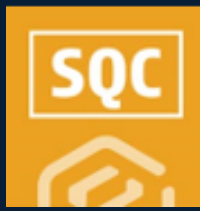


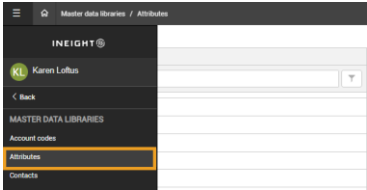
QUICK GUIDE

AUTOMAPPING WITH ATTRIBUTES PRE-REQ

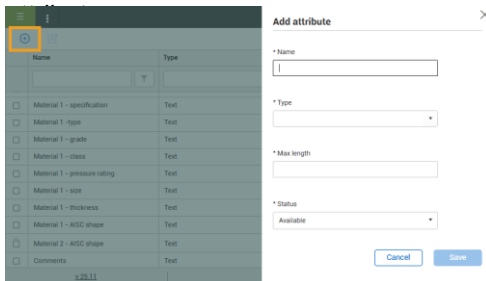


A CREATE ATTRIBUTE VALUE

- At the Core level, and from the Master Data Library, select **Attributes**.



- Click the **New** icon to create a new

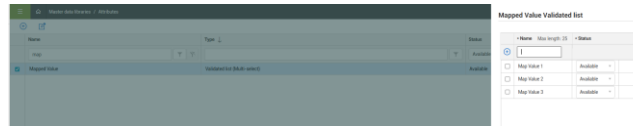


- Type in the following fields:

- Name: **Mapped Value** (or your preferred name to be used for automapping)
- Type: **Validated List (Multi-select)**
- Max Length: **25** (or up to a max of 100 to accommodate expected values)
- Status: **Available**

- Click **Next**.

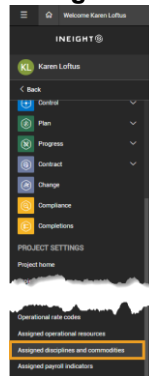
- Click the + icon to define the items that exist under the Mapped Value Attribute.



- Click **Save**.

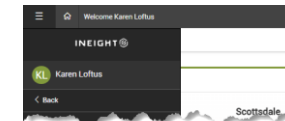
B ASSIGN ATTRIBUTE TO DISCIPLINE, COMMODITY & PROJECT VALUE

- At the Project level, under Project Settings, select **Assigned disciplines and commodities**.

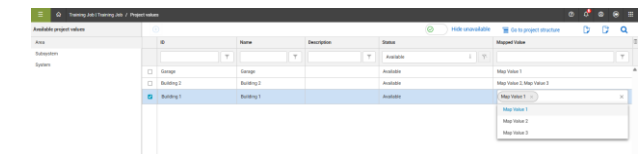


- On the Disciplines tab, click the hyperlink of your desired Discipline to open.
- Click the **Assign attributes** icon.
- Search for and select the Mapped Value option created previously.
- Click the **Add** icon.
- Repeat steps 1-5 above on the Commodities tab.

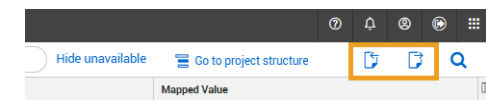
- At the Project level, under Project Settings, select **Project Values**.



- Click on each Available Project Value option on the left.
- Select the desired Mapped Value(s) in each Mapped Value column.

