## COMPLETIONS USER GUIDE





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## **EXERCISES**

# CHAPTER 1 – INEIGHT COMPLETIONS OVERVIEW

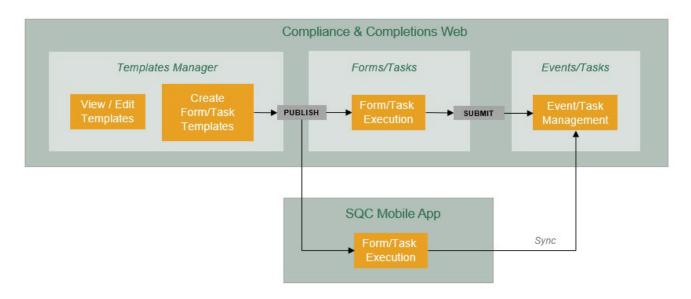
## 1.1 OVERVIEW

The InEight Completions application is used for managing forms and tasks that also lets you capture data, send out notifications, and use the information in all types of reports and dashboards. This includes:

- Creating and storing form and task templates in the Template manager.
- Selecting, filling out, and submitting events and tasks.
- Tracking the status of and managing data on the Events and Tasks pages.

#### 1.1.1 Workflow

Completions provides a workflow for creating templates, executing events and tasks, and managing them.



#### 1.1.2 Landing page

Completions contains standard templates for construction quality processes and the ability to customize any other template. You can access events, tasks, and administrative functions depending on your role and permissions.

inks I events	To do list			🛱 January			
II tasks rspection & Test Plans rspection & test plan report dministration emplates manager	Sun 8	Mon 9	<sup>тие</sup> 10	Wed 11	<sup>Thu</sup> 12	Fri 13	Sat 14
oles ser assignments						Overdue ev	ents: 0 Overdue tasks: 0
ettinga angeeston & Test Plans	Forms Ferworks (0) No III	Schedule form	q Tasks Pavoites (0)	No tens found		pcoming Planned Work arch by WP to or WP name There is no pla You are all co	etenet در المعالم المعا معالم المعالم ال معالم المعالم ا
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#### 1.1.3 Templates manager

You can access the Templates manager to view templates and check statuses (Published, Draft, or Inactive). You can also create new templates using the form builder or task builder. The creation of forms or tasks templates is an administrative function performed using web Completions.

#### 1.1.4 Form & task execution

#### 1.1.4.1 Mobile application

When you are out in the field, you can fill out and submit inspections, forms, questionnaires, and tasks using the Completions mobile application. You can complete events or tasks offline using the mobile app, and then synchronize the results when you are online.

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#### 1.1.4.2 Web forms and tasks

To fill out a form or task, select and launch the form or task using the Forms or Tasks dialog box.

Forms	🖽 Schedule form 🛛 🔍	Tasks	
Favorites (1)	T	Favorites (0)	
Assessment	*		
<u>SuneethaForm</u>	*		
		No items found	
	*		
	TOTAL: 1		TOTA

#### 1.1.4.3 Form and task builders

Completions has an intuitive form and task builder to create forms or tasks. The module includes numerous question types to collect the information you need from the field and provides functional-level permissions with customizable workflows for each form or task.

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#### 1.1.5 All events and all tasks

When you submit forms, you can track forms as events on the events page. You can track the status (i.e., Pending, With Claims Manager, Complete) of your events approval process. The due dates shown in red indicate the event form is overdue.

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	Test		III QA Performance III	01/12/2023		2023011200053	Quality ITP Header 1 -Simple - DO NO	Van Ni	142)	Mahesh		Per	iding	
	ITP		III QA Performance III	01/12/2023		2023011200052	ITP Form 2	Van Ni	142)	Mahesh 1		Sch	reduled	

When you submit tasks, you can track them on the tasks page. The due dates shown in red indicate the task is overdue.

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æ							-	🖹 Edit properti 📑 🧃	þ	(i) <b>Q</b>	Clear all filters
					① Automatic date filter applied - to clea	ar, use the due date column filter					
	Task title 📃	8	Category	Due date 🛫	Project/Organization	Responsible party	Status	Task Id		Task name	
	Te		III QA Performance III	01/12/2023	The B	Meghana	Scheduled	2023011200070		23.2 task	
5	Ie		III QA Performance III	01/12/2023	The B	Meghana	Scheduled	2023011200069		23.2 task	
כ	te:		III QA Performance III	01/12/2023	The B	Meghana	Scheduled	2023011200068		23.2 task	
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כ	te:		IIII QA Performance IIII	01/12/2023	The B	Meghana	Scheduled	2023011200061		23.2 task	
5	Te		III QA Performance III	01/12/2023	The B	Meghana	Scheduled	2023011200060		23.2 task	
5	Te		III QA Performance III	01/12/2023	The B	Meghana	Scheduled	2023011200058		23.2 task	
)	Te		III QA Performance III	01/12/2023	The B	Meghana	Scheduled	2023011200057		23.2 task	
1	te:		!!!! QA Performance !!!!	01/12/2023	The B	Meghana	Scheduled	2023011200056		23.2 task	

#### 1.1.5.4 Exports

You can export events or tasks. Click the **Export** icon to begin the export of your selected items from the Events or Tasks page. The system generates an Excel file that is sent to your email.

Quality > Tasks -							Global Events/Tasks_View:	
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					) interiorio ini	Juled		
		02/02/2023	The					

## **1.2 IN-APP REPORTING**

As an administrator, you can configure which templates can be printed in the application. The application uses a standard report to print events and tasks for the configured templates. Event and task data is captured, and then copied to a reporting database every 15 minutes. The time of this process might vary depending on the environment. As a result, you might experience a delay before new or updated event or task data shows in the report.

For more information about configuring template print options, see **Enable print functionality** in <u>Template Properties</u>.

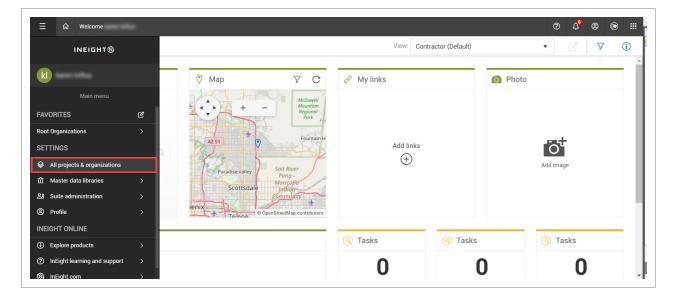
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## **CHAPTER 2 – GENERAL NAVIGATION**

### 2.1 LAUNCH COMPLETIONS

To open a project in Completions, use the link provided to you by your manager or other source.

Click the Main menu icon at the top left, and then select All projects & organizations.



Click the project link in the Name column to open the project. You can use the Search function at the top right to find a specific project.

												0	) (
	T T	Name 🚃	Stat	Pha.	Organization	Created by	Created on	Forecast duration	Original contract	Contract number	Contract start date	Contract date	
	105091	Steel Structure Training Job	Active	Execution	C-XYZ	Jeremy	08/31/2018 1:40:49 PM						
ו	105092	Steel Structure Training Job 2	Active	Execution	C-XYZ	Jeremy	08/31/2018 1:44:12 PM						
ו	105093	Steel Structure Training Job 3	Active	Execution	C-XYZ	Jeremy	08/31/2018 1:44:46 PM						
)	105094	Steel Structure Partner Job	Active	Execution	C-XYZ	Jeremy	08/31/2018 1:45:25 PM	365			10/07/2015		
)	183850	Wards Island WWTP	Active	Execution	C-XYZ	Jeremy	11/07/2018 8:02:08 AM						
	BMS Test	BMS Test	New	Execution	C-XYZ	Brenda	10/20/2020 1:55:15 PM						
)	Heavy PM Estimate	Heavy PM Estimate	Active	Execution	C-XYZ	Jeremy	01/08/2019 1:33:34 PM						
	Training Job	Training Job	Active	Execution	C-XYZ	Sterline	09/11/2018 10:28:37						

The Project home page opens.

<u>C</u>	🖉 Links	ď	Control	_	Quantity tra	cking		
Add project image	Organization							
Minimum of 540px x 360px	Learn.InEight		Manage budgets and forecasts		Build compo	nents and docu	iment quanti	ties
	InEight University							
	Project							
Control	Project     InEight University			Launch				Launch
Workspaces	Intright University							
Project library			Work packaging	_	🛞 Daily planni	20		
Plan			(S) Hork packaging		S Daily plaining	19		
Quantity tracking								
Work packaging			Group work into plans and packages		Assign tasks	for your crew		
Progress								
Daily planning				Launch				Launch
Weekly time sheet								
Contract	Project notes	c	Contracts		Supporting			
Bid packages	C FIOJECTIOLES	۵	Contracts		Supporting (	ocuments		
Contracts			Status	Count	In approval	Rejected		
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Compliance			Closed	0	0	0	0	
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			In review	0				۲
Report	_		Out for internal signature	0				
Explore			Out for vendor signature	0				
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t details					Unawarded			
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Click **Completions** on the left navigation.

#### 2.1 Launch Completions

	Add project image
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	r 10/50 i 10/10/ y
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	Work packaging
8	Progress
_	Daily planning
	Time center
	Weekly time sheet
6	Contract
	Bid packages
	Contracts
	Change
0	Compliance
E	Completions
6	Report
٩	Explore
	Dashboards
	API documentation
Proje	ct home
Proje	ct details
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#### The Completions landing page opens.

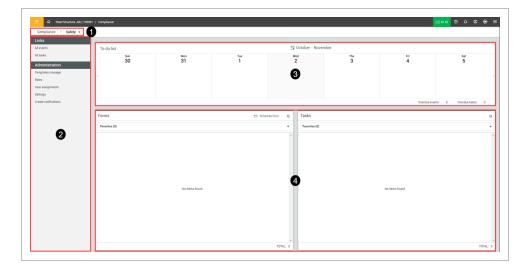
Completions > Quality -							
nks events	To do list			🛱 January			
tasks spection & Test Plans spection & test plan report	Sun 8	Mon 9	Tue 10	wed 11	Thu 12	Fri 13	<sup>Sat</sup> 14
dministration mplates manager Jes						Overdue even	ts: 0 Overdue tasks: 0
er assignments						Overdue even	to. U Uverdue tasks: U
ttings	Forms	🗂 Schedule form	q Tasks		Q Upcom	ning Planned Work	Planned Sched
spection & Test Plans	Favorites (0)		<ul> <li>Favorites (0)</li> </ul>		Search b	y IWP ID or IWP name	
	No	Rems found		No items found		There is no plant You are all caug	ned work ht up!

**NOTE** In the Projects home landing page you can launch Completions in other ways not mentioned here.

## 2.2 LANDING PAGE

When you launch Completions, the landing page opens. The landing page is the home page that contains all the quality processes.

On the landing page you can find and fill out forms or tasks.



#### **Overview – module landing page**

	Item	Description
1	Module navigation	Navigation showing your current landing page. You can use it to navigate the application.
2	Left navigation menu	<ul> <li>Access all events (filled out forms) or tasks and view their status. If you have</li> <li>Administrator settings permissions, you can access the Administration options:</li> <li>Templates manager - Library of all forms and tasks in your organization, where you can manage blank forms and tasks, and build new ones.</li> </ul>

	ltem	Description
		<ul> <li>Roles - Manage roles and permissions for Compliance.</li> <li>User Assignments - Assign users to organizations, projects, categories, and roles.</li> <li>Settings - Edit modules, categories, statuses, roles, email templates, and user assignments.</li> <li>Create Notifications - Send email notifications to users or roles with a personalized message.</li> </ul>
3	To do list	A week's view of your current assigned and pending tasks and scheduled or pending events.
4	Forms or Tasks	Fill out a form or task by selecting a category from the Forms or Tasks drop-down list. You can also search by title. You can schedule a form for a specific date by using the button at the top right of the Forms section.
5	Upcoming planned work	You can view upcoming planned or scheduled work from InEight Plan IWPs associated with an activity.

#### Overview – module landing page (continued)

The following steps walk you through navigating the landing page. You need to have admin permissions to access Administration settings.

#### 2.2 Step by Step 1 — Navigate module landing page

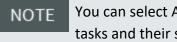
1. Launch web Completions to open the home landing page.

Completions > Quality -			
Links			
All events	To do list		
All tasks	Sun 29	Mon 30	
Inspection & Test Plans	25	00	
Inspection & test plan report			
Administration			
Templates manager			
Roles			
User assignments			
Settings	E		
occurrigo	Forms	🗎 Schedule form	
Inspection & Test Plans			
-	Forms	📇 Schedule form	

2. Click All events in the Links section of the left navigation menu.

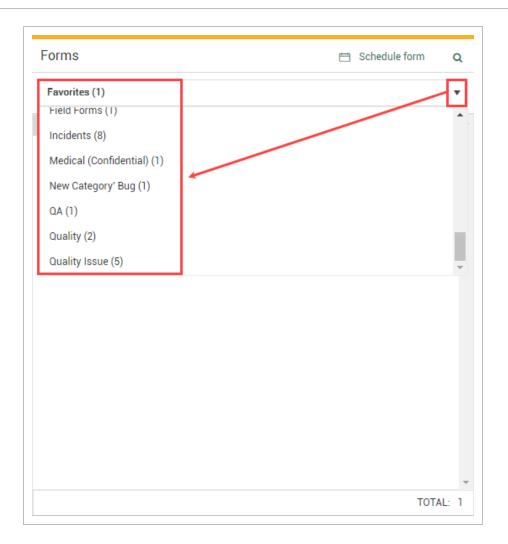
The All events page opens where you can see all filled out events and their status.

	S100000 - PKS Inc / Completion	IS														<i>(</i>	3 6	•
0	Quality > Events -								·	a Clob	al Events/Tasks Vi	iew:	My view					•
	⊗ ▼									🕑 6	fit properti	C	8	<b>(i)</b>	Q	Clear	r all filte	irs
					•	Automatic date filter applied - to clear, us	the event date column filts											
	Event title 1		Category	Event date	Ŧ	Event ID	Form name		Project/Organization		Reporter			= \$	tatus			
	Quality ITP Header 2 - Form Flow & Logic		Category A	01/28/2023		2023012700004	Quality ITP Header 2 - Fo	m Flow & L	RT Stage 2 (104133)		Jyothirmay				Pending			
	Question Email		QA Performance	01/31/2023		2023013100036	Question Email		S100000 - PKS Inc (RootOrg1)		Elakkiya				Pending			



You can select All tasks to open the Tasks page where you can see all filled out tasks and their status.

- 3. Click **Quality** on the top left navigation menu to go back to the Completions home landing page.
- 4. On the landing page, in the Forms section, click the Favorites drop-down menu to view the form categories.



5. Select a form from the category list.

Forms	런 Schedule form 🛛 🔾	
Quality Issue (5)	•	
ITP R22.12	<b>A</b>	*
Mobile2-Currency vs Ref	<b>A</b>	
Mobile-Currency vs Ref	☆	
<u>Quality Issue</u>	ŝ	
Ref Ques Vs Number Ques 22.8 vs 22.10	Å	
	TOTAL: 5	5

The form opens for you to fill out.

						II 🗟 🛈 Cancel Inter
Detailed Issue Information						
* Issue Name / Title		Date Issue Occured			Issue Number	
	(202 characters remain)	month/dap/year		<b>m</b>		(202 characters remaining)
Detailed issue information						
Letaieo issue información						
						(4000 elvaracters remaini
Segment / Area			Location of Issue ①			
			actery remaining)			
Attachments						
Paratementa			(+)			
			Select files or drag and drop			
Beference Documentation (Spec #, Drawing #, etc)			* Discipline			
			- Select and -			
		(201 char	actors remaining			-
is this issue related to a subcontractor or supplier?		* Issue identified by?			Manager of issue	
O Yes		Select one			Select one	
O 10						
* Type of Issue	Repetitive Issue		* Severity Level		Severity Level Examples	
O readuct	O 105		Select one		<ul> <li>Guality issue Deverity Levels</li> </ul>	
O Process	() NO					
* Cause		Potential Cost Impact			Is Issue Impacting Future Work	
- Salact and -	4	Belect one			O 1985	
					0 HE	

# NOTE You can select All tasks to open the Tasks page where you can see all filled out tasks and their status.

Forms	😑 Schedule form	Q	Tasks Q
Favorites (3)		•	Favorites (4)
**			

6. You can manage, filter, and create new forms or tasks for your team or organization in Templates manager. In the landing page, click **Templates manager** on the left navigation menu.

					Completions
					Links
		do list	To d	5	All events
	Mon 30	Sun 29			All tasks
		25		tion & Test Plans	Inspection & Te
			1	n & test plan report	Inspection & test pla
				istration	Administration
				es manager	Templates manager
					Roles
				ignments	User assignments
			Form		Settings
form	😑 Schedule form	IIIS	Form	n & Test Plans	Inspection & Test Pla
		vorites (0)	Favor		
fo	🗂 Schedule for	ms	Form	ignments	Templates manager Roles User assignments Settings Inspection & Test Pla

The Template manager page opens.

Module landing > Templates	ATUSES FUBLISHED GRUFT INACTIVE		🗊 📩 🔲 Create new
ilters earch ()	Project Manager Safety Walk Safety waik View associations	Created Jan 13,2023 11 21 AM Karen Laffus	Version 2 PUBLISHED
Safety Category 1		anners a second second second second second	at a state of the second

7. Click **Module landing** at the upper left navigation to go back to the landing page.

#### 2.2.1 To do list

The To do list shows the events and tasks assigned to y ou that need to be completed in the current week.

You can scroll forward or backward to view events and tasks for other weeks. To scroll, click the arrow icons to the left or right of the window. To go to a specific month, click the month button. Events are shown in dark gray, and tasks are light gray. When events or tasks are overdue, their text color changes to red. You can see how many overdue events and tasks you currently at the bottom right of the To do list.

<sup>Ved</sup>	<sup>Thu</sup> 25	Fri 26	Sat 27	
Formwork inspection	Batch plant checklist	Concrete pre-placement ch		
Summit Mountain punchlist	Bridge inspection			>
	🔒 Clean drain inlets			
	View all (6)			

You can click **View all** to see a list of all your assigned items for that day when you have several events or tasks assigned in one day.

🛱 June		
Wed 24	<sup>Thu</sup> 25	Fri 26
Formwork inspection	Batch plant checklist	Concrete pre-placement ch
Summit Mountain punchlist	Bridge inspection	
	🔒 Clean drain inlets	
	View all (5)	]
		Overdue events:

The following Step by Step walks you through editing a To do list item:

#### 2.2 Step by Step 2 — Edit a To do list Item

- 1. In the To do list, click an event or task.
  - A box shows you the item's name and reporter, a High importance icon to mark items of importance, and the Edit icon

2. Click the Edit icon.

	Leader Safety Walk	Ľ		
To do list	Event title: Leader Safety Walk_2022110700001			🛱 November
sun 6	Reporter Julio Salguero Leader Safety Walk_2022110700	! ) !	Tue 8	Wed 9

The Edit item dialog box opens

- 3. You can make changes to the following fields
  - Event title
  - Reporter
  - Event date
  - Importance:

**NOTE** When the Importance icon is red, the item is High importance, which is also reflected in the Events or Tasks pages.

		Leader Safety Walk Inspections Event title:	Ľ	
To do list	Sun 6	Leader Safety Walk_2022110700001 Reporter Julio Safety Walk_2022110700 !	1	Tue 8

Click Save.

## 2.2.2 Schedule a form

You can schedule a form to be filled out on a specific date. If the event goes beyond the scheduled date, the state is changed to overdue.

The following step by step walks you through scheduling a form from the landing page.

### 2.2 Step by Step 3 — Schedule a form

1. In the Forms section, click **Schedule form** at the top right corner.

The Schedule form dialog box opens.

- 2. Fill out the required fields.
- 3. You can click the **High importance** icon to flag this event as important.
- 4. You can click **Schedule** to set this event to repeat daily, weekly, monthly, or yearly and fill out the required fields.
- **NOTE** If you select to Exclude weekends, Saturdays and Sundays are greyed-out and will be excluded, even if you have already selected those days.

Form name	Category
- Select one -	▼ - Select one -
Event title	Reporter
	- Select one -
$m$ Schedule $\times$	
Repeat	Start date
Weekly	<ul> <li>11/07/2022</li> </ul>
Repeat every         week(s)         Image: Conclusion weekends           End	Repeat on       B     M     T     W     T     P     C       Importance     1
	Cancel Save & start new event

#### 2.2.2.1 Forms and tasks categories

Under Forms you can select a category for the type of form you need. Aside from favorites, only categories that have available templates show in the drop-down menu. The number of templates associated with each category is shown next to the title.

orms	🛗 Schedule form	Q
Favorites (1)		•
Field Forms (1)		
Incidents (8)		
Medical (Confidential) (1)		
New Category' (1)		
QA (1)		
Quality (2)		- 1
Quality Issue (5)		-
	T-0	TAL: 1

## 2.2.3 Form and task favorites

When you open the module, the default view for Forms and Tasks is Favorites. In each category, you can add your favorites by selecting the **Favorite** icon next to each category title. When you add forms to your favorites, they show listed in alphabetical order. To remove from your favorites, deselect the Favorite icon.

orms	🗂 Schedule form 🛛 🔍	Tasks	
Favorites (3)	•	Favorites (4)	
Assessment		Assessment	
Copy of-Quality Tour Form	*	Report photo	*
Building		Checklist	
Report photo	*	Task validation	*
Quality Issue		District / Project Forms	
Quality Issue	*	Task validation	*
		Quality Issue	
		Corrective Action	*

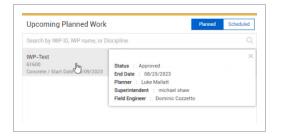
## 2.3 UPCOMING PLANNED WORK TILE

The IWP widget tile lets you track upcoming planned and scheduled work for InEight Plan IWP components that have been mapped to Inspection and Test Plans. You can schedule events from the IWP widget panel to components that have ITP mapped. For more information, see <u>Inspection and Test</u> <u>Plans</u>. To enable the IWP widget, go to project > Module settings > Project Settings. Inspection & Test Plans and Integrate with Plan components must be enabled before you can enable the IWP widget. For more information, see Project Settings.

When enabled, the Upcoming Planned Work tile shows in the module landing page.

.inks II events	My To Do List				Fi October				
II tasks	Sun	Mon		Tue	Wed	Thu		Fri	Sat
Il components	1	2		3	4	5		6	7
nspection & Test Plans									
spection & test plan report	<								
dministration									
emplates manager									
ser assignments							0	verdue events: 0	Overdue tasks: 0
ettings	Forms	C Schedule form	Q	Tasks		Q	Lines	oming Planned Work	C Planned Schedule
reate notifications			-					h by IWP ID, IWP name, or I	
	Favorites (0)		*	Favorites (0)		•	-		Discipline
			*			-	31	Concrete ete / Start Date: 08/28/2023	to t
								WP- Steel Erection Module	- 001
							32	/ Start Date: 08/29/2023	E0 E
	No iter	ms found			No items found				

Click the IWP to show status, end date, planner, superintendent, and field engineer information.



You can schedule IWP forms from the Planned tab, and then mark them as scheduled to move them to the Scheduled tab.

Upcoming Planned Work	Planned Scheduled
Search by IWP ID, IWP name, or Discipline	
IWP-Test 61600 Concrete / Start Date: 08/09/2023	6 5

Items marked as Scheduled are listed in the Scheduled tab. You can schedule additional items from the Scheduled tab if needed, or unschedule the item to move it back to the Planned tab.

## Upcoming Planned Work Planned Scheduled Search by IWP ID, IWP name, or Discipline Q IWP-Test 61600 Concrete / Start Date: 08/09/2023

## 2.3.1 Considerations

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- Components must first be associated to ITPs in InEight Plan
- IWPs must have a status of Approved or Work started.
- You must add your published template form to Required records Compliance Forms in the ITP activity.

## 2.3.2 Related information

InEight Plan Link activity components in Work Package Creation

## 2.4 PROJECT STRUCTURE

You can use the project structure hierarchy to view and filter the events performed on a project structure in the Events page. The relationships in the hierarchy list are defined in InEight Platform in Project values and Project Structure definition.

Quality > Events -						<b>Q</b> G	lobal Events/Tas	sks View: M	y view		
🗄 🛞 🕇 🕌						🕑 Ed	lit properti	1	<b>i</b>	Q 🛛	Clear all filte
	(	D Auto	matic date filter a	pplied	- to clear, use the	e event date colu	mn filter				
Project structure	×		Event titl 😑	0	Category =	Event da 🛫	Event ID, 😑	Form nai	Project/( =	Reporter 🔤	Status 📃
Fioject structure			place struct		Building	09/20/2023	202309180	PREPARATI	Steel Struct	Karen Loftus	Pending
Search	Q		<u>This is my e</u>		Field Forms	09/14/2023	202309140	STRUCTUR	Steel Struct	Michael Sh	Pending
			Structural c		Building	09/11/2023	202309110	PREPARATI	Steel Struct	Karen Loftus	Pending
	Clear		Mike demo		Field Forms	09/11/2023	202309110	STRUCTUR	Steel Struct	Michael Sh	Pending
Steel Structure Training Job (105091)			Mike Demo		Field Forms	09/11/2023	202309110	STRUCTUR	Steel Struct	Michael Sh	Pending
<b>∨</b> East			PS - East		Field Forms	09/05/2023	202309070	STRUCTUR	Steel Struct	Michael Sh	Pending
⇒SEG1			PS - East		Field Forms	09/07/2023	202309070	STRUCTUR	Steel Struct	Michael Sh	Pending
₩est											
▲SEG2											
Selected Item :											

When the project structure feature is enabled, you can click the **Project structure** icon on the Events page to view the project structure. Component values are shown in the project structure, based on their configuration defined in InEight Plan. For more information, see InEight Plan <u>Work Package</u> <u>Creation</u>.

## 2.4.1 Considerations

- It is imperative that the Platform project definition and Plan component configuration match exactly for components to show in the structure. For example, when the project structure definition is Area = North and Segment = 1, the Plan component configuration needs to be the same. If the Plan component configuration has an area = South Area and a segment = Segment 1, the component will not show in the structure.
- Commodity and Work Classification project structure values do not exist on a component and should not be used in the project structure definition.
- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

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# CHAPTER 3 – COMPLETIONS SETTINGS AND ADMINISTRATION

3.1 Settings Overview	,	46
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## 3.1 SETTINGS OVERVIEW

Organization and project level settings provide the structure necessary to manage the application successfully.

At the Organization level, you can manage the following:

- Product Settings Module management and template integrations.
- Module settings Manage individual module settings and configurations.

At the Project level, you can do the following:

- View Product, Template integration and Module settings configured at the organization level.
- View and manage Roles, User assignments, and Project settings.

## 3.1.1 Considerations

- You must have Level 3 Account Admin permissions in InEight Platform, an admin role in the assigned module or modules, or an assignment to the root organization based on permission configuration.
- There are other ways to navigate to the organization or project level settings not mentioned in this document.

## 3.1.2 Steps

#### Access organization level settings

- 1. From the Main menu, go to organization > **Settings**. The organization General Settings page opens.
- 2. Click the **Compliance** or **Completions** icon on the left navigation menu. The settings page opens to the Product Settings tab.
- 3. You can click the **Module Settings** tab to open the module tiles page. Click a module to open its settings.

### Access project level settings

- From the project's home page, click Settings on the left navigation menu, and then the Compliance or Completions icon. The settings page opens to the Product Settings tab. In the Product Settings tab, you can view Module management and Template integration settings configured at the organization level.
- 2. Click the **Module Settings** tab to open the module tiles page.
- 3. Click a module to open its settings. The Module settings page opens. You can manage roles, user assignments, and project settings.
- 4. Click the **Project Settings** tab to open the Project Settings page.

# 3. ORGANIZATION LEVEL SETTINGS

As an administrator, you can set up the correct settings at the organization level to manage and organize the application successfully. These settings will apply to all projects in the organization. You can view organization level settings at the project level, depending on your permissions.

Organization level settings include the following:

- Product settings
  - Module management
  - Template integrations
- Module settings
  - Module summary
  - ° Categories
  - Types
  - ° Classifications
  - Statuses
  - ° Email-templates
  - ° Roles
  - User-assignments
  - Inspection and Test Plans

### 3.0.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

### 3.0.2 Steps

To navigate to Organization settings, go to steps to access organization level settings in <u>Settings</u> <u>overview</u>.

## 3.1 PRODUCT SETTINGS

At the organization level, the Product settings page contains settings that apply to the entire application in the following tabs:

- **Module management** Manage modules for your organization and enable Inspection and Test Plans for individual modules.
- **Template integrations** Manage templates that integrate with other InEight applications for your organization.

		Module management Template integrations				
Description     Secondary module name     Inspection and Test Plans()       A module to track and manage safety related business processes.     Safety     Image: Compliance       A module to track and manage environmental related business processes.     Environmental     Image: Compliance       A module to track and manage compliance related business processes.     Compliance     Image: Compliance       A module to track and manage change related business processes.     Compliance     Image: Compliance       A module to track and manage change related business processes.     Change     Image: Compliance	<ul><li></li><li></li></ul>	Module management remplate integrations	>			Q
A module to track and manage environmental related business processes.     Environmental       A module to track and manage compliance related business processes.     Compliance       A module to track and manage change related business processes.     Change	•	Module name	Description	Secondary module name	Inspection and Test Plans	
A module to track and manage compliance related business processes. Compliance	*	Safety	A module to track and manage safety related business processes.	Safety	$\odot$	
A module to track and manage change related business processes. Change	×	Environmental	A module to track and manage environmental related business processes.	Environmental	Θ	
	-	Compliance	A module to track and manage compliance related business processes.	Compliance	$\odot$	
A module to track and manage custom related business processes. Custom	4]ª)	Change	A module to track and manage change related business processes.	Change	$\odot$	
	6	Custom	A module to track and manage custom related business processes.	Custom	Θ	
		-				
	6					

## 3.1.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

## 3.1.2 Steps

To open Product Settings, see steps to access organization level settings in Settings overview.

## **3.2 MODULE MANAGEMENT**

In Module management you can view the list of available modules. You can filter the module's view using the **Filter** icon. You can also choose from the available columns to update your list view using the **Column chooser** icon.

In each module, you can enable the **Inspection and Test Plans** (ITP) feature. Inspection and Test Plans are disabled by default.

Module management Template i	integrations	3			
					Q
Module name		Description	Secondary module name	Inspection and Test Plans	C
Safety		A module to track and manage safety related business processes.	Safety	$\odot$	
Environmental		A module to track and manage environmental related business processes.	Environmental	Θ	
Compliance		A module to track and manage compliance related business processes.	Compliance	$\odot$	
Change		A module to track and manage change related business processes.	Change	$\odot$	
Custom		A module to track and manage custom related business processes.	Custom	Θ	

## 3.2.1 Considerations

- You can only view available default modules.
- You can filter and update views at the organization level only.

## 3.2.2 Steps

To open Module management, see steps to access organization level settings in <u>Settings overview</u>.

## 3.2.3 Related information

**Inspection and Test Plans** 

## **3.3 TEMPLATE INTEGRATIONS**

In Template integrations you can view, edit, and delete the list of templates created in the form builder.

Modu	le management Template integrations				
Q	3				
	Integration title	Template name	Module	Category	Associated products
	Change Task Integration Template	Task for Mobile	Change	Task	Change
	Change Task Integration Template	Change Issue Creation KL NOT INTE	Change	Task	Change
	Quality task for Change	Manager quality review	Quality	Quality review	Change

Click on a template title to Edit the template. In the dialog box, you can edit the following:

- Integration title
- Description
- Category association
- Associated products
- Organization association

k for Mobile vdule: Change • Created by: Karen Loftus 08/31/2022 08:50 AM		
Integration title	Organization association	Show selected items only
Change Task Integration Template	Search	
Description	C-XYZ (RootOrg1) + Future Children Select all Deselect all	
Org/Project for which the template is applied	Steel Structure Training Job (105091)	
Category association	Steel Structure Training Job 2 (105092)	
Task	▼ Steel Structure Training Job 3 (105093)	
Associated products	Steel Structure Partner Job (105094)	
Change	Training Job (Training Job)	
	Wards Island WWTP (183850)	
	<ul> <li>Heavy PM Estimate (Heavy PM Estimate)</li> </ul>	
	BMS Test (BMS Test) (BMS Test)	
	C-XYZ-ND (EO-ID) + Future Children	
	Select all Deselect all	
	C-XYZ-SD (EO-ID-1) (+Future Children) Select all Deselect all	

## 3.3.1 Considerations

• You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

- Currently template integration only integrates with InEight Change tasks.
- You can only edit and delete integration templates at the organization level.
- You cannot add new integration templates in this section.

## 3.3.2 Steps

To open Template integrations, see steps to access organization level settings in <u>Settings overview</u>.

#### Edit a template

- 1. Click the Templates Integration title. The Edit template integration dialog box opens.
- 2. Complete your edits, and then click **Save**.

## 3.3.3 Related topics

Template Integration

## **3.4 MODULE SETTINGS**

Configuring module settings at the organization level provides the structure necessary to organize and manage the application successfully. In Module settings, you can configure:

- Module summary
  - Configurations
- Categories
- Types
- Classifications
- Statuses
- Email templates
- Roles
- User assignments
- Inspection & Test Plans

In settings, select the Module Settings tab, and then a module to open its settings.

Module summary Categories Types Classifications Statuses Email templates	Roles User assignments Inspection & Test Plans 🕣 T
	Cancel
Module summary	Configurations
• Module name	Alternate hierarchy 🛈
Custom	<ul> <li>Automatic user assignments ①</li> <li>Language settings ①</li> </ul>
Description	Module organization     A     Reporting tags
A module to track and manage safety related business processes.	
Email address	
InEight.Mail@INEIGHT.COM	

## 3.4.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

## 3.4.2 Steps

To access Module settings, see steps to access organizational level settings in <u>Settings overview</u>.

## 3.5 MODULE SUMMARY

On the module summary tab, you can activate or deactivate the module, view and modify the module name and description, and edit module configurations.

Module summary	Configurations
Module name	<ul> <li>Alternate hierarchy ①</li> <li>Automatic user assignments ①</li> </ul>
Safety	Language settings ①
Description	<ul> <li>Module organization ①</li> <li>Reporting tags ①</li> </ul>
A module to track and manage safety related business processes.	
Email address	
InEight.Mail@INEIGHT.COM	

The Activate module toggle can be used to activate or deactivate the module for the entire InEight product portfolio, organization, and project. Each module is self-contained and does not share information with the other modules. The changes made to a module will be shown throughout the product portfolio, module page, tabs, landing page and mobile device.

## 3.5.1 Considerations

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- To activate the module, you must select at least one module organization, a category, and a published template.
- To make the module available, you must select the **Activate module** toggle.

## 3.5.2 Steps

To navigate to Module summary, go to steps to access organization level settings in Settings overview.

To save any changes in Module summary, click Save.

## **3.6 CONFIGURATIONS**

On the Module summary tab, you can configure additional settings in Configurations. Each link shows an information dialog box you can hover over for more details.

Configurations
<ul> <li>Alternate hierarchy ①</li> <li>Automatic user assignments ①</li> </ul>
Language settings ①
<ul> <li>Module organization ①</li> <li>Reporting tags ①</li> </ul>

Configuration	Description
Alternate hierarchy	Future children assignments applied to organization level nodes on the default organization or project structure are applied to the child project per their additional relationship.
Automatic user assignments	Automatically add users from InEight Platform into Compliance/Completions.
Language settings	Select which languages you want to use in this module.
Module organization	Include or exclude organizations or project in the structure from seeing the current module.
Reporting tags	Secure information displayed in reports.

## 3.6.1 Considerations

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- Configuration settings must be done at the organization level.

## 3.6.2 Steps

To go to Configurations, see steps to access organization level settings in Settings overview.

## **3.7 ALTERNATE HIERARCHY**

An alternate hierarchy is separate from the default organization and project hierarchy in InEight Platform. You can set up an alternate hierarchy when you need to share templates and user permissions across projects that do not follow the default hierarchy. For example, if your default hierarchy is organized into legal entities for financial reporting purposes, you can create an alternate hierarchy based on project locations. A project in the infrastructure division might need to share templates and user permissions with a project in the Energy division because both are in the Western region.

To set up an alternate hierarchy, you must perform the following steps:

- 1. Define hierarchy attributes in Platform.
- 2. Associate hierarchy attributes at the project level with other projects or organizations.
- 3. Extend templates and user permissions between future child projects or organizations via hierarchy attributes in Completions organization settings.

## 3.7.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

## 3.7.2 Steps

To navigate to Alternate hierarchy, see steps to access organization level settings in Settings overview.

#### Define alternate hierarchy attributes at the organization level in Platform.

- 1. From the Main menu, go to organization > Settings. The organization's Home Page opens.
- 2. Click the General icon on the left navigation menu, and then click the Attribute Definitions tab.
- 3. Click the Add icon. The Add attribute side panel opens.

#### 4. Enter the required fields.

- NOTE For hierarchy purposes, the Data type field is most often set to text or data. When the type is set to Data, you must select a data source.
- NOTE In a location-based hierarchy example, an attribute might be named Region, Data type set to Data, Data source set to Organization, and Category set to Location, which lets you associate organizations with regions.

#### Associate alternate hierarchy attributes at the project level

- 1. From the Main menu, go to **All projects & organizations**.
- 2. Select the check box next to the project, and then click the **Edit project** icon.
- 3. Select the **Attributes** tab. For each attribute you want to associate, select an organization from its drop-down list or enter a project ID in its field, depending on the attribute's data source.
- 4. Click Save.
- **NOTE** In a location-based hierarchy example, you might associate an attribute named Region with an organization that represents the Western region. If you set this association in a project in the infrastructure division of your default hierarchy, you are saying that project is also part of the Western region in an alternate location-based hierarchy.

