

# QUICK GUIDE

# COMPONENT HEADER



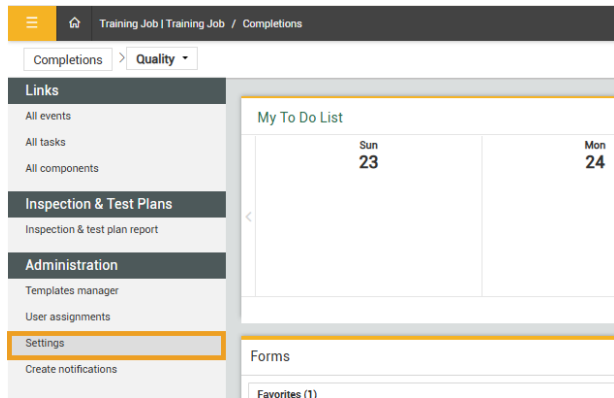
Metadata being pulled into the Component Header is associated with Plan components. It is a blend of master data (discipline, commodities, etc.) and data that exists only on components in Plan (Location/Line number or Specifications/Code class etc.)

## ENABLE THE COMPONENT HEADER

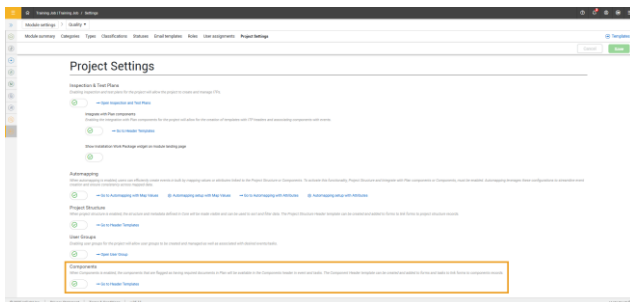
When you enable the Component Header feature in Project Settings, the system automatically generates the Component Header template.

The Attributes question seamlessly integrates with InEight Platform master data, ensuring data consistency and providing a single source for Platform data.

1. At the project level, open either Compliance or Completions.
2. Click on **Settings > Project settings**.



3. Turn on the **Components** toggle.



## TWO WAYS TO ACCESS THE COMPONENT HEADER TEMPLATE



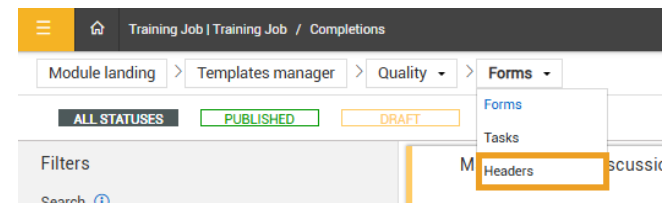
1. A. From a project's Project Settings page, ensure the Components toggle is turned on.  
B. Click on the Component's **Go to Header Template** link.

### Components

When Components is enabled, the components that are flagged as having required documents in Plan will be available in the Components header in event and tasks. The Component Header template can be created and added to forms and tasks to link forms to components records.