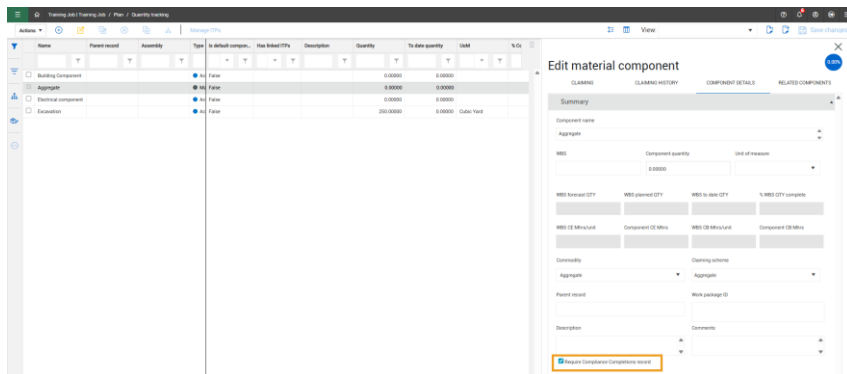


- If desired, utilize the import/export buttons to leverage updated project values.

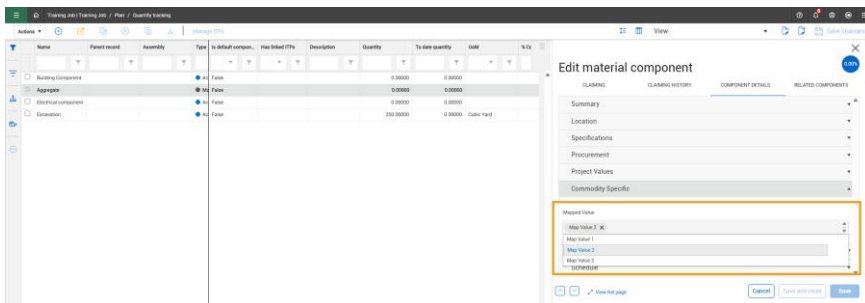


C CONFIGURE COMPONENTS IN PLAN

1. At the project level, open **InEight Plan > Quantity Tracking**.
2. Using the **Edit button**, open an existing Component.
3. Click on the **Component Details** tab.
4. At the end of the Summary section, check the **Require Compliance Completions record** checkbox.



5. On the Commodity or Discipline Specific drop-down, select the appropriate Mapped Value(s).



6. Repeat as necessary for other Activities or Materials.
7. Click **Save**.

NEED SOME MORE HELP?



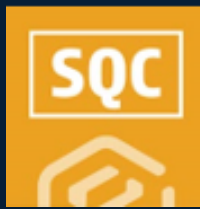
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AUTOMAPPING WITH ATTRIBUTES



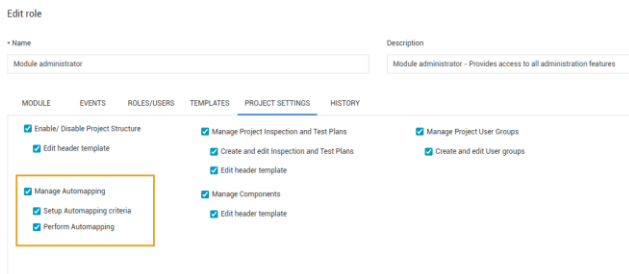
PREREQUISITES

To automap with Attributes:

- Components and/or Project Structure must be enabled in Module Settings > Project settings, and
- You must have published templates with expected headers defaulted.
- Project Structure values must be in place in Core Platform.
- A Project Structure must be set up in Core Platform.
- To automap Project Structure values, a Project Structure must be set up in Core Platform.
- To automap Components, Components in Plan must be configured.

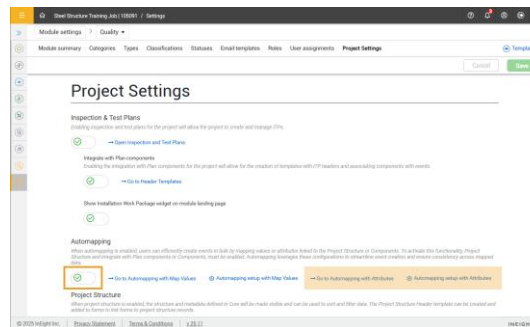
MODULE ADMINISTRATOR SETUP

1. Access a specific project, and then either Compliance or Completions.
2. Select a module, then **Settings > Roles**.
3. Search for and open the project-level role that will manage the automapping process at the project level.
 - Level 3 admins will have these abilities as well.
4. Select the Project Settings tab and ensure the Auto Mapping selections are checked.