#### Apply alternate hierarchy to templates and user permissions

1. On the Module summary tab, click **Alternate hierarchy** under Configurations. The Alternate hierarchy dialog box opens.

×
×

- 2. Select attributes from the drop-down lists for user permissions and template associations.
  - NOTE User permissions and template associations are applied to all future child organizations or projects of the attributes you select. If you remove the attributes, the associations themselves are not removed.
- NOTE In the example of a location-based hierarchy, if you add the Region attribute to these fields, for projects that are both associated with the Western region, templates and user permissions will be automatically assigned to users in future children of the Western region organization.

## **3.8 AUTOMATIC USER ASSIGNMENTS**

The Automatic user assignments configuration lets you save administrative setup time by automatically assigning a Compliance or Completions role and categories to all InEight Platform users.

Users will need to be assigned a role and a Project assignment in Platform, and then they will automatically get the following from automatic user assignments:

- User assignments for the role and category you provide.
- Assignment into any project they are related to in Platform.

The updates run nightly.

### 3.8.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

Automatic user assignments will not be assigned when organization level is chosen as the assignment in InEight Platform.

### 3.8.2 Steps

To navigate to Automatic user assignments, see steps to access organization level settings in <u>Settings</u> overview.

#### Add automatic user assignments

1. Click **Automatic user assignments** under Configurations. The Automatic user assignments dialog box shows.

* Select a role to auto assign	licare				
- ocicer a role to dato assign	03013				
L2 user EP					•
* Select a category or catego	ries to auto assign users				
Corporate Safety Forms	× District / Project Forms	×			×
	set as of 08/24/2023 by Dinesh and Category(ies) applied above as		w or updated permi	ssions to projects will a	utomatically be

2. Select a role and categories from the drop-down menus, and then click **Save**.

## **3.9 LANGUAGE SETTINGS**

You can select different languages to use in modules. All user-configurable fields can be translated into the languages you select.

After you configure your languages, to translate user-configurable fields, click the **Manage Translations** icon to select a language from the drop-down list.



To apply translations to a template, use the import function in a template's Properties tab. For more information, see Template translation.

## 3.9.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

## 3.9.2 Steps

To navigate to Language settings, see steps to access organization level settings in Settings overview.



1. Click Language settings under Configurations. The Language settings dialog box shows.

Lang	juage settings			$\times$
	<ul> <li>Select which languages you would like to use with this module</li> </ul>			
	English		×	
		Cancel	Save	

- 2. Click in the **Select which languages you would like to use with this module** field to view the language drop-down list, and then select a language or languages.
- 3. Click Save.

## 3.9.3 Related information

**Template Translation** 

## 3.10 MODULE ORGANIZATION

The Module organization lets you exclude any organization or project from seeing the current module. By default, all organizations and projects are included. When you exclude organizations or projects, you will not see the current module in those organizations or projects. When you exclude a project, the project cannot be used in user assignments or templates.

You might want to exclude the safety module from your project, if for example, the project is using a different software to keep track of safety data.

## 3.10.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

### 3.10.2 Steps

To navigate to Module organization settings, see steps to access organization level settings in <u>Settings</u> <u>overview</u>.

#### Exclude projects or organizations

1. Click Module organization under Configurations. The Module organization dialog box opens. The hierarchy shown, is your organization's operational structure.



NOTE You can expand and collapse organizations to view their projects.

2. Uncheck the organization or project to exclude it from seeing the module, and then click **Save**.

To select or deselect all projects in the organization click the **Select all** or **Deselect all** buttons. You can also click the **+Future Children** button to automatically include future children projects. When selected, the button will turn green.

To view all excluded organizations or projects, enable the View excluded jobs toggle.

## 3.11 REPORTING TAGS

Within Compliance or Completions individual modules, you can configure reporting tags to secure information shown in reports. Reporting tags drive permissions when running reports. If a question is assigned a reporting tag and you are not assigned that reporting tag, you cannot see the response to the question in a report. Reporting tags are defined per module.

R	Repo	orting tags		$\times$
	٠	0.8	1	•
	Re	eporting tag		
	CI	laims		^
	Co	onfidential		
	Fir	inancial		
	HP	R		
	Inj	jured Party		
	Qu	uality		
	W	fitness		
			8 reporting	tags
		Cancel	Save	
		Ourious		

After you add reporting tags, you can assign reporting tags to users in Module settings > User assignments.

When you build your form, you can define who can see the question reporting data in Template manager > Form builder > **Access** section.

## 3.11.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

## 3.11.2 Steps

To navigate to Reporting tags, see steps to access organization level settings in Settings overview.

#### Add a reporting tag

- 1. Click the **Add tag** icon.
- 2. Enter the reporting tag name, and then click **Save**.

## Delete a reporting tag

- 1. Select a tag or tags.
- 2. Click the **Delete tag** icon.

## 3.12 CATEGORIES

You can create and manage categories in your organization to divide your templates into topics that have shared characteristics. Categories are module specific and can be applied as another layer of permissions to drive security within the module.

Each template must be associated with at least one category. You can associate categories to a template in Template Properties > **Category association**. In the Templates manager page, under **Filters**, you can also filter your templates by categories.

In User assignments, you must designate categories as part of the assignment. For more information, see <u>User assignments</u>.

By creating categories, you can partition the module into smaller areas that can help define the module's purpose.

For example, you could break your module down into four different categories, such as:

- Work types
- Disciplines
- Processes
- Subcontractors

Categories can be created for anything you need based on your company's business processes.

M	todule settings $>$ Quality -	
Mo	odule summary Categories Types Classifications Statuses Email templates Roles User assignments Inspection & Test Plans	→ Temp
		Cancel
	Catagorian	
	Categories	
	Create at least one category for the module. (1)	
	• 8	<b>1</b>
	Category	
	Checklist	<u>^</u>
	Checklist Q	
	Quality I	
	Quality Process	
	Quality review	
	Safety Category 1	
	Safety Category 2	

## 3.12.1 Considerations

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- To activate the module, you must add at least one category created, in addition to a published template.
- You cannot delete categories that are designated in user assignments or used in published templates.

## 3.12.2 Steps

To navigate to Categories, see steps to access organization level settings in Settings overview.

#### Add a category

- 1. Click the Add category icon.
- 2. Enter the category name, and then click Save.

#### Delete a category

- 1. Select a category or categories.
- 2. Click the **Delete category** icon.

## **3.13 TYPES**

Type values can be used to classify an event or task for association to filters and reporting. They allow you to add identifiers to a template to further define the activity. These are typically associated with identifying the risk of the event or task. Defining types lets you bring awareness to those risks during the closing of a phase in your project.

Types can be defined and added in the Module settings > **Types** tab. They can then be used in the Template Managers properties section, and on the reference question type.

		> Quality •								
Mo	dule summary	Categories Types Cl	assifications Statuses	Email templates	Roles Us	ser assignments	Inspection & Test Plans		0	) Templa
								Cancel		Save
	-									
	Тy	bes								
	Create	any desired number of ty	pes for the module. 🧯	)						
	<b>(</b>							🌆 v		
		Types								
		Type A							^	
		Туре В								
		Type C								

In Templates manager, when creating a new form, the Types option is available to select or deselect in the Create new form page. Select the option to associate types to the template. When selected, the Types drop-down menu shows where you can then select from the list of defined types and make them available to use in the template form.

* Form name		* Organization association				
Types template form						
Description		► C-XYZ (RootOrg1) + Future Children				
Form to use Types feature		Select all Deselect all				
* Category association						
Select categories	×					
Select categories you want to associate to your forms Types						
	×					
Туре А						
Туре В						
Type C		Select organizations you want to be able to perform this form				

When building the form, the Types section is automatically populated as a header.

Like other question types, you can create a chain of associated events, set up default values, associate classifications, add form details, among other options, depending on your business process.

After the template form is created, you can enable or disable the Types option in the template properties tab.

When filling in the form, the Types option shows as a question. You can select a value from the predefined list.

## 3.13.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

You cannot delete Type values used in published templates.

## 3.13.2 Steps

To navigate to Types, see steps to access organization level settings in <u>Settings overview</u>.

### Add a Type value

- 1. Click the Add icon.
- 2. Enter the Type name.
- 3. Click Save.

#### Delete a Type value

- 1. Select a type or types.
- 2. Click the **Delete** icon.

## **3.14 CLASSIFICATIONS**

Classifications are used to further classify forms and associate them to filters and reporting, as well as facilitate logic within a form. You can use classifications on any template in the module.

	nodule s	ettings > Quality -		
M	lodule su	nmary Categories Types Classifications Statuses Email templates Roles User assignments Inspection & Test Plans		🕣 Tem
			Cancel	Sa
	CI	assifications		
		assincations		_
	Crea	te any desired number of classifications for the module. (1)		
	Œ	) 🛞	<b>1</b>	
		Classification		
		Classification		^
		Final Walkdown		
		Initial Walkdown		
		Quality Classification 1		
		Quality Classification 2		

You can use classifications to apply logic to template headers.

Details  Details  'yes  'yes  Label  Finalize quality review process  Access  Logic  Due date	Cancel Save
Label Finalize quality review process  Associate task  Enable copy section  Add supporting text  Finalize quality review process  Access  Label	
Finalize quality review process  Associate task  Enable copy section ①  Add supporting text ①  Finalize quality review process  Access  Logic	•
Associate task	
Enable copy section ①     Add supporting text ①     Finalize quality review process	
Enable copy section ①     Add supporting text ①     Finalize quality review process	
Add supporting text  Finalize quality review process  Finalize quality review process	
Access	
Logic	
.ogic ^ * Due date	
* Due date	
Show this section for the following classifications ()	<b>**</b>
Select one ×	
ntegration tag ①	
* Name of person conducting the next quality review Date of upcor	ning quality review
Prame of person conducting the next quality review 07/11/2023	<b>*</b>

Go to Template creation > Form and Task Builder – Build Tab > **Classifications** section for more information.

## 3.14.1 Considerations

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- You cannot delete classifications used in published templates.

## 3.14.2 Steps

To navigate to Classifications, see steps to access organization level settings in Settings overview.

#### Add a category

- 1. Click the Add Classification icon.
- 2. Enter a name.
- 3. Click Save.

#### Delete a category

- 1. Select a Classification or Classifications.
- 2. Click the **Delete classification** icon.

## **3.15 STATUSES**

Statuses represent the condition of a form or task. Default statuses of complete, pending, scheduled, and canceled are applied to each module. New sub statuses can be created under Complete, Pending, and Canceled statuses to facilitate your business processes. You can also change or add background and text colors to statuses to customize your view.

	would setting:	s > Quality •									
1	Module summary	Categories Types	Classifications	Statuses	Email templates	Roles	User assignments	Inspection & Test Plans			→ Tem
										Cancel	Sa
	Statu	ISES									
		additional statuses for t	the module (1								
	Create any	additional statuses for 1	the module. 🕕								
	$\odot$ $\otimes$							<b>1</b>	•		
		em/User-defined status							Background	Text	
	Complete						^				
	✓ Pending										
		Quality manager review							•		
		In review							•		
		Final review							•	•	
	Schedul	ed									
	🗸 Cano	celed									
	0	Void									

You can apply statuses to a template, and when used as an option on the perform form, either through a button or form flow, it will show on the Events and Tasks pages.

S	afety > Eve	nts 🗸						🥥 Glob	oal Events/Tasks V	iew: My view			τ.
		7						ß		<b>3</b>	(i)	Q Clea	r all filters
-					(i) Aut	omatic date filter app	lied - to clear, us	e the event date colu	mn filter		-		
	Event title =	0	Category -	Event date † 😑	Event ID	Form name	Reporter -	Status	State	Classifications	ту	pes 📃	
	Safety Conve		District / Pr	08/29/2023	202303310	Safety Conversa	Randall Ross	Scheduled	Overdue				
	Safety Conve		District / Pr	08/29/2023	202303310	Safety Conversa	Matthew Eld	Scheduled	Overdue				
	Parent Form	0	Bridge Cate	08/29/2023	202308280	Parent Form wit	Suchith Ma	Complete	Complete				
	Child Form w		Bridge Cate	08/29/2023	202308290	Child Form with	Suchith Ma	Complete	Complete				
	Child Form 2		Bridge Cate	08/29/2023	202308290	Child Form 25 J	Suchith Ma	Pending	In Process				
	Child Form 2		Bridge Cate	08/29/2023	202308290	Child Form 25 J	Suchith Ma	Pending	In Process				
	Parent Form		Bridge Cate	08/29/2023	202308290	Parent Form wit	Suchith Ma	Complete	Complete				
	Child Form w		Bridge Cate	08/29/2023	202308290	Child Form with	Suchith Ma	Pending	In Process				
	Parent Form		Bridge Cate	08/29/2023	202308290	Parent Form wit	Suchith Ma	Pending	In Process				
	Child Form w		Bridge Cate	08/29/2023	202308290	Child Form with	Suchith Ma	Pending	In Process				
	Child Form 2		Bridge Cate	08/29/2023	202308290	Child Form 25 J	Suchith Ma	Pending	In Process				
	Child Form w		Bridge Cate	08/29/2023	202308290	Child Form with	Suchith Ma	Pending	In Process				
	Parent Form		Bridge Cate	08/29/2023	202308290	Parent Form wit	Suchith Ma	Pending	In Process				
	Parent Form		Bridge Cate	08/29/2023	202308290	Parent Form wit	Suchith Ma	Pending	In Process				
	Parent Form		Bridge Cate	08/29/2023	202308290	Parent Form wit	Suchith Ma	Complete	Complete				
	Child form		IIII QA Perf	08/30/2023	202308300	Child Form - Mahi	Mahendra V	Pending	In Process		Ma	ahi 4	
	Reference va	0	IIII QA Perf	08/30/2023	202308300	Mobile 236 For	Mahendra V	Complete	Complete	2nd - Shot			
	Chid reference		IIII QA Perf	08/30/2023	202308300	Child Form - Mahi	Mahendra V	Pending	In Process		Ma	ahi 5	
	Reference on		IIII QA Perf	08/30/2023	202308300	Mobile 236 For	Mahendra V	Complete	Complete				
	Safety Tour		Corporate	08/30/2023	202209150	Safety Tour	Anthony Hu	Scheduled	Overdue				

The following table provides more information on the default statuses.

Status	Notes when:	Customizable	Permissions	Can Be Overdue	Editable
Complete	Form or Task is	Yes	It has permissions	No	Permission

Status	Notes when:	Customizable	Permissions	Can Be Overdue	Editable
	completed, and workflow is done.		tied to it such as when completed form or task locks and cannot be reopened by certain roles.		based
Pending	Form or Task is started and is in this status until completed.	Yes	All roles have permission to this status.	Yes	Х
Scheduled	An Event or Task has been scheduled.	No	All roles have permission to this status.	Yes	x
Canceled	An Event or Task was started but there is no intent to complete it.	Yes	All roles have permission to this status.	No	x

### 3.15.0.1 Differences between a state and a status

The state of a form or task is another indication of their condition that is different from a status. Unlinke statuses, states cannot be changed or customized. States are driven actions you take in forms or tasks. For example, they let you know that a work item is overdue regardless of its status in your workflow or process.

The following table provides more information about states:

State	Notes when:	Work item types
In Process	Form or Task is pending.	Forms and tasks.
Complete	Form or Task is complete.	Tasks only.
Overdue	Form or task workflow or due date has passed.	Forms and tasks.

State	Notes when:	Work item types
Saved	Task is not yet assigned.	Tasks only.
Scheduled	Form or task has been scheduled.	Forms and tasks.
Canceled	Form or task was started but there is no intent to complete it.	Forms and tasks.

#### 3.15.1 Considerations

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- The standard statuses cannot be renamed or deleted.

#### 3.15.2 Steps

To navigate to Statuses, see steps to access organization level settings in Settings overview.

## **3.16 EMAIL TEMPLATES**

You can apply system generated email templates to send to responsible parties when events and tasks are assigned, overdue, or reversed, and to send reminders of upcoming events and tasks before they are due.

	Module summary Categorie	es Types Classifications Sta	tuses Email templates Role	es User assignments Inspection	a & Test Plans	. т	emplates
d)							Q
•	Name	Description †	Created by	Created on	Last updated on	Last updated by	
彩	Assigned event	Assigned event template	Ineight Service Account	06/12/2020	08/14/2020	Ineight Service Account	
-	Assigned task	Assigned task template	Ineight Service Account	06/12/2020	08/14/2020	Ineight Service Account	
8	Overdue event	Overdue event template	Ineight Service Account	06/12/2020	08/14/2020	Ineight Service Account	
P	Overdue Event workflow step	Overdue Event workflow step tem	Ineight Service Account	06/12/2020	08/14/2020	Ineight Service Account	
6	Overdue task	Overdue task template	Ineight Service Account	06/12/2020	08/14/2020	Ineight Service Account	
	Reminder of upcoming event	Reminder of upcoming event tem	Ineight Service Account	06/27/2023	06/27/2023	Ineight Service Account	
æ	Reminder of upcoming task	Reminder of upcoming task templ	Ineight Service Account	06/27/2023	06/27/2023	Ineight Service Account	
	Reversed Event Workflow Notifica	Reversed Event Workflow notifica	Ineight Service Account	06/12/2020	08/14/2020	Ineight Service Account	

The system-generated emails leverage predefined templates that are configurable by module administrators.

Template	Description
<ul><li>Assigned event</li><li>Assigned task</li></ul>	Emails are sent to responsible parties when you assign a task or event.
<ul> <li>Overdue event</li> <li>Overdue Event workflow step</li> <li>Overdue task.</li> </ul>	Emails are sent to responsible parties when their assigned event, task, or workflow step has passed its due date.
<ul> <li>Reminder of upcoming event</li> <li>Reminder of upcoming task</li> </ul>	Emails are sent to responsible parties prior to the event or task due dates.
<ul> <li>Reversed Event Workflow Notification</li> </ul>	Emails are sent to responsible parties when a workflow is reversed back to a step already completed by the responsible party.

You can edit the following items in the email templates:

- Template name.
- The body of the email, including the font.
- Change the email language.
- Add variables so that users can enter information such as reporter names or event titles into emails. To add a variable, type @, and then select an option from the drop-down list.
- Click the **Restore default template** button to restore a template to its original state.

Overdue task		
ENCLISH DUTCH (NEDERLANDS) ESPAÑOL (AMÉRICA LATINA) FRANÇAIS (CANADA) NORSK (BOKMÁL)		
Email draft ①	at updated by	
Template name     Template description	evice Account	
Overdue task Overdue task template	rvice Account	
Overdue Task – [Task name] – Overdue as of [Due date]	evice Account	
orerdue rask [rask name] orerdue as or [oue date]	rvice Account	
B I U	evice Account	
(Responsible party),	andi Heffner	
An assigned task is now overdue.		
Task (Task name)		
Due date: [Due date]		
[Link to open task]		
Assigned		
Category		
Due date		
Form Flow Step Responsible Party		
Link to open task		
Module name		
Project name		
Recurrence Close Restore default template Save		
Reverse Comment		
Responsible party		

Click the **Restore default template** button to restore a template to its original state.

#### 3.16.0.1 Assigned, overdue, and reversed event workflow templates

When building your template, you can use Email templates in the following form questions:

- Button
- Form Button
- Form Flows
- Number
- People picker
- Text questions

Question types that support email notifications can be configured by selecting the question and expanding the Email option on the question property panel.

Form Flow	$\times$	BUILD	PROPERTIES	FORM FLOWS	HISTORY
	*			I have not saved your t	
Details	^				
* Button text					Reversal f
Manager Approval			_	← STEP 1	button
Add supporting text (i)		Manager Approval 🛶	·	24	
		(Manager Approval - Step 1)		Submit to	Purchasing
Mandatory		<b>x</b> ‡		for Order	
- Manuatory				(Manager Ap	proval - Step :
Question display ID:	506			2\$	
Access	~				
Logic	^			*	
C Defining conditional logic rules allow questions based on another question	rs you to show or hide ns response.				
<ul> <li>Leading questions</li> </ul>					
Integration tag (i)		Submit to Purchasing	<b>→</b>		
		(No MGR Approval Needed -	Step 1)		
		24			
Email	^				
Adding an email allows a con EMAIL to be sent once a question re	figured email message sponse is triggered.				
) Add email					

#### 3.16.0.2 Reminder of upcoming event and upcoming task

The feature can be enabled on a template-by-template basis when creating a new form or in existing templates.

When creating a new form, select **Enable reminder notifications**, and then enter the number of days of the reminder prior to the due date.

Create new form	
* Form name	<ul> <li>Organization association</li> </ul>
Description	S100000 - PKS Ir Select all Deselect all
Category association	
Select categories ×	
Select categories you want to associate to your forms	
Types	
Available on mobile ?	
Event title ①	
System default	
Event date (1)	
System default	
Add expiration date (1)	
Available through form button only? (1)	
Enable dynamic headers?	
Enable reminder notifications (1)	
* Send reminder notification: 7 day(s) prior to the due date	

For existing templates, you can enable the feature in template properties, under **Options**. Select **Enable reminder notifications**, and then enter the number of days prior to the due date.

Available on mobile ?	Event title (1)	Event date	D			
Θ	System default	▼ System def	ault 🔻	Add expiration	date 🚺	
Available through form by	utton only?	tion tag (1)	🔀 Enable remin	ler notifications (1)		
Available through form be	utton only? U Integra	tion tag 🔍	Chable remine	ter notifications		
Θ			Send reminder	notification: 7 day	(s) prior to the due date	
Enable print functionality	<ul> <li>Report to run</li> </ul>			Enable dyn	amic headers? ①	
				-		
(⊘ )	General Forms and	Tasks - Print Version		• (🕗 )		Add template integration

NOTE The default reminder notification is 7 days, and the maximum number of days allowed is 99. You will not receive a reminder when the number of notification days is past the due date.

## 3.16.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

#### 3.16.2 Steps

To navigate to Email templates, see steps to access organization level settings in <u>Settings overview</u>.

# **3.17 ROLES**

# 3.18 INEIGHT PLATFORM PERMISSIONS

InEight Platform account administrators must have Level 3 – Account Admin permissions and full access to all modules to manage and set up Compliance or Completions roles and permissions. By default, these permissions are assigned to the Account Administrator and Dev/Ops roles. These roles should be assigned with discretion.

In Platform, you can access permissions by navigating to Main menu > Suite administration > Roles and permissions. Permissions for Compliance and Completions are found in the Organization and project drop-down menu.

#### NOTE

There is no drop-down menu for the Compliance or Completions application in Platform Permissions.

During initial setup, a Platform role lower than level 3 will not have access to Compliance or Completions. Other permissions to access Compliance or Completions outside of the Level 3 role need to be configured and obtained within Compliance or Completions.

Platform level 3 roles are set up to edit all modules. These settings override all other Compliance or Completions level permissions. There are no settings or permissions in Platform that will allow a level lower than a Level 3 to access Compliance or Completions as an administrator.

A level 3 user must be the first user to log into the application to set up users and configure the module or modules or set up a module administrator in the application to perform these tasks. It is common practice for level 3 administrators to set up additional administrative roles in Compliance or Completions.

Role	Definition	Example
Platform account administrators	Level 3 - Account Admin - with edit and view permissions of all modules - Highest level access.	<ul> <li>Account administrator</li> </ul>
Compliance or Completions product Administrator	Level 3 - Responsible for creating or modifying the roles for Compliance or Completions Admins within each module.	<ul> <li>Quality Dept Administrator</li> <li>Compliance or Completions Product Administrator</li> </ul>

The following table shows examples of InEight Platform's user roles and definitions:

## 3.18.1 Considerations

- In general, the average Compliance or Completions user does not need Platform permissions to access the product. Users (other than a level 3 user) are maintained directly in Compliance or Completions. A level 3 user assignment overrides all Compliance and Completions-level assignments.
- The level 3 role must be maintained correctly in Platform to add subsequent users in Compliance or Completions.

## 3.18.2 Related information

InEight Platform Roles and permissions

## **3.19 ROLES**

The setup and design of Compliance and Completions roles and permissions are different than any other of the InEight cloud platform applications. A Level 3 – Account Admin role, with full permissions of all modules must be present and maintained correctly in Platform for subsequent users to get added to the Compliance and Completions application. The level 3 administrator can set up module administrators and configure modules according to business needs.

The image below shows the default seated roles:

	→ Templ ▲ × ×	
Image: Second state of the se		
Name †		C
Module administrator Module administrator - Pr. Service Account 11/04/2019 06/26/2023 Julio		<u> </u>
Module administrator Module administrator - Pr Service Account 11/04/2019 06/26/2023 Julio		Ŧ
Read-only         Read-only - Allows users r         Service Account         11/04/2019         11/04/2019         Service Account           Reporter         Reporter         Reporter         Service Account         11/04/2019         11/04/2019         Service Account	t	
Reporter Reporter - Allows performi Service Account 11/04/2019 11/04/2019 Service Account	t	

Name	Definition
Module administrator	Full access to all the permissions.
Reporter	A general role that allows the execution of forms in any category or project assigned. It does not allow manipulation of other users, role creation, or template creation.
Read-only	A general role that allows the viewing of events and tasks in assigned categories or projects. It does not allow manipulation of other users, roles, templates, events, or tasks.

Role permissions are module specific. They are comprised of permissions that you can perform in a specific module. You can create different roles with specific permissions as needed to facilitate any process you plan to do in a module. When you create a new role, it will default to Reporter role permissions. After you create a role, you can update its permissions.

The following table shows examples of user roles and definitions:

Role	Definition	Example names
Module Administrator	Responsible for administering Compliance or Completions daily per the organizational assignments.	Compliance or Completions Module administrator
Other general roles	Specific job roles with limited access.	<ul><li>Form Creator</li><li>Crane Manager</li></ul>

NOTE In User assignments, you must designate roles as part of the assignment. The users in the assignment will inherit the permissions in the designated role. For more information, see User assignments

The roles tab page shows the following role columns:

- Name
- Description
- Created by
- Created on

- Last Updated on
- Last updated by

You can filter the columns and use the Column chooser to customize your view.

#### 3.19.1 Considerations

InEight Completions is comprised of one module, Quality.

#### 3.19.2 Steps

To navigate to Roles, see steps to access organization level settings in Settings overview.

#### Add a new role

- 1. Click the Add role icon. The Add role dialog box opens.
- 2. Fill in the required role name and optional description.
- 3. Select the designated permissions, and then click Save.

## Copy or delete a role or roles

- 1. Select the checkbox next to the role or roles.
- 2. Click the **Copy role** icon to copy or the **Delete role** icon to delete.

#### Edit a role

- 1. Click the role name link. The Edit role dialog box opens.
- 2. Edit the role, and then click **Save**.

#### 3.19.3 Related links

InEight Platform Roles and permissions

## 3.20 MODULE PERMISSIONS

Within Compliance or Completions individual modules, you can configure permissions for the module. To go to Module permissions, go to Module settings > **Roles**. Select **Add role** or click an existing role to edit the role, and then select the **Module** tab.

* Name		Description	
Module administrator		Module administrator - Provides access to all administration features	
MODULE EVENTS ROLES/U	SERS TEMPLATES PROJECT SETTINGS	HISTORY	
Z Edit module summary	Create and edit categories	Create and edit statuses	^
Edit email templates	Manage module organization ex	clusions Create and edit classifications	
Create notifications	Create and edit types		
Make this role read only			

The following table is a summary of permissions in the Module tab:

Permission	Location	Allowed actions
Edit module summary	Module settings > <b>Module summary</b> tab.	<ul> <li>Edit Module name and description.</li> <li>Activate and deactivate module toggle.</li> <li>Manage Configurations.</li> </ul>
	Compliance/Completions landing page.	<ul> <li>View module tiles according to your assignments.</li> </ul>
	Module landing page.	<ul> <li>View side menu Settings link.</li> </ul>
Edit email templates	Module settings > <b>Email templates</b> tab.	Edit email templates.
	Template manager > Form builder	Use Email templates in

Permission	Location	Allowed actions
	or <b>Task builder</b> .	form questions.
Create notifications	Events and tasks lists (Project level).	<ul> <li>Create notifications for projects, roles, and users in your assignments.</li> </ul>
Create and edit categories	Module settings > Categories tab.	Add and delete categories.
	User assignments.	Designate categories.
	Template properties.	Associate categories.
Manage module organization exclusions	Module settings > Module summary > Configurations > <b>Module</b> organization.	<ul> <li>Exclude or include organizations or projects.</li> </ul>
Create and edit types	Module settings > Types tab.	Add and delete types.
	Template manager > <b>Create new</b> form.	<ul> <li>Select or deselect Type drop-down option.</li> </ul>
	Template manager > Form builder > <b>Properties</b> tab.	<ul> <li>Select or deselect Types option.</li> </ul>
Create and edit statuses	Module settings > <b>Statuses</b> tab.	<ul> <li>Add statuses.</li> <li>Edit statuses background and text color.</li> <li>Delete a status.</li> </ul>
	Form or task.	Edit statuses when performing an event.
Create and edit classifications	Module settings > <b>Classifications</b> tab.	Add classifications. Delete Classifications.
	Template manager > <b>Form builder</b> or <b>Task builder</b> .	Select classifications in template headers under the Logic drop-down.

## 3.20.1 Considerations

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- The **Make this role read-only** option is available in all tabs, except for the History tab. For more information, see Read-only role.

#### 3.20.2 Steps

To navigate to Module permissions, see steps to access organization level settings in <u>Settings overview</u>.

# 3.21 EVENTS PERMISSIONS

Within Compliance or Completions individual modules, you can configure permissions for Events. To go to Events permissions, go to Module settings > **Roles**. Select **Add** role or click an existing role to edit the role, and then select the **Events** tab.

Name	Desc	ription
Module administrator	Мо	dule administrator - Provides access to all administration features
MODULE EVENTS ROLES/USE	RS TEMPLATES PROJECT SETTINGS	HISTORY
Z Edit completed events/tasks ()	✓ Delete events/tasks	✓ View deleted categories in the event/task list
✓ Edit event/task properties ①	Copy events/tasks from event/task	r list
Edit event/task proj/org		
<ul> <li>Edit event/task category</li> </ul>		
<ul> <li>Edit event/due date</li> </ul>		
<ul> <li>Edit event/task status</li> </ul>		
<ul> <li>Edit event/task Reporter/Responsible</li> </ul>	party	
<ul> <li>Edit event/task title</li> </ul>		
<ul> <li>Only provide access to own forms/tasks on</li> </ul>	the event/task list	
Categories		
<ul> <li>Allow access to event/task history</li> <li>*For the following categories</li> </ul>		

The following table is a summary of permissions in the Events tab:

Permission	Location	Allowed actions
Edit completed events/tasks	Events and Tasks lists	<ul> <li>Reopen a completed event/task to pending status.</li> </ul>
	Event (inside) Task (inside)	Use the Complete button after a closed event or task is edited.
Edit event/task properties (The sub-permissions below can be selected and deselected after Edit event/task properties is selected.)	Events list Task list Event (inside) Task (inside)	<ul> <li>Edit and event or task in your assignments using the Information slide-out panel.</li> </ul>
	Form flow panel for event.	<ul> <li>Edit user on the current active step.</li> </ul>
Edit event/task proj/org	Events list Tasks list Event (inside) Task (inside)	<ul> <li>Edit the project and organization field of any event or task in your assignments using the Information slide-out panel.</li> </ul>
Edit event/task category	Events list Tasks list Event (inside) Task (inside)	• Edit the Category field of any event or task in your assignments using the Information slide-out panel.
Edit event/task due date	Events list Tasks list Event (inside) Task (inside)	<ul> <li>Edit the Event date and Due date fields of any event or task in your assignments using the Information slide-out panel.</li> </ul>
Edit event/task status	Events list Task list Event (inside) Task (inside)	<ul> <li>Edit the Status field of any event or task in your assignments using the Information slide-out panel.</li> </ul>
Edit event/task Reporter/Responsible party	Events list Task list Event (inside) Task (inside)	<ul> <li>Edit the Reporter and Responsible party fields of any event or task in your assignments using the Information slide-out panel.</li> </ul>

Permission	Location	Allowed actions
Edit event/task title	Events list Task list Event (inside) Task (inside)	<ul> <li>Edit the title field of any event or task in your assignments using the Information slide-out panel.</li> </ul>
Delete events/tasks	Events list Task list	<ul> <li>Delete any event in the assignments area.</li> </ul>
Copy events/tasks from event/task list	Events list Task list	<ul> <li>Copy an event or task. You cannot copy an event with form flow.</li> </ul>
View deleted categories in the event/task list	Events list Task list	Filter to show inactive categories.
Only provide access to own forms/tasks on the event/task list (Select one or more categories from the drop-down list)	Event list Task list	• View only events where you are a reporter. You cannot see any other events or tasks you did not initiate as a reporter.
Allow access to event/task history (Select one or more categories from the drop-down list)	Event and task information panel	<ul> <li>View the history of the event or task.</li> </ul>

## 3.21.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

The **Make this role read-only** option is available in all tabs, except for the History tab. For more information, see <u>Read-only role</u>.

## 3.21.2 Steps

To navigate to Module permissions, see steps to access organization level settings in <u>Settings overview</u>.

# 3.22 ROLES AND USERS PERMISSIONS

Within any Compliance or Completions individual modules, you can configure roles and user permissions. To go to Roles/Users permissions, go to Module settings > **Roles**. Select **Add role** or click an existing role to edit the role, and then select the **Roles/Users** tab.

Name Module administrator	Description Module administrator - Provides access to all administration features
Module administrator	Module administrator - Provides access to all administration features
MODULE EVENTS ROLES/USE	RS TEMPLATES PROJECT SETTINGS HISTORY
Create and edit roles	
_	
Create and edit user assignments	
<ul> <li>Restrict the ability to assign users to t</li> </ul>	he following roles:
Roles	
<ul> <li>Restrict the ability to assign users to open actions of the second second</li></ul>	only the following reporting tags:
Reporting tags	

The following table is a summary of permissions in the Roles/Users tab:

Permission	Location	Allowed actions
Create and edit roles	Roles	<ul> <li>Add, edit, copy, and delete roles.</li> </ul>
	Add and edit role dialog box	<ul> <li>Add and edit name.</li> <li>Add and edit description.</li> <li>Add and edit all permissions.</li> </ul>
	Compliance/Completions Landing page	<ul> <li>View tiles according to your assignments.</li> </ul>

Permission	Location	Allowed actions
Create and edit user assignments (The sub-permissions below can be selected and deselected after Edit event/task properties is selected)	User assignments	<ul> <li>Add, remove and transfer user assignments.</li> <li>Add reporting tags.</li> </ul>
	Compliance/Completions landing page	<ul> <li>View module tiles according to your assignments.</li> </ul>
	Module landing page	<ul> <li>View side menu User assignments link.</li> </ul>
Restrict the ability to assign users to the following roles:	Add user assignments wizard	Restrict roles available to create and edit user assignments.
	Remove user assignments	Remove icon is available only from roles list associated with the permissions.
Restrict the ability to assign users to only the following reporting tags:	Add reporting tags dialog box in User assignments	Can only assign the selected reporting tags to users.

## 3.22.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

The **Make this role read-only** option is available in all tabs, except for the History tab. For more information, see <u>Read-only role</u>.

## 3.22.2 Steps

To navigate to Module permissions, see steps to access organization level settings in Settings overview.

# **3.23 TEMPLATES PERMISSIONS**

Within any Compliance or Completions individual modules, you can configure template permissions. To go to Templates permissions, go to Module settings > **Roles**. Select **Add role** or click an existing role to edit the role, and then select the **Templates** tab.

* Name			Description			
Module administrator			Module adn	ninistrator - Provides acce	ess to all administration	features
MODULE EVE	NTS ROLES/USERS	TEMPLATES	ROJECT SETTINGS	HISTORY		
Create and Edit temp	ates					<b>^</b>
						- 1
						- 1
						- 1
						- 1
						- 1
						- 1
						-

The following table is a summary of permissions in the Templates tab:

Permission	Location	Allowed actions
Create and edit templates	Templates manager forms	Create, edit, copy, deactivate and delete forms.
	Templates manager tasks	<ul> <li>Create, edit, copy, deactivate and delete forms.</li> </ul>
	Form builder	<ul> <li>Use all functions including form flows.</li> </ul>
	Task builder	Use all functions.
	Compliance/Completions landing page	<ul> <li>View module tiles according to your assignments.</li> </ul>

Permission	Location	Allowed actions
	Module landing page	<ul> <li>View side menu Templates manager link.</li> </ul>

## 3.23.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

The **Make this role read-only** option is available in all tabs, except for the History tab. For more information, see <u>Read only role</u>.

#### 3.23.2 Steps

To navigate to Module permissions, see steps to access organization level settings in Settings overview.

# 3.24 PROJECT SETTINGS PERMISSIONS

You can configure project settings permissions within the individual Compliance modules or in Completions that can be associated to roles.

Project Settings permissions are in Module settings > **Roles**. Select **Add role**, or click an existing role to edit the role, and then select the **Project Settings** tab.

Name	Description		
MODULE EVENTS ROLES/USERS	TEMPLATES PROJECT SETTINGS		
Enable/ Disable Project Structure	Manage Project Inspection and Test Plans	🗌 Manage Project User Groups	
Edit header template	Create and edit Inspection and Test Plans	Create and edit User groups	
	Edit header template		
Manage Automapping			
Setup Automapping criteria			
Perform Automapping			

The following table is a summary of permissions in the Project Settings tab:

Permission	Description
Enable/ Disable Project Structure	Enable or disables the ability to manage, add, and edit project structure header templates, and add them to forms, based on user assignments at the project level. When selected, the <b>Edit header template</b> checkbox is automatically selected.
Edit header template	Enable the ability to edit header templates associated with the project structure process at the project level.
Manage Project Inspection and Test Plans	Enable the ability to manage, add, and edit Inspection and Test Plans (ITPs), and edit ITP header templates in Module settings > Inspection and Test Plans tab at the project level. You can access the Inspection and Test plan report in the module landing page in the left navigation menu. When enabled, the Create and edit Inspection and Test Plans and Edit header template check boxes are automatically selected.
Create and edit Inspection and Test Plans	Enable the ability to create and edit Inspection and Test Plans (ITPs) at the project level in Module settings > Project Settings > Inspection and Test Plans section. You can access the Inspection and Test plan report in the module landing page in the left navigation menu.

