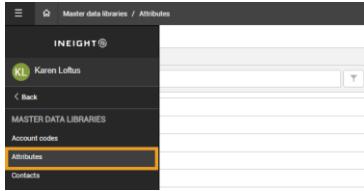
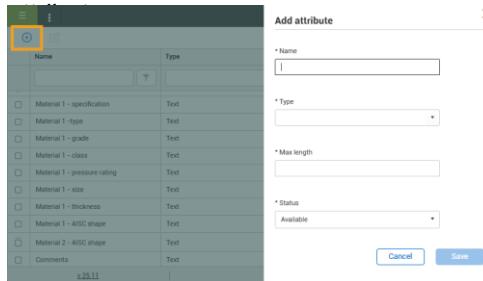


A CREATE ATTRIBUTE VALUE

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



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

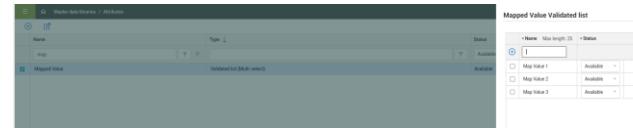


- Type in the following fields:

- 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**.

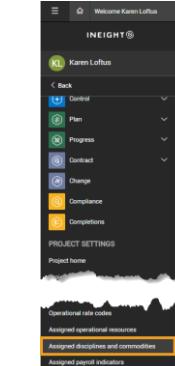
- Click the **+** icon to define the items that exist under the Mapped Value Attribute.



- Click **Save**.

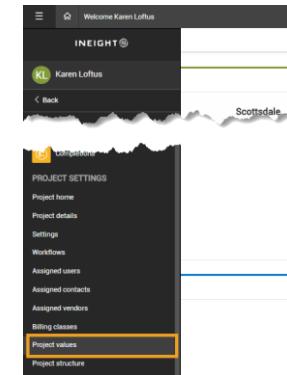
B ASSIGN ATTRIBUTE TO DISCIPLINE, COMMODITY & PROJECT VALUE

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

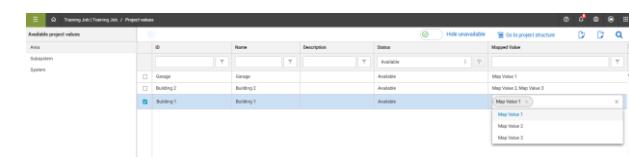


- On the Disciplines tab, click the hyperlink of your desired Discipline to open.
- Click the **Assign attributes** icon.
- Search for and select the Mapped Value option created previously.
- Click the **Add** icon.
- Repeat steps 1-5 above on the Commodities tab.

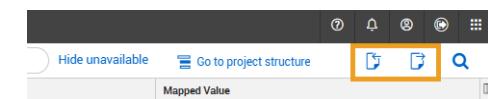
- At the Project level, under Project Settings, select **Project Values**.



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

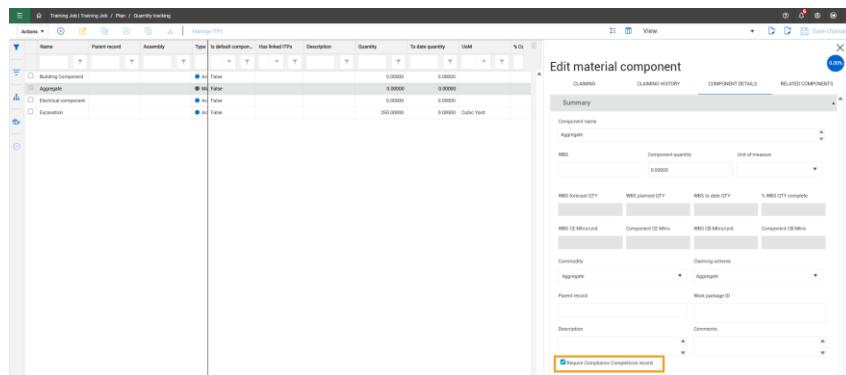


- If desired, utilize the import/export buttons to leverage updated project values.