A TURN ON AUTOMAPPING

1. Access a specific project, and then either Compliance or Completions.
2. Select a module, then **Settings > Project settings**.
3. Toggle on the **Automapping** options.



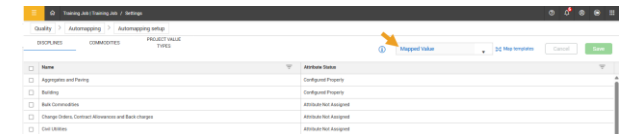
NOTE: Check out the [Knowledge Library](#) for additional Quick Guides such as:

- Automapping with Mapped Values
- Component Header
- ITP Setup and Scheduling
- Project Structure Header

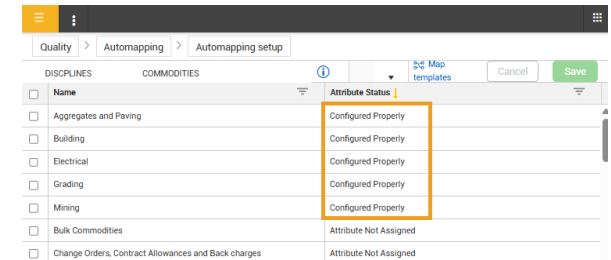
B SET UP MAP VALUES

For this scenario, the attribute is titled 'Mapped Value'.

1. Select **Automapping setup with Attributes**.
2. Select your attribute, in our case **Mapped Value**.
3. Click **Save**.

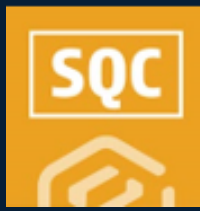


- Disciplines, commodities, and project values that possess the selected attribute will display a status of "Configured Properly" on the project's Automapping setup with Attributes page.



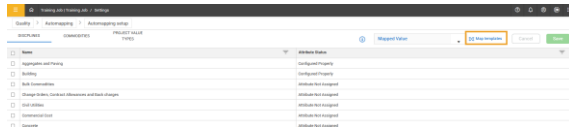
- This indicates that the attribute has been assigned to those values for the given project.
- Conversely, if an item shows a status of "Attribute Not Assigned," it means that the selected attribute is not present for those items.

QUICK GUIDE AUTOMAPPING WITH ATTRIBUTES

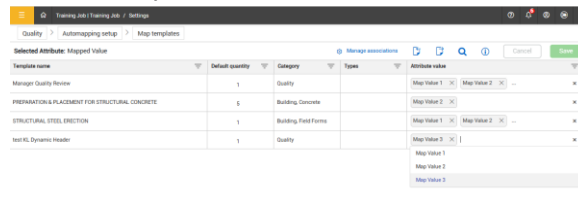


C ADD MAP VALUES TO TEMPLATES

1. Select **Map templates**.



2. Select one or many of the map values for each desired template and select **Save**.



D MAP TEMPLATES TO PROJECT STRUCTURE

1. From the project's Project Settings tab, select levels of project structure hierarchy by selecting **Go to Automapping with Attributes**.

Automapping

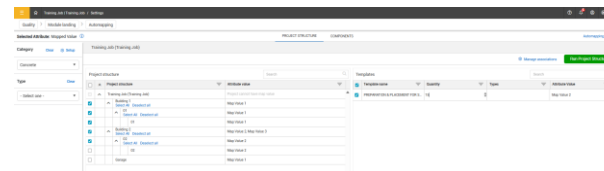
When automapping is enabled, users can efficiently create events in bulk by mapping values or attributes linked to the Project Structure or Components. To activate this functionality, Project Structure and integrate with Plan components or Components, must be enabled. Automapping leverages these configurations to streamline event creation and ensure consistency across mapped data.