Permission	Description
Edit header template	Enables the ability to edit the header template associated with the Inspection and Test Plan process at the project level.
Manage Project User Groups	Enable the toggle to manage, create and edit User Groups at the project level in the Module settings > Project Settings > <b>User Groups</b> section. When selected, the Create and edit User groups check box is automatically selected.
Create and edit User groups	Enable the ability to manage, create and edit user groups in the project settings.
Manage Automapping	Enable the ability to manage, setup criteria for, and perform automapping at the project level in the Module settings > Project Settings > <b>Automapping</b> section. When selected, the Setup Automapping criteria and Perform Automapping check boxes are automatically selected.
Setup Automapping criteria	Enable the toggle to manage Setup Automapping criteria in Project settings.
Perform Automapping	Enable the toggle to allow users with permission to run automapping. The toggle ability is associated with the Manage Automapping option that you can enable at the project level.

## 3.24.1 Considerations

You must have a Level 3 – Account Admin role in InEight Platform or a Compliance or Completions role with the applicable permissions.

The **Make this role read-only** option is available in all tabs, except for the History tab. For more information, see <u>Read-only role</u>.

#### 3.24.2 Steps

To navigate to Module permissions, follow the instructions in <u>Settings Overview</u>.

# 3.25 HISTORY

Within any Compliance or Completions individual modules, you can view the history of any changes performed in a role. To go to the history of a role, go to Module settings > **Roles**. Click an existing role to edit the role, and then select the **History** tab.

The History tab provides a list of changes made to a role. You can also edit the role's **Name** and **Description** fields. As with other InEight features, data in these columns can be filtered or sorted.

Each time a role is updated and saved a new entry is created. Each change constitutes a new line item on the History tab.

For auditing purposes and to meet ISO requirements, changes to roles are recorded with date and version history.

The following is a summary of the contents in the History tab:

Column name	Description
Permission category	Name of the category where the change occurred. Module, Events, Roles/Users, Templates, or Project Settings.
Permission	Specific permission in the category that was changed.
Action	The action that was performed.
Change date	The date the change took place.
Changed by	The name of the user responsible for the change.

#### 3.25.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

#### 3.25.2 Steps

To navigate to Module permissions, see steps to access organization level settings in <u>Settings overview</u>.

# 3.26 READ-ONLY ROLE

Within Compliance or Completions individual modules, you can configure roles with read-only permissions. To enable **Make this role read only**, go to Module settings > **Roles**. Select **Add role** or click an existing role to edit the role, and then select **Make this role read only**. You can select the option in the Module, Events, Roles/Users, Templates, or Project Settings tab.

The Make this role read-only option allows you to only view events and tasks based on their user assignments.

MODULE EVEN	TS ROLES/USERS	TEMPLATES	HISTORY	Create and edit statuses
- ,			2	
Edit email templates		) Manage module or	ganization exclusions	Create notifications
Create and edit User g	oups 🗌	) Create and edit cla	ssifications	Create and edit Inspection and Test Plans
Create and edit types				

The following table is a summary of the read-only role:

Location	Description
Compliance or Completions landing page	<ul> <li>View module tiles according to your assignments.</li> </ul>
Module landing page	<ul> <li>View links, forms, and tasks</li> <li>To-do list is not shown because forms and tasks cannot be assigned.</li> </ul>
Events page	<ul> <li>View events according to your assignments.</li> <li>View information side panel.</li> <li>Cannot enter information in fields.</li> </ul>
Tasks page	<ul> <li>View tasks according to your assignments.</li> <li>View information side panel.</li> <li>Cannot enter information in fields.</li> </ul>

- Considerations
- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

• When you select **Make this role read only option**, any other permissions previously selected will be automatically deselected.

## 3.26.1 Steps

To navigate to Module permissions, see steps to access organization level settings in Settings overview.

# 3.27 USER ASSIGNMENTS

You can use user assignments to assign any InEight Platform user to a Compliance or Completions organization, project, category, and role. The user will have access to manage Compliance or Completions, according to their assignment.

The User assignments tab page shows all users from InEight Platform. The user's name, email, and status are pulled from their profiles in Platform. The designated Roles, Reporting tags, and Last updated information from their assignments are also shown.

»		Modul	le settings > Qualit	V T							
) )	N	ection & Test Plans									
Ð	(+	Ð.					Ē	) Rem	ove reporting tags	Q Reset view	
	»		Name	Roles -	Email =	Active/Inactive =	Reporting tags		Last updated on 📃	Last updated by =	1
5			Kermilathan	Reporter, Module adm.	karen loftunginaight	Active			09-11-2023	Karen Loffus	
	•		Michael Jhee Consult	Reporter, Module adm.	michael share [insigh.	Active			00-00-2023	Michael Drawgineight	
2			land offset (search	Reporter	brand haffner (insigh.	Active			00-00-2023	Michael Davejineight	
l9			Julio Salissera	Module administrator,	plantiperspecification.	Active			08-14-2023	Karen Loffun	
			Jonatian Mendez		pratas mendecipinal.	Active					
2 2			Define, Tassie		starting participants .	Active					
			used.used.		une " (insight care	Active					
3			used used		une (gineight con	Active					
			used used		une Spinsight com	Active					
			Used Used		som förstigte com	Active					
~			used used		userfightinght com	Active					
			used used		unertigiosophi com	Active					
			Line1.Line1		une " (insight con	4,014					
			used used		userfightinght com	Active					

User assignments are added by designating users to organizations, projects, categories, and roles. You can also assign Reporting tags to users. For more information about reporting tags, see <u>Reporting tags</u>.

Module summary Categorie	es Types	Classificatio	ons Statuses	Emai	I templates Ro	les I	User assignments	Ins	pection & Test Plans
( <del>+)</del> •							(	) Ren	nove reporting tags
Add user assignments	Roles 🗸		Email		Active/Inactive	Ŧ	Reporting tags		Last updated on
Add reporting tags	Reporter, M	odule adm	karen loftungin	nghi	Active				09-11-2023
Michael Devilopment	Reporter, M	odule adm	nichael share@	negt.	Active				08-30-2023

NOTE Automatic user assignments can be configured to assign roles and categories to InEight Platform users. For more information see Automatic user assignments.

After user assignments have been designated, they can be removed or transferred to other users.

ASSIGNMENTS HISTORY				
Ð				
Drganization/Project		Role	Category	
BC Mining Group (ABC-W1),BMS Test	(BMS Test),	Module administr	Checklist, Checklist Q, Quality I, Quality Process, Quality review, Safety Category 1, Safety Category	Θ
BC Mining Group (ABC-W1),BMS Test	(BMS Test),	Read-only	Checklist, Checklist Q, Quality I, Quality Process, Quality review, Safety Category 1, Safety Category	
BC Mining Group (ABC-W1),BMS Test	(BMS Test),	Reporter	Checklist, Checklist Q, Quality I, Quality Process, Quality review, Safety Category 1, Safety Category	

In the Add user assignment wizard an assignment consists of one or more users, organizations, projects, categories, and roles.

#### 3.27.0.1 Assignments and History

When viewing a user assignment, the user assignment page shows the Assignments and History tabs. The Assignments tab lists all user assignments. You can filter them by Organization/Project, Role, or Category. The History tab lists the history of all assignment's changes. You can filter them by Change type, Role, Category, Organization/Projects, Reporting tags, Change date, and Changed by.

#### 3.27.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

#### 3.27.2 Steps

To navigate to User assignments, see steps to access organization level settings in <u>Settings overview</u>.

#### Add a User Assignment

- 1. Click the Add icon, and then select Add user assignments from the drop-down list.
- 2. Select users to add assignments to, and then click Next.

NOTE When you add multiple users, the assignment is listed individually for each user.

3. Select the organizations, projects, categories, and roles to designate for the selected users, and then click **Done**.



You can be assigned multiple assignments. Assignments do not affect existing Platform roles.

#### Transfer user assignments

- 1. Click a user's name. The user assignment window opens that shows all user's assignments.
- 2. Click the **Transfer assignment** icon next to the role you want to transfer.
- 3. In the assignment wizard, select the user, categories, organizations and projects to transfer the assignment to, and then click **Next**.
- 4. In the Confirmation step, click **Transfer**. You can click the Transfer drop-down, and select **Transfer and select next user**, or **Transfer and close**.

NOTE You can only transfer one role's assignment at a time.

#### Remove user assignments

- 1. Click a user's name, and then click the **Remove assignment** icon next to the role. The Remove user assignment wizard opens.
- 2. Select organizations, projects, and categories to remove, and then click **Done**.

Email notifications are sent when adding, transferring, and removing assignments.

#### View user's assignment history

- 1. Click a user's name, and then select the **History** tab.
- 2. Click **Close** to close the window.

NOTE

#### Add reporting tags

- 1. Click the **Add** icon, and then select Add reporting tags.
- 2. Select users to add reporting tags to, and then click Next.
- 3. Select reporting tags to include, and then click **Save**.

NOTE To create reporting tags, see <u>Reporting tags</u>.

## 3.28 INSPECTION AND TEST PLANS

You can manage Inspection and Test Plans (ITP) in the Inspection & Test Plans tab. You can create, edit, copy, create new versions, and import ITPs at the organization level.

Module settings > Qu	ality 🔻						
Module summary Categor	ies Types (	Classifications Status	es Email templates F	Roles User assignments I	nspection & Test P	lans	🕣 Templa
				L Download template	• 🔳 🗎 🖨	Q	Create ITP
Cast In Place Concrete	e - Update		Concrete - Update	Electrical Install			
Version 2 - APPROVED Description		Version 3 - DRAFT Description		Version 1 - APPROVED CSI-0000-EL-ITP-0009			
Description		Description		C31-0000-EL-11P-0009			
3	G :	3	:	42	· :		
	-						
Electrical Install		Testing ITP nar					
Version 2 - DRAFT		Version 1 - APPROV	/ED				
CSI-0000-EL-ITP-0009		ITP description					
42	:	1	<b>•</b>				
	•		•				

For more information about managing ITPs, see Inspection & Test Plans.

#### 3.28.1 Considerations

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- To access Inspection & Test Plans, it must be enabled for the module in org > Product Settings > Module management. For more information, see Module management.

## 3.28.2 Steps

To navigate to the Inspection and Test Plans tab, see steps to access organization level settings in <u>Settings overview</u>.

For more information about creating ITPs at the organization level, see <u>Create ITPs At The Organization</u> Level.

# **3. PROJECT LEVEL SETTINGS**

3.1 Project level settings	103
3.2 Inspection & test plans	
3.3 Automapping	
3.4 Project structure	
3.5 User groups	

# 3.1 PROJECT LEVEL SETTINGS

You can enable project-level settings in either the individual Compliance modules or in Completions to successfully manage projects' business processes. The settings are applied throughout the project.

In Project Settings, you can manage the projects' ability to use the following features:

- Inspection & Test Plans
  - ° Integrate with Plan components
  - ° Show Installation Work Package (IWP) widget on the module landing page
- Automapping
- Project Structure
- User Groups

These functions can be enabled on a project-by-project basis.

≡	ରି Steel Structure Training Job   105091 / Settings 🧷 🖗 🗰
»	Module settings $>$ Safety $\bullet$
$\odot$	Module summary Categories Types Classifications Statuses Email templates Roles User assignments Project Settings
·\$	Cancel Save
۲	Project Settings
	Inspection & Test Plans Enabling inspection and test plans for the project will allow the project to create and manage ITPs.
	Automapping       senabled, users will have the ability to map templates to Project Values in the Project Structure or Components. (Project Structure and/or Integrate with Plan components must be enabled)

At the project level, administrators can manage roles and user assignments. For more information about managing role, see <u>Roles</u>. For more information about managing user assignments, see <u>User</u> <u>assignments</u>.

#### 3.1.1 Considerations

- You must have a Level 3 Account Admin role in InEight Platform or a Compliance or Completions role with the applicable permissions.
- You are only allowed to view and not manage other product and module settings that have been configured at the organization level. To manage, click the **Modify at the root level organization** icon at the top of the page.

≡	:	
>>	PRODUCT SETTINGS MODULE SETTINGS	
$\bigcirc$	Module management Template integrations	t
		Q

 For more information about the project settings at the organization level, see <u>Project settings</u> permissions.

#### 3.1.2 Steps

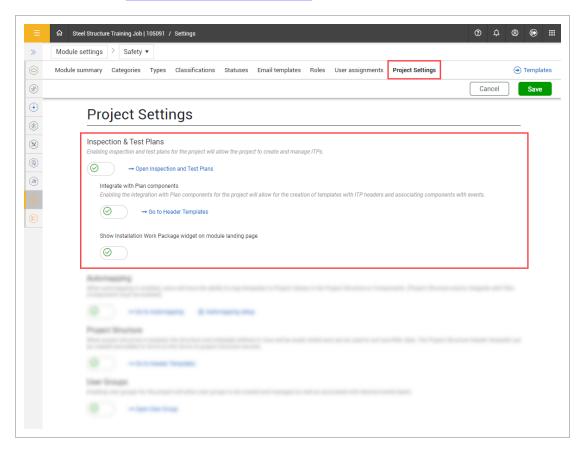
To navigate to Project settings, follow the instructions in <u>Settings overview</u>, and then click the **Project settings** tab.

## **3.2 INSPECTION & TEST PLANS**

You can enable and manage the following Inspection and Test Plans settings and related features in either the individual Compliance modules or in Completions. The settings are applied throughout the project:

- Inspection & Test Plans (ITP) Create and manage ITP's for your project. For more information, see Inspection & Test Plans.
- Integrate with Plan components Create templates with ITP headers and associate InEight Plan components with events. For more information, see <u>ITP header template</u>.
- Show Installation Work Package (IWP) widget on module landing page You can view and manage IWP's from the module landing page in the Upcoming Planned Work tile. For more

#### information, see Upcoming Planned Work tile.



#### 3.2.1 Considerations

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- To integrate with Plan, you must enable ITP mapping between Completions and Plan in InEight Plan project settings.

#### 3.2.2 Steps

To navigate to Project settings, see steps to navigate to project level settings in <u>Settings overview</u>, and then click the **Project settings** tab.

# **3.3 AUTOMAPPING**

You can enable the Automapping setting for your project in either the individual Compliance modules or in Completions. The setting is applied throughout the project.

When enabled, you can map templates to project values in the project structure or components and create a series of checklists for project structure levels (nodes) or inspection and test plans.

Automapping is enabled on a project by project basis in project> Settings> Project Settings> Automapping. This enables the Go to Automapping and Automapping setup links.

≡	🕅 Steel Structure Training Job   105091 / Settings 🕜 🗘 🕲 🛞 🎬
»	Module settings → Safety ▼
	Module summary Categories Types Classifications Statuses Email templates Roles User assignments Project Settings
( <del>1</del> )	Cancel
٠	Project Settings
۲	Inspection & Test Plans
<ul> <li>(*)</li> <li>(*)</li></ul>	O Hour requires and her free
	Stagethends The comparable
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	No. 10000 No. To up og a nor a trace
	Automapping When automapping is enabled, users will have the ability to map templates to Project Values in the Project Structure or Components. (Project Structure and/or Integrate with Plan Components must be enabled)
	Image: Components must be enabled)       Image: Optimized processing of the second processing setup       Image: Optimized processing setup
	Q
	The Trough

When enabled, you can configure automapping in Go to Automapping, Automapping setup, Map project structure, and Map templates. For more information, see Automapping <u>Overview</u>.

#### 3.3.1 Considerations

- You must have a Level 3 Account Admin role in InEight Platform or a Compliance or Completions role with the applicable permissions.
- The setting Project structure or Integrate with Plan components must be enabled in addition to published templates.
- ITP or Project Structure associations must be configured.
- A project structure and values must be set up in InEight Platform.

#### 3.3.2 Steps

To navigate to Project settings, follow the instructions in <u>Settings overview</u>, and then click the **Project settings** tab.

# **3.4 PROJECT STRUCTURE**

You can enable the Project Structure setting in either the individual Compliance modules or in Completions. The settings are applied throughout the project.

When enabled, a Project Structure Header is created in the Headers tab and the structure and metadata defined in InEight Platform shows in the header template. You can use the structure to sort and filter data.

To do this, enable the **Project Structure** toggle. This will enable the **Go to Header Templates** link to access the Headers page.

≡	ଜ Steel Structure Training Job   105091 / Settings . ଓ ତ :
>>>	Module settings → Safety ▼
$\bigcirc$	Module summary Categories Types Classifications Statuses Email templates Roles User assignments Project Settings
( <del>1</del> )	Cancel
۲	Project Settings
*	
۲	Inspection & Test Plans
<ul> <li>(*)</li> <li>(*)</li></ul>	O reacting and the first first first.
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	Addressed
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	Project Structure When project structure is enabled, the structure and metadata defined in Core will be made visible and can be used to sort and filter data. The Project Structure Header template can be created and added to forms to link forms to project structure records.
	the Trugs
	O Harterbar

In the Headers page, you can oversee and manage Project Structure Headers for projects. For more information, see <u>Project structure header template</u>.

## 3.4.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

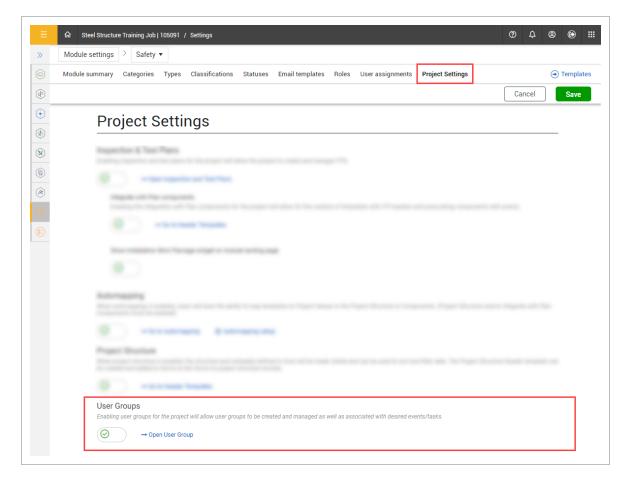
#### 3.4.2 Steps

To navigate to Project settings, follow the instructions to access project level settings in <u>Settings</u> overview, and then click the **Project settings** tab.

# 3.5 USER GROUPS

You can enable user groups to be created and managed for your project in either the individual Compliance modules or in Completions. The settings are applied throughout the project.

User groups provide access to events and tasks that may be beyond the usual permissions.



You can use a user group to give access to events and tasks to members of that group, even if they would normally not have permission to view events or tasks in selected categories. User groups can also be used in a template's From Flow option as responsible parties.

After you create a user group, you can assign the user group to individual forms or tasks when you fill them out or when you open an event or task after it has been started.

For example, when a subcontractor is performing work on a project, and another entity is doing quality assurance, the subcontractor will not be part of the project's NCR process and will not be assigned the category for the form. However, if a piece of the subcontractor's work was non-conforming, users from the subcontractor can be associated to a specific user group, and the user group associated with the events (NCRs) to address them.

Click **Open User Group** to open the User groups page tab. In User Groups you can create, edit, copy, deactivate, and delete user groups.

Duality tour viewers         Inspection viewers           Created Jan 27.2023 07.34 AM Julio Salguero         Created Jan 27.2023 07.35 AM Julio Salguero           InEight group         Viewers of quality forms         Created Jan 27.2023 07.36 AM Julio Salguero			USER GROUPS INSP	ECTION & TEST PLA	ns Q	Create user gro
2 22 : 7 22 :	TW InEight Created Jan 27.2023 07:34 AM Julio Salguero InEight group		Created Jan 27,2023 07:35 AM Julio Sal	guero	Created Jan 27,2023 07:36 AM Julio Salgu	NO
	2 28	:	2 🕾	:	7 28	:

# 3.5.1 Considerations

- You must have Level 3 Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.
- To delete a user group, you must deactivate it first, and then remove all users from the group.
- Only users with assignments to the project are shown on the list of Available users. For more information, see <u>User assignments</u>.

# 3.5.2 Steps

To navigate to User Groups, follow the instructions to access project level settings in <u>Settings overview</u>, and then click **Open User Group**.

#### **Create User Groups**

1. Click the **Create user group** button, and then fill in the User group name, Description, and select users from **Available users** to include in the group. You can use the search box and select users or use the Select all option.

2. Click **Save**. The new group tile will show. The tile will show the group name, date and creator name, description, and number of users in the group.

### View, edit, or copy a group

- 1. Click a group tile. The group opens and shows the Detail and History tab. In the history tab, you can view the history of changes, names, change dates, and changed by information.
- 2. In the Details tab, make your changes, and then click **Save**. Select the **Show selected users only** toggle to view the selected users only.
- 3. To copy, click the ellipses in the group tile, and then select **Copy**. A copy of the group is created.

## Deactivate and Activate a group

- 1. Click the ellipses in the group tile, and then select **Deactivate**. The group tile will turn gray when deactivated.
- 2. Click the ellipses in the group tile, and then select **Activate** to activate the group.

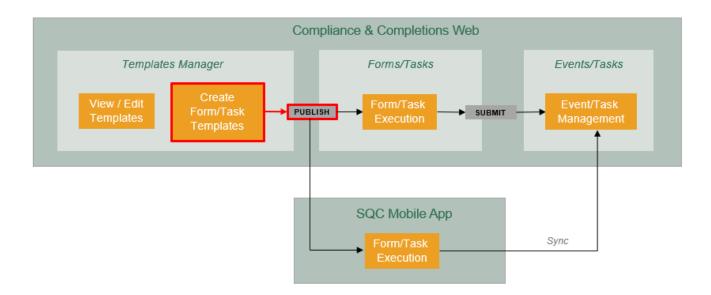
### Delete a group

- 1. You must first deactivate the group, and then remove all users from the group by editing the group.
- 2. Click the ellipses, and then select **Delete**.

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# **CHAPTER 4 – TEMPLATE MANAGEMENT**

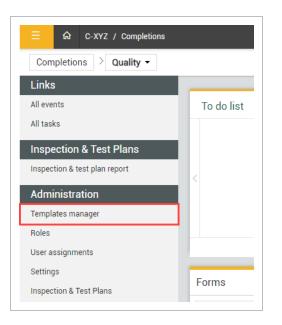
# 4.1 TEMPLATE OVERVIEW



A template is a task, or a form (or checklist) that is set up in advance for inspections and other tasks that require documentation during the life cycle of your projects.

You can use templates to standardize your organization's form and data capturing process. For example, if your projects always require a safety tour, you can create a safety tour template, so the same safety tour form is used for every project. This leads to capturing the same data from project to project, and to reporting that is clear, concise, and meaningful. At the same time, should your project have unique requirements for a safety tour, you can customize your template for your specific project needs.

The Templates Manager is the storehouse for all your template forms. You access the Templates Manager from your Module landing page.



NOTE

Depending on your permissions, you may not have access to edit or create new template forms/tasks but will have access to copy them.

	> Quality •		567 8
Tasks 2 ALL STATUSES			🛙 🚖 🔝 Create new
ilters earch ()	Quality review - 1 View associations	Created Feb 06.2023 12.20 FM Julio	Version 1 DRWPT
ategories	Clear Quality manager inspection NEW Outly inspection View associations	Created Jun 31.2023 07 57 AM Julio	Verson 1 PUBLISHED
) Checklist ) Quality I ) Quality review ) Safety Category 1	Incident Form To be completed by the Laad/Supervisor in charge. View associations	Created Jan 5020023 10:12 AM Julio	Version 1 DRWPT
Safety Category 2	New Form for ITP View associations	Created Jan 242022 01:38 PM Karen	Version 1 PUBLISHED
rganization			
C-XYZ (RootOrg1)			
Steel Structure Training Job (105091)     Steel Structure Training Job 2 (105092)     Steel Structure Training Job 3 (105093)			
Steel Structure Training Job (105091)     Steel Structure Training Job 2 (105092)			

### **Overview – Templates manager**

	Title	Description
1	Filters	Search for a template by keyword or filter down your templates by selecting the appropriate category and/or organization.

	Title	Description
2	Form or Task toggle	Toggles between each the Form and Task templates, per module.
3	Template status	Each template has a status: <b>Published</b> - available to fill out via web or mobile device <b>Draft</b> - being built and not yet available for use to fill out <b>Inactive</b> - not drafts, but available to activate when needed Selecting a status option filters to only templates with that status.
4	Template form	Provides key information about the template, including: form name and ID, associations, creation date, time and author, and version. When hovered over, options appear to delete the form (if it is a draft) or to edit, copy, or deactivate the form (if it is published).
5	Available on mobile device	This option visually identifies if a template is available on a mobile device. [Shown as the column "Mobile" when in the List View for Tasks.]
6	Favorites	This option filters to templates tagged as favorites
7	List or Card view toggle	Click this icon to view templates in list or card view.
8	Create new form or task	Click this button to launch the Form Builder or Task Builder page, where you can create a new template form or task.

# **Overview – Templates manager (continued)**

## 4.1.0.1 Templates manager page view

Each template form or task shows important information including:

- Name and description of the form or task
- Associations
- Availability on mobile device

- Creation date, time, and author
- Version
- Status
- Favorite selection icon

	Quality review - I	-	Version	
	To be completed by the Lead/Supervisor in charge.	Created Feb 06,2023 12:30 PM Julio	1 🕸	\$2
	View associations			
L '				

### 4.1.0.2 Versioning

A new version is created when a draft is published. Even if no information has changed on the template. Once it enters a draft status and that draft is published it will move to the next version.

### 4.1.0.3 Favorites

You can select the favorite icon at the right-end of the card to mark the template as a favorite.

Created Jan 13,2023 11:21 AM Karen	Version 2 PUBLISHED	*
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### 4.1.0.4 Additional Options

When you hover over a template in card view, additional options appear for the form or task. For draft templates, a delete option appears.



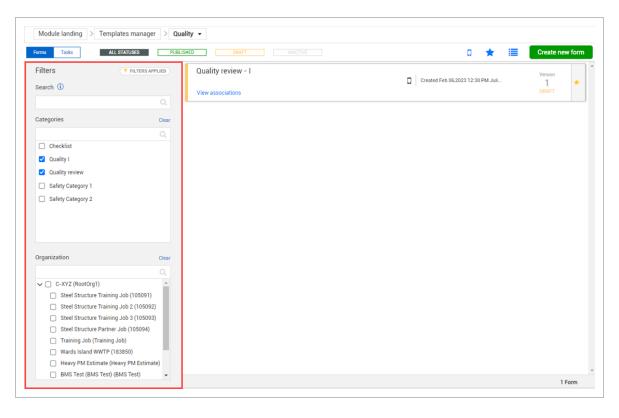
For published templates, options appear to either edit, copy, or deactivate the form or task.



# 4.1.1 Filters

The left panel of the Templates manager contains a search bar to look up templates by keyword, as well as filtering lists to narrow down your template list.

You can filter by categories and organization. Check the boxes in the categories to filter the view to show the templates associated with your selection.



NOTE The only items that appear as choices within the Filters side panel are the ones that have templates associated to them. In other words, you can have more categories or projects in the system, but they won't display in the Filters panel unless you have created a template that uses them.

TIP All the filters work together. If you are not seeing what you need, clear all the filters, and start with a new search. When filters are selected, a Filters Applied button will show.

# 4.1.2 Favorites

When you select the Favorites icon at the top right of the page, it filters your view to the templates you marked as favorites. This is a quick way to filter to the templates you use most often.



# 4.2 TEMPLATE CREATION

You can create new form and task templates in the Templates manager with the correct permissions.

On the Templates manager page, to create a new template, click **Create new form** when in Forms, or **Create new task** when in Tasks.

Module landing > Templates manager	> Quality -			
Forms Tasks ALL STATUSES	PUBLISHED DRAFT INACTIVE		*	Create new form

This launches a two-step process:

1. Creates a dialog box to begin the creation process.

After the first step is complete, it will lead to the second step.

2. The form or task builder.

# 4.2.1 Create a form or task dialog box

From the Create a form or Create a task dialog box, fill out basic information and settings for the form or task.

NOTE You only have the options to create templates for organizations, projects and categories for which you already have assignments.

Each new form or task requires these initial entries:

* Form name	* Organization association	
Description	C-XYZ (RootOrg1) + Future Children	
	Select all Deselect all	
* Category association		
Select categories ×	2	
Select categories you want to associate to your forms	<b></b>	
Available on mobile ?		
Event title (1)		
System default		
Event date ①		
System default		
Add expiration date ①	4	
	<u> </u>	
	╡ ┃	
Attach ITP header?		
	Select organizations you want to be able to perform this form	
	Cancel	

# **Overview - Create a Form Dialog Box**

	Title	Description
1	Form or task name and description	The name or title for the template. The description is optional and can also be added.
2	Category and Organization associations	Associating the form or task with categories and organizations makes it easy to find the form or task using the category and organization filters on the Templates manager page. Categories also determine who can use the forms or tasks. If you do not have assignments to that category, you will not be able to view the form or task to fill it out.
3	Availability on mobile devices	Enable the toggle to make it available on iOS mobile devices.

### **Overview - Create a Form Dialog Box (continued)**

	Title	Description
4	Event title and date settings	These settings indicate if the date and title will be filled out automatically with the system default or if they will be filled out with a custom title and date by the person filling out the form or task. An expiration date can also be added if the check box is selected.
5	Add expiration date	Select the check box to add a mandatory date of expiration question on the form.
6	Available through form button only?	Enable the toggle so that the form can only be accessed through a form button association on a template. The form will not show on the new events or tasks tile or be able to be scheduled as a stand-alone item.
7	Attach ITP header?	When the inspection and test plan process has been enabled for a module, you can enable this toggle to add the inspection and test plan header to the template allowing users to capture component related data on events.

Click the **Create** button after you fill out the initial form entries. This will create a new template form or task. You can continue building your form or task or return to it to complete later.

The following step-by-step walks you through creating a new template form.

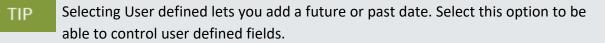
# 4.2 Step by Step 1 — Create a template form

1. From the Project home landing page, select **Completions** on the left navigation menu.

=	☆ Steel Structure Training Job   105091 / Project home	
	Add project image Minimum of 540px x 360px	
	Steel Structure Training Job   105091	<u>ô</u>
	Bid packages Contracts	
<ul> <li>(a)</li> <li>(b)</li> <li>(c)</li> <li>(c)</li></ul>	Change Compliance	
(F)	Completions	]
<b>B</b>	Report Explore Dashboards API documentation	
	t home	ļ
Projec Settin	et details	1
Workf Assigi		
Assig	ned vendors	

- 2. Select **Templates manager** on the left navigation menu.
- 3. In the Templates Manager page, select Create new form.
- In the Create a form dialog box, enter a form name in the Form name field.
   For this example, we will name it Manager quality review

- 5. For Category association, select an appropriate item from the drop-down menu.
- 6. Enable Available on mobile to indicate it will be available on mobile devices.
- 7. Change Event title and Event date to **User defined**.



8. In Organization association, select the check box for the highest organization level to make the template available for the entire association.

d by the Manager/Supervisor in charge.	y association
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a by the Manager/Supervisor in charge.	y association
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ile ? ⊘	on mobile ? 🥥
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	P header? (1)
	P header? (1)
n date ①     form button only? ①	efined

9. Click Create.

The Form builder opens with a section already created and Event title and Event date already populated on the form.

			BUILD PROPERTIES FORM FLOWS	HISTO	DRY		Ľ
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D Column	Section			··· SECTIN	ION		
estion types							
Attachment	Button	SECTION HEADER					
D Choice	Date - Time				* Event date		
Form Button	11 Form Flow	* Event title			02/07/2023		<b>**</b>
9 GPS	% Reference		(250 characters remaining	J)			
List	# Number						
9 People picker	Signature		Add fields to your form by dragging	types fror	m the left panel to the blank section above		

# 4.2 Step by Step 2 — Build a Template Task

1. Select **Templates manager** on the left navigation menu.

#### 2. Select **Tasks** in the top left.

Module landing	> Templates manager	> Quality -		
Forms Tasks	ALL STATUSES	PUBLISHED	DRAFT	INACTIVE

- 3. Click Create new task.
- 4. On the Create a new task dialog box, enter a task name. in the Task name field. Add a Description if needed.

For this example, we will name it **Finalize quality review**.

- 5. In Category association, select an appropriate item from the drop-down menu.
- 6. Enable Available on mobile to indicate it will be available on mobile devices.
- 7. Select System default in the Task title drop-down menu.

**NOTE** The Due date field provides a mandatory date question on the template where the user can provide a date that will become the due date.

- 8. Check the Add expiration date check box.
- 9. In Organization association, select the check box for the highest organization level to make the template available for the entire organization.
- 10. Select the + Future Children button.
- 11. Click Create.

The Task builder page opens in the appropriate Category, in a section already created and with Description, Responsible party, Due date, and Assign fields already populated on the tasks form Section.

12. In the Description field, change the Question text to Identify steps in the process.

Section	$\times$	BUILD
	≽	
Details	^	
* Label		
Finalize quality review process		
Associate task		Finalize quality review process
Enable copy section (i)		
Add supporting text		

- 13. Change the Assign button text to Assigned, keeping the status as Scheduled.
- 14. Click Save.
- 15. Click the **Publish** icon.



# 4.2.2 Activate, deactivate, and copy published tasks and forms

You can deactivate, reactivate, and copy tasks and forms after they are published.

The following step-by-steps walk you through the processes.

NOTE All step-by-steps are shown in Card view.

#### 4.2 Step by Step 3 — Deactivate a form or task

- 1. In the Templates manager page, hover your cursor over a published form.
- 2. Click the **Deactivate form** icon.

	Manager quality review To be completed by the Manager/Supervisor in charge. View associations			Created Feb 06,2023 01:07 PM Julio	v, 🗹 1 PUBLISHED	÷	j ☆
--	---	--	--	------------------------------------	------------------------	---	-----

The form will remain visible in the Templates manager, but its status will show as Inactive.



# 4.2 Step by Step 4 — Activate a form or task

- 1. In the Templates manager page, locate the inactive form.
- 2. Hover over the form, and then click the Activate form or Activate task icon when visible.



The form or task is shown in Draft mode in the Status column.

Manager quality review To be completed by the Manager/Supervisor in charge.	Created Feb 06,2023 02:12 PM Julio Salguero	Version	÷
View associations		DRAFT	

# 4.2 Step by Step 5 — Copy a published form or task

- 1. Hover over a published form and the Edit, Copy, and Deactivate form icons will show.
- 2. Select the Copy form or Copy task icon.

Manager quality review To be completed by the Manager/Supervisor in charge. View associations	Created Feb 06,2023 02:12 PM Julio	
---	------------------------------------	--

A new copy of the form opens.

3. You can now edit the copy of the form or task.

* Form name	Organization association	
Copy of-Manager quality review		
Description	C-XYZ (RootOrg1) (+ Future Children)	
To be completed by the Manager/Supervisor in charge.	Select all Deselect all	
Category association		
Select categories ×		
Select categories you want to associate to your forms		
Available on mobile ? 🥥		
Event title (1)		
User defined 🗸		
Event date ①		
User defined		
Add expiration date (1)		
Available through form button only? (i)		
Attach ITP header?		
	Select organizations you want to be able to perform this form	
	serect organizations you want to be able to perform this form	

- 4. The Copy button will be available after you fill out the required fields.
- 5. Click Copy.

The form builder opens to further edit the form.

6. Click **Save** after any edits are made, and then click the **Publish** icon to publish the form.

After the form is published, the Templates manager opens with your new copied form.

# 4.2.3 Form and task builder – Build tab

The form and task builder consist of the following tabs:

- Build
- Properties
- Form flows (forms only)
- History

This section focuses on the Build tab.

Module landing > Templa	tes manager > Form builder	Manager quality review	46
Layout types		BUILD PROFERTES FORM FLOWS HISTORY	Cancel 7 Save
🖸 Column 🔳 Se	ection	3	
Attachment	SECTION HEADER	9	
	te - Time * Event title	* Event date	
© Form Button II Fo	ference	253 duareters remaining	<b></b>
List # Nu People picker 2 Sig			
🗮 Text			4
	Any quality misses?		
			(250 characters remaining)
	· · · · · · · · · · · · · · · · · · ·	Add fields to your form by dragging types from the left panel to the blank section above	

### Overview - Form and task builder: Build tab

	Title	Description
1	Layout types	Drag and drop columns and sections onto your form or task.
2	Question types	Drag and drop attachments, buttons, dates, times, form buttons, form flows, GPS, integrated lists, references, lists, numbers, people, signatures, and text fields to your form or task.

# **Overview - Form and task builder: Build tab (continued)**

	Title	Description
3	Building area	The blank area you drag your sections and questions onto. It represents the template you are creating.
4	Edit	For existing templates, allows you to edit the existing template.
5	Publish	When finished building the template, click this button to make the template available for use.
6	Section	Lists each section on the form or task.
7	Cancel/Save	You can Cancel new changes and they will not be retained since your last save. Select Save to save the form or task in its current state. If not yet published, it is saved as a draft.

			BUILD	PROPERTIES FOR	M FLOWS HISTO	IRY	6	ď
ayout types	0						Cancel	7 Savi
🖽 Column	Section				3	γ		
uestion types	2							
Attachment	Button	SECTION HEADER						
Choice	Date - Time							
Form Button	11 Form Flow	* Event title				* Event date		<b>**</b>
				(250 chara	cters remaining)	10/28/2022		
♥ GPS	♣ Integrated list							
% Reference	I≣ List							
# Number	People picker			Add fields to your form	by dragging types from	m the left panel to the blank section abov	e	

The system does not automatically save your changes.