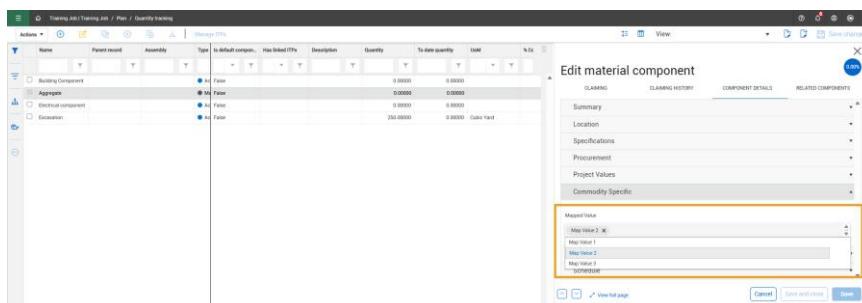


C CONFIGURE COMPONENTS IN PLAN

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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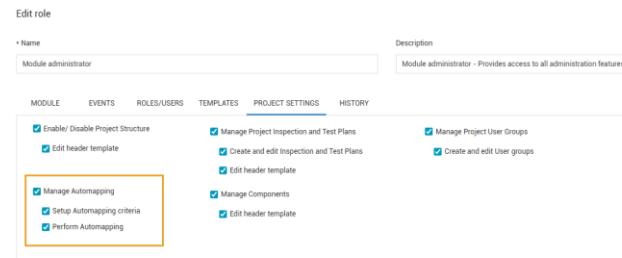
PREREQUISITES

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

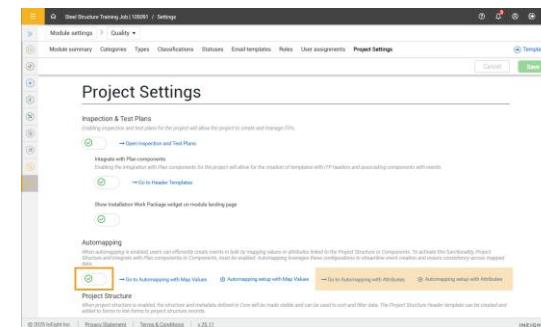
- Access a specific project, and then either Compliance or Completions.
- Select a module, then **Settings > Roles**.
- Search for and open the project-level role that will manage the automapping process at the project level.
 - Level 3 admins will have these abilities as well.
- Select the Project Settings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



A

TURN ON AUTOMAPPING

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



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

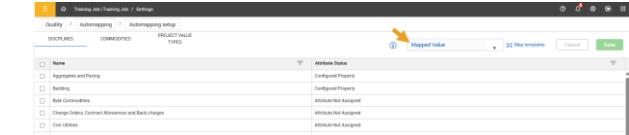
- Automapping with Mapped Values
- Component Header
- ITP Setup and Scheduling
- Project Structure Header

B

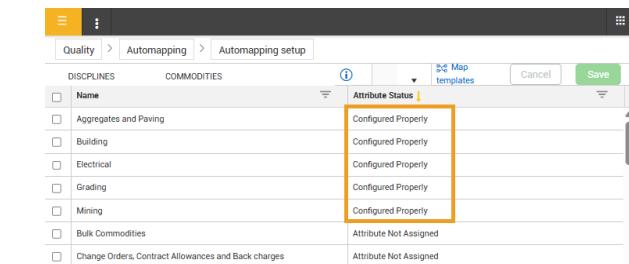
SET UP MAP VALUES

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

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



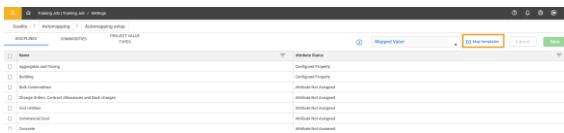
- Disciplines, commodities, and project values that possess the selected attribute will display a status of "Configured Properly" on the project's Automapping setup with Attributes page.



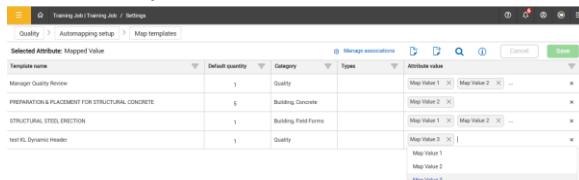
- This indicates that the attribute has been assigned to those values for the given project.
- Conversely, if an item shows a status of "Attribute Not Assigned," it means that the selected attribute is not present for those items.

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**.



