

COMPONENT HEADER

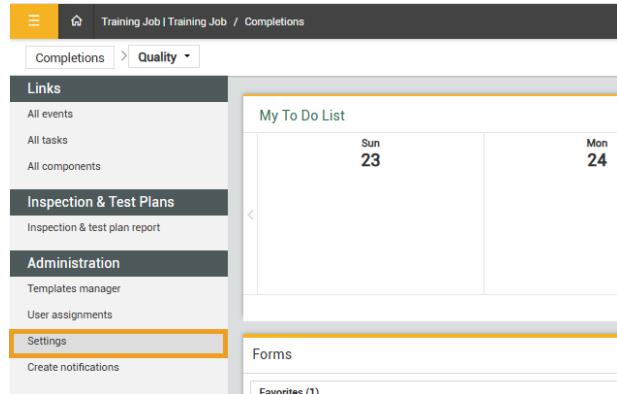
Metadata being pulled into the Component Header is associated with Plan components. It is a blend of master data (discipline, commodities, etc.) and data that exists only on components in Plan (Location/Line number or Specifications/Code class etc.)

◆ ENABLE THE COMPONENT HEADER

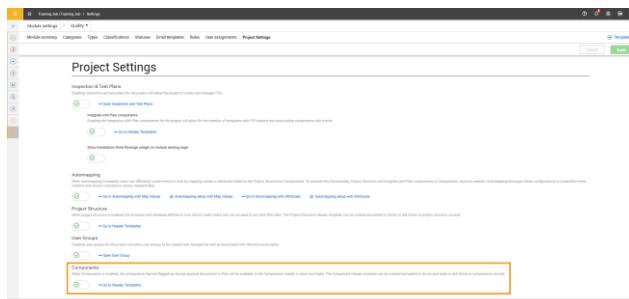
When you enable the Component Header feature in Project Settings, the system automatically generates the Component Header template.

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

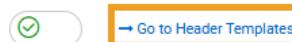


1

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

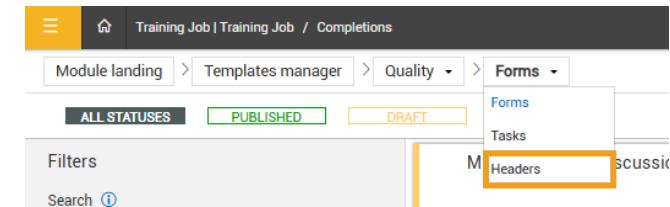
Components

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

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



PUBLISH THE COMPONENT HEADER



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

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

- Select the desired attributes by checking the boxes.
- Click **Add to list**.
- 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.

PUBLISH THE COMPONENT HEADER



7. Click **Save**.

- The draft Component Header appears.

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.

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

MANAGE HEADER ASSOCIATIONS



◆ MANAGE COMPONENT HEADER ASSOCIATION

1. Click **Manage Associations**.

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

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.

5. Click **Save**.

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

NEED SOME MORE HELP?



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