### 4.2.3.1 Layout Types

NOTE

Layout types let you divide your form or task into sections. Your form or task may cover different topics or areas and you want to organize the form or task accordingly.

When you first drag a section onto the form or task, it creates a section that extends the width of the form or task.

			BUILD PROPERTIES FORM FLOWS HISTORY	Ľ (
ayout types			✓ Cancel	Save
Column	Section		section	
Jestion types				
Attachment	Button	SECTION READER		
Choice	Date - Time	" Event title	* Event date	
Form Button	11 Form Flow	Secion Button Bu	<b></b>	
🕈 GPS	% Reference		(210 characters remaining)	
🔳 List	# Number			
O People picker	🕼 Signature	Review section I		
🗈 Text				4
		Any quality misses?		
			(250 characters rem	aining)

You can let users copy sections when filling out a form or task. This feature lets a user determine if duplicate sections are needed, instead of creating templates with duplicate sections in advance.

To allow a user to copy a section, click the section header, and then select the **Enable copy section** check box on the side panel.

You can change the text of the button. By default, it is named Copy section.

NOTE You can enable the copy section option only for sections without mandatory questions, form buttons, or associated tasks.

		Quality review - I	Draft
Module landing > Templates	s manager > Form builder	l de la constante de	
Section Details	× * ^	BULD PROPERTIES FORM FLOWS HISTORY All changes have been saved (I05:30 AM)	Cancel Save
Label  GUALITY HEADER  Associate task  Copy button text Copy button text Copy section		- SICTION	Se Copy section
Add supporting text      Add supporting text		Click to type your question Click to type your question (200 characters remaining) (200 characters remaining)	<u> </u>

# 4.2.3.2 Question Types

You can drag different question types into your form or task sections area.

Column	Section		SECTION
Attachment	Button	QUALITY HEADER	
Choice	Date - Time	· · · · · · · · · · · · · · · · · · ·	* Review date
Form Button	11 Form Flow	* Location of quality review	02/07/2023
♥ GPS	% Reference		(250 characters remaining)
🔳 List	# Number		O People picker
O People picker	G: Signature		Add fields to your form by dragging types from the left panel to the b
People picker     Text	us orginature		

The following is a brief overview of each question type and its key characteristics.

# **Overview – Question types**

Question Type	Image	Description
Attachment	Provide photos from the tour Select files or drag and drop	Enables an attachment to be added to the form or task, such as photos and documents. You can include additional text with this question if needed, such as instructions. Attachments can be marked as Mandatory. If integration with InEight Document is set up, attachments can be supporting documents from the Document application.
Button	Submit the completed tour	Adds a button to the form or task. You can set the button to close or change the status of the form or task. The button type can also be marked as single-use or multi-use. Buttons can be marked as Mandatory.

Question Type	Image	Description
Choice	Did you recognize any safety wins?  Yes No	Adds a question with two options. Settings include icons and predefined text answers (e.g., yes/no, pass/fail, and accept/reject) or you can customize your own. Choices can be marked as mandatory. You can mark answers as exceptions.
Date - Time	Click to type your question 04/30/2019 04:22 PM	Adds a field to fill out either date and time, just the date, or just the time. Dates can be marked as Mandatory.
Form Button	Click to type your button text	Adds a button that opens another template from within your form or task. It can be designated as single-use or multi-use. Form buttons can be marked as Mandatory. You can set this button to change the form or task's status when it is clicked. Status change does not affect the form or task that is opened by the button.
Form Flow Button	Submit to manager for approval	Adds a button that facilitates a specific step in a form flow. Form flow buttons can also go back to a previous step.

Question Type	Image	Description
GPS	Please provide location information	Lets users enter their location coordinates. Coordinates can be entered manually or by clicking the button.
Integrated list	Integrated list Select one	Adds the integrated list question type to your form that integrates with InEight Platform Master data list resources.
Reference	<b>%</b> Reference	Adds a supporting document attachment, event or task, or a hyperlink to other pertinent information. References cannot be marked as Mandatory.
List	Indicate the quality of this section  Very Good Good Fair Poor Very Poor	Adds a multiple-choice question to the form or task. Answer options include radio buttons, check boxes, drop-down lists, or multi-level drop-down lists. You can select answers from predefined lists or create your own. Lists can be marked as Mandatory. You can set default values for radio buttons, check boxes, and drop-down lists. Default values

are selected when a user opens a form or task and requires the

	Overview - Question types (c	/
Question Type	Image	Description
		user to manually select a different value. You can mark answers as exceptions. For more information about multilevel drop-down lists, see <u>Multilevel Drop-Down Lists</u> .
# Number	How many widgets were fastened?	Adds a question that requires a numerical answer to the form or task. The number can be formatted to be currency, decimal, \$, %, or phone number. Numbers can be marked as Mandatory.
People Picker	Who led the tour?	Adds a question that must be answered by selecting users from the drop-down list. People pickers can be marked as Mandatory. You can let end users select multiple users or none. You can also select whether end users can choose from only assigned users, who have a Compliance role, or all project-level operational resource, which includes users who do not have Compliance roles. You can also show users' employee IDs with their names and set up an email to send when a user is selected. Operational resources are managed in project home page > Assigned operational resources.

Question Type	Image	Description
Signature	Click to type your question	Adds a signature block to the form or task. Signatures can be marked as Mandatory.
Text	How many wins? (150 characters remaining)	Adds a question that requires text for the answer. The field can be short or long text, or you can use this question type to only be a label with no text field. Text can be marked as Mandatory.

### 4.2.3.3 Question settings

After a question is added, you can click the question in the section. A slide-out panel is shown on the left. You can type your question and define the settings related to the question. As you type the question, the question populates into your template.

* Question text	
Location of Quality Type your question	Location of Quality
Type Short O Long O Label only	(250 characters remaining)
Add supporting text     ①	

You can also click on the text within the question type on the form or task and it will enter the text on the slide-out panel.

Click to type your question	• •
0	
	(200 characters rem

All question settings include the option to make the question mandatory. This means the form or task cannot be submitted unless the question is answered.

TIP

You can mark responses to list and choice questions as exceptions. This feature is useful to indicate responses that are undesired or outside of normal business processes in some way and have those exceptions shown in reporting. To set a response as an exception in the form or task builder, select a response to a list or choice question. In the Details side panel, select the **Exception** check box. An Exception icon is added to the right of the response. This icon is visible only in the builder.

	×	BUILD PROPERTIES FORM FLOWS HISTORY	<b>1</b>
Details	× (		Cancel Save
Option text		Quality conditions	
Very Poor ype your option		Very Good     Please provide location inf	ormation
Default value Add supporting text		O Good	
		O Fair	
Exception (i)		O Poor Reset	
ogic	~	Very Poor	

### 4.2.3.4 Access

In the Access section you can manage access using the Manage access button. In the Manage access dialog box, you can control which users or roles can view or answer each individual question or entire sections when filling out the form or task. If they do not have access, they will not see the question on the form or task.

Access			
Manage access			
Reporting tags Select one			
Manage access	Ability to view	Ability to edit	
∧QUALITY HEADER	All roles	All roles	Location of Quality area.
Location of Quality area.	All roles	All roles	Ability to view
	All roles	All roles	All roles O Select roles
Quality conditions	All roles	All roles	
Please provide location information	All roles	All roles	
	All roles	All roles	
			Cancel Save

In Manage access, the ability to view and edit permissions are set separately from each other. You can manage access for all sections and questions in a template in the dialog box. It does not matter which section you choose when you click the **Manage access** button.

To control who can see data in reports for question responses, add reporting tags in the Access section. Users with the same reporting tags you set here can see this data when using reports.

### 4.2.3.5 Logic

The Logic setting lets you show or hide a question based on the response from another question on the form or task. For example, you are creating template for a Quality review, and have added the Choice question "Did you recognize any quality wins?"

Did you recognize any qu	ality wins?		
O Yes			
O No		 	

Following this question, you add a Text question for them to indicate the wins they had, but you only want this question to show up if they answered yes to the previous question.

Under the Logic section of the Text question's properties, you select Leading questions.

Text	$\times$		BUILD
	*		
Details	^ (	<ul> <li>All changes have been saved (07:27 AM)</li> </ul>	
* Question text			
Safety wins: explanation			
Type your question		* Did you recognize any safety wins?	
Туре		O Yes	
Short O Long O Label only			
Short Clong Claberonny C		∪ No	
+ Add supporting text (i)			
Mandatory			
		Safety wins: explanation	
Question display ID: 1	202		
Access	~		
Logic	^		
Defining conditional logic rules allows you to show o questions based on another questions response.	r hide		
<ul> <li>Leading questions</li> </ul>		Approval after safety walk	
<b>1</b>			
Integration tag (j)			
		×	

A Leading questions dialog box opens, where you set the Text question to show when the user answers Yes to the "Did you recognize any safety wins?" question.

Logic rules			×
Add logic set			
SHOW Quality wins: explanation when <u>ANY</u> of the following rules match			8
Did you recognize any quality wins?	IS	Yes   Select a response	
and produced from the second	<u>_</u>	الى مىسى بى مىسى بىمى مىلى بىرى بى	Add logic rule
		Cancel	Save

Depending on the form or task, you can show or hide the question depending on how the other question is answered.

TIP If there is a form flow button that can be reversed, you can apply separate leading logic sets to the reverse form flow button and the form flow button that advances to the next step.

#### 4.2.3.6 Classifications

TIP

You can use classifications to apply logic in your forms in List and Choice questions. For more information, see <u>Classifications</u>.

### 4.2.3.7 Copying, deleting and moving questions

When hovering over a question on your template, three options are shown:



- Copy icon creates a duplicate question in the same section.
- Delete icon removes the question from the template.
- Move icon lets you drag and drop the question to a different area on your template.

TIP

You can move questions by clicking and holding anywhere on the question and dragging it into place.

## 4.2.3.8 Using the form and task builder – Build tab

The following step-by-steps walk you through building out a template using the Task builder and Form builder.

### 4.2 Step by Step 6 — Build a Template Using the Task Builder

In the Task builder page, design the template with the following changes. In this example, we will use the Finalize quality review process template you created in the Build a Template Task Step by Step:

		Finalize quality review process	Draft
Module landing	> Templates manager >		
		BUILD PROPERTIES HISTORY	C ()
yout types			Cancel Save
Column	Section	E SECTION	
uestion types		Finalize quality review process	
Attachment	Button	Finalize quality review process	
C Choice	Date - Time	* Expiration date	
Form Button	♥ GPS	02/07/2023	<b>—</b>
% Reference	I List		
# Number	People picker		
🖉 Signature	🗮 Text	* Quality step	
			R (4000 characters remaining)
		* Responsible party	

- 1. Drag and drop the **People picker** question type underneath the Due date question.
- 2. Click the question and enter **Name of person conducting the next quality review** in the Question text field.
- 3. Select the Mandatory check box.
- 4. Close the People picker settings slide-out panel by clicking the X at the top right of the panel.
- 5. Drag and drop the **Date Time** question type to the right of the Name of person conducting the next quality review question, so it becomes a second column on the same row.
- 6. Make the title of the Date-Time field, Date of upcoming Safety Walk.
- 7. On the Details panel, change the **Type** to Date so the answer selection will only be for a date, not a time.
- 8. Close the settings slide-out panel.

- 9. Click the **Assigned** button at the bottom of the section and notice the Close task upon the button selection is selected and grayed out. Ensure that Change status to is Scheduled.
- 10. In the top right corner, click **Save** to save your new template task. A notification is shown indicating the time the change was saved.
- 11. To make the template available for use, click the **Publish** icon.

## 4.2 Step by Step 7 — Build a template using the form builder

In the Form builder page, design the template with the following changes. In this example we will use the Project Manager quality review created in the previous step by step. As needed, close the settings slide-out-panel.

			BUILD PROPERTIES FORM FLOWS HISTORY	Ľ
yout types				ancel Sav
🗇 Column	Section		SECTION	
estion types				
Attachment	Button	SECTION HEADER		
Choice	Date - Time		" Even date	
Form Button	11 Form Flow	* Event title	* swint care 02/07/2023	
9 GPS	% Reference		(250 characters remaining)	
List	# Number			
People picker	Signature		Add fields to your form by dragging types from the left panel to the blank section above	

1. Drag and drop the **People picker** question type into the existing section underneath the Location and Date questions.

Column	Section				SECTIO	N
uestion types		_				
Attachment	Button		.ITY HEADER			
Choice	Date - Time					* Review date
Form Button	II Form Flow		Location of quality review			02/07/2023
♥ GPS	% Reference			(250 characters rema	ining)	
i List	# Number			9	People picker	
O People picker	G Signature			Add fields to your form by dragg	ing types from	the left panel to the b
■ Text						

2. Click the question and enter "Who is leading the review?" in the Question text field.

- 3. Close the **People Picker** settings slide-out panel.
- 4. Drag and drop the **Date Time** question type to the right edge of the "Who is leading the review" question, so it becomes a second column on the same row.
- 5. Click the **Date Time** question and enter "**Time of review**" in the Question text field.
- 6. Under Type, select **Time** so the answer selection will only be for a time, not a date.

- 7. Close the **Date Time** settings slide-out panel.
- 8. Drag and drop the **Text** question below these two questions.
- 9. Click the question and enter **Explain the agenda for the review** in the Question text field.
- 10. Under Type, select **Long** so the user has more room (4000 characters) to enter a response when filling out the form.

Explain the agenda for the review Type your question Type O Short O Label only ①	Question text			
Type	Explain the a	genda for th	e review	
	ype your quest	tion		
		_		•

- 11. Close the **Text** settings slide-out panel.
- 12. Drag and drop the **Choice** question type into the existing section underneath the agenda question.
- 13. Click the question and enter "Was the review acceptable" in the Question text field.
- 14. Under Predefined lists, select **Yes/No** from the drop-down list.

Type your question		
Text     O Icons	•	
	•	
Option2	I	
	I	
	I	~
Predefined lists	1	~
Predefined lists Select one	1	~

- 15. Select the Mandatory check box.
- 16. Close the **Choice** settings slide-out panel.
- 17. Drag and drop the **Text** question type into the existing section underneath the Was the review acceptable question.
- 18. Click on the question and enter "Unacceptable review: explanation" in the Question text field.
- 19. Under Type, select **Long**. You want to only show this question if the user answered "No" to the previous question (Was the review acceptable?).
- 20. Expand the Logic section and select Leading questions.

Details ^
* Question text
Unacceptable review: explanation
Type your question
Type O Short O Label only
(+) Add supporting text (i)
Mandatory
Question display ID: 1292
Access ~
Logic
Defining conditional logic rules allows you to show or hide questions based on another questions response.
Integration tag (i)
Email

The Logic rules dialog box opens.

Logic rules		×
Add logic set		
1 Unacceptable review: explanation when <u>ANY</u> of the following rules match		0
Was the review acceptable? Select a question	IS No     Select a response	• •
والمتحاصية والمراجع والمحاصين والمراجع والمراجع والمحاصية	المحمد ووجارون المحار المحمد والروانية المحمد والمراجع والمحمد ومحر المحمد ومروح والم	<ul> <li>Add logic rule</li> </ul>
		Cancel Save

- 21. Switch the Show/Hide toggle to **Show**.
- 22. From the Select a question drop-down list, select Was the review acceptable?
- 23. From the Select a response drop-down list, select No.
- 24. Click **Save** to close the Logic rules dialog box.

25. Close the **Text** settings slide-out panel.

**NOTE** The "Unacceptable review: explanation" question now only shows if No is answered to "Was the review acceptable?" question.

- 26. Drag and drop the **Attachment** question type into the existing section underneath the existing questions.
- 27. Click the question and type Provide photos from the review in the Question text field.
- 28. Close the **Attachment** settings slide-out panel.
- 29. Drag and drop the **Button** question type into the existing section underneath the existing questions.
- 30. Click the question and enter "Submit the completed tour" in the Button text field.
- 31. Select the close the form upon the button selection box.
- 32. Under Change status to, select **Complete** from the drop-down list.

Details	^
* Button text	
Submit the completed review	
Close form upon the button selection	
Type <ul> <li>Single-use</li> <li>Multi-use</li> </ul>	
Change status to	
Complete	<b>~</b>
(+) Add supporting text (i)	
Mandatory	
Access	~
Logic	~
Email	~

33. Expand the Email section, and then select Add email.

34. From the dialog box, enter a Subject line, such as "**Review has been completed**". Enter **Roles** and/or **Users**, and then add content to the body of the email, such as "**Please review at your convenience**." Select the **@Reporter** if needed.

Button	Add email	$\times$
	ENGLISH DUTCH (NEDERLANDS) ESPAÑOL (AMÉRICA LATINA) FRANÇAIS (CANADA) NORSK (BOKMÁL)	
Details	Email draft 🛈	A
Access		
Logic	Users:	- L.
Email	Roles: Search	
Adding an email allows a configured email messi to be sent once a question response is triggered.		5 .
Add email	Subject: Review has been completed	
	🛛 @Reporter 🕕	
		- L
	Type content here	
		- 1
		_
	Close	Save

- 35. Click Save.
- 36. In the upper-right corner, click **Save** to save your new template form.

A dialog box is shown indicating the time the change was saved.

37. To make the template available for use, click the **Publish** icon.

### Multi-level drop-down lists

When you use the List question type, you can build branching questions using a multilevel drop-down list. For more information about multilevel drop-down lists, see <u>Multilevel Drop-Down Lists</u>.

### **Referenced Forms and Tasks**

When you create a task or an event from another task or event, you see the referenced item in both associated tasks or events, letting you see which events and tasks are associated. For more information, see Referenced Forms and Tasks.

## 4.3 CLASSIFICATIONS

You can use classifications to drive logic in your forms in List and Choice questions. Classifications provide the following benefits:

- You can apply logic at a section level so that when the classifications are selected on a form question in the template, only that section with the classification is shown.
- In the events and tasks lists, you can sort and filter by classification.

The entire section of questions is hidden in the event or task until the classification question or choice entry is selected so that you do not have to apply question level logic to each question in the section.

To create classifications, see <u>Classifications</u> in Module settings.

Two steps are required to use classifications in logic as shown in the Steps section below.

### 4.3.1 Steps

### Apply classification logic to a List or Choice question

#### 1.

In the Form builder, select an entry from the List or Choice question.

2.

In the Logic section in the left panel, click the Designate the following classifications field, and then select from the list of classifications. You can select more than one.

Settings > Templates manager > Form b	Non-Injury / Illness	Draft
>	BUILD PROPERTIES FORM FLOWS HISTORY	<b></b>
Vetails		Cancel     Save
Details		
* Option text		24
Secondary re-classification required	* Additional re-classification	
Type your option Default value	Secondary re-classification required	<u>()</u>
Add supporting text	O N/A	
Exception ()		
Logic  Defining conditional logic rules allows you to show or hide  questions based on another questions response.	*2nd Re-Classification approved by	ation Date 🕕 🛪
Designate this option to display sections with the following classifications	(250 characters remaining) 01/23/2024	<b>*</b>
Work Related × ×		
COVID-19		
Craft	24	24
Crane	* 2nd - Current Classification (From) * 2nd - New Classification (To)	
Crane	* 2nd - Current Classification (From) * 2nd - New Classification (To)	•
Crane	* 2nd - Current Classification (From) * 2nd - New Classification (To)	<b></b>

3.

Save the form.

### Apply classifications logic to a section

1.

After the classifications are assigned to the list or choice entry, select the section you want to be shown by clicking the section header text.

2.

On the left panel, in the Logic section, click Show this section for the following classifications field, and then select from the list of classifications. You can select more than one.

	builder	
Section ×	BUILD PROPERTIES FORM FLOWS HISTORY	<u>c</u> (
Details ^	1	ancel Save
Label	SECTION	
RE-OPENED INCIDENT INFORMATION Associate task	RE-OPENED INCIDENT INFORMATION	
Ceess	*Re-Classification approved by    *Re-classification Date	m
Logic		
Show this section for the following classifications ① Work Related × ×	* Current Classification (From) * New Classification (To)	
1crane		
2nd - Shot 2nd Observation Access/Egress	* Additional re-classification	
Act of Nature	O Secondary re-classification required ()	0

3. Save the form.

# 4.4 MULTILEVEL DROP-DOWN LISTS

Using the List question type, you can build branching questions using a multilevel drop-down list. When you select from a list of question options, your response branches off to another question. This functionality helps you manage list items better for greater control of data in the database.

A Multilevel drop-down list can be nested at several levels. For example, this type can be useful for showing a complicated organizational structure.

at	×		BUILD	PROPERTIES	FORM FLOWS	HISTORY		Ľ	(
tails	*						✓ Canc	xel 💽	Save
uestion text		SECTION HEADER				SECTION			
ick to type your question e your question									
se Aulti-level drop-down Manage list options	~	* Event title							
Add supporting text ①							(250 characters i	temaining)	
Mandatory									
Mandatory terminal response		Click to type your question							
Mandatory required level ()		- Select one -						di,	

In the List side panel, there are options to make features of a multilevel drop-down list mandatory:

- Mandatory The multilevel drop-down list question must be answered.
- Mandatory terminal response The user must go all the way to the last level of the list to make a selection, instead of just clicking through without expanding the list beyond the first level. If you select this option, you cannot select Mandatory required level.
- Mandatory required level You must select a mandatory required level from a drop-down list that determines how many levels down users must expand the list to make a selection, instead of clicking through without expanding the list beyond the first level. If you select this option, you cannot select Mandatory terminal response.

If you click **Manage list options**, the List options dialog box lets you organize list options manually or through Excel import.

In the dialog box, there are buttons to add and remove options, as well as move them up and down in the list, and in and out of other options to create a hierarchy.

Import	List	
Drag and drop the file here or browse	⊕ ↑ ↓ ↦ ← ⊗	
Browse	□ × List options	
File must not exceed 5 MB	Option1	A
L Download multi-level list starter template	Option2	
	Option3	
		v

**NOTE** There can be up to a maximum of 10,000 items in the complete list, including all items in the levels.

### 4.4 Step by Step 1 — Add a manual multilevel list question

- 1. In a form, drag the List question type onto the form or task.
- 2. In the **Question** text field, type in the question.
- 3. In the **Type** drop-down list, select the **Multi-level drop-down** option.
- 4. Click Manage list options to open the List options dialog box.

TIP When a check box to the left of an option is selected, the up and down arrows are shown to let you move that question response up or down in the listing

NOTE If available, indenting can be done with the **Move List in to** and **Move List Out of** arrows.

The **Add list** option and **Delete list** option icons are available for you to use.

- Select the check box of the second list item, and then select the Move list option in to icon.
   That option now falls below, or within, the item above it.
- 6. Unselect the second list item.
- 7. Select the third list item.
- 8. Indent the third list option using the **Move list option in to** icon.

Your List option dialog box should look like this example:

_ist	
•	↑ ↓ ↦ ← ⊗
	★ List options
	Yes 4
	Yes, absolutely
	Yes, but with concern

- 9. Using the Add List icon, add three more list options.
- 10. With the final two items, use the **Move list option in to** icon to indent them.

Your List option dialog box should look like this example:

<ul> <li>&gt; I</li> <li>&gt; Y</li> </ul>	List options	
• Y	•	
	es	*
	Yes, absolutely	
	Yes, but with concern	
□ ~ N	0	
	No, though I have a question	
	No, no questions asked	

11. Click Save, and then click Publish.

Now, when the form or task is opened, the first question can be answered, which then leads to branched options for the second question.

>
>
>
ncel Save

To create a multilevel drop-down question using the template from Excel, first download the starter template. Click the List in the Section > Manage list options > **Download multi-level list starter template**. The template has one Example sheet with instructions on how to use it. You can then fill out the Import sheet with list options for as many levels as necessary.

This step-by-step walks you through adding items through the multilevel list starter template.

### 4.4 Step by Step 2 — Add a multilevel list using the list starter template

- 1. In a form, drag the **List** question type onto the form or task.
- 2. In the Question text field, type in a question.
- 3. In the **Type** drop-down list, select the **Multi-level drop-down** option.
- 4. Click Manage list options.
- 5. Click Download multi-level list starter template.

The Excel file downloads to your configured downloads folder. When you open the file, you will see the Example and Import tab. The latter of which you use to create your multilevel branching template.

Select to Enable editing if needed.

- 6. Select the **Import** tab.
- 7. Create a Level 1 item in Column A, PMH1 in the example.
- 8. In Column B, create the Level 2 item, Segment 1 in the example.
- 9. In Column C, create the Level 3 items, or decision points, Roadway, Structure, and Walls in the example.

This means that when a user selects a Column B segment, they will have three additional choices from Column C in the next drop-down list

10. In column D, add Level 4 options.

In the example shown, there are only Level 5 options in Column E for Hwy 1, Eastbound and Hwy 1, Westbound.

	A	В	С	D	E
1	Level 1	Level 2	Level 3	Level 4	Level 5
2	PMH1				
3	PMH1	Segment 1			
4	PMH1	Segment 1	Roadway		
5	PMH1	Segment 1	Roadway	Hwy 1, Eastbound	
6	PMH1	Segment 1	Roadway	Hwy 1, Eastbound	Hwy 1 EB to Phoenix exit
7	PMH1	Segment 1	Roadway	Hwy 1, Eastbound	Hwy 1 EB to Central Ave
8	PMH1	Segment 1	Roadway	Hwy 1, Westbound	
9	PMH1	Segment 1	Roadway	Hwy 1, Westbound	Hwy 1 WB to 101
10	PMH1	Segment 1	Roadway	Hwy 1, Westbound	Hwy 1 WB to Scottsdale Rd
11	PMH1	Segment 1	Structure Segment 1		
12	PMH1	Segment 1	Structure Segment 1	1st Ave	
13	PMH1	Segment 1	Structure Segment 1	TUC #2 overpass	
14	PMH1	Segment 1	Structure Segment 1	101 WB overpass	
15	PMH1	Segment 1	Walls Segment 1		
16	PMH1	Segment 1	Walls Segment 1	TUC A0	
17	PMH1	Segment 1	Walls Segment 1	TUC A1	

- 11. Save the Excel file.
- 12. Go to Completions, and then click **Browse**.
- 13. Navigate to the folder where your Excel file is located.
- 14. Select the file, and then click **Open**.
- 15. The Excel data populates. Click **Save**.

Import	List	
Drag and drop the file here or browse		
Browse	□ × List options	
File must not exceed 5 MB	□ ~ PMH1	~
Download multi-level list starter template	Segment 1	
	Roadway	
	Hwy 1, Eastbound	
	Hwy 1 EB to Phoenix exit	•

There are no limits on how many levels can be added. Having many levels down might not be the best when using the list.

There is a maximum of 10,000 items in the complete list including all items in the levels.

TIP

TIP There is a maximum of 200 characters, including spaces, for each item. Items that exceed 200 characters are truncated.

In a form, a multilevel list option looks similar in both the web or mobile versions:

						••••• Verizon 🗢 1:40	PM
	Section 1					Cancel Summit Mount	ain Punchlist
is C	* Item title		Description			* Priority	-
-1						- Select one -	
a		(150 characters ren	saining)	(150 c	characters remaining)	Type of work	
e	* Date identified	* Type	System	* Priority		- Select one -	
st v1	<b>C</b>	Worklist     Punchlist	- Select one -	Select one -	•	* Responsible person	
st		O Punchilist				- Select one -	•
	Type of work	* Responsible person	* Area/Level			* Area/Level	
	- Select one -	- Select one -	Select one -		dh.		ф
	* Due date	Estimated manhours	Attachments			* Due date	0
	<b></b> ©			(+)		January 22, 2018	-
te la				Select files or drag and drop		Estimated manhours	
		l≥					

		••••• Verizon 🌩	1:40 PM	100% 8
	×	Cancel	Area/Level	Done
Area/Level			nt 2 / Roadway / Hwy 1 EB	Seg 2 / Brunett
		< Back	Hwy 1 EB Seg 2	
PCM1 / Segment 2 / Roadway / Hwy 1 EB Seg 2 / Brunette Ave SB to Hwy 1 EB On Ramp		Able Auctions		
< BACK Hwy 1 EB Seg 2		Brunette Ave SI	B to Hwy 1 EB On Ramp	
		✓ Brunette NB to	Hwy 1 EB On Ramp	
Able Auctions		WB to SB Brune	ette Ave Off Ramp	
Brunette Ave SB to Hwy 1 EB On Ramp				
Brunette NB to Hwy 1 EB On Ramp	and the			
O WB to SB Brunette Ave Off Ramp				
	Cancel Save			
Select fil	es or drag and drop			

Section 1				Cancel Summit Mountain Punchlist
* Item title		Description		
				- Select one -
	(150 characters remaining)		(150 characters remaining)	Type of work
* Date identified	* Type	System * Priority		- Select one -
C	Worklist	- Select one - • Select one -	•	* Responsible person
Type of work	* Responsible person	* Area/Level		- Select one -  * Area/Level
- Select one -	Select one -	WB to SB Brunette Ave Off Ramp	ф	Brunette NB to Hwy TEB On Ramp
* Due date	Estimated manhours	Attachments		* Due date
C	30	(+)		January 22, 2018
		Select files or drag and drop		Estimated manhours

# 4.5 REFERENCED FORMS AND TASKS

When you create a task or an event from another task or event, you see the referenced item in both associated tasks or events, letting you see which events and tasks are associated. When you create a new event, you can select the **Associate Task** check box.

				Manager qu	ality review	
Module landing > Templates m	nanager > Fo	m builder				
Section	$\times$		BUILD	PROPERTIES	FORM FLOWS	
Details	*	O All changes have been saved (10:42 AM)		-		
* Label						
QUALITY HEADER						
Associate task		QUALITY HEADER				
Enable copy section ()						
Add supporting text     ①		* Location of quality review				
Access	~			(23	0 characters remaining)	
Logic	~					

When you select Associate task, the Task Button is shown. In this example it is in the Section Header. The Details panel also updates and shows the following:

- The Task button text field shows up so you can modify the name of the button.
- The Type lets you choose from Single-Use or Multi-use.

 The Template to open upon button selection drop-down list requires you to select a Task Template.

		Manager quality review	Draft
Module landing > Templates manager	> Fo	rm builder	
Section	$\times$	BUILD PROPERTIES FORM FLOWS HISTORY	6
Details	*	All changes have been saved (10:42 AM)     Cancel	Save
Details	^		
* Label		SECTION	
QUALITY HEADER		QUALITY HEADER	
Associate task			sk button
*Task button text	_	,	
Task button			
Туре		* Location of quality review * Review date	_
Single-use     O Multi-use		(250 characters remaining) 02/07/2023	<b> </b>
*Template to open upon button selection			
*Associated categories Select one		Who is leading the review? Time of review 10.42 AM	0
Select one	<u> </u>	10:42 AM	U
Enable copy section (i)			
Add supporting text (i)			
Access	~	Explain the agenda for the review	
Logic	~		

Select Save after any changes are made.

You can also start a task from the Section area of an event, not just a question, which is useful for reporting purposes.

# 4.6 INTEGRATED LIST

### 4.6.1 Summary

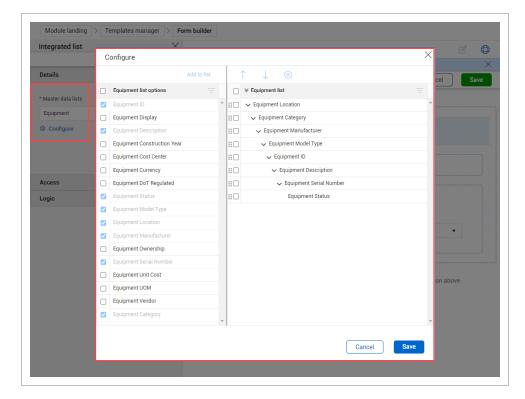
TIP

When building your template form, the Integrated list question lets you build lists that integrate with InEight Platform master data library. The Integrated list question lets you add resource column fields in a series of cascading questions. You can use cascading questions to narrow down the selection of a resource. For example, you can add Vendor Region, Vendor Country, and Vendor City column fields of cascading questions to narrow the selection down to a city. The list pulls data from Platform's resources in Main menu > Master data library.

NOTE Currently, the Integrated list feature is only available for Operational resources equipment and Vendors master data.

After you add the integrated list question, select the question, and then click the **Configure** button to choose from your selected resource's column headings to add to the list.

The series of selected column headings fields show as a hierarchy and can be modified in any order.



After saving your integrated list configuration, each column heading option in the hierarchy shows as a series of cascading questions in your template form. You can add multiple series of lists to your integrated list.

		BUILD P	ROPERTIES FORM FLOWS HI	ISTORY	C 4
Layout types			① You have not saved your templat	te for 10 minutes. Please consider saving.	, ,
Column	Section				Cancel Save
Question types				ECTION	
Attachment	Button	SECTION HEADER			
Choice	Date - Time				
Form Button	11 Form Flow		······	· · · · · · · · · · · · · · · · · · ·	
♥ GPS	Integrated list				
% Reference	III List	Equipment Location	Equipment Category Select one •	Equipment Manufacturer	Equipment Model Type Select one
# Number	People picker	Equipment 1-1	Equipment 1-2	Equipment 1-3	Equipment 1-4
🕼 Signature	🖻 Text				
		Equipment ID	Equipment Description	Equipment Serial Number	Equipment Status
		Select one 🔻	Select one 💌	Select one 💌	Select one 🔻
		Equipment 1-5	Equipment 1-6	Equipment 1-7	Equipment 1-8

### 4.6.2 Steps

To add and configure an integrated list:

- 1. In a new or unpublished form, drag the **Integrated list** question into the form.
- 2. Click the Integrated list question.
- 3. In the left slide-out panel, select from the Master data lists drop-down resources.
- 4. Click the **Configure** icon, and then select the fields to add to the list.
- 5. Click Add to list.

Each field becomes a drop-down question in the form or task template and shows in a cascading manner. You can use the **Move up** and **Move down** arrows to modify the columns in a logical order according to your business process.

6. Click Save.

You can reorder, add, and delete from your list by clicking on any of the list column attributes, and then clicking **Configure**.

## 4.6.3 Related links

InEight Platform Master Data Libraries

# 4.7 TEMPLATE PROPERTIES

On the correct Form builder or Task builder page, the Properties tab contains the basic information entered when the form was created (on the Create a form or Create a task dialog box). This includes a header section containing the following:

- Form or Task ID (this is automatically assigned when the form or task is created)
- Version
- Status
- Module
- Creation date
- · Creation time
- · Created by

,			BUILD	PROPERTIES FORM	FLOWS HISTORY		Canaal
•							Cancel
Dropor	tion						
Proper	lies						
Form ID	Version	Status	Module	Creation date	Creation time	Created by	
FOITIND	Version	Status	Wodule	Creation date	Creation time	Created by	
126	3	Draft	Quality	02/07/2023	08:45 AM	Julio	

The Properties tab also includes the following fields, which you can edit at any time with the right permissions:

- Form or Task name
- Description
- Category association with + Future Children functionality
- Organization association
- Options
- Template language settings
- Export and Import

	BUILD	PROPERTIES	FORM FLOWS HISTORY	0
s 🔻				Cancel
* Form name			* Organization association	
Manager quality review				Q
			✓ ✓ C-XYZ (RootOrg1) (+ Future Children)	
Description			Select all Deselect all	
To be completed by the Manage	er/Supervisor in charge.		<ul> <li>Steel Structure Training Job (105091)</li> </ul>	
			Steel Structure Training Job 2 (105092)	
<ul> <li>Category association</li> </ul>			Steel Structure Training Job 3 (105093)  Steel Structure Partner Job (105094)	
	Quality review	××	Steel Structure Partner Job (105094) Training Job (Training Job)	
			Wards Island WWTP (183850)	
Select categories you want to associate	e to this form		<ul> <li>Heavy PM Estimate (Heavy PM Estimate)</li> </ul>	
			<ul> <li>BMS Test (BMS Test) (BMS Test)</li> </ul>	
			C-XYZ-ND (EO-ID) (+ Future Children)	
			Select all Deselect all Select organizations you want to be able to perform this form	•
Options				
	ent title (i) Even	nt date (i)		
Available on mobile ? Ev		nt date (j)	_ Add expiration date (i) Add renewal date (	D
Available on mobile ? Ev		nt date (i) ser defined	✓ Add expiration date ① Add renewal date ②	1
Available on mobile ? Ev	User defined  Us		▼ ✓ Add expiration date ① Add renewal date ①	0
Available on mobile ? EV	User defined  Us			0
Available on mobile ? Ev	User defined  Us		Add expiration date      Add renewal date	1)
Available on mobile ? EV	User defined   Use only? (i) Integration tag (i)			Ū
Available on mobile ? Ev Available through form button of Enable print functionality ①	User defined  Use only?  Integration tag  Attach ITP header			Ð
Available on mobile ? EV	User defined   Use only? (i) Integration tag (i)			D
Available on mobile ? Ev Available through form button of Enable print functionality ①	User defined  Use only?  Integration tag  Attach ITP header			Ð
Available on mobile ? Ev Available through form button of Control of the second seco	User defined  Use only?  Integration tag  Attach ITP header			Ð

### 4.7.0.1 Task and form builder options

In Form builder, both the Event title and date fields can be System defined or User defined. Both can be used to personalize your form.

vailable on mobile ?	Event title 🛈	Event date	0	
${\boldsymbol{ \oslash}}$	User defined	▼ User define	ed 🗸 Add expiration date (i)	
Available through form b	hutton only?	ntegration tag 🛈		
valiable through form t	Jutton only?			
Θ			Add template integration	
nable print functionality	Attach ITP head			

### Form builder: Event options

	System Default	User Defined
Event title	The event title defaults to the "name of the form event ID" and is presented on the event list as the event title	This provides a mandatory text question on the form where the user can provide a title presented on the events list.
Event date	The event date defaults to the date the form was started.	This provides a mandatory date question on the form where the user can provide a date presented on the events list.

