

Integration Guide

InEight Document-Compliance-Completions



InEight®
DOCUMENT



InEight®
COMPLIANCE



InEight®
COMPLETIONS



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	09-JUL-2021	Initial publication
2.0	28-MAR-2022	Revised publication
3.0	29-AUG-2023	Reformatted and added instructions for Completions.

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Document/Compliance and Completions Issue Integration Setup

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

Pre-requisites

Document APIs must be activated for the required projects. Currently, the project does not require mapping in InEight Platform as this 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 requires the following permissions:

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

For the current state of the middleware, a nonproduction project for the client should be identified for the middleware to be uploaded to. This will be uploaded as a document to the register and will be where users access to update and manage the project mappings.

Project delivery should discuss the following with the client:

- Which Forms are required for transfer?
- For each Form type, what status should trigger in 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 or Completions Environments

Access the Compliance or Completions middleware from the location as described above, and then enter the following information:

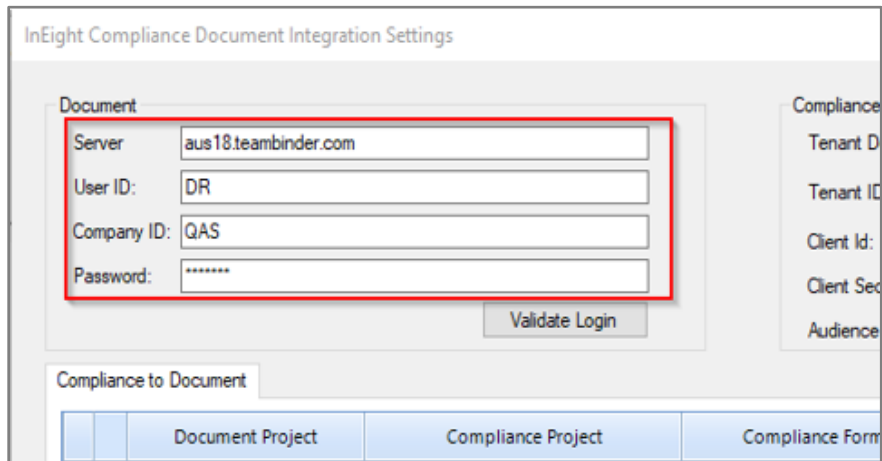
Document Section

Server – Document server URL.

User ID/CompanyID/Password – Credentials for the service account used to connect and upload Forms into Document.

NOTE:

For transferring, it is recommended to create a service account. If multiple projects are being linked, the service account should be duplicated in each project.



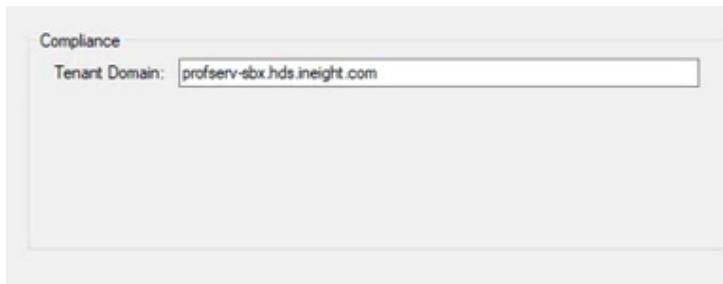
The screenshot shows the 'InEight Compliance Document Integration Settings' window. It is divided into two main sections: 'Document' and 'Compliance'. The 'Document' section contains four input fields: 'Server' (aus18.teambinder.com), 'User ID' (DR), 'Company ID' (QAS), and 'Password' (masked with asterisks). These fields are enclosed in a red rectangular box. Below these fields is a 'Validate Login' button. The 'Compliance' section is partially visible on the right, showing fields for 'Tenant D', 'Tenant ID', 'Client Id', 'Client Sec', and 'Audience'. At the bottom, there is a 'Compliance to Document' tab and a table with three columns: 'Document Project', 'Compliance Project', and 'Compliance Form'.

NOTE:

In Document, this account should be set up with the ability to upload documents with the applicable attributes.

Compliance and Completions Section

Enter the Tenant Domain, which is the first part of the URL that is shown when using Compliance or Completions.

