# Compliance and Completions to Document

## Pinned Task 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 | 11-APR-2024 | Initial Release |

# Contents

# Introduction

This document describes how to set up a task template in InEight Compliance or InEight Completions to leverage the pinned task feature in InEight Document. Tags are defined to capture specific data sent from Document to fill in the task details. For more information about creating templates, see [Template creation].

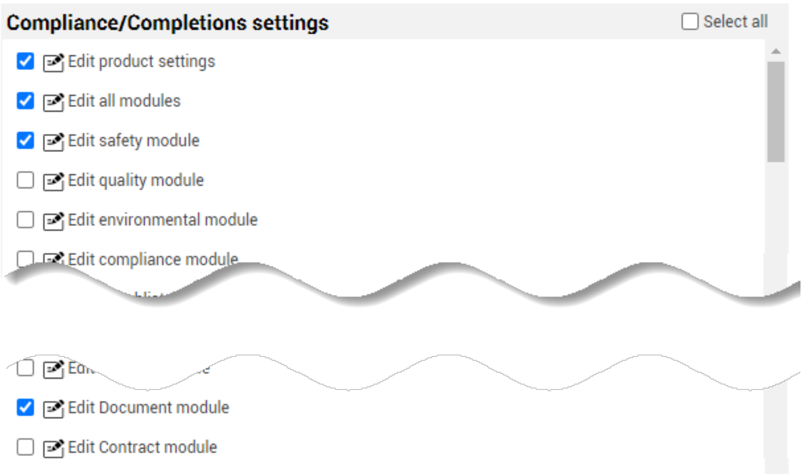
# Considerations

You must have a Level 3 - Account Admin role in InEight Platform or a role with applicable permissions to access the module settings.

You can only create one pinned task integration template and associate it with Completions or a module in Compliance. An error message shows stating *"Integration title must be unique"* to indicate that the integration feature already exists.

Ensure the following settings are selected for your role in Suite administration > **Roles and permissions**:

- Edit product settings.
- Edit all modules or Edit [individual module].
- Edit Document module.




Ensure that the category being used exists to associate with in the task template. For more information, see [Categories].

Task integration must be configured and enabled in the InEight Integration tab in Document.

When you create a pinned task in Document and select a user contact, the user contact must exist in Platform and have applicable permissions to perform tasks on the assigned project. If the user does not exist in Platform, the task is created with a *Saved* status and not a *Scheduled* status. A user with project permissions must assign the task to the user.

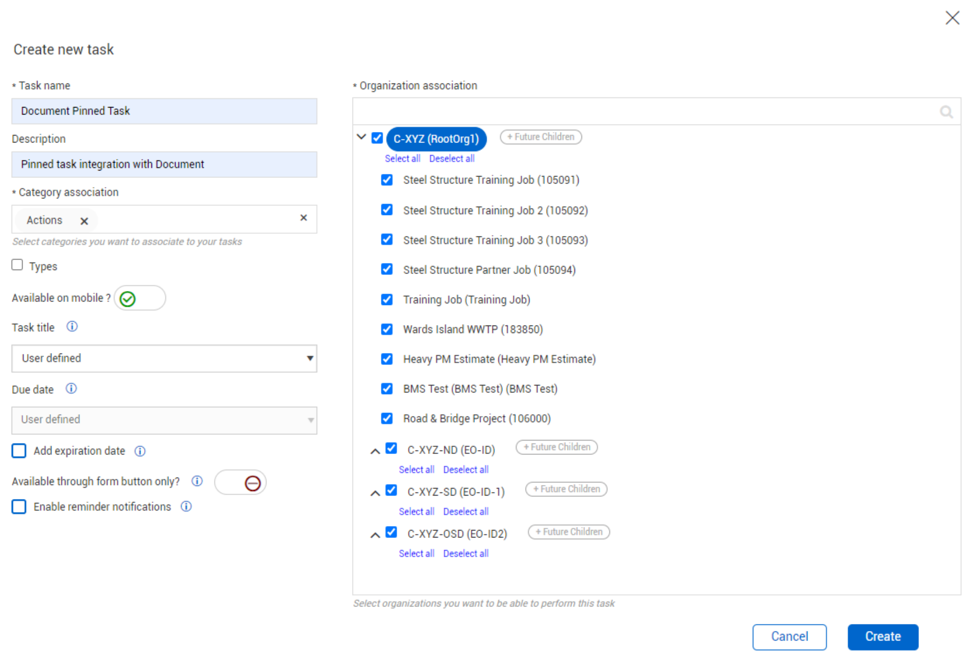
# Create and configure task template

The pinned task template and integration can be created in Completions or a specific Compliance module. The template can then be associated with the entire organization or a specific project or projects.