In Task builder, both Task title and Due date can be used strategically to personalize your task.

	System Default	User Defined
Task title	The task title defaults to the "name of the task_task ID" and is presented on the task list as the task title.	This provides a mandatory text question on the template where the user can provide a title that is presented on the task list as the task title.
Due date	Not applicable	This provides a mandatory date question on the template where the user can provide a date that is presented on the task list as the due date.

### Task builder: Task and due date options

### 4.7.0.2 Expiration date

When the Add expiration date check box is selected, the Add renewal date option is shown.

Selecting Add expiration date makes this a mandatory field on the form. If selected, the Add renewal date also provides a mandatory question on the form.

### Form builder: Date options

	Definition
Add expiration date	This selection provides a mandatory date of expiration question on the form. This question and the value show on the event list as well after the form has been filled out.
Add renewal date	This selection provides a mandatory date of renewal

### Form builder: Date options (continued)

Definition
question on the form. This question and the value show on the event list as well after the form has been filled out.

NOTE After the form is published, only certain fields in the properties may be changed without putting the form into a draft status.

### 4.7.0.3 Template availability

To hide a template from being started as a stand-alone form or task, turn on the **Available through form button only?** toggle. When hidden, these templates can be used only through association with the Form Button.

### 4.7.0.4 Integration tag

You can add an integration tag to a template to include the form in reporting. Specific questions in that form with the same integration tag are then reported on. This applies only to standard reports.

### 4.7.0.5 Template integration

Template integration is helpful when you need to use a task in InEight Change. For more information about template integration, see <u>Template Integration</u>.

### 4.7.0.6 Enable print functionality

You can enable a template to be printable from the Events or Tasks page, and from the event or task detail page.

# NOTE When you enable the print feature, it will not contain any permissions associated with the event or task. If you have access to the work item and can print it, you can print all questions and answers in the work item.

To enable a template to be printable, turn on **Enable print functionality**, and then select which report to run. Currently, only the Completions General Forms Integration is available.

### 4.7.0.7 Template language settings

Template language settings let you import translations for each question and section in a Microsoft Excel spreadsheet. For more information about how to import translations, see <u>Template Translation</u>.

### 4.7.0.8 Organization association

On the Properties tab, selecting a project is as simple as selecting the check box next to the project name.

In any parent level, you can click the Select all or Deselect all option, if needed.

Projects not available to you are grayed out.

Clicking the **+ Future Children** button in a parent organization allows you to associate templates and users with that parent organization and all its children with just one click. The association can also persist through any new children (projects) that get associated after the original selection, so you do not have to manually add each project.

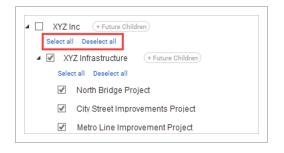
TIP The **+ Future Children** changes color after it is selected.

### Select only the parent organization

When you select a parent organization, only that organization is selected. If the parent organization has child suborganizations or projects, those children are not automatically selected when you select their parent. This change gives you the flexibility to fine-tune which children to associate.

### Select or deselect all child organizations or projects

The **Select all** and **Deselect all** buttons are available for each parent organization with children. When you use these buttons, only the children are selected or deselected. The parent organization is not affected.



# NOTE When you select all, only existing children are selected. New projects are not automatically selected unless you use the + Future Children option. See the next section for more information.

### Persistently associate future children

The + Future Children button is available for each parent organization. If you enable this option, all new children of that parent are automatically selected. This option prevents having to constantly select each new project when you create one.

▲ 🕢 XYZ Building (+ Future Children)
Select all Deselect all
Central Hospital Project
Pine Street Office Project

**NOTE** The + Future Children option works independently of the Select all option. For example, if you want to select all future new projects, but not necessarily all existing ones, you could select a few existing projects, or none, and still enable + Future Children.

### 4.7.0.9 Manage custom IDs

Custom IDs let you sort and filter forms and tasks for better management of your events and tasks. You can also assign multiple custom IDs to one template and add or remove properties for existing custom IDs.

The following step by step shows you how to create a custom ID.

### 4.7 Step by Step 1 – Add a custom ID

1. Click Actions > Manage custom IDs in the top-left of the Form or Task builder's Properties tab.

Module landing > Templates man	ager > Form builder		
		BUILD	PROPERTIES
Actions 🔻			
Manage custom IDs ျက			
Manage template integrations	Properties		

The Manage custom IDs dialog box opens.

2. Click the **Add** icon to open the Add custom ID wizard.

3. Enter values in the Prefix, Starting number, and Suffix fields, and then click **Next**.

Create custom ID	2 Select organizations/projects	3 Select categories	Cancel Ne
Custom ID: - rgs/Projects: - Categories: -			
Croata	unitern ID		
Create	custom ID		
	e custom ID, please utilize the following field	c	
	e custom ID, please utilize the following field	: ffx Custom ID	
* To create a uniqu	e custom ID, please utilize the following field		

NOTE You must fill out at least one of the fields, but you are not required to fill out all of them.

NOTE Each of the fields can be up to 10 characters long. Prefix and Suffix are alphanumeric, and Starting number is only numeric.

4. Select the organizations and projects you want the custom ID associated with.

ate custom ID 2 Select organizations/projects 3 Select categories	Cancel Back
ustem ID: A 4001-JS Projects: C-V/Z (RootOrg1) teopries -	
Select organizations/projects	
· Please select the organizations/projects you would like to associate to the custom ID.	Apply this custom ID to each selected project (1)
Search organizations/projects	
C-XYZ (RootOrg1)	
Select all Deselect all Steel Structure Training Job (105091)	
Steel Structure Training Job 2 (105092)	
Steel Structure Training Job 3 (105093)	
Steel Structure Partner Job (105094)	
Training Job (Training Job)	
Wards Island WWTP (183850)	
Heavy PM Estimate (Heavy PM Estimate)	
BMS Test (BMS Test) (BMS Test)	

- 5. You can select Apply this custom ID to each selected project if needed.
  - NOTE When this option is selected, the custom ID number increases independently for each project. For example, if the custom ID starts at CUS-200-ID and this option is selected, when you perform the form or task twice in Org/Project 1, the ID increases from CUS-200-ID to CUS-201-ID. If you then perform the same form or task twice in Org/Project 2, the ID also increases from CUS-200-ID to CUS-201-ID independently from the ID numbering in Org/Project 1.
- 6. Click Next.
- 7. Select the categories you want the custom ID associated with.

ate custom ID — (2) Select organizations/projects — 3 Select categories	Cancel Back	Save & add new Save
ustom ID: A-0001-JS		
//Projects: C-XVZ (RootOrg1) lategories: -		
Select categories		
Please select the categories you would like to associate to the custom ID.		
Search categories		
Safety Category 2		

8. Click Save & close.

TIP You can also click Save & add new to immediately add another custom ID.

## 4.8 TEMPLATE INTEGRATION

### VIDEO | Template Integration

Template integration lets you make tasks available for use with InEight Change. For example, you might need to complete a task associated with a change issue.

**NOTE** Template integration works only with Change and only for tasks.

The functionality to add an integration is in the template Properties tab. To add a template integration to a template, you must have a level 3 admin role, and the template must have already been published. If you do not have a level 3 admin role, you can see the Add template integration button, but you cannot use it.

The following step-by-step shows you how to add an integration to a template.

### 4.8 Step by Step 1 — Add a template integration

On the Properties tab of the task builder, under Options, click Add template integration.
 The Add template integration dialog box opens.

Available on mobile ?	Event title 🕕	Event date (1)		
$\odot$	User defined	<ul> <li>User defined</li> </ul>	▼ Add expiration date (i)	
	Integratio	on tag (i)		
vailable through form b	outton only? U integratio			
Θ			Add template integration	
nable print functionalit	y (i) Attach ITP header (i)			

- 2. Fill out the following required fields:
  - Integration title
  - Category association One category associated with this integration. For more information about categories, see <u>Categories</u>.
  - Associated products Text-only field that indicates which InEight application this integration is for.
  - Organization association Organizations and projects that this integration is associated with. For more information about organization association, see <u>Template Properties</u> -<u>Organization Association</u>.
  - You can also fill out the Description field.

odule: Quality • Created by: Julio 02/07/2023 08:45 AM		
Integration title	Organization association	Show selected items only
	Search	
escription	C-XYZ (RootOrg1) (+ Future Children)	
compton	Select all Deselect all	
	Steel Structure Training Job (105091)	
Category association	Steel Structure Training Job 2 (105092)	
	Steel Structure Training Job 3 (105093)	
Select one	<ul> <li>Steel Structure Partner Job (105094)</li> </ul>	
Associated products	Training Job (Training Job)	
	Wards Island WWTP (183850)	
	<ul> <li>Heavy PM Estimate (Heavy PM Estimate)</li> </ul>	
	BMS Test (BMS Test) (BMS Test)	
	C-XYZ-ND (EO-ID) (+ Future Children	
	Select all Deselect all	
	C-XYZ-SD (EO-ID-1) + Future Children	
	Select all Deselect all	
	C-XYZ-OSD (EO-ID2) (+ Future Children	
	Select all Deselect all	

3. Click Save.

## 4.8.1 Manage template integrations

There are several ways to view existing integrations for a single template and for all your organization's templates

After at least one integration has been added for a template, the number of integrations is shown to the right of the Add template integration button. To view the current template's integrations, click the number next to the button. The Template integrations dialog box shows all integrations for the current template.

	В	UILD PROPERTIE	ES FORM FLOWS HISTORY	<b></b>
ctions 💌				Cancel
	Description		Select all Deselect all	
			Steel Structure Training Job (105091)	
	To be completed by the Manager/Supervisor in charge.		Steel Structure Training Job 2 (105092)	
			Steel Structure Training Job 3 (105093)	
	* Category association		Steel Structure Partner Job (105094)	
	Quality review	××	Training Job (Training Job)	
			Wards Island WWTP (183850)	
	Select categories you want to associate to this form		<ul> <li>Heavy PM Estimate (Heavy PM Estimate)</li> </ul>	
			<ul> <li>BMS Test (BMS Test) (BMS Test)</li> </ul>	
			C-XYZ-ND (EO-ID) (+ Future Children)	
			Select all Deselect all	-
				•
	Options           Available on mobile ?         Event title ①	Event date ①	Select all Deselect all	-
	Available on mobile ? Event title ①		Select all Deselect all	·
	Available on mobile ? Event title ①	Event date ① User defined	Select all Deselect all Select organizations you want to be able to perform this form	•
	Available on mobile ? Event title ① ③ User defined	User defined	Select all Deselect all Select organizations you want to be able to perform this form	•
	Available on mobile ? Event title ① O User defined  Available through form button only? ① Integration tag	User defined	Select all Deselect all Select organizations you want to be able to perform this form    Add expiration date   Add renewal date	•
	Available on mobile ? Event title ① ③ User defined	User defined	Select all Deselect all Select organizations you want to be able to perform this form	•
	Available on mobile ? Event title ① Output Output	User defined	Select all Deselect all Select organizations you want to be able to perform this form    Add expiration date   Add renewal date	•
	Available on mobile ? Event title ① O User defined  Available through form button only? ① Integration tag	User defined	Select all Deselect all Select organizations you want to be able to perform this form    Add expiration date   Add renewal date	•
	Available on mobile ?       Event title ①         Image: Constraint of the second s	User defined	Select all Deselect all Select organizations you want to be able to perform this form    Add expiration date   Add renewal date	•

To view or edit all existing integrations for your organization, click the **Actions** button in the upper left of the Properties tab, and then select **Manage template integrations** in the drop-down menu.

Module landing > Templates manager > Form builder			
	BUILD	PROPERTIES	
Actions 🔻			
Manage custom IDs			ř
Manage template integrations			
* Category association			
Quality review		××	
Select categories you want to associate to this form			

The Template integrations page opens.

Mo	dule management Template integrati	ions			
	$\otimes$				
)	Integration title	Template name	Module	Category	Associated products
	Change Task Integration Templ	Task for Mobile	Change	Task	Change
- 0	Change Task Integration Templ	Change Issue Creation KL NO	Change	Task	Change
	Quality task for Change	Manager quality review	Quality	Quality review	Change

You can manage template integrations by editing or deleting them.

You can also access the Template integrations page from the Product Settings page. For more information about product settings, see Product Settings.

# 4.9 TEMPLATE TRANSLATION

Templates can be translated into multiple languages with a Microsoft Excel template. When a template has translations applied, users can change the language in their user profile and view events and tasks in their selected language. Translation requires language setup in Module summary settings and Excel template export and import in Template properties. The export functionality gives you a template spreadsheet file with all questions and sections to fill out and import back into the form or task template.

## 4.9.1 Module summary setup

To make a language available in a module, go to Main menu > Your organization > **Completions**. Click **Settings** on the left navigation menu, and then select the **Module Settings** tab. Click the **Quality** tile, and then **Language settings** under Configurations. See <u>Module Summary</u> for more information.

## 4.9.2 Template language settings

You can export and import the translations Excel file in the template Properties tab under Template language settings.

	BUILD	PROPERTIES	FORM FLOWS HISTORY	(
•		-		Cancel
To be completed by the Ma	nager/Supervisor in charge.		Steel Structure Training Job (105091)	
			Steel Structure Training Job 2 (105092)	
<ul> <li>Category association</li> </ul>			Steel Structure Training Job 3 (105093)	
	Quality review	××	Steel Structure Partner Job (105094)  Training Job (Training Job)	
	cluaity review	0.0	Training Job (Training Job) Wards Island WWTP (183850)	
Calant antennia ununat la ana	wind to this form		Heavy PM Estimate (Heavy PM Estimate)	
Select categories you want to asso	clate to this form		BMS Test (BMS Test) (BMS Test)	
			C-XYZ-ND (EO-ID) (+ Future Children)	
			Select all Deselect all	-
Options Available on mobile ?	User defined <b>v</b>	nt date ①	Add expiration date ()	
Available on mobile ?	User defined   U U User defined U U U U U U U U U U U U U U U U U U U	lser defined	Add expiration date ()  Add template integration	
Available on mobile ?	User defined   U U User defined U U U U U U U U U U U U U U U U U U U	lser defined		
Available on mobile ?	User defined   U U User defined U U U U U U U U U U U U U U U U U U U	lser defined		
Available on mobile ?	User defined  U User defined U U User defined U U U U U U U U U U U U U U U U U U U	lser defined		
Available on mobile ?	User defined  U User defined U U ton only?  Attach ITP header	lser defined		
Available on mobile ?	User defined  U User defined U U User defined U U U U U U U U U U U U U U U U U U U	lser defined		

NOTE Th

The template must be published to enable Template language settings.

The following step by step shows you how to import translations.

### 4.9 Step by Step 1 — Import template translations

1. In the Template language settings, select a language from the drop-down menu.

NOTE If you do not see the language you want, go to Settings >Completions> Module > Module summary, and then select the language in the Module language settings section.

2. Click Export.

A Microsoft Excel spreadsheet file is downloaded with all the template questions and sections in rows.

NOTE After you export the Excel template, do not edit the published template until after you import translations. If the template is edited, you must publish the new version, and then export the Excel file again. If you try to import the old version of the Excel file, it results in an error.

3. Under the column for your chosen language, enter translations for each question and section.

NOTE See the section below for more detailed information about translation template columns.

- 4. Save the file.
- 5. In the Template language settings, click **Import**, and then select the saved spreadsheet file.

**NOTE** If you make any further changes to the template, you must publish the template again, and then repeat the steps above.

## 4.9.3 Translation Excel template

The translation Excel file template is created from the current published version of the form or task template.

4	D	E	F	G	н	I
1 1	Туре	Info		If questions are in columns you will see them shown here in a straight line going from a Z pattern from the form		
2		Language Code	EN	DT	ES	
3		Section	SECTION HEADER			
4		Question	Expiration date			
5		Question supporting text	Selecting provides a mandatory date of expiration field.			
6		Section	SECTION HEADER			
7		Question	Event title			
8		Question	Event date			
9 F	People	Question	Review section I			
10 T	Text Short	Question	Any quality misses?			
11 F	People	Question	Who will conduct the next review?			
12 [	Date	Question	Next review date			
13 T	Text Long	Question	General comments			
14 S	Signature	Question	Approved by			
15 E	Button	Question	Submit review			
16		Template Name	Manager quality review (copy)			
			To be completed by the Manager/Supervisor			
17		Template Description	in charge.			
18						
18 19						
	> Tem	plate (+)			: •	

The Excel file consists of the following columns:

Column	Title	Description
A (hidden)	Object ID	Do not edit this column. These are specific IDs for form or task items. The numbers change between published versions of the form or task.
B (hidden)	Characteristic type	Do not edit this column. This is the question type and is required for the migration path of information used in the import.
C (hidden)	Object type	Do not edit this column. This is the type of form or task item and is used in the import process. The types are section, section supporting text, question, question supporting text, option, option supporting text, hyperlink text to display, and form flow title.
D	Туре	Do not edit this column. This shows each type of question.
E	Info	Do not edit this column. This shows what object type and part of the template the row refers to. The object types are section, section supporting text, question, question supporting text, option, option supporting text, hyperlink text to display, and form flow title.
F	Section/Section supporting text/Question/Question supporting	This is the English version of entered text for each object type. Language code of EN indicates English. Do not change the language code for any

Column	Title	Description
	text/Option/Option supporting text/Hyperlink text to display/Form Flow Title	column.
G	Other languages	All columns after column F are for other languages. Enter your translations for each object in these columns for each language.
t I c	ext. HTML code is shown in colu anguage columns, you must ma	such as bold, highlighted, and underlined to supporting imn F. If you want to apply the same formatting to other nually enter or copy the HTML code to the other copy the code in the translated columns, the translation is

# 4.10 FORM FLOWS

The Form Flows tab of the Form builder lets you manage all the form flows associated with a form template. A form flow adds workflow functionality to your form so that responsible parties can be actively engaged in an event's process life cycle. Adding a form flow can be helpful if your business process needs to be handed off from the reporter to another individual or department. Each step of a form flow has an associated form flow button in the template that you, as a responsible party, can select to complete your part.

Multiple form flows can also be added to a form to suit your specific business processes. For example, when filling out a form, you might need manager approval to proceed sometimes, but not every time.

In this case, you could have one form flow for when manager approval is required, and another form flow when it is not required. Each form flow's steps are independent of each other but contained in the same form.

The Form Flows tab is separated into the following areas:

- 1. Each form flow is shown as its own card with a description and number of steps.
- 2. When a form flow is selected, each of its steps is shown as a card with information like the associated button, the responsible party, and the number of days until the step is overdue. You can also add a new step here.

3. The side panel lets you edit fields associated with the selected form flow or step.

		Ν	/lanager qualit	y review (cop	oy)				Draft
Module landing > Templates ma	anager > Fo	rm builder							
	8	BUILD	PROPERTIES	FORM FLOWS	HISTORY	r			
Unsatisfactory report workflow	•		-					Crea	ate form flow
* Form Flow Name		Unsatisfactor	y report workflow	× ×					
Unsatisfactory report workflow		Submit and comp		Ŭ					
* Description									
Submit and complete quality report				STEPS 3					
Creation date	02/08/2023	· · · · · ·			- 0				
Creation time	8:44	Step 1		Step 2 🐤	3 DAYS	$\otimes$	Step 3 (Final Step)		
Created by	Julio	Original Repo	rter	Julio					
Re-enable form flow on completed events		Submit to Qual	ity Manager for review	→ Quality Manager	3	<b>&gt;</b>	Completed		

### 4.10.1 Create a form flow

TIP

To create a form flow, you must use both the Build and Form Flows tabs to associate form flow questions with a form flow and its steps.

To efficiently plan and create a form flow, you can build your form with all its questions before moving to the Form Flows tab to associate those questions with steps.

There are two ways to start creating a form flow:

• From the Build tab, in the Form Flow Button's side panel under Details, click **Step setup**, and then click **Next** if you see a dialog box that says no form flows exist.

Form Flow	×
Details	^
* Button text	
Submit to manager for approval	
Add supporting text (i)	ep setup
Mandatory	
	1321

• From the Form Flows tab, click Create form flow.

PROPERTIES	FORM FLOWS	HISTORY	
			Create form flow
	No	form flows exist.	$\bigcirc$
Clie	ck the Create form fl	ow button to create a ne	w form flow.

The following step-by-step walks you through the process of creating a form flow from the Build tab.

### 4.10 Step by Step 1 — Create a form flow

1. In the Build tab, add a form flow question.

		BUILD PROPERTIES FORM FLOWS HISTORY	Ľ
ayout types		1	Cancel Sa
Column	Section		
uestion types		Who will conduct the next review? Next review date 02/08/2023	<b>m</b>
Attachment	Button	02/08/2023	
Choice	Date - Time		
Form Button	11 Form Flow	General comments	
♥ GPS	% Reference	Approved by	
E List	# Number		
O People picker	🕼 Signature	(4000 characters remaining)	
■ Text		I Form Flow	
		• Submit review	

2. In the Form Flow Button's side panel under Details, click **Step setup**.

orm Flow	× *	BUILD PROPERTIES FORM FLOWS	HISTORY	Ľ
etails	^		Cancel	Sa
Button text				
lick to type your button text		General comments		
	Step setup	General comments	Approved by	
) Add supporting text (i)				
			×	_
Mandatory		(4000 characters remaining	a)	
ccess	~			
ogic	~			
nail	~	$\sim$		
		Click to type your button text		
		Submit review		

3. Click **Next** if you see a dialog box that says no form flows exist.

4. In the Create form flow dialog box, fill out the form flow name and description, and then click **Create**.

Create form flo		
* Form flow name		
* Description		
I		
	Cancel	Create
	Cancer	Create

5. Select the **Step 1** card, and then on the left side of the page, in the Details section, select who is responsible and which form flow button to use for this step.

			BUILD	PROPERTIES	FORM FLOWS	HISTORY
Step 1	>	$\times$				
	:	*				
Step details		^	sfactory report workflow and complete quality report	$\otimes$		
Who will be responsible for this step?						
Original Reporter	~			STEPS		
Which form flow button will be used for this step	p?			1		
Click to type your button text	~		01			
			nal Reporter			
Email		~	k to type your button text	<b>→</b> (+)		
		-11		Add Step		

6. Click **Add email** in the Email section and complete the dialog box if you want to send an email notification to the responsible party for this step.

**NOTE** The email notification indicates the start of the step after clicking its form flow button, not the step's completion.

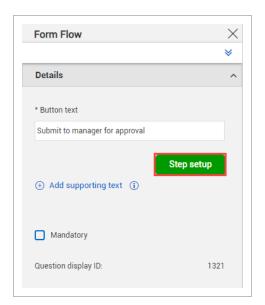
## 4.10.2 Set up form flow steps

You can add a new step to a form flow through the Add Step button in the Form Flows tab or the Step setup button of a form flow question in the Build tab. The Add Step wizard contains several pages of

options. After you have added a step, you can edit any of this information by selecting the step card and editing the fields in the left side panel.

There are two ways to start setting up an additional form flow step:

• From the Build tab, in the Form Flow button's side panel under Details, click **Step setup**.



• From the Form Flows tab, click Add Step.

	STEPS
	1
Step 1	
Original Reporter	
	$\bullet$
Submit to manager for review	→ ○

The following step by step walks you through the process of setting up additional form flow steps from the Build tab, having at least one form flow and form flow question.

### 4.10 Step by Step 2 — Set up an additional form flow step

- 1. Add a new form flow question in the Build tab.
- 2. In the Form Flow button's side panel under Details, click **Step setup**.

3. On the Step details page of the Add Step wizard, select the form flow button to use for this step.

**NOTE** If you already started the Add Step wizard from the Build tab, this option is already filled with the form flow button you selected.

- 4. Select if this step can move to the next step when all responsible parties complete it or any one of them completes it.
- 5. Select who is responsible for this step.
  - If you select Users, you must select a specific user.
  - If you select Role, you must select which role and whether the user can choose an individual from the selected role to be responsible.

TIP You can let the user choose an individual from the selected role if, for example, one individual with that role is off work and cannot complete the step.

- 6. Click Next.
- 7. On the Email page, select if you want to add an email that notifies responsible recipients each time this step is reached, and then enter the contents of the email.
  - NOTE The email notification indicates the start of the step after clicking its form flow button, not the step's completion.
  - TIP You can personalize the email by pressing the @ key and selecting responses to questions in the form to insert.
- 8. Click Next.
- 9. On the Actions page, select the status the event changes to when this step is initiated.
- Select how many days until this step becomes overdue and whether the days are counted from the initiated date or the previous step.
- 11. You can select **Make this step reversible** to let users go back to a previous step. Select which step to go back to, whether to cc recipients to the email, and whether to require a comment when reversing.
  - NOTE If you make a step reversible, you must go back to the Build tab after the step setup to edit the text of the new button, which is named Reversal form flow button by default.

TIP

The reverse form flow button can have leading logic applied to it independently from the button that advances to the next step.

12. On the Step access page, set view or edit access by role for each form question or section when the event is in this step. Access rules are shown as a table with the ability to view and edit as columns and questions and sections as rows. When you select a cell, a slide-out panel shows options for all roles, a select role, or no roles.

Section / question	Ability to view	Ability to edit				
SECTION HEADER	All roles	All roles	^	SECTION HEAD	ER	
Expiration date	All roles	All roles		Ability to edit All roles	O Select roles	
SECTION HEADER	All roles	All roles			Occertoico	0 110 10 10
Event title	All roles	All roles				
Event date	All roles	All roles				
Review section I	All roles	All roles				
Any quality misses?	All roles	All roles				
Who will conduct the next review?	All roles	All roles				
Next review date	All roles	All roles				
General comments	All roles	All roles	-			

- NOTE The view and edit permissions you set on this page are applied to the form only when in this specific step of the form flow. Step access does not override question access given in the template. If you cannot view a question using the access given in the template, you cannot view it when step access is applied.
- 13. On the Button details page, select what form flow button is used to advance to the next step.

NOTE You can select **None**.

- 14. Select whether this button completes the form flow.
- 15. Click Save.

### 4.10.3 Re-enable form flow

You can let users re-enable a form flow of a completed event by selecting a form flow, and then selecting the **Re-enable form flow on completed events** check box in the side panel.

When you re-enable a form flow, it will move it back to the step of your choice. All step data is saved from previously completing the form flow unless the user changes an answer in a way that leads to

different questions based on logic. Only the selected form flow is re-enabled, not all form flows associated with the template. If a re-enabled form flow leads to another form flow that is not re-enabled, the user cannot see the other form flow.

NOTE Users must have permission to edit completed events to re-enable a form flow.

### 4.11 TEMPLATE HISTORY TAB

The History tab provides a listing by date of changes made to a form or task. Not all changes made to a template are shown in the history tab.

			BUILD	PROPERTIES FORM FL	OWS HISTORY			
Change type	Question/Option	Section	Old value	New value	Area	Version	Change date	Changed by
Access	Click to type your button text	SECTION HEADER		View; All Roles	Builder	3	02/08/2023 10:57 AM	Julio
Access	Click to type your button text	SECTION HEADER		Edit; All Roles	Builder	3	02/08/2023 10:57 AM	Julio
Question Added	Click to type your button text	SECTION HEADER		Click to type your button text	Builder	3	02/08/2023 10:57 AM	Julio
Status	Not applicable	Not applicable	Saving	Draft	PROPERTIES	3	02/08/2023 10:57 AM	Julio
Question Changed	Submit to manager for review	SECTION HEADER	Submit to manager for approval	Submit to manager for review	Builder	3	02/08/2023 10:48 AM	Julio
Status	Not applicable	Not applicable	Saving	Draft	PROPERTIES	3	02/08/2023 10:48 AM	Julio
Question Changed	Submit to manager for approval	SECTION HEADER	Click to type your button text	Submit to manager for approval	Builder	3	02/08/2023 10:47 AM	Julio

Each time a form or task is updated and saved a new entry is created. Each change constitutes a new line item on the History tab.

As with other InEight features, data in these columns can be filtered or sorted on this tab.

					BU	UILD PROP	ERTIES	FORM FLOWS HISTORY	
Change type	Question/Option	Section	Old value	Ŧ	New value	Area 📃	Version	Change date L	Changed by
Status	Im				Published	PROPERTIES	3	02/08/2023 7:29 AM	Julio
Associated Task Removed	Search		Q			Builder	3	02/08/2023 7:29 AM	Julio
Status	Access				Draft	PROPERTIES	3	02/08/2023 7:29 AM	Julio
Property Option	Associated Task		- 1		Expiration date	PROPERTIES	3	02/07/2023 1:03 PM	Julio
ssociated Task	Associated Task Removed		- 1		Task button	Builder	3	02/07/2023 11:59 AM	Julio
Status	Option Added		- 1		Draft	PROPERTIES	3	02/07/2023 11:59 AM	Julio
locess	Option changed		- 1		View; All Roles	Builder	3	02/07/2023 10:42 AM	Julio
locess	Property Option		- 1		Edit; All Roles	Builder	3	02/07/2023 10:42 AM	Julio
locess	Question Added		- 1		View; All Roles	Builder	3	02/07/2023 10:42 AM	Julio
locess	Question Changed		- 1		Edit; All Roles	Builder	3	02/07/2023 10:42 AM	Julio
Question Added	Question Removed				Provide photos from the review	Builder	3	02/07/2023 10:42 AM	Julio
Question Added	Section Changed		-		Submit the completed review	Builder	3	02/07/2023 10:42 AM	Julio
Status		Clear	Filter		Draft	PROPERTIES	3	02/07/2023 10:42 AM	Julio
Status					Draft	PROPERTIES	3	02/07/2023 10:30 AM	Julio
locess	Unacceptable review: explanation	QUALITY HEADER			View; All Roles	Builder	3	02/07/2023 10:24 AM	Julio
locess	Unacceptable review: explanation	QUALITY HEADER			Edit; All Roles	Builder	3	02/07/2023 10:24 AM	Julio

For auditing purposes and to meet ISO requirements, changes to both Form and Task templates are recorded with date and version history.

The following step-by-step shows you how to view user history in templates.

#### **4.11** Step by Step **1** — View User history in templates

1. In the module landing page, select **Templates Manager**, and then select **Forms** or **Tasks**.

In this example, select Forms.

- Forma Tasks
- 2. Select a form, and then select the **History** tab.

				BUILD PROPER	RTIES FORM F	LOWS	HISTORY	
Change type	Question/Option	Section	Old value	New value	Area 📃	Version	Change date	Changed by
Status	Not applicable	Not applicable	Saving	Published	PROPERTIES	3	02/08/2023 7:29 AM	Julio
Associated Task Removed	Not applicable	QUALITY HEADER	Task button		Builder	3	02/08/2023 7:29 AM	Julio
Status	Not applicable	Not applicable	Saving	Draft	PROPERTIES	3	02/08/2023 7:29 AM	Julio
Property Option	Expiration date - Expiration date	General		Expiration date	PROPERTIES	3	02/07/2023 1:03 PM	Julio
Associated Task	Not applicable	QUALITY HEADER		Task button	Builder	3	02/07/2023 11:59 AM	Julio
itatus	Not applicable	Not applicable	Saving	Draft	PROPERTIES	3	02/07/2023 11:59 AM	Julio
ccess	Provide photos from the review	QUALITY HEADER		View; All Roles	Builder	3	02/07/2023 10:42 AM	Julio
ccess	Provide photos from the review	QUALITY HEADER		Edit; All Roles	Builder	3	02/07/2023 10:42 AM	Julio
ccess	Submit the completed review	QUALITY HEADER		View; All Roles	Builder	3	02/07/2023 10:42 AM	Julio
ccess	Submit the completed review	QUALITY HEADER		Edit; All Roles	Builder	3	02/07/2023 10:42 AM	Julio
Question Added	Provide photos from the review	QUALITY HEADER		Provide photos from the review	Builder	3	02/07/2023 10:42 AM	Julio

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# **CHAPTER 5 – AUTOMAPPING**

# 5.1 OVERVIEW

Automapping is a feature that lets you create a series of events in bulk for project structure levels (nodes) or components associated with inspection and test plans. Automapping is enabled on a project-by-project basis.

By leveraging mapped values, you can associate them with project structure nodes and templates. Leveraging values sets the mapping of templates and the quantities for each template to be created for each project structure level or component value, which eliminates the need to manually create and schedule processes.

When enabled, you can configure automapping in the following areas:

• Automapping setup - Create map values to associate to the project structure. The map values serve as tags to associate them to the project structure node levels and templates.

Ð	S Standard Structure	😂 Map templates 🎁 📄 🍓 🗸 🔾 🕦 Cancel Save
	Map value name	Description $\overline{-}$
	ABSORBER VESSEL	DES ABSORBER VESSEL
	AC DISTRIBUTION PANEL	DES AC DISTRIBUTION PANEL
	AC INDUCTION MOTOR	DES AC INDUCTION MOTOR
	AC MOTOR	DES AC MOTOR
<u>ہ</u>		
		des de voltante de la constante de
	Altra Altra Altra Altra Altra Altra	vile_ufk_ufle_

• Map project structure - Associate map values to the project structure nodes such as areas, subsystems, and commodities. This creates a relationship between the tag values and the project structure levels. You can map multiple values to a project structure node.

Q	ualit	y :	Automapping setup > Map proje	ect structure							
					**	Map templates	C7	🗗 Q	i	Cancel	Save
*	Proje	ct str	icture		Ŧ	Map value					Ŧ
~	Calca	asieu	Pass LNG - EPCM and BOP (103989)			Project cannot	have map val	lue			
	^	011 -	A/G General Liquefaction/Jetty			Pumps ×	Structures	× Electrica	×		×
		^	1			Pumps ×	Electrical	×			×
			GEN			Pumps ×	Electrical	×			×
		^	11			Pumps ×					×
			GEN			Sub-System	×				×
		^	2			System ×					×
						Sub rate					
	$\checkmark$										$\sim \sim \sim$
			GEN			Sub-System	×				×
		^	25			System $\times$					×
			0.52			Cours autom					

• Map templates – From the list of published templates, you can select mapped values, associating them to the template. This creates a relationship between the tag values and the templates. You can map multiple values to a template.

		sta Map proje	ect structure 🛛 🔅 Mana	ge associations 👣 📝 Q 🛈 Cancel Sa	ve
Template name =	Default quantity 👘	Category -	Types 😇	Map value	Ŧ
05622 - PKS-FRM-PIPE-5.06.06 - Pressure Test Re	1	Checklist		$\fbox{PiPING TESTP} \times \fbox{Pumps} \times$	×
05622- PKS-CHE-PIPE-5.07.01 -Flange Bolt Tighte	1	Checklist		Electrical $\times$ FLANGE $\times$ Pumps $\times$	×
05622-PKS-FRM-PIPE-5.02.01, Piping Installation	1	Checklist		FLANGE X FLANGE INSU X	×
CD Test From flow	1	Checklist	Туре 1	CLEAN OUT $\times$	×
ORT-PR & ORT (21 13 13) - Wet Pipe Fire Sprinkler Sy	2	Facilities Commissioni		ISOMETRIC × SPOOL ×	×

 Go to Automapping – To run the mappings configured in Project Settings, click Go to Automapping. Select a mapped value, category, project structure nodes, templates, and default quantities to create forms (events) for each level. You can filter by type to narrow list results.

Map Value Clear 🕲 Setup	Ca	alcasieu Pass LNG - EPCM and BOP (103989)				
Electrical 🗸	1			Manage associa	ations	Rur
		Template name	Header associations	-	Default qu	Ŧ
Category Clear		105622 - PKS-FRM-PIPE-5.06.06 - Pressure Test Report	ITP, Project Structure		1	
Checklist •		105622- PKS-CHE-PIPE-5.07.01 -Flange Bolt Tightening Record	ITP, Project Structure		1	
Type Clear		Care, Maintenance, & Prevention	ITP, Project Structure		1	
- Select one -		CHPE-FRM-ELEC-07.01.05, Duct Bank Cleaning & Testing Report	ITP, Project Structure		1	
Project Structure		CHPE-FRM-ELEC-07.04.03, Grounding & Bonding Installation Checklist - Op	ITP, Project Structure		1	
•		CHPE-FRM-ELEC-07.04.05 Ground Systems Test Record	ITP, Project Structure		1	
Search Q						
<ul> <li>Calcasieu Pass LNG - EPCM and BOP (103989)</li> </ul>	•					
▲ 🗌 011 - A/G General Liquefaction/Jetty						
^ □1						
GEN						
▲ 26						
▲ 2-P-26-8P11.01						
Electrical						

When you run the selected automapping items, a dialog box opens to confirm the creation of the activities. An email confirmation is sent to you with a Microsoft Excel file showing a summary of the new forms.

The new events show in the Events list in a *Scheduled* status where you can add an event date, and a reporter. As soon as a reporter and event date are provided, the user is notified.

You can view events associated to the project structure in Events > **Project structure**.

Quality > Events -						0	Global Events/Ta	sks View: N	/ly view		•
🕀 🛞 🍸 🚠						🔽 Edi	t properti 🌾	1 📑	ə ()	Q 🔽	Clear all filters
	(	D Auto	matic date filter	applied	- to clear, use the	event date colu	mn filter				
Project structure	×		Event titl	0	Category	Event dat 🛫	Event ID,	Form nar	Project/C	Reporter	Status 📃
Project structure	~		Public Inter		Public Inter	01/29/2024	202401250	Public Inter	Calcasieu P	Kori Dooley	Schedu
Search	Q		CHPE-F		Checklist	01/01/2024	202312180	CHPE-FRM	Calcasieu P	Michael Sha	Schedu
Collapse all	Clear										
Calcasieu Pass LNG - EPCM and BOP (103989)											
✓011 - A/G General Liquefaction/Jetty											
<b>v</b> 1											
GEN											
√11											
GEN											
√2											
GEN											
A20											
▲21											
^ <sup>22</sup>											
^ <sup>23</sup>											
0.4	•										
Selected Item :											
011 - A/G General Liquefaction/Jetty											2 events

### 5.1.1 Considerations

- The setting Project structure or Integrate with Plan components must be enabled to use the Automapping feature. For more information, see <u>Project level settings</u>.
- You can enable Automapping at the project level in Project settings. For more information, see <u>Automapping</u> in Project Settings.