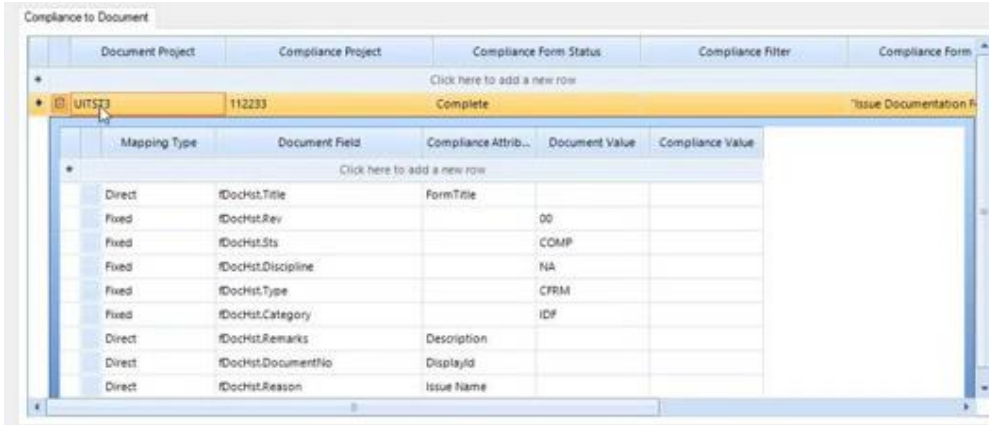


The screenshot shows the 'Compliance' section of the settings. It features a single input field labeled 'Tenant Domain' with the value 'profserv-sbx.hds.ineight.com' entered.

Mapping Projects

To start a new mapping do the following.

1. Enter the Document project number in the Document Project column.
2. In Compliance or Completions, enter the project number in the Project column.



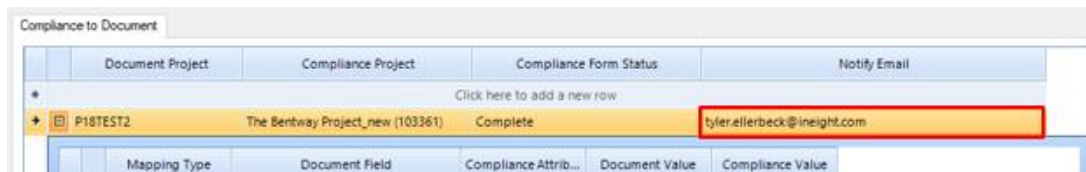
The screenshot shows the 'Compliance to Document' form. It has a header with columns: Document Project, Compliance Project, Compliance Form Status, Compliance Filter, and Compliance Form. Below the header is a table with the following data:

Document Project	Compliance Project	Compliance Form Status	Compliance Filter	Compliance Form
UITS23	112233	Complete		Issue Documentation Form

Below this table is a mapping table with the following data:

Mapping Type	Document Field	Compliance Attrib...	Document Value	Compliance Value
Direct	IDocHist.Title	FormTitle		
Fixed	IDocHist.Rev		00	
Fixed	IDocHist.Sts		COMP	
Fixed	IDocHist.Discipline		NA	
Fixed	IDocHist.Type		CFRM	
Fixed	IDocHist.Category		IDF	
Direct	IDocHist.Remarks	Description		
Direct	IDocHist.DocumentNo	DisplayId		
Direct	IDocHist.Reason	Issue Name		

- Enter the Compliance or Completions form status that will trigger a transfer into the Compliance or Completions Form status column. It is possible to establish different criteria for different projects. If additional conditions are required such as data filters, please contact InEight support.
- Define the Compliance or Completions forms that will be transferred into Document. The title must be entered between quotation marks for example, "Issue Documentation Form". If multiple form types need to be transferred these can be entered into the same cell with a comma separating each form type title, for example, "Issue Documentation Form", "Permission to work Form".
- Define the transfer modified option:
 - Yes, if a Compliance or Completions form is modified after the first transfer as second transfer will be attempted.
 - No, if a Compliance or Completions form is modified after the first transfer, no further attempts will be made.
- Define the users to be notified of transfers in the notify email column. For more than one email address, separate each address with a comma.



The screenshot shows the 'Compliance to Document' form. It has a header with columns: Document Project, Compliance Project, Compliance Form Status, and Notify Email. Below the header is a table with the following data:

Document Project	Compliance Project	Compliance Form Status	Notify Email
P18TEST2	The Bentway Project_new (103361)	Complete	tyler.ellerbeck@ineight.com

Below this table is a mapping table with the following data:

Mapping Type	Document Field	Compliance Attrib...	Document Value	Compliance Value

When more than one form needs to be mapped:

- If the mapping is the same, separate the two forms names with a comma.
- If the mapping is different, create a new row, select the same projects, and then enter the information as detailed in steps 3-6.