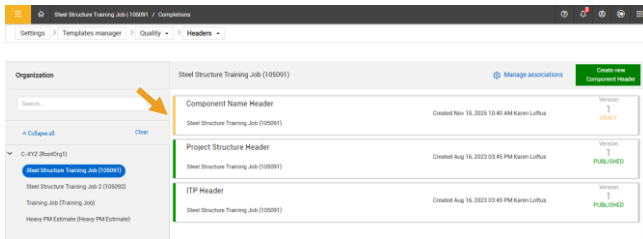


2. A. Open a project's **Templates manager** page.  
B. Click on the drop-down and select **Headers**.

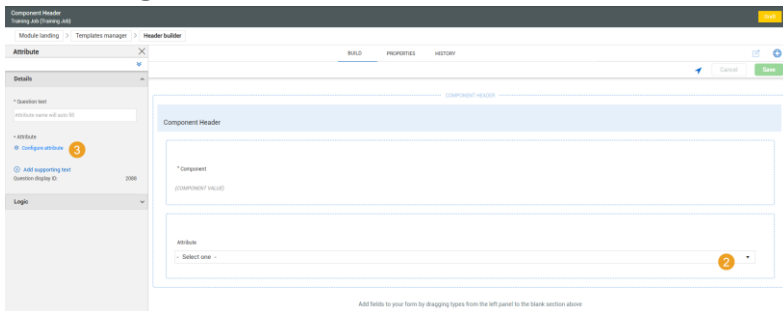


## PUBLISH THE COMPONENT HEADER

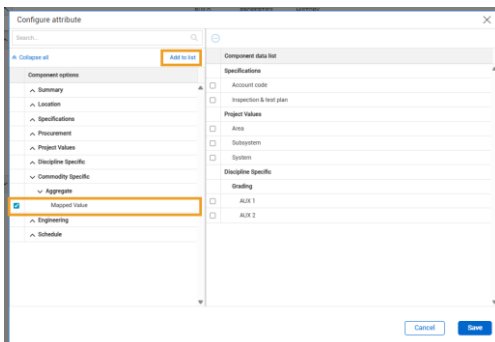
1. At the project level, click to open the draft Component header.




2. Add the Attribute question and click to open the question.
3. Click **Configure attribute**.

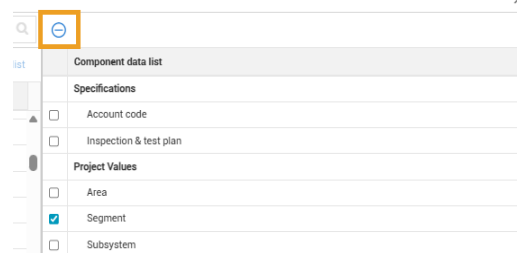


4. Select the desired attributes by checking the boxes.
5. Click **Add to list**.
6. Repeat as necessary.



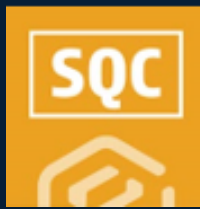
### NOTE:

To remove an item from the Component data list, check the box of the attribute to remove and click the  icon.



# QUICK GUIDE

# PUBLISH THE COMPONENT HEADER



## 7. Click **Save**.

- The draft Component Header appears.

Unlike the ITP and Project Structure Headers, multiple Component Headers can be created to allow for Discipline-specific use.

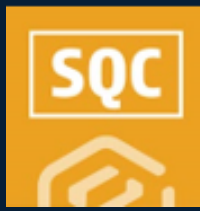
Organization	Component Name Header	Created	Version	Status
Steel Structure Training Job (105091)	Steel Structure Training Job (105091)	Created Nov 10, 2025 10:40 AM Karen Loffus	Version 1	PUBLISHED
C-XYZ (RootOrg)	Project Structure Header	Created Aug 16, 2023 03:43 PM Karen Loffus	Version 1	PUBLISHED
Steel Structure Training Job 2 (105092)	ITP Header	Created Aug 16, 2023 03:45 PM Karen Loffus	Version 1	PUBLISHED

## 8. Re-order and/or add Component questions by dragging and dropping them into position to fit your preference.

## 9. Click **Save** and then **Publish**.

- Note the additional **Attribute** question type option on this form.

# MANAGE HEADER ASSOCIATIONS



## MANAGE COMPONENT HEADER ASSOCIATION

1. Click **Manage Associations**.

Steel Structure Training Job (105091)			<a href="#">Manage associations</a>	<a href="#">Create new Component Header</a>
Component Name Header	Steel Structure Training Job (105091)	Created Nov 10, 2025 10:40 AM Karen Loftus	Version 1	PUBLISHED
Project Structure Header	Steel Structure Training Job (105091)	Created Aug 16, 2023 03:45 PM Karen Loftus	Version 1	PUBLISHED
ITP Header	Steel Structure Training Job (105091)	Created Aug 16, 2023 03:45 PM Karen Loftus	Version 1	PUBLISHED

2. For each template that requires a Component Header, click in the **Header associations** column.
3. Check the box for the Component Header.