2. Select the Project Structure or Components tab.

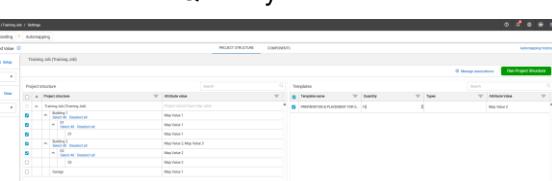
3. Select a Category.



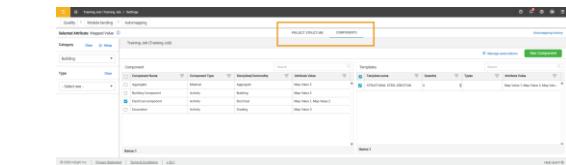
4. Check the box(es) for the desired Project Structure or Component value(s).

5. Select the check box next to the Template Name(s).

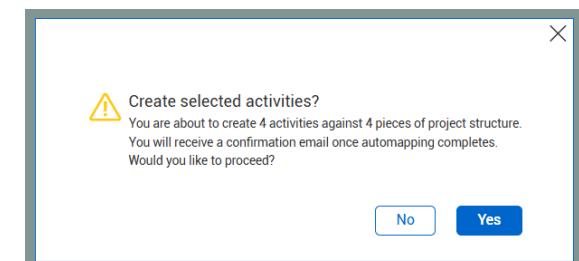
6. Update the Default Quantity as needed.



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.



⚠ Create selected activities?
You are about to create 4 activities against 4 pieces of project structure.
You will receive a confirmation email once automapping completes.
Would you like to proceed?

NEED SOME MORE HELP?



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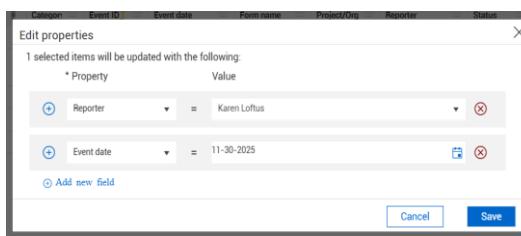
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E EDIT EVENTS TO ASSIGN REPORTER & DATE

- 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**.



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



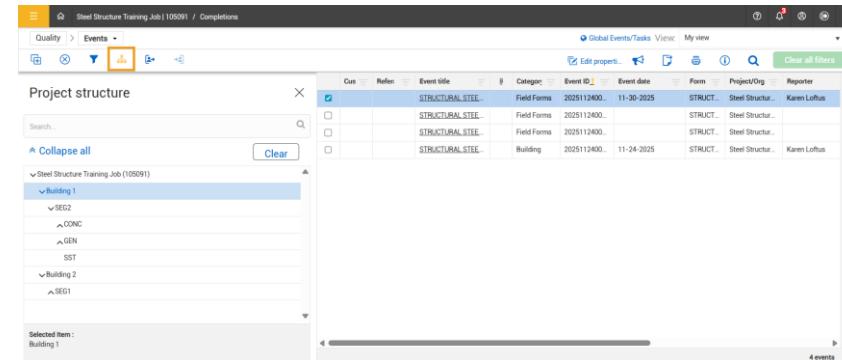
- The fields will now be populated.
- Repeat as necessary.

- With the Event populated in the previous step, the Reporter will receive a programmatic email indicating the automapping event has been created.

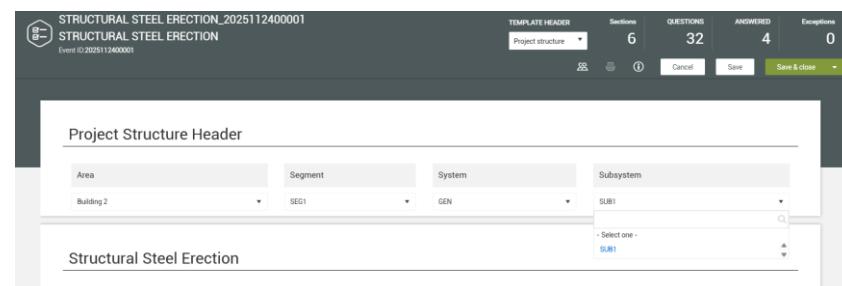
The Excel attachment provides a detailed breakdown of the Project Structure level where automapping occurred.

F PERFORM THE FORM

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



- Open the event and perform the form.



- 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.