When more than one project is being mapped, repeat steps 1-6 in a new row. Note that the basic information can be copied but mapping needs to be specified).

Populating Form Mapping Table

When the integration is active, the minimum requirement is to populate information for the mandatory fields in the destination Document project. Optional fields can be populated but are not required. Refer to the InEight Document project to see which Document fields need to be populated.

1. Populate the mandatory and applicable Document fields.
2. Select from the Mapping Type field whether the field will be Direct, Translated or Fixed.
3. Select from the list in the Document Field column.
4. As the headings are technical, contact InEight support for guidance about selections if it is unclear.

Document Project	Compliance Project	Compliance Form Status	Compliance
Click here to add a new row			
P18TEST2		Complete	\$[?](@.FormName== 'C'

Mapping Type	Document Field	Compliance Attrib...	Document Value	Compliance Value
Click here to add a new row				
Direct	fDocHst.Title	FormTitle		
Fixed	fDocHst.Title		011	

5. Select the **Compliance or Completions Attribute** column and enter the attribute to be mapped. This can be copied and pasted from the field heading in the Compliance or Completions form.
6. After completing all the required fields, click **Save**.

Applying Mapping Types

Use the following guidelines for applying mapping in the UI:

Direct – Both Compliance or Completions and Document fields must be entered. This is used when there is an exact 1:1 match between Compliance or Completions and Document. For Document Number and Document Title which are commonly direct mappings.

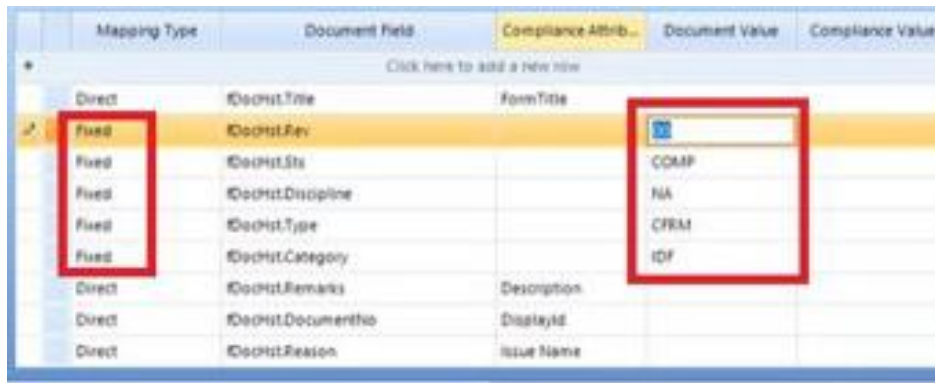
- Map the FormTitle (Compliance or Completions) to the Document title (fDocHst.Title) to populate the titles accurately.
- Map the DisplayID (Compliance or Completions) to the Document number (fDocHst.DocumentNo) to populate the document number accurately.

Mapping Type	Document Field	Compliance Attrib...	Document Value	Compliance Value
Click here to add a new row				
Direct	fDocHst.Title	FormTitle		
Fixed	fDocHst.Sts		COMP	
Fixed	fDocHst.Discipline		NA	
Fixed	fDocHst.Type		CRM	
Fixed	fDocHst.Category		IDF	
Direct	fDocHst.Remarks	Description		
Direct	fDocHst.DocumentNo	DisplayID		
Direct	fDocHst.Reason	Issue Name		

Fixed – Only the Document field needs to be entered. This is used when the mandatory field is not being populated from Compliance.

Compliance or Completions does not use a revision, so the document field value would be fixed. Enter the code for the Document field value into the Document Value column.

This should be used to cover all mandatory fields that exist in Document that are not being populated or do not exist on the Compliance or Completions form.

