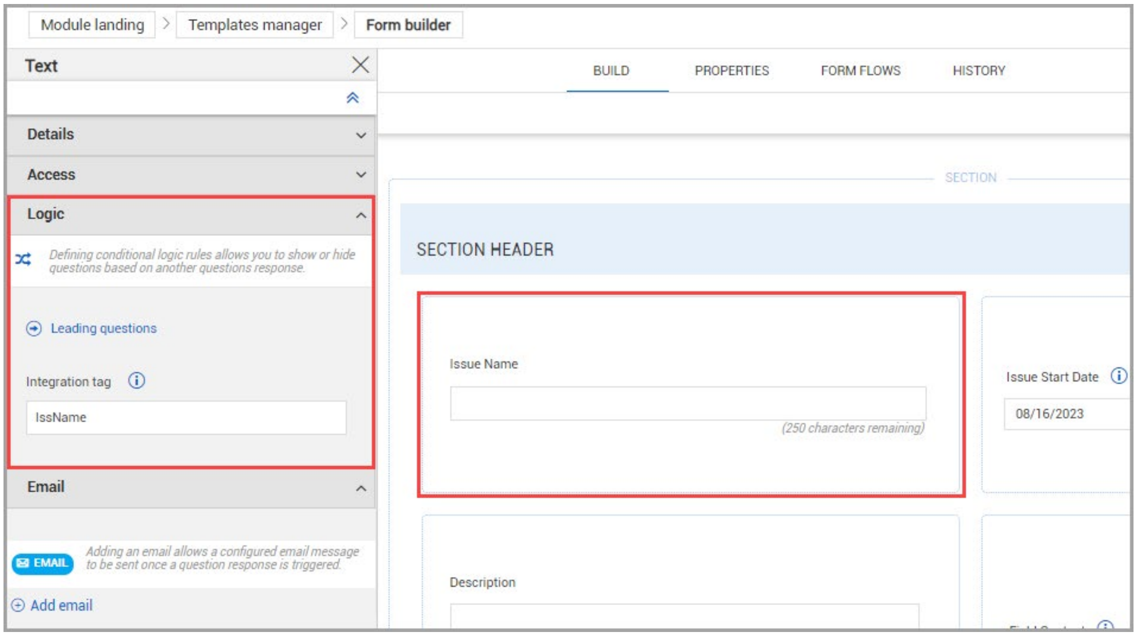
1. Create the fields in the table below and map the integration tags as follows.

NOTE:	Any field name can be used. The standard Change fields of the same name are filled in. You cannot change the integration tags in the table below.

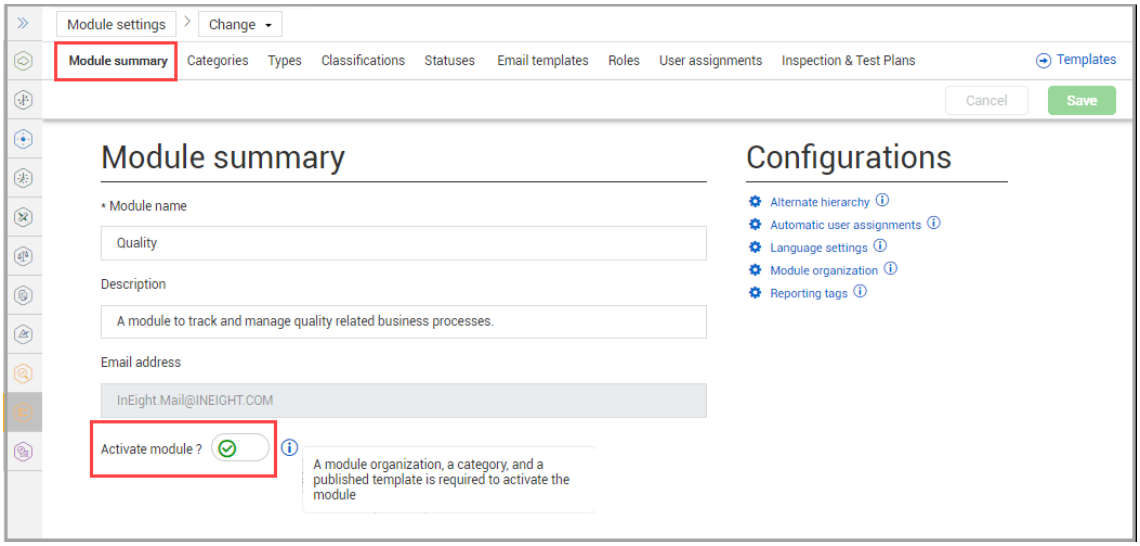
Field name	Field type	Integration tag
Issue Name	Short Text	IssName
Issue Start Date	Date	IssSDate
Description	Long Text	Desc
Field Contact	People picker or Short Text	FCon
Has the work started?	List (Yes/No)	WrkStrtd
Does this impact the schedule?	List (Yes/No)	SchImp
Schedule Comments	Long Text	SchImpDet
Have you verbally notified the client?	List (Yes/No)	VerNClient
Client conversation summary	Long Text	IssSum

NOTE:	In Change, you can find the integration tag fields in Project Settings > Change > Configurations > **Compliance Response Codes**.

2. For each field you add to the form, go to **Logic**, and then add the integration tag name.



3. Add a button at the bottom of the form to complete the form and set Change status to **Complete**.
4. Publish the form.
5. If this is the first form, go to **Module summary** and set **Activate module?** to on.



The form is now available on the web and mobile applications. When you complete the form, the new issues are shown in Change with the data you have captured in the event.

Change form with associated tags in each field

The images below show examples of a Change issue with associated fields and tags.