Manage associations

Steel Structure Training Job (105091)			
Actions	<a href="#">Go to Automapping with Map Values</a> <a href="#">Automapping setup with Map Values</a> <a href="#">Go to Automapping with Attributes</a> <a href="#">Automapping setup with Attributes</a>		
Template name	Template Type	Header associations	Default header
<input type="checkbox"/> Manager Quality Review	Form	Select header associations.	Not set
<input type="checkbox"/> PREPARATION & PLACEMENT FOR STRUCTURAL CONCRETE	Form	<input type="checkbox"/> Component Name Header <input checked="" type="checkbox"/> ITP <input checked="" type="checkbox"/> Project structure	Not set
<input type="checkbox"/> Quality review - Dynamic Header Enabled	Form	<input type="checkbox"/> Component Name Header <input checked="" type="checkbox"/> ITP <input checked="" type="checkbox"/> Project structure	Not set
<input type="checkbox"/> STRUCTURAL STEEL ERECTION	Form	<input type="checkbox"/> Component Name Header <input checked="" type="checkbox"/> ITP <input checked="" type="checkbox"/> Project structure	Not set
<input type="checkbox"/> test KL Dynamic Header	Form	<input type="checkbox"/> Component Name Header <input checked="" type="checkbox"/> ITP <input checked="" type="checkbox"/> Project structure	Not set
<input type="checkbox"/> Type Form button Template Example	Form	<input type="checkbox"/> Component Name Header <input checked="" type="checkbox"/> ITP <input checked="" type="checkbox"/> Project structure	Not set

4. If only one Header Association is made, it will become the Default Header. Otherwise, select which Header you prefer as the default from the drop-down list.

Manage associations

Steel Structure Training Job (105091)			
Actions	<a href="#">Go to Automapping with Map Values</a> <a href="#">Automapping setup with Map Values</a> <a href="#">Go to Automapping with Attributes</a> <a href="#">Automapping setup with Attributes</a>		
Template name	Template Type	Header associations	Default header
<input type="checkbox"/> Manager Quality Review	Form	Select header associations.	Not set
<input type="checkbox"/> PREPARATION & PLACEMENT FOR STRUCTURAL CONCRETE	Form	<input checked="" type="checkbox"/> Component Name Header <input checked="" type="checkbox"/> ITP <input checked="" type="checkbox"/> Project structure	Component Name Header
<input type="checkbox"/> Quality review - Dynamic Header Enabled	Form	<input type="checkbox"/> Component Name Header <input checked="" type="checkbox"/> ITP <input checked="" type="checkbox"/> Project structure	ITP
<input type="checkbox"/> STRUCTURAL STEEL ERECTION	Form	<input type="checkbox"/> Component Name Header <input checked="" type="checkbox"/> ITP <input checked="" type="checkbox"/> Project structure	Not set
<input type="checkbox"/> test KL Dynamic Header	Form	<input type="checkbox"/> Component Name Header <input checked="" type="checkbox"/> ITP <input checked="" type="checkbox"/> Project structure	Not set
<input type="checkbox"/> Type Form button Template Example	Form	<input type="checkbox"/> Component Name Header <input checked="" type="checkbox"/> ITP <input checked="" type="checkbox"/> Project structure	Not set

5. Click **Save**.

Use the organization structure on the left side to manage your header templates and template associations, where your user has permission.

Steel Structure Training Job (105091)			<a href="#">Manage associations</a>	<a href="#">Create new Component Header</a>
Organization	Steel Structure Training Job (105091)			
Search				
+ Collapse all	Clear			
C-XYZ (RootOrg)				
Steel Structure Training Job (105091)				
Steel Structure Training Job 2 (105092)				
Training Job (Training Job)				
Heavy PM Estimate (Heavy PM Estimate)				
Component Name Header	Steel Structure Training Job (105091)	Created Nov 10, 2025 10:40 AM Karen Loftus	Version 1	PUBLISHED
Project Structure Header	Steel Structure Training Job (105091)	Created Aug 16, 2023 03:45 PM Karen Loftus	Version 1	PUBLISHED
ITP Header	Steel Structure Training Job (105091)	Created Aug 16, 2023 03:45 PM Karen Loftus	Version 1	PUBLISHED

## NEED SOME MORE HELP?



Learn more in our Knowledge Library  
[learn.ineight.com](https://learn.ineight.com)



Take a course at InEight U  
[university.ineight.com](https://university.ineight.com)