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# **CHAPTER 6 – HEADERS**

## 6.1 HEADERS OVERVIEW

You can create Inspection and Test Plan (ITP) and Project Structure templates headers in the Headers tab. When you enable the project's header feature in Project settings, the headers are automatically created. The header templates ensures that the data captured remains consistent through the use of question types.

# 6.2 ITP HEADER TEMPLATE

When you enable Inspection & Test Plans for the project, you can also enable the ability for the form to seamlessly integrate InEight Plan components using a template header. This ensures that component data captured from Plan remains consistent through the use of question types.

To do this, enable the **Integrate with Plan components** toggle. This will enable the Go to Header Templates link to access the Headers page.

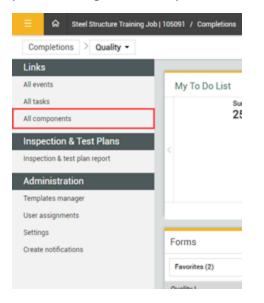
Mo	odule summary Categories Types Classifications Statuses Email templates Roles User assignments Project Settings
	Cancel
	Project Settings
	Inspection & Test Plans Exhausing inspection and test plans for the project will allow the project to create and manage ITPs.
	Open Inspection and Test Plans
	Integrate with Plan components Enabling the integration with Plan components for the project will allow for the creation of templates with /IP headers and associating components with events.
	Go to Header Templates
	Project Structure When project structure is enabled; the structure and metadata defined in Core will be made visible and can be used to sort and fifter data. The Project Structure Header template can be created and added to forms to link forms to orgical structure records.
	User Groups Enabling user groups for the project will allow user groups to be created and managed as well as associated with desired events/tasks.

Click the **Go to Header Templates** link to open the Headers page. You can oversee and manage ITP Headers for projects.



#### 6.2.0.1 All components grid

View all component activities and their status in the All components option. You can track the work performed against a component in the module landing page, under **Links**.



The All components option groups events by component.

	8 7								😢 Edit properties 🛛 🕻	ē	•	Q
A 1	Event ID 1 👳	Event title 👘	Event date	$\overline{T}$	Reporter	r.	Status	P.	orm name	$\overline{T}$	Types	
	<b>√</b> 2778											
0	20230621000	Event title	06/21/2023		Michael		Pending	R	eporting - Shaw Testing Form			Mahi 1
	¥ 2795											
0	20230627000	KLoftus 27JU-	06/27/2023		Karen		Complete	R	eporting - Shaw Testing Form			Mahi 4

## 6.3 PROJECT STRUCTURE HEADER TEMPLATE

You can use a Project structure template header to seamlessly integrate with InEight Platform master data. The project structure configured in Platform is shown in the header template. This ensures data consistency and provides a single source for InEight Platform data.

To do this, enable the **Project Structure toggle** in Project settings. This will enable the **Go to Header Templates** link to access the Headers page. For more information, see **Project structure** under **Project level settings**.

In the Headers page, you can oversee and manage Project Structure Headers for projects.

	Image: Steel Structure Training Job J       Settings       Templates manager       Forms       Tasks	105091 / Com	pietona (	) ¢	8 (	€ #
	Organization		Steel Structure Training Job (105091)	🍪 Man	age assoc	ations
	Search	Q	Project Structure Header Created Aug 30.2023 06 22 AM Michael Sha Steel Structure Training Job (105091)		Version 2 DRAFT	
~	C-XYZ (RootOrg1) Steel Structure Training Job (105091)		Project Structure Header Created Aug 16,2023 03:45 PM Karen Leitus Steel Structure Training Job (105091)	i	Version 1 PUBLISH	
	Steel Structure Training Job 2 (105092) Training Job (Training Job)		ITP Header Created Aug 16,2023 03:45 PM Karen Loltus Steel Structure Training Job (105091)	1	Versior 1 PUBLISH	
					3 Hea	ders

Under Organization, you can view the list of projects that have the Project Structure processes enabled. Select a project to view the associated template headers. You can click a project structure header to open and manage it.

To use a Project structure header in a template, you must associate it to the template. Click **Manage associations** to associate the template. For more information, see <u>Manage associations</u>.

### 6.3.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

To integrate Project Structure header with Platform, all Project Structure values and definitions for your project must first be made in InEight Platform.

### 6.3.2 Steps

To navigate to Project settings, see steps to navigate to project level settings in <u>Settings overview</u>, and then click the **Project settings** tab. Click the **Go to Header Templates** link.

# **6.4 DYNAMIC HEADERS TOGGLE**

ITP and Project Structure dynamic template headers are used to enhance your template forms. You can enable and disable the use of header templates created for your project using the **Enable dynamic headers?** toggle feature in your template properties.

	BUILD PROPERTIES FORM FLOWS HISTORY	<b>C</b> 🗇
ctions 🔻		Cancel Save
	Mahi 4 × +	
	Options	
	Available on mobile ? Event title ① Event date ①	
	System default    System default	
	Available through form button only?	
	O Add template integration	
	Enable print functionality (1) Enable dynamic headers? (1)	
	Θ	

When enabled, the Project Header space will dynamically show to serve as a placeholder at the top of the form and the form will show in the Manage associations page to associate headers to your form.

			Cancel
		PROJECT HEADER	
	Proje	$\$ specific header questions will appear in this section when performing the form.	
		SECTION	
is is my exciting section header text			
* Event title		* Event date	
* Event title		* Event date 06/13/2023	
* Event title	(250 characters remaining)	* Tunes	•
* Event title	(250 characters remaining)	* Tunes	•
* Event title		* Tunes	•
* Event title		06/13/2023	• @ Opy setter
* Event title		06/13/2023	

## **6.5 MANAGE ASSOCIATIONS**

You can associate published header templates with template forms in the Manage associations page. In the Headers page, click **Manage associations**.

Forms Tasks Headers				
Organization		Steel Structure Training Job (105091)		Manage association
Search A Collapse all	Clear	Project Structure Header Steel Structure Training Job (105091)	Created Jul 13,2023 12:25 PM Karen Loftus	Version 3 PUBLISHED
C-XYZ (RootOrg1) Steel Structure Training Job (10	25091)	ITP Header Steel Structure Training Job (105091)	Created Jun 27:2023 11:11 AM Karen Loftus	Version 3 PUBLISHED
Training Job (Training Job) Wards Island WWTP (183850) BMS Test (BMS Test)				

On the Manage associations page, you can view templates with dynamic headers that meet specific conditions. In the header associations column, you can select which header templates to associate with each template. If both header templates are selected, you can choose the header template that shows when filling out the form. If the header association is not set, the header templates will not show in the form.

Ma	anage associations				2
Ste	el Structure Training Job (105091)				
Act	tions v				
	Template name	Header associations	Default hear	der	
)	Incident Form	Project structure x ITP x x	ITP		
	Quality review - Dynamic Header Enabled	Project structure x ITP x x	ITP		
			N		
ו	test KL Dynamic Header	Select header associations	Not set		
	test KL Dynamic Header	Select header associations	Not set		

# CHAPTER 7 – INSPECTION AND TEST PLANS

# 7.1 INSPECTION AND TEST PLANS OVERVIEW

Inspection and Test Plans (ITP) is a feature that can be activated for templates to let you gather ITP information for a project. They can also integrate with InEight Plan. You can collect information to understand where you stand from a project perspective. At the organization level, administrators have the option to enable Inspection and Test plans for any given module.

At the project level, with the applicable permissions, you can enable Inspection and Test plans on a project by project basis.

# 7.2 CONFIGURE ITPS AT THE ORGANIZATION LEVEL

You can enable and disable Inspection and Test plans for a given module at the organization level in Product Settings.

To enable and disable ITPs, in the Organizations home page, click **Settings** on the left navigation panel, and then click the **Compliance** or **Completions**icon.

Use the toggles to enable and disable ITPs for the module. When you enable ITPs, its related functions will show throughout the module. ITPs are disabled by default.

	Module management Template integrations			
Ð				۵
Ð	Module name	Description	Secondary module name	- Inspection and Test Plans(i)
£)	Safety	A module to track and manage safety related business processes.	Safety	$\odot$
2	Environmental	A module to track and manage environmental related business processes.	Environmental	Θ
	Compliance	A module to track and manage compliance related business processes.	Compliance	Θ
P	Change	A module to track and manage change related business processes.	Change	Θ
0	Custom	A module to track and manage custom related business processes.	Custom	Θ
	4			

### 7.2.1 Configure project settings ITP permissions in Roles

When Inspection and Test Plans are enabled for a given module, you can then enable Project Settings ITP permissions in Roles.

• Name	Description		
MODULE EVENTS ROLES/USERS  Enable/ Disable Project Structure Edit header template	TEMPLATES PROJECT SETTINOS    Manage Project Inspection and Test Plans  Create and edit Inspection and Test Plans  Git header template	Manage Project User Groups Create and edit User groups	*
☐ Make this role read only ④	L	1	

You can select the following options:

- Manage Project Inspection and Test Plans When selected, this option includes Create and edit Inspection and Test Plans and Edit header template options.
- Create and edit Inspection and Test Plans Lets you create and edit ITPs at the organization level.
- Edit header template Lets you access and edit ITP header templates.

# 7.3 CONFIGURE ITPS AT THE PROJECT LEVEL

In the project's module settings > Project Settings tab, you can enable Inspection & Test Plans for the project to create and manage ITPs. This will also enable the **Open Inspection and Test Plans** link to open the Inspection and Test Plans page where you oversee and manage ITPs.

Module su		
	ummary Categories Types Classifications Statuses Email templates Roles User assignments Project Settings	Templa
	Cancel	Save
	Project Settings	
-	Inspection & Test Plans         Enabling inspection and test plans for the project will allow the project to create and manage ITPs.         Image: the project of the project will allow the project to create and manage ITPs.         Integrate with Plan components         Enabling the integration with Plan components for the project will allow for the creation of templates with ITP headers and associating components with events.         Image: the integration with Plan components for the project will allow for the creation of templates with ITP headers and associating components with events.	
	Project Structure When project structure is enabled, the structure and metadata defined in Core will be made visible and can be used to sort and filter data. The Project Structure Header template can be created and address of forms to sink forms to project structure records.	9

To integrate ITPs with InEight Plan, enable the **Integrate with Plan components** toggle. This will allow you to create templates with ITP headers and associate components with events. For more information see the Header templates topic.

### 7.3.1 Considerations

To integrate with Plan, you must enable **ITP mapping between Compliance and Plan** option at the project level in InEight Plan settings.

# 7.4 CREATE ITPS AT THE ORGANIZATION LEVEL

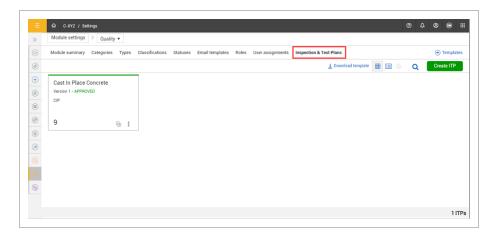
After Inspection and Test Plans have been enabled for the module, you can create and manage ITPs at the organization level. Create new ITPs manually or import them using a template. The template is available to download from the **Download template** link.

### Navigate to Inspection and Test Plans at the organization level

1. From your organization home page click **Settings**, and then select **Compliance** or **Completions**. The Module management page shows the available modules under Product Settings.

**NOTE** The Inspection and Test Plans toggle must be enabled for the module.

- 2. In the Product Settings landing page select the **Module Settings** tab, and then select a module. The Module settings landing page shows.
- 3. Select Inspection & Test Plans.



#### Create an Inspection and Test Plan

1. Click Create ITP. The create ITP dialog box opens.

• ITP name	
I	
Account code	
Assign account code.	
Discipline	
Select one	•
Description	

2. Enter the ITP information, and then click **Save**.

#### Import ITP

- 1. In the Inspection & Test Plans page, click the **Download template** link. The Inspection and Test Plan Import Template is downloaded to your downloads folder.
- 2. Fill in the ITP information. Included in the template are the Instruction and Example sheets.
- 3. Click **Create ITP**. The Create ITP dialog box shows.
- 4. Enter the required fields, and then click **Select file to Import**.
- 5. Select the ITP template, and then click **Open**. The ITPs will show in the Inspection & Test Plan page.

### 7.4.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

# 7.5 CREATE ITPS AT THE PROJECT LEVEL

At the project level, you can create new ITPs manually from scratch, copy ITPs created at the organization level, or import them using a template. The template is available to download from the Download template button.

#### Navigate to Inspection and Test Plans at the project level

1. From your project home page click **Settings**, and then select the **Compliance** or **Completions** icon. The Module management page shows the available modules under Product Settings.

NOTE The Inspection and Test Plans toggle must be enabled for the module.

- 2. In the Product Settings landing page select the **Module Settings** tab, and then select a module. The Module settings landing page shows.
- 3. Select the Project settings tab, and then click the **Open Inspection and Test Plans** link. The Inspection & Test Plans page opens.

≡	Steel Structure Training Job   105091 / Se	ttings			0 L	. 8 ©
»	Quality > Project settings					
		USER GROUPS INSPECT	ION & TEST PLANS			
÷	Copy ITPs from Org		1 Download template	<b>#</b> = 8	Q	Create ITP
• * * *	Copy - Cast In Place Concrete Version 2 - APPROVED CIP	Owner Required Project Specifi Version 1 - INACTIVE Owner Requested Inspection				
۲	9 .	0 :				
) )						
9						
						2 IT

#### Manually create a new ITP

- 1. In the Inspection & Test Plans page, click **Create ITP**. The Create ITP dialog box shows.
- 2. Enter the ITP information, and then click **Save**.

#### **Copy ITP from organization**

- 1. Click **Copy ITPs from Org**. The Copy ITPs from Org dialog box opens.
- 2. Select ITPs from the list and then click **Copy**. You can select up to 20 ITPs at a time.
- 3. The ITPs now show in draft mode in your projects Inspection & Test Plans page.

#### Import ITPs

- 1. In the Inspection & Test Plans page, click the **Download template** link. The Inspection and Test Plan Import Template is downloaded to the downloads folder.
- 2. Fill in the ITP information.

NOTE Included in the template are the Instruction and Example sheets.

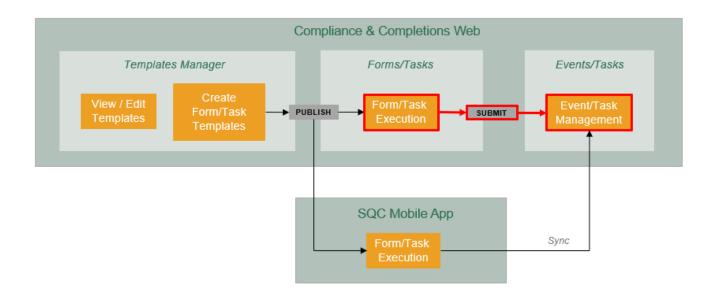
- 3. Click Create ITP. The Create ITP dialog box shows.
- 4. Enter the required fields, and then click Select file to Import.
- 5. Select the ITP template, and then click **Open**. The ITPs will show in the Inspection & Test Plan page.

#### 7.5.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform or a Compliance or Completions role with the applicable permissions.

# CHAPTER 8 – FORM AND TASK EXECUTION AND MANAGEMENT (WEB)

# 8.1 FORMS AND TASKS



### 8.1.1 Launching a form or task

You can launch a form or task by navigating to the Completions landing page, and then choosing a category in the Forms or Tasks window.

三 ଜ Steel Structure Training Job	105091 / Completions						0 L 8 D
Completions > Quality -							
Links							
All events	To do list			🛱 February			
All tasks	Sun 5	Mon 6	Tue 7	Wed 8	Thu 9	Fri 10	Sat 11
All components	Ŭ	° °		Ū	5		
Inspection & Test Plans	<						
Inspection & test plan report							
Administration							
Templates manager Roles						Overdue eve	nts: 0 Overdue tasks: 0
Jser assignments							
Settings	Forms	🗂 Schedule form	o, Tasks			ning Planned Work	Planned Scheduled
Inspection & Test Plans Create notifications	Favorites (0)		<ul> <li>Favorites (0)</li> </ul>		- Search	by IWP ID or IWP name	
	N	o itema found		No items found		There is no plan You are all cau	ned work yht up:
			DTAL: 0		TOTAL: 0		TOTAL: 0

In the Completions landing page you can find the Forms and Tasks windows. Select the **Favorites** dropdown list under Forms or Tasks, and then a category associated with the module needs to be selected. A category contains the forms/tasks that are associated with Completions.

TIP

If you do not see a category that applies, it means you do not have Completions assignments to that category for that project.

The following step-by-step will show you how to launch a form.

#### 8.1 Step by Step 1 — Launch a form

- 1. Select the Main menu > your organization > **Completions**.
- 2. In the Forms window, click the **Favorites** drop-down menu.

A list of form categories is shown.

Forms	🗂 Schedule form	Q
Favorites (0)		,
Favorites (0)		4
IIIIINEW CATEGORYIIIII (1)		
Assessment (1)		
Checklist (1)		
Quality Issue (1)		

3. Select a category, and then a form in the category.

A new window opens showing the selected form.

			× 11 5 0	Cancel Save Sa
etailed Issue Information				
* Issue Name / Title	* Date Issue Occured		Issue Number	
	month/day/year	<b>m</b>		
(250 characters remain	ng)			(250 characters remaining)
Detailed Issue Information				
				(4000 characters remaining
Segment / Area		Location of Issue 🛈		
	(250 characters remaining)			(250 characters remainin)
Attachments				
	(	<del>+</del> )		
		r drag and drop		
Reference Documentation (Spec #, Drawing #, etc)		* Discipline		
reference becamentation (opeo #, brawnig #, etc)				
	(250 characters remaining)	- Select one -		đ
Is this issue related to a subcontractor or supplier?	* Issue identified by?		Manager of Issue	
			-	
) Yes ) No	Select one	٣	Select one	4
* Type of Issue Repetitiv	e Issue	* Severity Level	Severity Level 8	manufact (D)

- 4. You can close the form by selecting **Cancel** on the top right corner.
  - **NOTE** Selecting Cancel results in the loss of any data you have entered since the last time you saved. The system does not autosave your work.
  - TIP Launching a task follows the same process. In the Task window, select a category to launch the task.

## 8.2 FILLING OUT A FORM AND TASK - WEB

After selecting a form, you can now fill out the form and submit it. A task might also need to be completed.

There are many types of question formats which can include different types of fields: free text fields, calendar fields, time drop-downs, and more. Short free text fields have a 250 character limit. Long free text fields have a 4000 character limit.

# **NOTE** Form and task types can vary depending on what is required to complete prior to submitting. The overview below is only an example of what a typical form might require.

#### Form example:

			11	& <b>0</b>	Cancel Save	Save
			10	345	6	
AREA / TASK OBSER	VED					
		معدقينين. اللي	and the second	and the summaries of the summer	مستسبين	-
Supervisor's name		Supervi	sor's Signature			
Supervisor's name		Superv	sor's Signature			
			sor's Signature			
			-			
	Start Time		-	Stop Time		

#### **Overview – Forms or tasks page**

	Title	Description
1	Form name	Name of the template.
2	Quick info	The number of sections, questions, questions answered, and answers considered exceptions. If you click the number of sections or exceptions, a table of contents opens for easy navigation.
3	User groups	Select what user groups have access to this form or task. This button is available only at the project level.
4	Print	Print a PDF of the form or task.
5	Information	The number of questions that have been answered. It also shows you several details pertaining to the form or task.
6	Cancel/Save	Cancels the form or task. Any changes made since the last time you saved are lost.

### **Overview – Forms or tasks page (continued)**

	Title	Description
		Saves the form or task in its current state, and you can continue to fill it out if necessary. You can also save and close to exit the form. For tasks, you can choose to save and start a new task.
7	Question types	Various ways of asking questions within a form or task. Examples include: • Attachments • Choice • Date-time • Form button • Form Flow • People picker
8	Signature block	Some forms or tasks might require a user to sign off prior to submitting it.
9	Button	The outcome of clicking on a form or task button vary depending on the button's configuration. The name of the button is defined by the administrator who created it (for example, Submit the form).
10	View active form flow	Lets you view which step and status in the form flow you are in. This only shows active after a form flow has started. If a form flow has not been started, the option is disabled.

Task example:

Finalize quality review process			
* Due date			
month/day/year			m
* Name of person conducting the next quality review		Date of upcoming quality review	
Select one	4	month/day/year	<b>E</b>
* Quality step			
			(4000 characters remaining)
			(non-narran analysis)
Was any work impacted due to quality issues?			
○ Yes			
O No			
* Responsible party			
Select one			×
* Due date			
month/day/year			
El Schedule			
Assigned			
Assign and start new task			

### 8.2.1 Header Information

Most forms contain basic identifying information such as date, time, event location, or free text fields asking for details about the event. The header information is higher-level material needed to complete a form. Not all forms have header information, however, this is determined by the person creating the template of the form. Filling out the required information accurately is important for workflow and reporting reasons.

Tasks might also have header information such as description, responsible party, and due date. These are programmed fields.

Description of the accident	* Date of incident		Time the incident occurred	
	month/day/year	<b>m</b>	hours:minutes	Q
(200 characters remaining)				
Specific location where the accident occurred				
			(4000 charac	ters remaining

#### 8.2.2 Copy a section

Depending on how the form or task template is set up, you may be able to copy a section. If the copy option is enabled, use the Copy section button in the section header to copy the section below the current section. You can rename the copy section button, so you may see it under its updated name.

The Copy section button is shown in both the upper-right and lower-right of the header.

		🕀 Сору
Evidence		
Is there evidence?		
O Yes		
O No		
O Not Applicable		
Upload documents		
	$(\div)$	
	Select files or drag and drop	🖷 Сору
		(B)

You can also click the **Remove** icon to remove a copied section.

		□ Copy section ⊖
Evidence		
Is there evidence?		
○ Yes		

### 8.2.3 Attachments

Some forms or tasks might include an option to include attachments such as photos. You can also include any annotations to describe the attachment in greater detail. Annotations help clarify what the photo represents.

Upload documents		
	Select files or drag and drop	
1 file(s) attached		~

After you click **Save**, it is saved in the form or task.

You can click the **file(s)** attached button and view your attachments. You can also open the attachment and annotate them using the edit icon.

232-copy-section-remove-icon-option.png		×
Evidence		
Evidence		Spy section 💿
Is there evidence?		
O Yes Upload documents		
	Eddet Tiles or drug and drug - • • •	

When you click the edit icon, you can annotate, edit, or use the delete icon to delete the attachment.

232-copy-section-remove-icon-option.png		×
Evidence		
Evidence		 Copy section 😑
Is there evidence?		
	Select files or drag and drap -	

If integration with InEight Document is set up, you can attach supporting documents from the Document application.



Click **Select files or drag and drop**, and then click **InEight Document** in the dialog box.

A new window opens where you can sign into Document, and then enter search criteria.

Click **Search**. Results are shown according to your Document user permissions. Select one or more documents, and then click **OK**.

Register View:	All	•
	Documents that I can download	
Status:	All	•
Discipline:	All	•
Туре:	All	•
Document No.:	Contains 💌	2
Title:	Contains 💌	2
Category:	All	•
Date Recorded:	Between And      And      Between And      And	
Date Released:	Between And III And III     Within the last days	

Document No. 🔺	Rev	Version	Sts	Title	Disc	Cat	PDF	DWG	DOC	OTHER		
ABC-123	А	A.01	IFR	TEST_Document	ADMIN	GEN						
ABC-124	А	A.01	IFI	Referential removal validation	ADMIN	GEN						
AUDIT-00001-ABC	А	A.01	IFI	Audit response	CP	ALL						
COMPLIANCE_VALIDATION_D	AX	A.01	AB	Validation check	ADMIN	ALL						
COMPLIANCE_VALIDATION_D	AX	A.02	AB	Validation check	ADMIN	ALL						
COMPLIANCE_VALIDATION_D	AX	A.03	AB	Validation check	ADMIN	ALL						
DC-AUDIT-00001-ABC	А	A.01	IFI	Audit doc	СР							
DOC2AA	А	A.01	AB	Documentation check	ADMIN	ALL						
DOC2AA	А	A.02	AB	Documentation check	ADMIN	ALL						
DOC2AA	А	A.03	AB	Documentation check	ADMIN	ALL						
DOCUMENT1	А	A.01	AB	QADoc1	CIV							
DOCUMENT2	в	B.01	IFC	QADoc2	ARCH							
XYZ-123-ABC		01	IFI	House drawings for customer	ADMIN	GEN						
XYZ-123-ABC	-	02	IFI	House drawings for customer	ADMIN	GEN						
XYZ-123-ABC		03	IFI	House drawings for customer	ADMIN	GEN						
XYZ-123-ABC	А	A.01	IFI	House drawings for customer	ADMIN	GEN						
H I H Page siz	e: 10	• 0									16 Search OK	tems in 1 page

Document links are shown in the list of attachments in orange with the document version numbers. If you click a Document attachment, a new window opens to the Document application where you can see the details of an attached document and see it in the File Viewer.

$(\pm)$	
Select files or drag and dro	p
1 file(s) attached	^
Audit response (InEight Document) (Version A.01)	

If integration with Document is not set up, you cannot click the InEight Document button. If you are a level 3 administrator, you can click the **Set up InEight Document integration** icon. On the Application integrations page, add your InEight Document URL if it not already added. In the table, select your InEight Document URL and project ID in the same row as your project, and then click **Save**.

on / Appli	cation integrations					0 ¢ 8 🖲
https://	.com	• • • •				
				Last synced on:	03/28/2022 7:30 AM   C Sync all pr	ojects Cancel Save
	Suite project name	Suite organization		InEight Document URL 📜 👘	InEight Document project ID	InEight Document project name
				https:// .com	PLANTEST	Plan Test Project
	https://	https:// com	https:// com 🔻 🕑 🗹 😒	https:// com • • • • • • • • • • • • • • • • • • •	https:// com	https://       com       Image: Common Commo

### 8.2.4 Form and task details

The form might require you to fill out additional details. For example, for a quality review form you may need to know who was leading the review and a detailed explanation of the agenda.

Location of quality review		* Review date	
		month/day/year	
	(250 characters remaining)		
/ho is leading the review?		Time of review	
elect one	۵.	Hour:Minute	
			(4000 characters ree

Other form questions might include determining if a quality issue is a repetitive issue, severity levels, and impact in cost or future work.

TIP Tasks might also require you to fill out additional details.

### 8.2.5 Smart forms and tasks

Smart forms and smart tasks generate additional questions based on how the original question was answered. For example, the below image is showing that only if the question "Was any work impacted

due to quality issues?" is answered Yes, then the following question, "Work that was impacted: explanation" is shown.

	that was impacted. explanation the following rules match	$\otimes$
Select a que	work impacted due to quality issues?	
	Was any work impacted due to quality issues?  Ves No	
	Work that was impacted: explanation (250 characters remaining)	
	(250 characters remaining)	

## 8.2.6 Form within a form or task

You may need to open a new form from within the existing form or task you are working in. For example, while working on a review form you might need to start a quality claim report.

If you believe that a claim is	s required please start the process by clicking here	
Click here to start a claim report	()	

By selecting the quality claim report form button, a new form generates with steps of to fill out. After filling out the required information, you submit the form, which returns you to the original form or task you were working in.

When you click a form or task button, the status of the current form or task might change, depending on how it is set up by your administrator.

#### 8.2.7 Form flows

When the form you are filling out has a form flow associated with it, there are special buttons to complete each step in the flow. These form flow buttons appear similar to other form buttons but have an arrow icon next to them.

Form flow buttons that move the flow to the next step have a right arrow. Form flow buttons with a left arrow revert to a previous step.

Who was present?	
Select one	
Submit to manager for review 🗕	

When you select a form flow button after filling out all mandatory information, the form saves and closes.

Some form flows can be re-enabled after an event is completed, depending on the form flow's setup.

Click the **Re-enable form flow** button in the upper-right of the page if it is shown. When you re-enable a form flow, you can move it back to the step of your choice. All step data is saved from previously completing the form flow unless you change an answer in a way that leads to different questions based on logic.

If you re-enable a form flow, only the selected form flow is re-enabled, not all form flows associated with the template. If a re-enabled form flow leads to another form flow that is not re-enabled, you cannot see the other form flow.

NOTE You must have permission to edit completed events to re-enable a form flow.

#### 8.2.8 View active form flow

When you open an event from the Events page, and the event has a form flow that has been started, you can click the View active form flow icon at the top of the page. The Active Form Flow dialog box opens.



At the top of the dialog box is the name and description of the form flow and the number of steps.

FORM FLOW	Testing		steps 3
STEP 1	<b>FI</b> Original Reporter		COMPLETED
	(Current Step)	$\downarrow$	()
STEP 2	F2 Role		1 DAYS IN PROGRESS
		$\downarrow$	
STEP 3	Completed		NOT STARTED
			CLOSE

Below them, each step is shown with its status and responsible party.

```
NOTE If a form flow is not started, this option is disabled.
```

## 8.2.9 GPS questions

A GPS question lets you provide your location by clicking **GPS** or by entering your coordinates directly in the fields. You can also click **Clear GPS** to remove information if you need to enter a different location.

NOTE If you enter GPS coordinates automatically, you cannot manually edit the coordinates.

## 8.2.10 Complete a form or task

For more information on how to save and submit a form or task, see Complete a Form or Task.

#### 8.2 Step by Step 1 — Fill out a form

1. From the Completions landing page, in the Forms window, select a category from the Favorites drop-down menu, and then select a form.

orms	📇 Schedule form	Q
Favorites (2)		ļh
Favorites (2)		J.
Checklist (1)		
Quality I (1)		
Quality review (2)		
Safety Category 1 (1)		
Safety Category 2 (1)		

# NOTE If you have forms you have selected as favorites, they will show in the form window.

Forms	🚍 Schedule form
Favorites (2)	
Quality I	
Quality review - I	*
Quality review	
	TOTAL

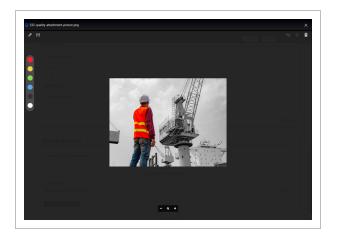
2. Complete all fields in the form. Required fields are marked with an asterisk.

Quality review - I			SE	стіонs <b>1</b>	QUESTIONS	AN	swered	EXCEP	тюн (
		窓		1	Cancel	Save	I	Save & close	
									1
QUALITY HEADER									
Location of Quality area.	Supervisor's name				Review date and t	time			
(250 characters remaining)	Select one		<b>±</b>		02/09/2023 08:55 AM		Ê	0	
Did you recognize any quality wins?		Please	e provid	e loca	tion information				
O Yes		🕈 GPS							
O No		Latitude : Longitude Reset							
Supervisor's signature			o approve	2					
				-					
<u>×</u>									
	INE	IGHT®							

Some items require free-form data entry such as Location of Quality area. Others require selecting a time or date. Other question types may require attaching documents.

Provide photos from the review		
	(+)	
	Select files or drag and drop	
1 file(s) attached		

You can use the annotation feature to add text or drawing to an image.



Some questions require selecting from radio buttons or icon type questions.

Did the review get completed?	Select one or the other	
O Yes	$\odot$	
O No	$\otimes$	

- 3. To update the photograph's annotations, click the **Save** icon.
- 4. On the top right of the form, select the Information button to see form information.

sections 4	QUESTIONS ANSWERED EXCEPTIONS 8 8 0
	Cancel Save Save & close -
	Manager quality review X To be completed by the Manager/Supervisor in
	Northwest area
	Organization/Project Steel Structure Training Job (105091)
	Module Quality
	Category Quality review
	Event Date
	02/09/2023
	Start Date 02/09/2023
	Status Pending
	Reporter Julio
	Version 5
	Attachments     Attachments     History     References

5. Most often forms have a button at the end to move the form to the next process. In this example, the **Click here to start a claim report** button initiates the form within a form feature, where the system branches to another form, in this case the claim report form.

LOSU If you believe that a claim is re	equired please start the process by clicking here	
Click here to start a claim report	0	

**NOTE** The process for completing a task is very similar to filling out a form.

The process is similar whether checking the status of a form or task.

## 8.3 COMPLETE A FORM OR TASK ON THE WEB

There are several ways to complete a form or task. This depends on how it is set up by your administrator and what the next steps are.

## 8.3.1 Save a form or task

When you do not have enough time to complete a form or task in its entirety, or not all information about the event is readily available, you can save your work and continue. You can also save and close the form, and then return to the form later to complete and submit it.



You can use the Button question type to facilitate a simple workflow outside of using the form flow feature.

If you are filling out a form and want to start a new event immediately after saving the current event, click the **Save & close** drop-down button, and then select **Save & start new event**.



### 8.3.2 Assign a task

As part of filling out a task, you might have to assign it to someone else to complete a portion of it. To assign a task, click the **Assign** button. If you want to start a new task immediately after assigning the current task, click **Assign and start new task**.



## 8.3.3 Submit a form or task

When you have completed the form or task, you are ready to submit it or send for manager review. This is the end of what you need to complete. An email notification, if configured, is typically sent to the manager, or assigned parties.

As part of closing out the form or task, a signature may be required, and the button varies depending on what type of form or task it is.

CLOSURE
Click here to start claim report
Signature of Manager
×K
Close and complete

NOTE All mandatory questions on the form or task need to be answered or you will not be able to submit it.

## 8.4 EVENT AND TASK MANAGEMENT

A Completions event is an occurrence that has already happened; it therefore refers to forms that have already been filled out. Because events are part of a workflow, you can add more information to events, review existing data in the event, or move the event through the workflow.

The Events page shows a repository of forms in various statuses such as pending, with claims manager, manager review, and complete. The Task page is also a repository of forms that provides the same functionality as the Events.

The following are common column headings and their descriptions:



	Title	Description
1	Attachment	Indicates whether an event or task has attachments. Click the icon to see the attachments.
2	Event or Task ID	The unique value assigned to each event or task.
3	Project/Organization	The project or organization associated with the event or task.
4	Category	The category associated with the event or task. It is specific per module and defined by the organization. Allows the module to be partitioned into smaller areas and assigned permissions.
5	Form or Task name	The name of the form or task template.
6	Event or Task title	The title given to the event or task by the user or generated by the system.
7	Reporter or Responsible party	For events, the user who initially submitted the form. For tasks, the responsible individual.
8	Event date or Due date	Date the event occurred or the due date of a task.
9	Status	Four default statuses are provided, Complete, Pending, Scheduled, and Canceled. Admins can create sub statuses under each that best align with their business processes.

#### (continued)

	Title	Description
10	Location	Shows whether the event or task location is On web or On mobile. When an event or task is scheduled and synced to a mobile device, a lock shows next to the Task title.

You can access events or tasks by going to the module landing page, and then selecting **All events** or **All tasks**.

The event ID, Event title are shown on the Events page. The Event status is also shown, and changes based on the state of the event.

0	Event ID	Project/Organization	Category	Form name	Event title	Reporter	Event date 1 🛫	Status	Location
	20230112	Platform ( )	Category A -	Quality ITP Header 2	Quality ITP Header 2	Mahesh	01/12/2023	Pending	On Web

The Tasks page also shows columns such as Task ID, Project/Organization, Category, and Status. Columns unique to the Tasks page include Task name, Responsible party, and Due date. Tasks automatically become overdue when the assigned due date expires. The tasks page shows a visual indication of overdue states. Sorting and filtering capability in the lists lets you to quickly associate tasks to individuals, categories, status, etc.

Quali	y > Tasks -							Global Events/Tasks	View:	My view			
Ð	8 <b>T</b>							🕑 Edit properti	D	8	١	Q	Clear all filters
				③ Automatic date filter applied - to cl	ear, use the due date col	umo filter							
	Task Id	Project/Organization	Category	Task name	Task title		Responsible party	Due date			Status		
3	20230117	S100000 - PKS Inc (RootOrg1)	Assessment	Report photo	Beference		Julio	01/25/2023			Pen	fing	
	20230117	Van Nuvs North Platform (	III QA Performance III	Integrated list guestion - Do not edit	Beference		Jyothimay	01/17/2023			Pen	ting	

In the Tasks page, like the Events page, you can update columns by clicking the Column chooser icon, and then selecting or deselecting the check boxes for columns you want to add or remove.

<ul> <li>Status</li> <li>Attachment</li> <li>Task Id</li> <li>Project/Organization</li> <li>Category</li> <li>Task name</li> </ul>
<ul> <li>Attachment</li> <li>Task Id</li> <li>Project/Organization</li> <li>Category</li> <li>Task name</li> </ul>
<ul> <li>Task Id</li> <li>Project/Organization</li> <li>Category</li> <li>Task name</li> </ul>
<ul> <li>Project/Organization</li> <li>Category</li> <li>Task name</li> </ul>
<ul> <li>Category</li> <li>Task name</li> </ul>
✓ Task name
—
Task title
🗹 Responsible party
Due date
✓ Status
🗌 Assigner
Classifications
Custom ID
Exceptions
<ul> <li>Expiration date</li> </ul>
Importance
Location
References
Renewal date
Source
Start date
State

NOTE When a task is assigned, the responsible party receives an email with a link to complete the task.

NOTE Sorting or filtering by the Assigner and/or Responsible party, may be helpful.

## 8.4 Step by Step 1 - Add additional columns to the list of all events or all tasks

- 1. In the Completions landing page, click **All events** or **All tasks**.
- 2. Click the **Column chooser**icon.
- 3. Select Assigner and/or Responsible party.

