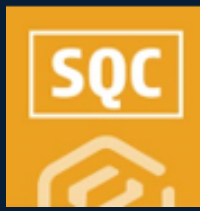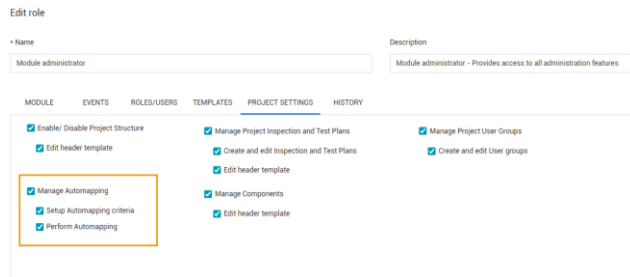# QUICK GUIDE
AUTOMAPPING WITH MAPPED VALUES

SQC

PREREQUISITES

- A Project Structure must be set up in Core Platform.
- Project Structure values must be in place.
- ITP and/or Project Structure must be enabled along with having published templates.
- ITP and/or Project Structure associations must already be set up.
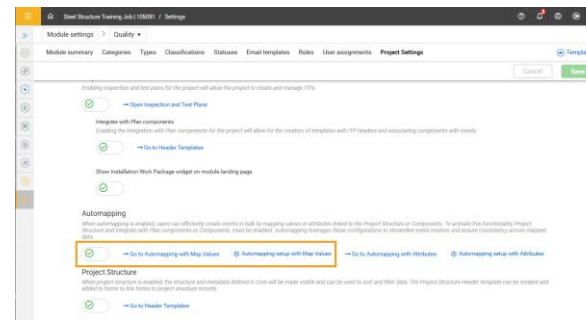
⬡ MODULE ADMINISTRATOR SETUP

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.

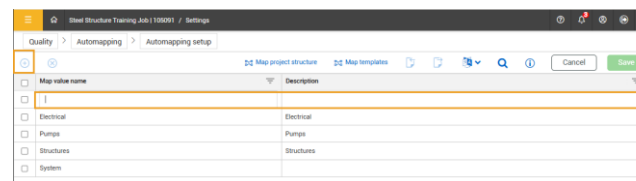4. Select the Project Settings tab and ensure the Auto Mapping selections are checked.

A TURN ON AUTOMAPPING

1. Access a specific project, and then either Compliance or Completions.

2. Select a module, then **Settings > Project settings.**

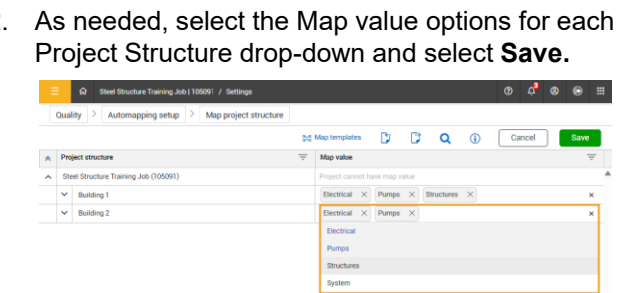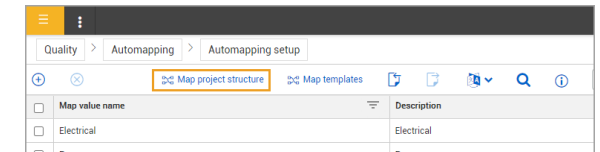3. Toggle on the **Automapping** options.

B SET UP MAP VALUES

1. Select **Automapping setup with Map Values**.

2. Select the **Add** icon.

3. Type in Map value names and Descriptions and select **Save**.
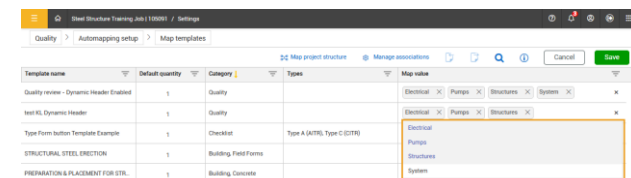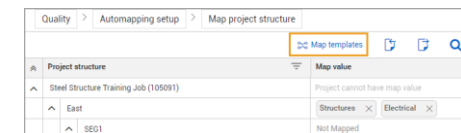
C ADD MAP VALUES TO PROJECT STRUCTURE

1. Select **Map project structure**.

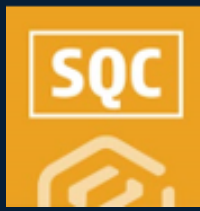2. As needed, select the Map value options for each Project Structure drop-down and select **Save.**

D 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**.
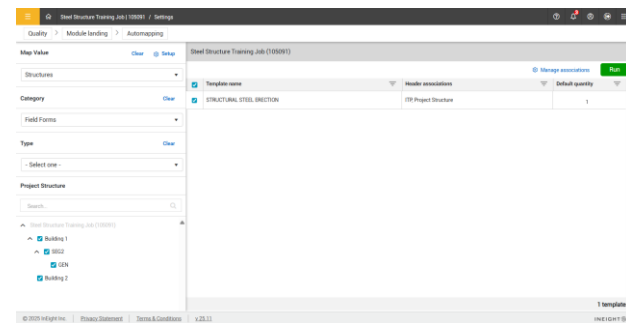
E MAP TEMPLATES TO PROJECT STRUCTURE

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

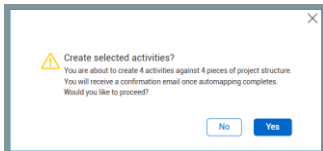2. On the left side of the screen:
   A. Complete the Automapping drop-downs.
   B. Select the levels of the hierarchy.

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

4. Update the Default Quantity as needed.

5. Select **Run.**

6. In the resulting pop-up, select **Yes** to create the activities.
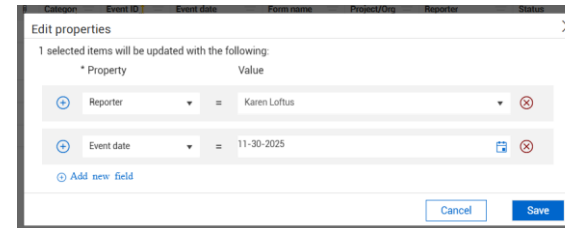

F EDIT EVENTS TO ASSIGN REPORTER & DATE

1. 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.

2. Select the checkbox next to the **Event Title** and then select **Edit Properties**.

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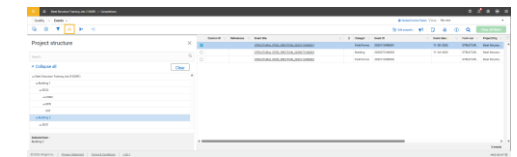

   • The fields will now be populated.

   • Repeat as necessary.

4. 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.

G PERFORM THE FORM

1. From the All Events tab, open **the Project Structure** icon.

2. Filter or search for the event.

3. Open the event and perform the form.

4. 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.