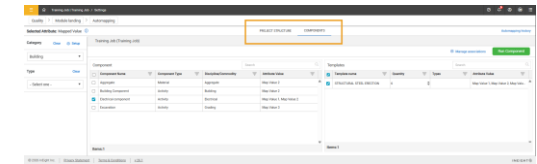
2. Select the Project Structure or Components tab.
3. Select a Category.



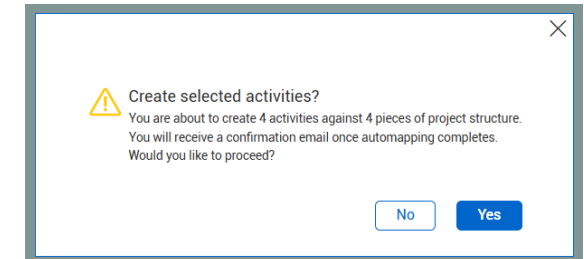
4. Check the box(es) for the desired Project Structure or Component value(s).
5. Select the check box next to the Template Name(s).
6. Update the Default Quantity as needed.



7. Select the **Run Project Structure** or **Component** button.



8. The resulting pop-up tells us the application will calculate the needed number of events to be created based on your selections and the number of checklists you want to generate. If the quantity displayed matches your selections and expectations, click **Yes** to proceed with creating the activities.



NEED SOME MORE HELP?



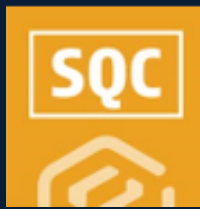
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AUTOMAPPING WITH ATTRIBUTES



E EDIT EVENTS TO ASSIGN REPORTER & DATE

- From the module's All Events page, remove the filter on the Event Date so all items appear.
 - The Event Date and Reporter will be unassigned.
- Select the checkbox next to the **Event Title** and then select **Edit Properties**.

Customer ID	Reference	Event title	Category	Event ID	Event date	Form	Project/Org	Reporter	Status	Form Row copy	Local	Site	State
		STRUCTURAL STEEL ERECTION	Building	202511240001	11-24-2025	STRUCT.	Steel Structure	Karen Loftus	Scheduled	On Web	Autosync	In Process	
		STRUCTURAL STEEL ERECTION	Field Forms	202511240001		STRUCT.	Steel Structure		Scheduled	On Web	Autosync	In Process	
		STRUCTURAL STEEL ERECTION	Field Forms	202511240001		STRUCT.	Steel Structure		Scheduled	On Web	Autosync	In Process	
		STRUCTURAL STEEL ERECTION	Field Forms	202511240001		STRUCT.	Steel Structure		Scheduled	On Web	Autosync	In Process	

- In the resulting pop-up, add the Reporter and Event Date, then select **Save**.

Property	Value
Reporter	Karen Loftus
Event date	11-30-2025

Buttons: Cancel, Save

- The fields will now be populated.
 - Repeat as necessary.
- With the Event populated in the previous step, the Reporter will receive a programmatic email indicating the automapping event has been created.

The Excel attachment provides a detailed breakdown of the Project Structure level where automapping occurred.

F PERFORM THE FORM

- From the All Events tab, open the **Project Structure** icon.
- Filter or search for the event.

Project structure

Selected item: Building 1

4 events

- Open the event and perform the form.

STRUCTURAL STEEL ERECTION_2025112400001

STRUCTURAL STEEL ERECTION

Event ID: 2025112400001

Project structure

Area: Building 2, Segment: SEG1, System: GEN, Subsystem: SUB1

Structural Steel Erection

Buttons: Cancel, Save, Save & close

- Select **Save** or **Save & Close**.
 - For events to show on a user's mobile device, the event (with an event date) must be assigned. If the user's sync profile is enabled, and if the event is within the selected sync profile date range, the event will be synced to the user's device.