## Create the task template for an organization

1. In the module landing page, under Administration, select **Templates manager**.
2. Select the **Tasks** tab, and then click **Create new task**. The Create new task properties page opens.
3. Complete the following:

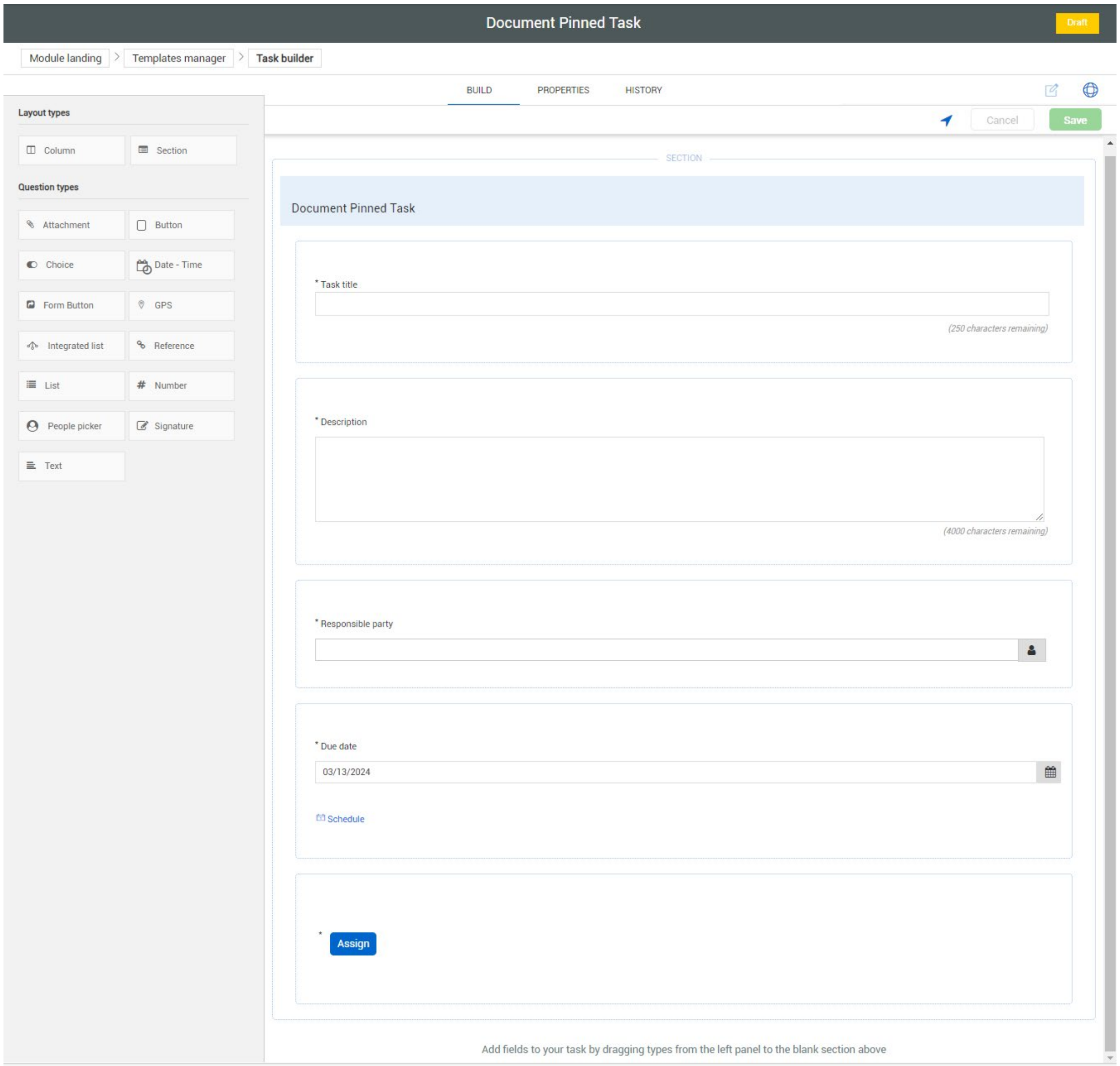
| Field name | Description |
|---|---|
| **Task name** | Enter a task name, such as Document Pinned Task. |
| **Description** | Enter a template description to describe your business process, such as Pinned task integration with Document. |
| **Category association** | Select a category from the list. For more information, see Categories. |
| **Types** | Not required for pinned task integration. |
| **Available on mobile** | Toggle on or off depending on your business process. |
| **Task title** | Select **User defined** to allow for a naming convention that users can modify. |
| **Due date** | The default is **User defined** and cannot be changed for tasks. |
| **Add expiration date** | Not required for Pinned task integration. |
| **Available through form button only** | Not required for Pinned task integration. |
| **Enable reminder notifications** | Not required for Pinned task integration. |
| **Organization association** | Select the root organization, **Select all**, and the **+Future Children** button to apply the template to future projects within the organization. |