<ul> <li>✓</li> </ul>	Attachment
<b>~</b>	Task Id
<b>~</b>	Project/Organization
<ul> <li>✓</li> </ul>	Category
<b>~</b>	Task name
~	Task title
<ul> <li>Image: A set of the set of the</li></ul>	Responsible party
<ul> <li>Image: A start of the start of</li></ul>	Due date
<ul> <li>✓</li> </ul>	Status
<ul> <li>✓</li> </ul>	Assigner
	Classifications
	Custom ID
	Exceptions
	Expiration date
	Importance
	Location
	References
	Renewal date
	Source
	Start date
_	State

You are now able to sort or filter the selected columns.

## 8.4.1 Additional event or task functions

You can use the following functions in the All events and All Tasks pages:



	lcon	Description
1	Edit properties	Edit properties of one or many selected events or tasks. All the selected events or tasks must be from the same template and you must have permission to edit them.
2	Notifications	Send notifications with messages to specific users, and roles for the specific project you are navigated to. This is available only at the project level.
3	Export events	Export data from the Events or Tasks list to Excel, with an email

	lcon	Description
	or tasks	generated once the file export is completed.
4	Print	Print a PDF report of the selected event or task.
5	Information	Open a slide-out panel to the right that outlines data about a specific EventID or TaskID. You can also see the history of changes to the event or task.
6	Search	Open a slide-out panel to search all columns in your view for specific terms.
7	Clear all filters	Revert the listing to its unfiltered state if filters have been used.

#### 8.4.1.1 Edit properties

#### 8.4 Step by Step 2 — Edit an event or task properties

- 1. In the All events or All tasks list page, select events or tasks by clicking the check boxes.
- 2. Click the Edit properties button.

The Edit properties dialog box opens.

	⊗		Edit prop 3 selecte	erties d items will be updated wi	th the f	ollowing:			×	(i) Q	
	Event title	0		* Property		Value			-	Status	
~			<b>(</b>	- Select one -	=			$\otimes$		Pending	
~		θ		- Select one -						Complete	
	LSA Ar	0	÷	Category	=			$\otimes$		Complete	
~		θ		Event date						Complete	
	Safety.	0	$\odot$	Organization/Project	=			$\otimes$		Complete	
	Safety	0		Reporter						Complete	
	LSA As		÷	Status	=			$\otimes$		Complete	
	Safety									Complete	
	LSA A:	0	(*) A	dd new field						Complete	
	Safety.	0								Complete	
		0								Complete	
		8					Cancel	Save		Complete	

3. After making your changes, click Save.

#### 8.4.1.2 Notifications

As an administrator at the system level, you can control the ability to send notifications to roles and user in Organization home > Settings > Compliance > Module > **Roles** tab. You can also restrict users to send notifications to their assigned projects only.

* Name Compliance module administrator	Description	ce module administrator - Provides access to all administration features
MODULE EVENTS ROLES/US	ERS TEMPLATES HISTORY	
Z Edit module summary	Create and edit categories	Create and edit statuses
✓ Edit email templates	Manage module organization exclusions	Create notifications
Create and edit User groups	Create and edit classifications	Create and edit Inspection and Test Plans

#### 8.4 Step by Step 3 — Send notifications

1. At the project level, click the **Notifications** icon.

The Notify users dialog box shows.

2. Select Roles or Users recipients, and then use the drop-down lists to select recipients.

⊗ ▼							roperti 📢	
			(	Automatic date filter applied	- to clear, use the event date colu	mn filter		
Event title	9	Category	Event date	😑 Event ID 🌡	Form name	Project/Or	nization	1
S01.2.1 Incident_Injury Re		Incidents	Not	ify users			imes hing Pro.	- L
S01.2.1 Incident_Injury Re	0	Incidents	Recipients				ning Pro.	
S01.2.1 Incident_Injury Re		Incidents	Roles	O Users			ning Pro.	- /
S01.2.1 Incident_Injury Re		Incidents	1				ning Pro.	
Issue Documentation For		IDF	Select Roles			×	ning Pro.	. 1
Issue Documentation For	0	IDF	Message				ning Pro.	
					(2000 ch	aracters remaining)		
					Cancel	Send		

- 3. Enter your message in the Message box. Messages can be up to 2000 characters.
- 4. Click **Send** when complete.

#### 8.4.1.3 Export events and tasks

#### 8.4 Step by Step 4 — Export events and tasks

1. In the All events or All tasks list page, click the Export icon.

The Export dialog box opens.

2. Select **Export** to export all items.

The export contains the filtered grid set that shows in your view. You can also export selected events or tasks by checking each item's check box, and then clicking the Export icon.

0	Quality > Events -							Global Events,	Tasks View: M
Ē	8 7								C B
		Category		Event d			×	ation	Reporter
				)2/08/	_			Inc (RootOrg1)	Julio Salguero
				02/08/	()	Export events to Excel You will receive an email with the Excel file once completed.	*	Inc (RootOrg1)	Anitha Dooshety
				02/08/				Inc (RootOrg1)	Julio Salguero
				02/08/		Cancel Export		Inc (RootOrg1)	Gopi Badana
				02/08/				Inc (RootOrg1)	Aaquibulla Khan
	testdel1_20230208	ABC - Category	0	02/08/2023		2023020800041 testdell Va	n Nuys Nor	th Platform (103	Suneetha Thaduk

#### 8.4.1.4 Print

You can print a report of an event or task that has been enabled to be printed. Print functionality can be enabled in the template's Properties tab. See Template Properties for more information.

#### 8.4 Step by Step 5 — Print an event or task

- 1. In the All events or All tasks list page, select an event or task.
- 2. Click the **Print** icon to print the event or task.

	$\otimes$								🕑 Edit p	roperti 🚺	l é	1	Q	Clear all filters
	Event title	 Category	Ŧ	Event date	Event ID	Form name	P	Project/Organization	Reporte	ar -		Print	un eu	
3	Ron-Injury / Illness_20210913000	Incidents-eng		09/13/2021	2021091300001	Non-Injury / Illness						(	cheduled	
	Non-Injury / Illness_2021082500020	Incidents-eng		08/25/2021	2021082500020	Non-Injury / Illness							ending	
	1171360_2021081200008	Incidents-eng		08/12/2021	2021081200008	1171360							ending	
	Report a Safety Incident_2021080900	Incidents-eng		08/09/2021	2021080900001	Report a Safety Incident						F	ending	

A PDF of the report will open for the selected item in a new browser tab.



The Print feature only works for one event or task at a time. To print in bulk, you can use InEight Report.

### 8.4.1.5 Form and task information

You can view data, references, and history changes of an event or task and edit their properties in the Form information slide-out panel.

#### 8.4 Step by Step 6 — Navigate to event or task informaiton slide-out

1. In the All events or All tasks list page select an event or task, and then click the Form information icon.

The Form information slide-out opens where you can view the form data.

2. Click Edit properties.

The editable fields show so you can edit them.

	QUESTIONS ANSWERED 1/2
	Edit properties
Proj/org	S100000 🔻
Category	!!!! QA Performance !!!! ▼
Event date	02/01/2023 🛅
Status	Pending 🔻
Reporter	Meghana 📃 🔻
Event title	23.2 Template quality _20230201
Date started	02/01/2023
Module	Quality
Version	1
<ul> <li>Attachments</li> </ul>	
<ul> <li>References</li> </ul>	

3. After editing any fields, click **Save**.

NOTE	You must have permissio	n to open the Form	information panel.
------	-------------------------	--------------------	--------------------

### Additional Form information panel options

You can also view attachments, references, and form history using the buttons at the bottom of the slide-out.



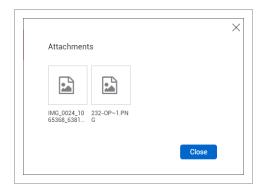
#### Attachments

You can view and edit attachments other events and tasks referenced in a certain event or task.

#### 8.4 Step by Step 7 — View and download attachments

1. In the Form information slide-out, click Attachments.

The attachments dialog box opens.



2. Click an attachment to view.



- 3. You can zoom in or out using the **Zoom** icons.
- 4. You can click the **Download** icon in the upper right to download the attachment to your computer.
- 5. To close the attachment, click the **Close** icon in the upper right.
- 6. Click **Close** to close the Attachments dialog box.

**NOTE** The Attachments button is greyed out when there are no attachments in the form.

NOTE You can also view an event or task's attachments by clicking the attachment icon in the Attachment column on the Events or Tasks pages.

#### References

You can view other events and tasks referenced in a certain event or task.

#### 8.4 Step by Step 8 — View and edit references

1. In the Form information slide-out, click **References**.

The References dialog box opens where you can view and add references.

> Tas	SWPPP inspe	ection								×
F ×	EVENTS	TASKS								€ Add References             Cli
Task title	Event ID		Event title		Reporter		Event Date	Status	State	<b>4</b> =
COPY OF Repla						No event	references			÷
SWPPP inspect										
Add yellow r										
Clean drain i										
A. A. M.	وررا			and the	Julean.		and the second	 	 	الاستحر
										0 events
										Close

2. To add a reference, select Events, Tasks, or other available tabs, and then click the Add References icon.

warenouse	issue									>
EVENTS	TA	SKS	CHANGE ISSUES	G CONTRACT	IS DOCUM	MENT ITEMS				
(+)	Θ	$\otimes$								
Task ID		Task title	Task nam	Responsil	Due date 📃	Project/0	Status		State	Reference
المطارب بالمنا	A		ى مىسىتىن	All and the second second	and the second	the second second	, المعين	and the second	,	and the second
1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -			gentenne, g	and the second second	y have		، المجموع	And and		
					y have		، المعيني			0 reference

NOTE

Integration is available with InEight Change, InEight Contracts, and InEight Document.

The Add References dialog box opens.

3. Select the **Events** or **Tasks** or other available tabs, and then select events or tasks to be referenced.

E١	ENTS TASK	S					
	Task ID 📔 👘 📃	Category	Task name	Task title	Responsible pr 📃	Due date 📃	Project/Organi 📃
<	2023032400001	Subcontractor Iss	Task test for SUB	SDAAsdASD			Steel Structure Tr
	2022090200001	Inspections			Karen	09/02/2022	C-XYZ (RootOrg1)
	2022090100009	Inspections			Karen	09/02/2022	C-XYZ (RootOrg1)

- 4. To remove references, select the reference, and then click the **Remove references** icon.
- 5. After editing references, select **Close**.

NOTE In Tasks, you can use the Delete task option to delete tasks.

In the References dialog box, a column named **Reference type** will show information on the reference association.

EV	ENTS TASKS	CHANGE I	SSUES CONTRACT	TS DOCUMENT	ITEMS				
Ð	Θ								
	Event ID	Event title	Form name	Reporter	Event date	Project/Organiz	Status	State	Reference type
	2023032700009	Form Flow - SUB	Form Flow - SUB u	Karen	03/27/2023	Steel Structure Tra	Pending	InProcess	External reference

The Reference type column can have the following values:

- Associated form Started from a form or task button from within the form or task.
- Internal reference Associated with a reference question.
- External reference Associated by using the Add References button in the reference dialog box.

#### History for events and tasks

You can view the history of changes for events or tasks. You can sort and filter the list view.

## 8.4 Step by Step 9 — View form history

1. In the Form information slide-out, click **History**.

The history page opens where you can view changes made to the event or task.

Change type	Question/Option	Section	Old value	New value	Change date	Changed by
Answer	Did the tour result in a next step?	TOUR INFORMATION		No, there is no next step needed.	03/27/2023 11:21 AM	Karen
Answer	Update	TOUR INFORMATION		Karen 27/03/2023 11:21 AM	03/27/2023 11:21 AM	Karen
Answer	Who gave the tour	TOUR INFORMATION		Karen	03/27/2023 11:21 AM	Karen
Answer	Date & Time of the tour	TOUR INFORMATION		03/27/2023 12:00 AM	03/27/2023 11:21 AM	Karen
Answer	Name(s) of non-employees on the tour:	TOUR INFORMATION		John	03/27/2023 11:21 AM	Karen
Answer	Name of Company that was given the tour:	TOUR INFORMATION		JT Company	03/27/2023 11:21 AM	Karen
Status	Not applicable	Not applicable		Manager Review	03/27/2023 11:21 AM	Karen

2. Click **Close** when done viewing.

NOTE You must have permission to view the History dialog box.

#### 8.4.1.6 Delete an event or task

To delete an event or task, select events or tasks, and then click the **Delete** icon.

Environmental > Events -		
· ⊡ 🛛 🕶		
Delete form		
Event title	0	Category
Renew WWDP - Janitorial	0	Matrix
MB 535 - Rental Barge Weekly Inspec		Forms

Your role must contain permission to delete.

#### 8.4.1.7 Copy an event or task

NOTE

The ability to copy a task, or an event, along with its associated tasks and attachments, is useful when you have many tasks and attachments that mimic the last event, such as an environmental permit event. You can copy one event at a time or multiple tasks at the same time.

#### 8.4 Step by Step 10 — Copy event or task

1. In the **All events** or **All tasks** list page select an event or tasks to be copied, and then click the **Copy form** icon.

E	nvironmental > Events -		
Ē	⊗ ▼		
	Event title 1	0	Category
	Above Ground Storage Tank Inspec		Forms

When you copy one or multiple items from All tasks, the copied tasks are created with *COPY OF* in front of the task title.

When you copy an event from All events, the Copy event page opens to edit form details, attachments, and tasks.

	Сору е	event	
1 Details — 2	Attachments 3 Tasks		Cancel Next
	Details		
	• Event title	Organization/Project	
	Copy of Above Ground Storage Tank Inspection_20210	30 Crossing	•
	* Category		
	Forms		
	* Reporter	Event date	
	•	03/29/2023	<b>m</b>

- 2. In the Details page, you can edit the copied event, and then click **Next**.
- 3. In the Attachments page, you can uncheck any existing attachments to remove them, and then click **Next**.
- 4. In the Tasks page, you can uncheck any existing tasks to remove them, and then click **Next**.
- 5. Click **Copy** to create a copy of the form.

#### 8.4.1.8 Query builder

The Query builder feature can be used on event and task list pages. It provides a more granular filtering and querying option for events and tasks. These filtering options are an alternative to the options found in the grid page columns.

#### 8.4 Step by Step 11 — Using the Query builder

1. Click the Query Builder icon.

The query builder dialog box shows.

⊞ ⊗ ▼		
Event title 👳	8 Category	
Safety > Events •		
Queries		×
⊕ 🗹 ⊗ 🤜	Search	Q
My Query		*
Shared queries		

In the query builder you can add, edit, delete, and share queries. Your saved queries are listed under the My Query menu, and your shared queries are listed under the Shared queries menu.

NOTE Queries can only be shared with users in the same project.

- 2. Click the **Add** icon to add a new query, and then enter the conditions to your query.
- 3. Click Apply.

You can then use the Reset, Cancel, and Save Query buttons at the bottom of the query window. If you update an existing query, you can save the new query using the Save Query As button.

Query builder column condition choices

Query builder column condition choices are dependent on events or tasks. For example, if you select Events, you see column choices that are related to events.

		Column		Operator	Value	
Ð	nd	- Select one -	•	- Select one - 🔹 🔻		$\otimes$
Ð A	nd	- Select one -	•	- Select one - 🔹 🔻		$\otimes$
A	nd	- Select one -	•	- Select one - 🔹 🔻		$\otimes$
) A	nd	- Select one -	•	- Select one - 🔹 🔻		$\otimes$
) A	nd	- Select one -	•	- Select one - 🔹 💌		$\otimes$
) A	nd	- Select one -	٠	- Select one - 🔹 💌		$\otimes$
) A	nd	- Select one -	•	- Select one -		$\otimes$

NOTE You can enter up to seven conditions in a query.

#### 8.4.1.9 Views

For more information on how to save and send views and use the Global Events or Tasks option, see Event and Task Views.

#### 8.4.2 Managing tasks and events

#### 8.4 Step by Step 12 — Manage an event

- 1. From the Compliance landing page, select a **module** card.
- 2. Select the All events link.

All events and tasks links are shown under Links in the upper left side of the page.

Links	
All events	
All tasks	

3. On the Events page, select an event or task that requires additional review based on business process requirements. For example, an event with a pending status.

Event ID	Project/Organizati	Category	Form name	Event title	Reporter	Event date	Status
2019101100004	S100000 - PKS Inc	Incident	Project Manager	Johnson Branch facili	Karen	10/09/2019	Manager Review

- 4. Advance the event or task to the next form flow step, as required.
- 5. The status of the event will u pdate depending on how your form workflow is setup.

Managing tasks follow a very similar process, as shown below.

#### 8.4 Step by Step 13 — Manage tasks

1. Select the **All Tasks** link on the left side of the page.

Links	
All events	
All tasks	

- 2. Select a task by clicking on a Task title.
- 3. Advance the task to the next form flow step, as required.

#### 8.4.2.10 Monitor due dates, overdue states and statuses

You can monitor the events or tasks due dates, states, and status, and their adherence.

#### 8.4 Step by Step 14 — View due dates, overdue states and statuses

1. From the Completions landing page, click **All tasks**.

You can also go to **All events**.

In the tasks page, find the Due date (or Event date for events), Status, and State columns.
 Click the Column chooser icon to add the columns if they are not in the view.

	i	Q	Clear all filters
		State	= 🗆
	Attachme	ent	
	Task Id		
~	Project/C	rganization	
	Category		
<b>~</b>	Task nam	ne	
	Task title		
<b>~</b>	Responsi	ble party	
<ul> <li>Image: A start of the start of</li></ul>	Due date		
<b>~</b>	Status		
<ul> <li>Image: A second s</li></ul>	Assigner		
	Classifica	ations	
	Custom I	D	
	Exceptior	ıs	
	Expiratio	n date	
	Importan	ce	
	Location		
	Reference	es	
	Renewal	date	
	Source		
	Start date	9	
~	State		

3. Click the **Column chooser** again to close.

An overdue event or task will make the Due date and State columns turn red. An overdue email is also automatically triggered.

Due date	= Status	State	
02/01/2023	Scheduled	Overdue	
02/23/2023	Scheduled	In Process	
03/01/2023	Scheduled	In Process	
02/17/2023	Scheduled	In Process	
01/31/2023	Scheduled	Overdue	
02/24/2023	Scheduled	In Process	
02/28/2023	Scheduled	In Process	
02/08/2023	Scheduled	Overdue	
02/08/2023	Scheduled	Overdue	
02/09/2023	Pending	Saved	
03/07/2023	Scheduled	In Process	
02/07/2023	Pending	Saved	
01/25/2023	Pending	Saved	

**NOTE** The State column changes to Overdue after the due date.

#### 8.4.2.11 Monitor form flow status

When an event has an active form flow, you can click its Status column to open a dialog box with detailed information about the current status of the form flow.

The current status box has the following areas:

URRENT STEP Step 2	1. Form Initiated Start date: 10/31/2018	2. Quality Review Due date: 11/13/2018	3. Client Concurrence Due date: 11/19/2018	4. Close and complete workflow Due date: 11/21/2018
Quality Review	Abby Carter Original Reporter	Karl Jensen Site Auditor	Amy Peterson Project Engineer	Sarah Montgomery Administrator
2 Pending		Jimmy Crammer Site Auditor	Jeff Singleton Project Engineer	Steven Taylor Administrator
In Process		Jennifer Bard Site Auditor	Donald Thorton Project Engineer	Monica Bremmer Administrator
AYS UNTIL OVERDUE		Michael Lowe Site Auditor		Jamie Conner Administrator
4 5		Sondra Keppler Site Auditor		
DTAL DAYS OPEN		Louis Brown Site Auditor	1	
5 11/13/2018		Mary Johansen Site Auditor		

	Description
1	Current step.
2	Current status.
3	Current state.
4	Number of days until the form flow step becomes overdue.
5	Total days the form has been open.
6	Estimated form completion date.
7	All steps and their responsible parties.

For each step you will see the step name, start date, responsible parties, and their roles. Responsible parties have colored bars according to their sign-off status for each step:

Color	Sign-off status
Green	Complete
Yellow	Pending
Red	Overdue
Grey	Step not started

You can select different users to be responsible parties, depending on how a step is set up. The ability to select different responsible parties allows for updating users who no longer participate in the project, their roles have changed, etc.

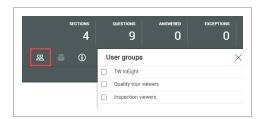
	2. Quality Review Due date: 11/13/2018	3. Clie Due di
	Karl Jensen	✓ An
	Search	C Pro
-	Karl Jensen	
	Jimmy Crammer	Je
	Jennifer Bard	Pro
	Michael Lowe	
	Sondra Keppler	DC
	Louis Brown	Pro
	Mary Johansen	11
	Mike White	
	Site Auditor	-

#### 8.4.2.12 Assign user groups

At the project level, you can give user groups permission to view events or tasks. User groups must first be set up for the project. For information on setting up User Groups, see <u>User Groups</u>.

#### 8.4 Step by Step 15 — Assign user groups to an event or task

1. Open the event or task, and then click the User groups icon in the upper-right of the page.



- 2. In the **User groups** side panel, select the groups you want to give permission to.
- 3. Click Save.

## 8.5 EVENT AND TASK VIEWS

You can change the column views in the All events and tasks pages. The custom viewsets can be saved and sent so that the global events and tasks can be viewed outside your current organization and project.

#### 8.5.1 Save a view

After you filter or sort the view to your preference, click the Viewset drop-down list, and then Save view as... option. You can save the views you use often.

		0	¢	8	٢	
Global Events/Tasks View:	My view					•
🖾 Edit properti 📢 📑	My view					19
	Save view					
Reporter	Save view as					Π
	Restore to default vi	ew				
	Send view					

In this example, the page is filtered to only include Incident related events.



When a saved view is created, it is also available as a link to the left of the module card.



## 8.5.2 Send a view

You can send your saved view to others. When you send a view, you are sending the organization, project, and applied filters defined by the view, not the exact same forms and tasks that you can see.

What receiving users see depends on their permissions. If they do not have permission to view all forms or tasks within the parameters, they cannot see them.

#### 8.5 Step by Step 1 — Send a view to another user

1. Click the View drop-down menu, and then select Send view.

My view	
JS - Tasks Statuses	
Save view	
Save view as	
Rename view	
Delete view	

2. In the dialog box, select the users and roles to whom you want to send the view, and then click **Send**.

Users	Remove all
Search	
Roles	Remove all
Search	

## 8.5.3 Global view

Global Events/Tasks view lets you see events and tasks outside of the organization or project you are currently viewing. To show the Events or Tasks page in global view, click **Global Events/Tasks** at the top-right of the page.

Quality > Tasks -								Global Events/Tasks View: JS - Tasks Statuses				*
	3 ⊗ ▼						🔁 Edit properti	D	-	(i)	Q Clear	all filters
	Due date 🛫	State	Status	Responsible party	Assigner	Task Id	Task name			Task title		
5	02/01/2023	Overdue	Scheduled	Elakkiya	Elakkiya	20230131	23.2 task					
1	02/23/2023	In Process	Scheduled	Elakkiya	Meghana	20230201	23.2 task					
2	03/01/2023	In Process	Scheduled	Elakkiya	Meghana	20230201	23.2 task					

In the global events an tasks page, you can narrow or expand your view using the query builder in the side panel. You can narrow or expand according to module, organizations, and projects you are assigned to.

Ġ <back< th=""><th></th></back<>	
Tasks 👻	
$\otimes$	
▼ Filters	«
Module	
	×
Organization/Project	Clear
	Q
✓ □ S100000 - PKS Inc (RootOrg1)	<b>^</b>
Select all	
0	
0	
0	
0	
0	
	,
Reset	Apply

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# CHAPTER 9 – PINNED TASKS

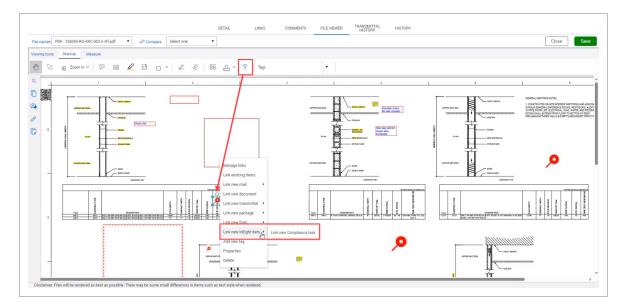
9.1 Pinned tasks overview	52
---------------------------	----

## 9.1 PINNED TASKS OVERVIEW

The pinned task feature integrates Document's Pinned links feature and both Compliance and Completions tasks. Oftentimes, project members need to mark on a file or drawing to fix or address a finding and assign to a team member for action. The pinned task feature lets users create and pin a new task from the Document viewer and sync it with the Compliance or Completions application.

NOTE Although Compliance is referred to throughout the topic, the Pin Task feature is available for both Compliance and Completions.

As an administrator, you can use the pinned task feature between both applications by configuring the feature in Document and Compliance. After you configure the integration, you can go to Document > File Viewer > **Markup** and place a pin on a drawing. From the pin, you can link it to a task in Compliance based on configuration. To do this, right- click the pin, and then select Link new InEight item > **Link new Compliance task** from the menu.



You can also create a new task in Links > Add > Link new InEight item.

Bocument No: A	-ARC-DRG-005-000002	PRev: A Sts: IFI			
			DETAIL	LINKS	COMMENTS
Mail (2)	<b>⊙</b> • ⊙				
	Link items	Subject			Mailbox
Document (2)	Link new InEight item	Add new Compliance task	Structure		Inbox
	HCC-000003		TACHMENT - 2023-11-20		Inbox

When you select Link new Compliance task, a dialog box shows to enter details for the task.

* Task Name	
Replace ceiling tile in	n office 4A
* Task due date	
12-22-23	ť
User contact	
Tyler Ellerbeck	
Description	
Ceiling tile is damag	ed and needs to be replaced.

After saving the task, and then saving the markup in File Viewer, a link is saved in the Links tab that is associated with the task created in Compliance.

The following image shows the link in the Document > Links tab:

		DETAIL LINKS	COMMENTS FILE VIEWER T	RANSMITTAL HISTORY		
ompliance Tasks (37)	● • ⊖					0
informative tasks (21)	Task Name	Task Due Date	Task Start Date	Responsible User	Status	Completion Date
	* Replace ceiling tile in office 4A					
	<ul> <li>Beplace ceiling tile in office 46</li> </ul>	12-22-23		Tyler Ellerbeck	Scheduled	
	+ Dige sale - Check 3					
	C Dessen.Chek3	12-17-29		Gogi Badara	Scheduled	
	+ Dage check4					
	O Desidents	12/18/29		Gopi Badara	Scheduled	
	- Dage check 4 - Double click					
	Describert 4. Double city	12-05-29		Gopi Badara	Scheduled	
	- Age checks					

You can launch the task by clicking the link in the Document Links page after the task has been created. When you click the link, the task opens in the Compliance web application. When the task has not been completed, a dialog box shows to create the task.

The following image shows the associated task created in Compliance:



Assigned tasks will be available to complete in Compliance web or the SQC mobile application as shown in the following images:

Disco el Terelo				
Pinned Task			 	
* Issue name				
Replace ceiling tile in office 4A				
				(217 characters remaining)
* Issue due date		* Responsible user		
12/22/2023	<b>m</b>	Tyler Ellerbeck - tyler.ellerbeck@ineight.com		4
🔁 Schedule				
Issue number		* Description		
		Ceiling tile is damaged and needs to be replaced.		
Not Applicable				
				(3957 characters remaining)
Assign Tyler Ellerbeck 12/06/2023 8:43 PM				
Notes:				

15:28				
Cancel	Pinne	ed Task	s	Save
Sections   C	uestions 2	Answered O	Exception 0	<sup>15</sup>
inned Task				
* Issue name				
Replace ceiling	g tile in off	ice 4A		
		217 chara	acters rema	aining
Incrue due det	-			
	e			-
* Issue due dat	e			Ċ
12/22/2023	e			Ë
12/22/2023	-			8
	iser			<b>*</b>
12/22/2023	iser			
12/22/2023	iser			
12/22/2023 Schedule * Responsible of Tyler Ellerbec	iser			≙
12/22/2023 Schedule Responsible u Tyler Ellerbec Issue number	iser k			≙
12/22/2023 Schedule * Responsible of Tyler Ellerbec	iser k			
12/22/2023 Schedule Responsible u Tyler Ellerbec Issue number	iser k			۵ ۱

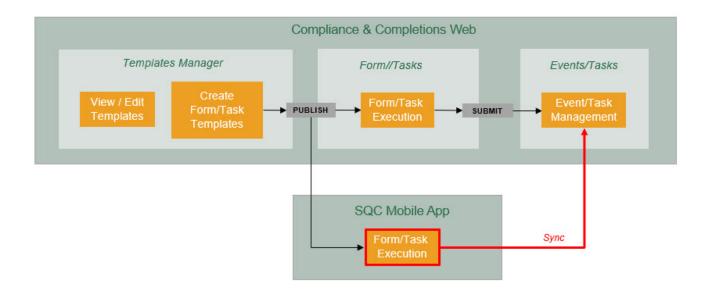
Any updates to task values, such as task start date, issue date, and responsible user are synced with the pinned task in the Document links page.

### 9.1.1 Considerations

- Although Compliance is referred to in this topic, the Pin Task feature is available for both Compliance and Completions.
- In Document, you must configure the integration in Address book > Companies > <company> > InEight Integrations tab.
- In Compliance, you must configure a module template that integrates with Document. For more information, see the Pinned task setup guide in <u>Integrated Solutions</u>.

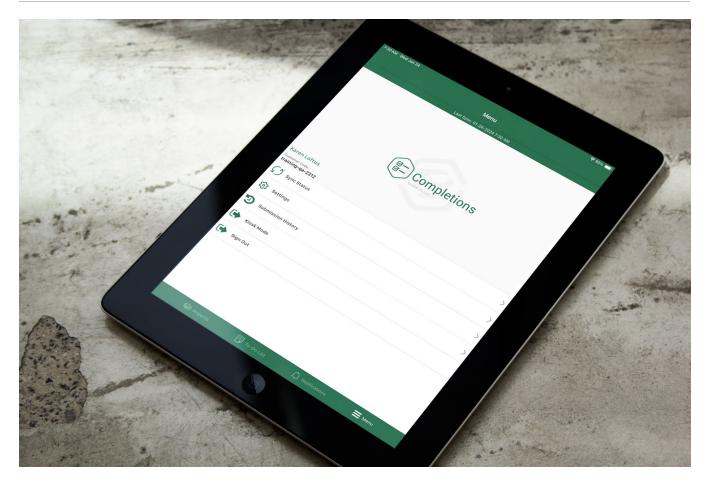
# CHAPTER 10 – SQC MOBILE

## 10.1 OVERVIEW



The InEight SQC mobile app lets you incorporate technology when completing inspections and tasks instead of a traditional method of using a paper form. The SQC mobile app is available to download from the Apple App Store.

You can perform inspections and complete tasks using the forms, questionnaires and tasks created in the Compliance or Completions web application. You can complete them while connected online or complete them offline, and then synchronize the results when online using your iPhone or iPad. You can also easily locate your forms or tasks based on your project assignment.



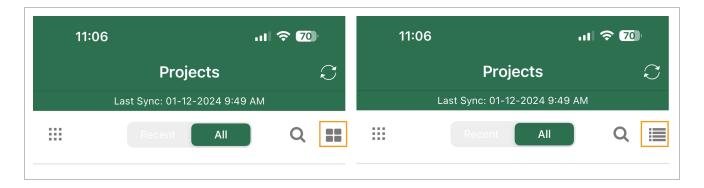
For more information about mobile device requirements, see <u>Client System and Mobile Device</u> <u>Requirements Specification</u>.

## **10.2 NAVIGATION**

In the mobile application you can view your project assignments, use notifications, and navigate to your forms or tasks. After opening a project, you can then select a module, category, and then choose your assigned forms or tasks in the Templates page.

#### 10.2.1 List view

You can view listed items as a list or tiles. Switch by tapping the List or Tiles icon at the top right of the page. This option is available on every list page, such as the Projects and Modules page.



You can also tap the **Sync** icon at the top of any list page to manually sync the data when you are in a connected environment. For more information, see <u>Sync</u>.

#### 10.2.2 Bottom menu

You can navigate to the Projects, To-Do List, Notifications, and the Menu pages from the buttons at the bottom of the page. The following image and table show the bottom navigation buttons and descriptions:



#### **Bottom navigation buttonz**

Name	Description
Projects	View and select projects for which you have permission.
To-Do List	View forms and tasks under the Saved or Assigned tabs that need attention. Forms and tasks are listed within organizations and projects you have been assigned to.
Notifications	Send notifications with messages to specific users, roles, projects, or organizations.
Menu	Go to Sync Status, Settings, Submission History, Kiosk Mode, and Sign Out.

### 10.2.3 Navigate to forms and tasks

From the Projects window, you can navigate to your forms and tasks. Read more

## Go to your assigned forms or tasks.

1. In Projects, select from the list of projects assigned to you.

	11:06	I 🗢 70
	Projects	$\mathcal{C}$
	Last Sync: 01-12-2024 9:49 AN	1
	Recent All	Q <b>#</b>
	BMS Test (BMS Test) (BMS Test) (BMS Test)	>
	<b>C-XYZ (RootOrg1)</b> (RootOrg1)	$\left.\right>$
	C-XYZ-ND (EO-ID) (EO-ID)	$\left.\right>$
	C-XYZ-ND-BC (EO-ID4) (EO-ID4)	$\left.\right>$
	C-XYZ-ND-HC (EO-ID3) (EO-ID3)	$\left.\right>$
nc.   Relea	<b>C-XYZ-ND-M (EO-ID5)</b> (EO-ID5) ase 24.5	Page 263 of 3 <sup>-</sup>
~		

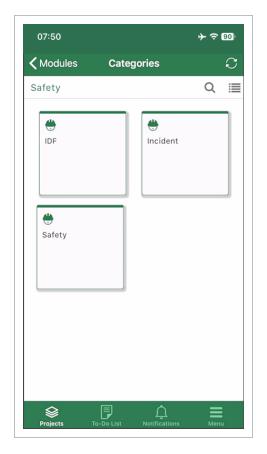
The Modules page opens.

2. In Modules, select from the modules assigned to you.

9:34		<b>.</b> 11 🗢 90	þ
<b>〈</b> Projects	Modules		$\mathcal{O}$
Last S	Sync: 01-12-2024 9::	33 AM	
		Q	
Compliance	Chan	ge	

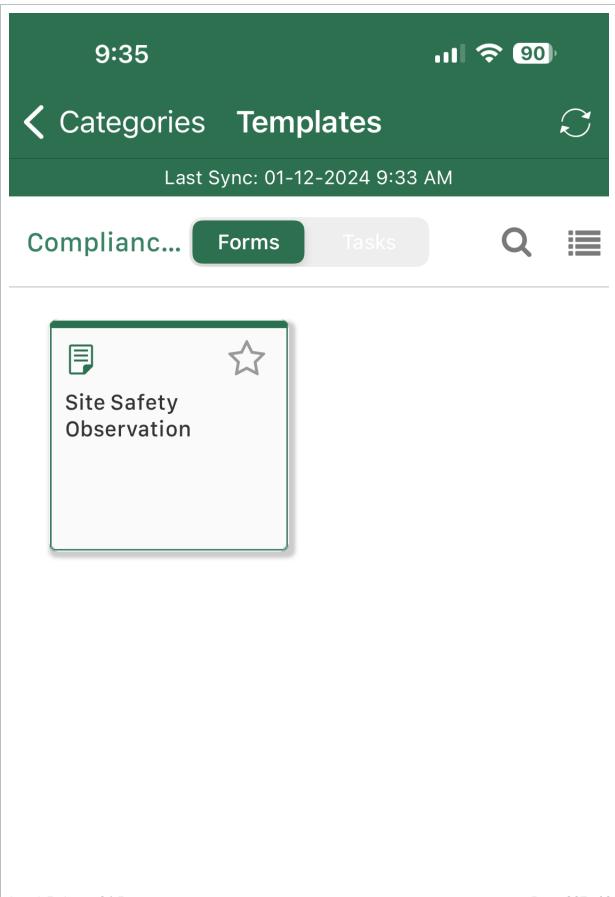
The Categories page opens.

3. In Categories, select from the list of categories.



The Templates page opens.

4. In Templates, select templates from the Forms or Tasks tab.



The form or task opens on your mobile device.

5. Complete the form or task.

9:35			.ıI 奈 90	),
Cancel S	ite Safety	y Observa	ation Sa	ave
Sections <u>2</u>	Questions 9	Answered 0	Exceptions	i
INSPECTION				
* Event Date				
* Event Time				<b>U</b>
* Who condu	cted the Safe	ety Observat	tion?	() ()
Safety Categ	ory			
Select one				•
nc.   Release 24.5 Location			Pa	age 26



19

### 10.2.4 Considerations

All projects, modules, and categories are assigned by your administrator through permissions on the Compliance or Completions web application.