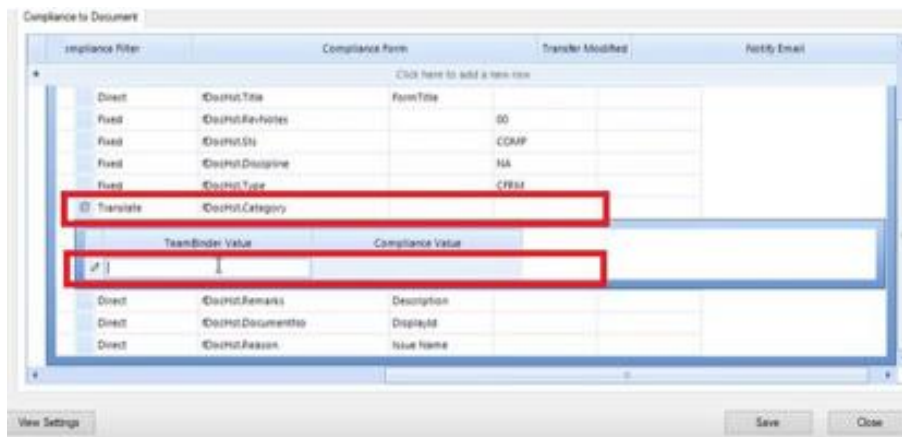


Mapping Type	Document Field	Compliance Attrb...	Document Value	Compliance Value
Direct	IDocHist.Title	FormTitle		
Fixed	IDocHist.Rev			COMP
Fixed	IDocHist.Sts			NA
Fixed	IDocHist.Discipline			CFRM
Fixed	IDocHist.Type			IDF
Fixed	IDocHist.Category			
Direct	IDocHist.Remarks	Description		
Direct	IDocHist.DocumentHo	DisplayId		
Direct	IDocHist.Reason	Issue Name		

Translate - Both Compliance or Completions and Document fields need to be entered. This is used when the values in the fields are slightly different. This is typically used for drop-down values.

The value in the category field in Compliance or Completions is listed as Drawing but in Document is DRG.

Select **Translate**, and then Expand the table. Enter the code for the Document Value (field code) – DRG. Enter the full value for the Compliance or Completions value – Drawing.



Mapping Type	Document Field	Compliance Attrb...	Document Value	Compliance Value
Direct	IDocHist.Title	FormTitle		
Fixed	IDocHist.RevNotes	SD		
Fixed	IDocHist.Sts	COMP		
Fixed	IDocHist.Discipline	NA		
Fixed	IDocHist.Type	CFRM		
Translate	IDocHist.Category		DRG	Drawing
Direct	IDocHist.Remarks	Description		
Direct	IDocHist.DocumentHo	DisplayId		
Direct	IDocHist.Reason	Issue Name		

Compliance or Completions items with a category of Drawing, will now be transferred to Document with the category as DRG.

It is only required to define values where there is a difference. Values that are the same do not need to be listed.

Frequently Asked Questions

What will happen to the Compliance or Completions form when it is transferred to Document?

- A single document will be created with a PDF view file of the form attached.

What will happen to the attachments to the form?

- Files that can be converted to PDF (Word, Excel, PDF) will be combined with the Form PDF.
- Files that cannot be converted to PDF will be included in a zip. Note that a single form transfer could have two view file attachments in document (PDF and zip).

What will happen to the document if the form is updated in Compliance or Completions?

- If document has versioning enabled, a new version will be created.
- If the middleware account can replace view files, the initial view file will be replaced.
- If the middleware account does not have the ability to replace view files, nothing will happen.

In the mapping table, I cannot understand what the document field name means or which field this will map to in Document. How do I find out this information?

- Reach out to InEight support for further guidance on applying the technical names.

Can I use Document's Auto-numbering with to create the compliance document ID?

- It is recommended to map the document number to a Compliance or Completions ID to ensure that the identifier remains consistent throughout the interface transaction. If this is not done, the same Compliance or Completions form will create multiple document numbers in InEight Document.

Common Issues

Forms failing to transfer.

- 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. Check the mandatory field configuration table in the Document Project
- Mapped values are incorrect between Compliance or Completions and Document.
 - Ex. If the mapping type is Direct and the value from Compliance or Completions is Civil, but the value in Document is CIV.
 - Check the mapping table for the project and ensure that the information is entered in correctly.

Changes made after the first transfer are not reflected in Document (additional attachments, data changes, etc. to the Compliance or Completions form).

- The option to transfer modified is set to No.
- The Document project does not have versioning enabled.
 - If versioning is not enabled, the service account cannot remove or replace view files.

The same form is populating numerous document numbers in the register.

- The Document Number and Compliance or Completions ID have not been mapped.
 - A new record is created each time the Compliance or Completions form is updated or edited.