4. Select **Create**. The task builder opens to configure the pinned task template.

## Configure the task template for integration

Task templates have default general questions related to tasks when created as shown in the following image:




You must add a Text and Attachment question to the template and associate integration tag names to each question. The Text and Attachment question integrate task data between the two applications. There is no restriction on where the questions reside on the form.

## Add additional questions

1. Add Text question, and then enter the following in the details:
    - **Name**: Notes
    - **Type**: Long
2. Add Attachment question, and then rename it to **Attachment**.
3. In the Assign button details, ensure the Change status to is set to **Scheduled**.

## Associate integration tag names

1. Add integration tags in Logic > **Integration tag**. Click the question box, and then on the left slide-out, select the **Logic** heading. The tags must be associated with the corresponding question, otherwise the Document values will not be captured. Add tags as shown in the table below:

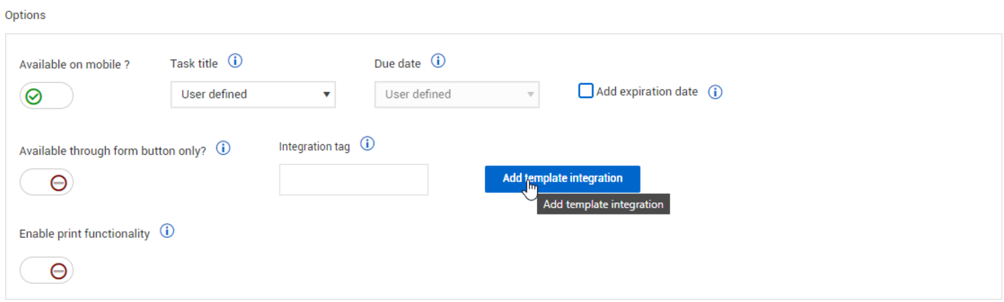
| Question name | Type | Integration tag |
|---|---|---|
| **Task title** | Short Text | TitleInt |
| **Due date** | Date | DueInt |
| **Responsible party** | Mandatory | RespInt |
| **Description** | Long/Mandatory | DescInt |
| **Notes** | Long | Notes |
| **Assign** | Scheduled/Mandatory | N/A |

2. Select **Save**, and then **Publish** the template.

## Add template integration

After publishing the task template, you must make it available in the task's Add template integration option. To make it available, complete the following steps:

1. Select the published template, and then click the **Properties** tab.
2. Click **Add template integration**.




3. Complete the following option details:

| Field | Type |
|---|---|
| **Integration title** | The title must be Internal Integration – Document Pinned Task |
| **Description** | Enter a description such as Internal Integration – Document Pinned Task. |
| **Category association** | Select a category. These options directly relate to the categories associated with the template. |
| **Associated products** | Document |
| **Organization association** | Select the organizations or projects to use this feature. To use across the entire organization, select the root organization, **Select all**, and the **+Future Children** These options directly relate to what is associated with the task template. |
| **Attachment** | List (Yes/No) |
| **Assign** | Scheduled/Mandatory |

4. Click **Save**.

The template is now available to collect pinned tasks created in Document.