## **10.3 PROJECTS**

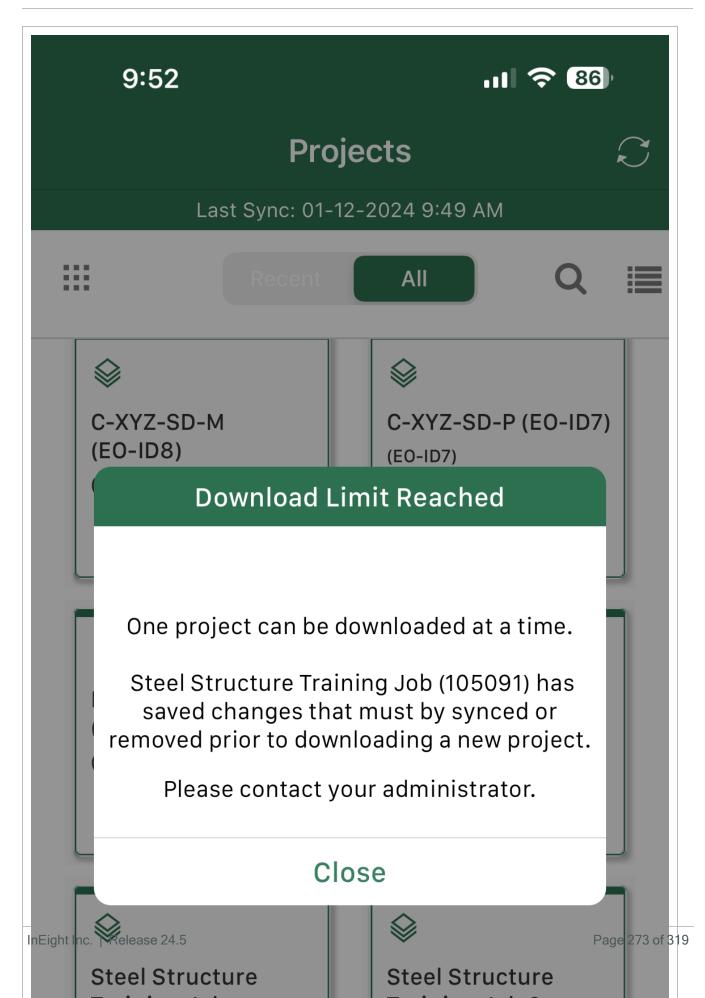
On the Projects page, you can view all projects or the two most recent downloaded projects using the All or Recent tabs at the top of the page. You can also tap the **Search** icon to find a specific project.

	11:06 <b> ?</b> (	70
	Projects	$\mathcal{C}$
	Last Sync: 01-12-2024 9:49 AM	
	Recent All	
	BMS Test (BMS Test) (BMS Test) (BMS Test)	>
	<b>C-XYZ (RootOrg1)</b> (RootOrg1)	>
	C-XYZ-ND (EO-ID) (EO-ID)	>
	C-XYZ-ND-BC (EO-ID4) (EO-ID4)	>
	C-XYZ-ND-HC (EO-ID3) (EO-ID3)	>
nEi	C-XYZ-ND-M (EO-ID5) (EO-ID5)	Page 27 of 31

07:50		≁≎	90)
Pro	ojects		$\mathcal{C}$
Last Sync: 02,	/27/2024 7:48 AM		
Recent	All	Q	
Q Project 4			×
			٦
Project 4A (100003) (100003)	Project 4B (Project 4B) (Project 4B)		
★ Active			

You can have one active project at a time. In the Recent tab, the current open project shows as Active.

Any project changes must be synced prior to selecting a different project. When you select a different project to sync, a Download Limit Reached notification shows to remind you to sync or remove the projects changes prior to downloading the new project as shown in the following image:



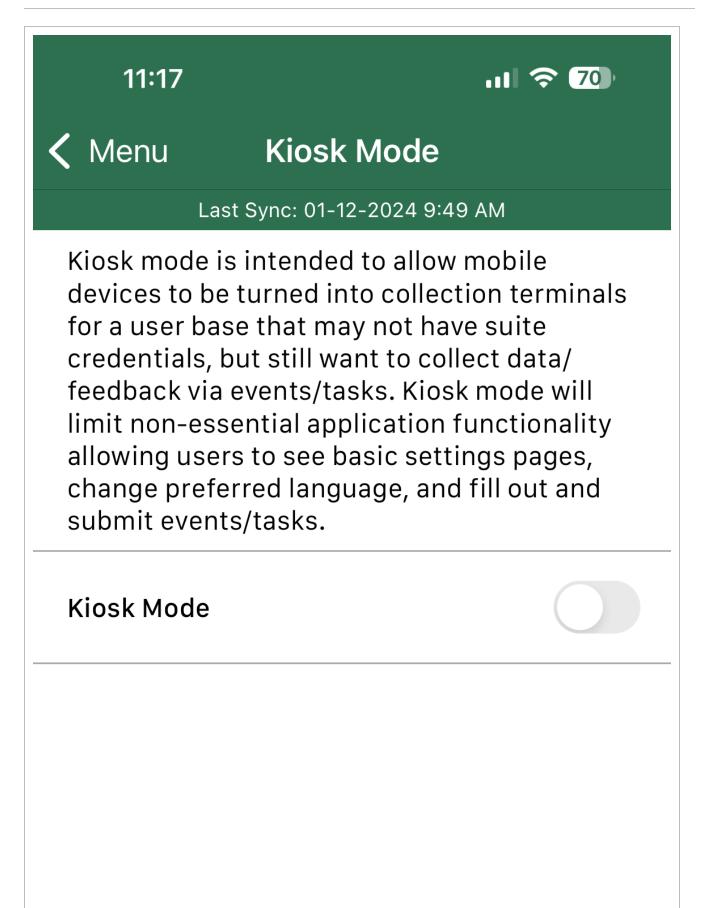
### 10.3.1 Considerations

- In the Recent tab, you can remove the project by tapping the screen and holding it until you see the Delete icon. Select to delete the project.
- The Recent tab shows the current and previous active project. When you switch back to the previous active project, the existing data is updated, improving the sync performance.

## **10.4 KIOSK MODE**

Kiosk mode limits mobile functionality to filling out and submitting forms or tasks without requiring users to sign in. Kiosk mode is useful if your project has subcontractors who may not be users in your system, but who need to report information.

To enable kiosk mode, go to Menu > Kiosk mode, and then switch the toggle to On.

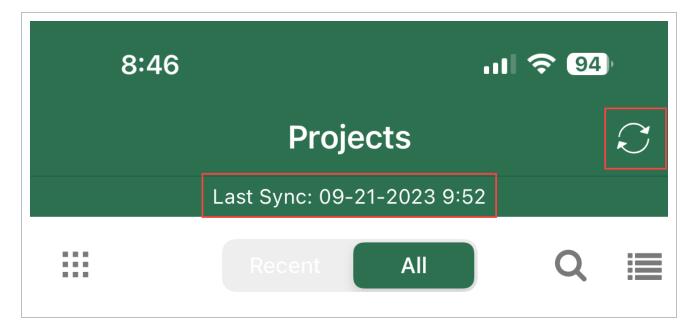


If you want to limit kiosk mode to a default project, module, or category, you can set those in Menu > **Settings** when kiosk mode is off. After you set defaults, and then enable kiosk mode, you can only see forms within the default settings.

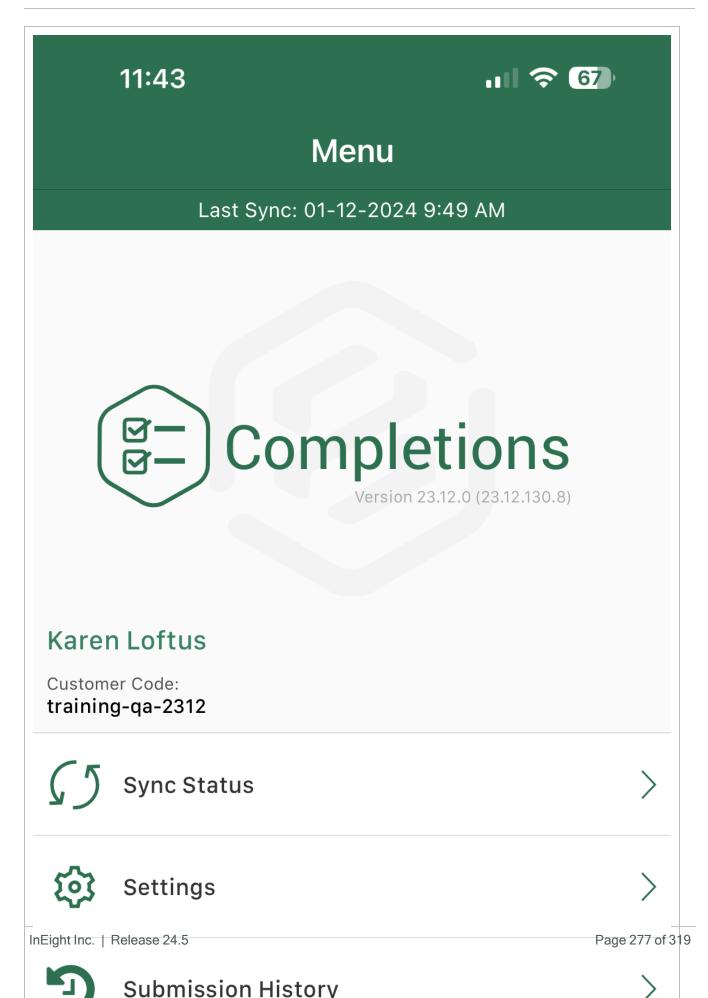
## 10.5 SYNC

The application must be synced to get the most recent updates from the web application, such as the latest template revisions, permissions, or access to newly assigned projects.

When you are in a connected environment, tap the **Sync** icon at the top of any list page to manually sync the data. A banner at the top of the application informs you when the last sync took place.



You can access Sync Status and Sync Settings from the Menu page.



### 10.5.1 Sync status

You can check the status of your syncs in Menu > Sync Status.

9:27		ul 🗢 90)
🗸 Menu	Sync Status	
La	st Sync: 01-12-2024 9:2	26 AM
<b>Project Master -</b> 01-12-2024 9:26 AM	105091	Complete
<b>Project List</b> 09-11-2023 12:38 PM		Complete

### 10.5.2 Sync Settings

You can customize how the mobile application syncs with the web application in Menu > Settings > **Sync Settings**.

**Sync in Advance** – Syncing in advance lets you choose whether to sync items from the web in 7, 14, or 21 days in the future. <u>Read more</u>

As events and tasks are assigned, they need to be available on your mobile device days ahead of the due date so that they can be done on time.

12:00	III 🗢 66
<b>〈</b> Settings <b>Sync In Adva</b>	ince
7 Days	
14 Days	$\bigcirc$
21 Days	$\bigcirc$
Choose the number of days synch place in the future.	aronization will take

**Sync Over** – You can choose whether to allow syncing only over Wi-Fi or over both Wi-Fi and Cellular. Read more

This gives you the flexibility of choosing the most reliable connection available in your location.

12:01		ul 🗢 😚
<b>〈</b> Settings	Sync Over	
Wi-Fi		
Wi-Fi or Cellular		$\checkmark$
 InEight Inc.   Release 24.5		Page 283 of 3

Sync Profile – The Sync Profile settings lets you sync assigned work items to your device. Read more

You can select to enable syncing for events and/or tasks. Both are disabled by default. When you have assigned work items on your device, and then disable one of the sync toggles, you are asked to confirm whether you want to remove the work items from your assignments and unlock them on the web.

12:01		ul 🗢 😚
<b>〈</b> Settings	Sync Profile	
SYNC ASSIGNED	WORK ITEMS	
Events		
Tasks		
_ InFight Inc.   Dologge 24.5		

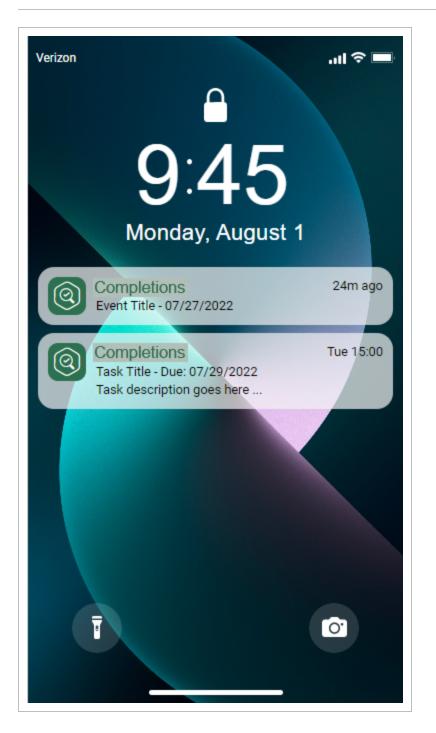
11:22		ul 🗢 🚱
< Menu	Settings	
Last	Sync: 01-12-2024 9:4	49 AM
SYNC SETTINGS		
Sync In Advance 7 Days	e	$\left.\right>$
<b>Sync Over</b> Wi-Fi or Cellular		$\left.\right>$
<b>Sync Profile</b> Events & Tasks		$\left.\right>$
LANGAUGE SETTIN	NGS	
Default Languag English Page 286 of 319	ge	InEight Inc.   Release 24

## **10.6 PUSH NOTIFICATIONS**

You can setup push notifications on your iOS mobile device to alert you of any updates of assigned events and tasks. Use the iOS notification settings to control notification alerts.

5:21 1	4 7
Compliance Notifications	
Allow Notifications	C
NOTIFICATION DELIVERY	
Immediate Delivery     Deliver right away	~
Scheduled Summary     Deliver at 08:00, 12:00, 15:00, 18:0	0, 20:00
Notifications are delivered immediately.	
ALERTS	
ALERTS	Banners Ø
Lock Screen Notification Center	Banners ©
Lock Screen Notification Center	0
Lock Screen Notification Center	0
Lock Screen Notification Center	0

When an assigned item is set up, you receive a notification on your mobile device.



You can tap on the notification to launch the application automatically. If you are logged in, it takes you directly to the item in the To do list. You must be logged into the application to receive notifications.

# **10.7 FILLING OUT AN EVENT OR TASK**

TIP

Mobile tasks all have the same abilities as using tasks on the web with the added ease and efficiency of offline use.

When filling out a form or task, the top of the form or task shows the following information:

••• Verizon	TE 9::	21 AM	99%	ý <b>(11)</b> ,
Cancel	Finalize qu	ality revi	iew Sa	ve
Section <u>1</u>	us   Questions   3	Answered 2	Exceptions	<b>i</b>
Finalize qua	ality review pro	cess		
quality re	eview			
Julio	LINETO .			9
Date of up	coming quality	review		
02-16-202	23		ť	
* Quality st	ер			

Name	Description
Sections	The number of sections. Tap this number to open a slide-out panel of sections that you can navigate to without scrolling.
Questions	The total number of questions.
Answered	The number of questions answered.
Exceptions	The number of answers flagged as exceptions. Tap this number to open a slide-out panel of questions answered with exceptions. You can go to those questions by tapping them in the panel.

The information icon is next to the header numbers. When you tap it, a slide-out panel opens that provides more information about this event. Task functions the same way.

In the example below, there are four questions on this event, three of which are answered.

Can	Form	×
Accide	312	
Descri		
Hid h	ANS	STIONS WERED
* Date		14
Janua	Proj/Org	Appomattox Topsides
Janue	Category	
Time c	Event date	01/16/2020
1:18 P	Status	-
	Reporter Event title	Karen
Specif	Event title	Politi
8th fl	Date started	01/16/2020
	Module	
	Version	

The slide-out also provides you with the project and organization information, category, event date, status, reporter, event title, start date, module, and version. To close the slide-out, tap the **Information** icon again or tap the **Close** icon at the top right of the page.

#### NOTE Using tasks will follow the same process.

Mandatory questions on an event or task are denoted with an asterisk (\*). Sometimes the Information icon may provide more information such as cautions or general information to help you complete the event or task.

II VZW Wi-Fi 🗢	2:44 PM	🖵 74% 🔲	🖬 VZW Wi-Fi 奈	🖵 2:42 PM	🖵 74% 🗖
	Form	<b>1</b> (i)	<b>K</b> Back	Details	
Cancel		Save	Description	he accident	
Inform	ation		Please do not ind this field	cludes individuals na	ames in
Description	ve accident	i			
On Friday morn	ing I ran into				
* Date of		ters remaining			
		<u>^</u>			
Time the	occurred				
		0			
Specific location	n where the too	curred			

You can use voice dictation in the Completions mobile application. Tap the microphone on the keyboard and speak.

••• Verizon LT	9:21 AM	99% 🔲,
Cancel I	Finalize quality review.	Save
Sections <u>1</u>	Questions Answered Exce 3 2	o o o o o o o o o o o o o o o o o o o
Finalize qual	ity review process	
quality rev	iew	
Julio	813	2
Date of upco	oming quality review	
02-16-2023	3	
* Quality ste	р	
I		
I	The	l'm
QW	RTYUI	ΟΡ
AS	DFGHJ	KL
▲ Z	XCVBN	M
123 👲	space	return

The dictation will be transferred to the area you selected, making it convenient to fill out the event or task without the keypad.

## 10.7.1 Copy a section

You can copy sections of a form or task when the template sections have been set up to allow it. If the copy option is enabled, you can use the Copy section button in the section header to copy the section below the current section.

NOTE Depending on how the form or task template was set up, the Copy section button might have a different name.

You can also tap the **Remove** icon to remove a copied section.

Crew Information	
Select crew member	
	<b>4</b>
	E Copy section
Crew Information	
Select crew member	
	۵.

## 10.7.2 Question types

#### 10.7.2.1 Date – Time

Your event or task might include a field to indicate the date and time and lets you collect the date and time together or separately.

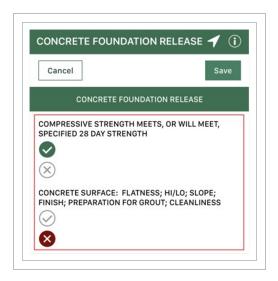
Select a date field. Scroll to the date you want, and it is shown in the date field.

			~
	Forr	n 🔺	<b>(</b> )
Cancel		5	Save
Information			
Date of			
October 15, 2019			
Time the			
			0
Specific location where	the	et accurred	0
Specific location where	the	rt accurred	0
Specific location where	the	rt accurred	0
•		et accurred	0
Specific location where Juny August	the 12	2016 2017	0
July	12		0
July August	12 13	2017	٢
August September	*2 13 14	2017 2018	٢

The Time question defaults to the time at your current location. Use the scroll bar to move to the time in AM or PM for your selection.

#### 10.7.2.2 Choice

Choice questions are used for options like yes/no, pass/fail, accept/reject. These questions use a radio button or icon.



#### 10.7.2.3 Text

Text questions are areas in the event or task that capture free text in short (250 characters) or long form (4,000 characters). For example, this can be used for descriptions, short descriptions, explanations, names of subcontractors, and locations.

In the long text fields, you can tap the expand icon to expand the box for you to continue typing or use the microphone to dictate.

🛛 VZW Wi-Fi 奈	2:59 PM	🖵 71% 💷	🗚 VZW Wi-Fi 🗢	2:59 PM	🖵 71%
	Form	<b>1</b> (i)			Done
Cancel		Save			
Inform	nation		1		
Specific locatio	n				
			1		
			1		
	4000 characters r	emaining 🖌			
Please add any	pertinent photos	,			
	ō				
	Attach photos				
0 photo(s) a	ttached				
			1		
				4000 char	acters remainir

TIP On free text fields, the mobile application opens a full page for efficiency.

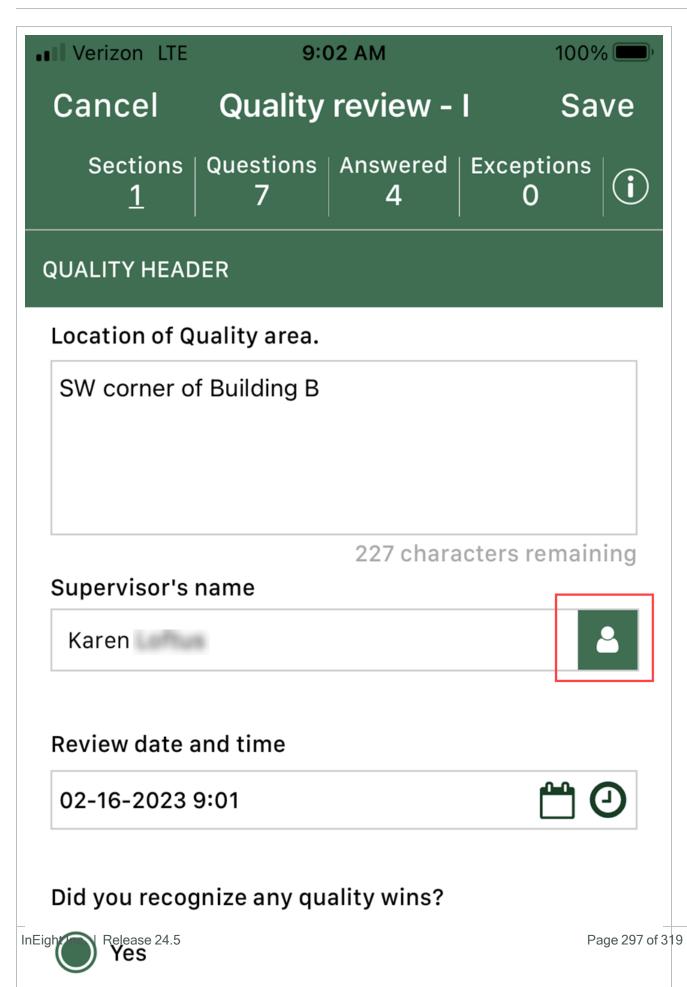
#### 10.7.2.4 People picker

A people picker question is available to use to select those users that have access to the module at the organization level in which the event or task is being performed against.

To access the names, begin typing the name or select the **People Picker** icon. Depending on how the administrator sets up the question, you can select multiple users or none, and the list of users can include only users with Completions roles or all users in the project.

A new page is shown with the names of users. Select the name and it appears in the indicated field on the event or task.

Depending on how the question is set up, the selected user can receive an email notification.



Verizon LTE	9:03 AM	100% 🔲
<b>〈</b> Back	People picker	
		Q
J		
Jorge @ine	ight.com	
Julio @	ineight.com	
К		A B C D
Karen @IN	IEIGHT.COM	G V J K
L		N P R
<b>Lorraine</b> Lorraine	@ineight.com	S U V Z
ge 298 of 319		InEight Inc.   Release

Μ

**NOTE** The people who show in the list are the users who have a Completions assignment to the project for which the event or task is being filled out.

#### 10.7.2.5 Attach photos

The Completions mobile application lets you take photographs and annotate the areas of focus while filling out the event or task. Select **Attach photos** to add photos to the form or task. After tapping attach photos, it will open a page from which you can select an option from the Photo Library or Take Photo using your device.

For example, you might attach location photos of buildings or objects, or a picture of a letter or certification.

🛿 VZW Wi-Fi 奈	3:04 PM	🖵 70% 🗔
	Form	<b>1</b> (i)
Cancel		Save
Informa	tion	
	3969 characters	remaining 🖌
Please add any pe	ertinent photos	,
I. I. I.	<b>O</b> <sup>†</sup>	
	Attach photos	1
🛋 0 photo(s) att	ached	;
* Manager's signa	ture	
1	Photo Library	
	Take Photo	
	Cancel	

After the picture is taken, you can edit the photo by selecting the **Edit** button at the top right of the page. This opens editing and annotation options. There are colors, widths, and text options available. A time stamp is added when edits are made, and the stamp can be moved around the screen for optimal

viewing. You can also edit the name of the image file to be more meaningful than the default name given by your device.

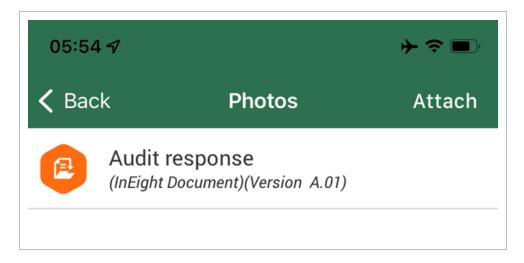


Prior to the image being saved, the Undo icon in the lower left removes edits.

When finished, tap **Done** and return to the event or task page. You will see the included photo attachments links. If you want to view a photo, tap the attachment link to open. Alternatively, if you want to include more photos, tap **Attach photos** again.

Please add	any pertinent photos	
	Ō	
	Attach photos	
🖬 1 phato	(s) attached	'

If integration with InEight Document is configured, you can also see if supporting documents from the Document application are attached when performing a form or task. Document links are shown in the list of attachments with the Document icon and document version numbers.

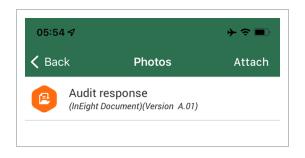


To remove an attachment, swipe left, and then tap the Remove icon.

Crew Information	
Select crew member	
	۵
	E Copy section
Crew Information	
Select crew member	
	۵

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Accident Inform	ation	
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Please add any p		_
     	<b>e</b> t	
	Attach photos	
• 1 - h - h - (-) - h		J
1 phpto(s) at	lacheu	
* Submit form		
	•	

If you have set up integration with InEight Document, you can also see if supporting documents from the Document application are attached when performing a form or task. Document links are shown in the list of attachments with the Document icon and document version numbers.



To remove an attachment, swipe left, and then tap the **Remove** icon.

05:54 🔊		■ ≎ ﴿
🗸 Back	Photos	Attack
Audit respon		0

#### 10.7.2.6 Form flow

A form flow button can complete the first step of a form flow from the mobile application. Additional steps must be completed by responsible parties in web Completions.

Form flow buttons have a right arrow next to them.

📲 Verizon 🗢	4:42 PM	<b>—</b>
	Form	<b>1</b> (i)
Cancel		Save
Party Inf	ormation (Confidential	
Date of Birth		
		Ê
Date of hire		
		Ë
	]	
Send for Mana	ger Review 🔶	

#### 10.7.2.7 GPS

A GPS question lets you provide your location by tapping GPS or by entering your coordinates directly in the fields. You can also tap Clear GPS to remove the information if you need to enter a different location.

••• Verizon LTE	9:17 AM	<b>1</b> 00% 🗩
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Sections   Qu <u>1</u>	estions Answered 6 6	Exceptions 0
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O Yes		
No No		
Please provide lo	cation information	
♥ GPS		
	3.5758931154505	
Ū	111.885464591354	
Clear GPS		
Supervisor's sign	ature	
<u>×                                    </u>	7. 97	/ ~
Select to approv	ve	

To use the GPS button on your mobile device, you must allow the Completions app to access your location when prompted.

NOTE If you enter GPS coordinates automatically, you cannot manually edit the coordinates.

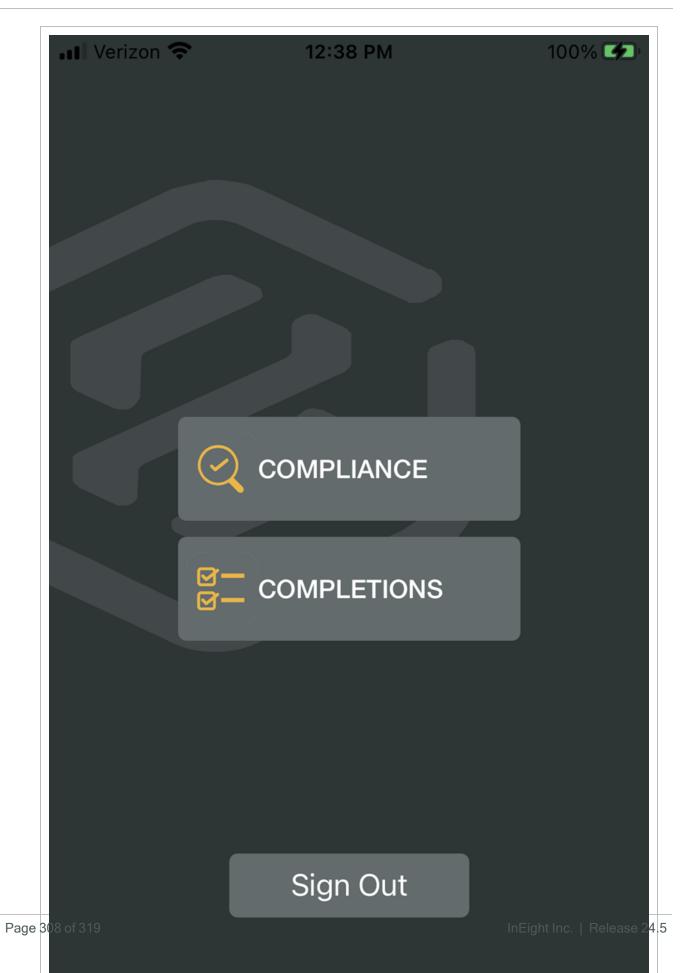
## 10.7.3 Complete a Form or Task

For more information on how to save and submit a form or task, see Complete a Form or Task.

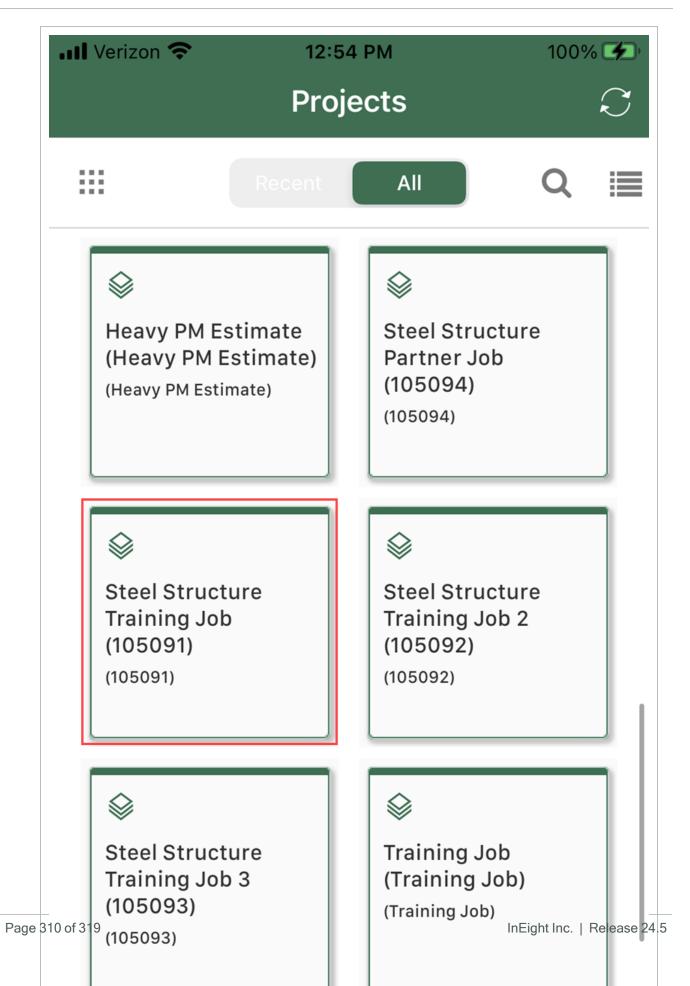
The following step-by-step walk you through performing an event on a mobile device.

## 10.7 Step by Step 1 - Fill out an event form

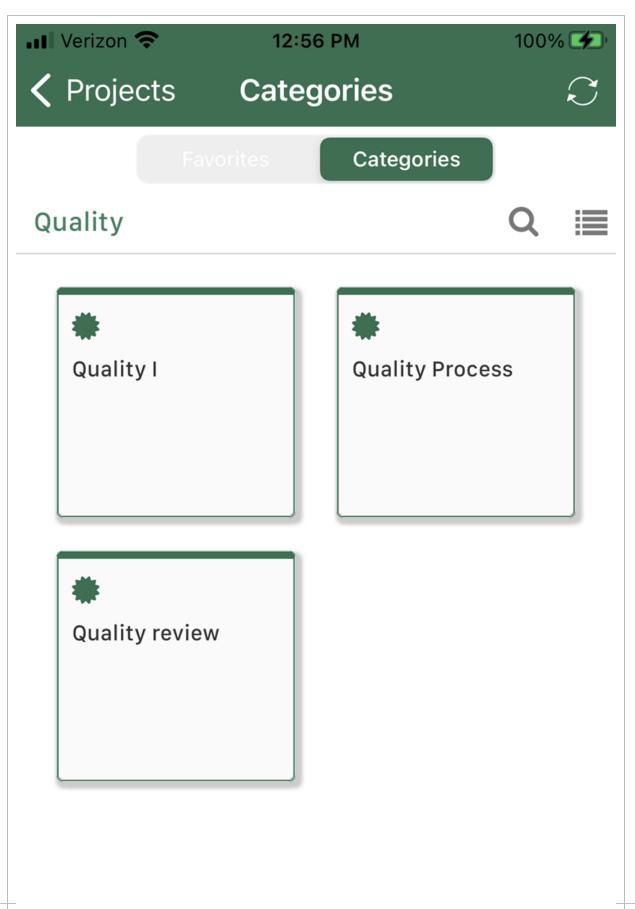
1. Open the InEight SQC mobile application and launch Completions by tapping Completions.



2. In the project landing page, open your project.



3. Select a category from the Categories screen, and then select an event from the template list.



4. Fill out the form and complete all required fields.

II Verizon LTE	9:17 AM	<b>100%</b>
Cancel (	Quality review	- I Save
Sections   Qu <u>1</u>	uestions Answere 6 6	ed Exceptions 0
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No No		
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Longitude : Clear GPS	-111.88546459135	4
Supervisor's sig	nature	
x 7	2.2	5
Select to appro	ove	

## 10.8 COMPLETE A FORM OR TASK

There are several ways to complete a form or task depending on how it is set up by your administrator and what the next steps are.

## 10.8.1 Save a form or task

If you do not have enough time to complete a form or task, or not all information about the event is readily available, you can tap **Save** to save your work. You can then continue or close the form or task, and then come back later to complete and submit it.

••• Verizon LTE	9:2	23 AM		98% 🔲,
Cancel Fin	alize qu	ality revi	ew	Save
Sections   G	Questions 3	Answered 3	Except	ions
Finalize quality	review pro	cess		
	397	9 characters	s remair	ning 🖌
Was any work i	mpacted d	ue to quality	y issues	?
◯ Yes				
No No				
* Responsible p	arty			
	Janty			
* Due date				
02-17-2023				
Schedule				
*				
Assigned				
Assign and s	start new t	ask		

## 10.8.2 Assign a task

As part of filling out a task, you might have to assign it to someone else to complete part of the task. To assign a task, tap the Assign button. If you want to start a new task immediately after assigning the current task, tap Assign and start new task.

### 10.8.3 Submit a form or task

After you complete your event or task, tap the **Submit** button to submit it. Depending on how the form or task is configured, the buttons may have other labels. In this example, the button is labeled **Select to approve**. This syncs with Completions (web) for manager approval.

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Cancel	Quality	review -	I Sa	ve
Sections   <u>1</u>	Questions 6	Answered 6	Exceptions O	<b>i</b>
QUALITY HEAD	ER			
טוע אטע ופרטע	յուշե գուծ ժո	מוונא אוווס:		
◯ Yes				
No No				
Please provid	e location ir	nformation		
♥ GPS				
Latitude :		31154505		
Longitude :	-111.8854	164591354		
Clear GPS				
Supervisor's	signature			
<u>×</u>		J.	<u>~_</u> 7	
Select to ap	prove			

TIP If you have not completed your event or task, you can tap **Save**, and it goes to the to-do list, where you can retrieve it when you are ready to complete it.

NOTE After you sync the completed event or task to the web, it is removed from your device.

In Completions (web), you can view the event to review or open it to continue filling out the form.

	Safety > Event	S					View:	All			Ŧ
×							N	3	<b>i</b>	Q	Clear all filters
	Event ID		Project/Organizatio 😑	Category	Form name	Event title	Reporter	Event da	te		Status 📃
	2019101100005		\$100000 - PKS Inc		Form	Form_20191	Karen	10/16/20	019		With Claims Mana

The manager can now sign off on the event in the web application. Click the event title to open the event to the closure of investigation section. This is where the manager signs and taps on the Close and complete this incident button to complete the form.

Report form			1	Canc	cel Save
Send for mana			×		
	Signature				
CLOSUR					
Click here to st					
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×	×		Clear		
			Done		
Close and com					
		INEIGHT (B)			

After the event is signed and completed, its status on the Events page changes to Complete.

# **10.9 LOCKED EVENTS AND TASKS**

When you are in the process of completing a task or event on a mobile device, a locking mechanism is in place to ensure your completion of the task or event. This means another user cannot open your task or event as long as you are synced to the mobile device and the list shows the item as locked.

0	uality > Events -						View:	My view	v		•
[+	) 🛞							3	<b>(i</b> )	Q	Clear all filters
	Event ID .	Project/Organization	Category	Form name	Event title	Reporter	Event date		Status		
	2019112700063	iSmart	iSmart_001	All_Questions_Oct_15	Testing nov 27	Krishna	11/27/2019		Pend	ing	i i
	2019112700060	iSmart	iSmart_001	All_Questions_Oct_15	Esting for web lock	Krishna	11/27/2019		Com	olete	
	2019112700055	iSmart	iSmart_001	All_Questions_Oct_15	Esting for checking do list	Krishna	11/27/2019		Pend	ing	
	2019112700047	iSmart	iSmart_001	All_Questions_Oct_15	Testing for email associated	Pradeep	11/27/2019		Com	lete	

If the Event title of a locked item is	s tapped, the event will open,	but will be unavailable for editing.
--	--------------------------------	--------------------------------------

	QUESTIONS
(	ANSWERED
	7/7
	Edit properties
Proj/org	iSmart
Category	iSmart_001
Event date	11/27/2019
Status	Pending
Reporter	Krishna
Event title	Testing for checking do list
Date started	
Module	Quality
	4
Version	
◆ Attachments	

NOTE

If the Information icon is selected, edit properties are also unavailable.

#### 10.9.0.1 Unlock

If you prefer to complete a task on the web rather than on mobile, you can delete the task from your To-Do List.

To delete a task, go to To-Do List > **Assigned**. Swipe to the left on the task, and then tap the delete icon that is shown to the right.

NOTE

🕻 To-Do List	RootOrg1 (S100000 - PKS Inc)	$\Sigma$
	Saved Assigned	↓† Q
ABC 123 - Cor	rporate Forms	~
Crane /15/2021		匬

NOTE When you delete a task from the To-Do List, you must be online. If you delete a task when not online, the item is deleted but not unlocked on the web application. In this case, you must resync when connected, and then delete again.

After you delete a task from the To-Do List, it is recommended that you not sync your device until the assigned task's status is changed from Scheduled to Pending in the web application. To update the status, you can start the task on the web or, if you have permission to edit properties, you can bulk update unlocked tasks.

If the task status remains Scheduled the next time you sync, the task is locked and downloaded to your device.