

# PROJECT STRUCTURE HEADER

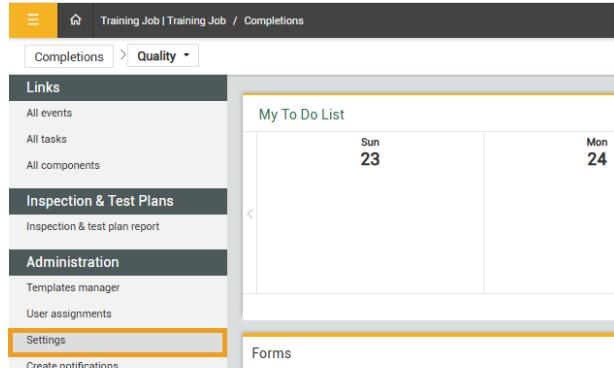


## ◆ ENABLE THE PROJECT STRUCTURE HEADER

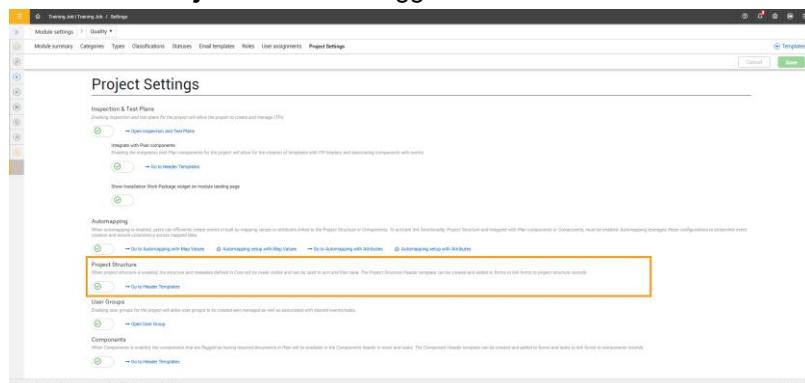
When you enable the Project Structure Header feature in Project Settings, the system automatically generates the Project Structure Header template.

The Project Structure 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 **Project Structure** toggle.



## TWO WAYS TO ACCESS THE PROJECT STRUCTURE HEADER TEMPLATE

1

- A. From a project's Project Settings page, ensure the Project Structure toggle is turned on.
- B. Click on the Project Structure's **Go To Header Templates** link.

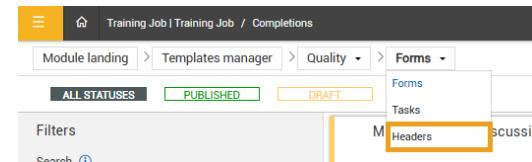
### Project Structure

When project structure is enabled, the structure and metadata defined in Core will be made visible and can be used to sort and filter data. The Project Structure Header template can be created and added to forms to link forms to project structure records.



2

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



## NEED SOME MORE HELP?



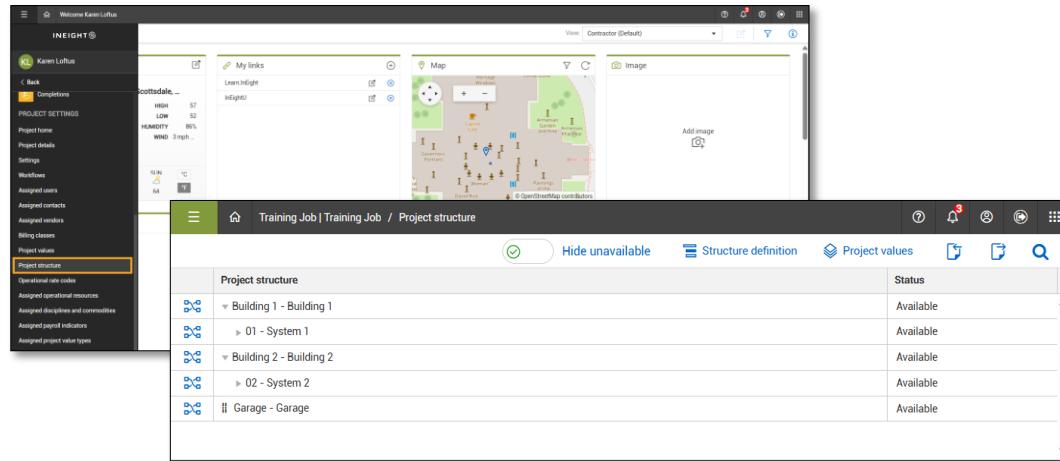
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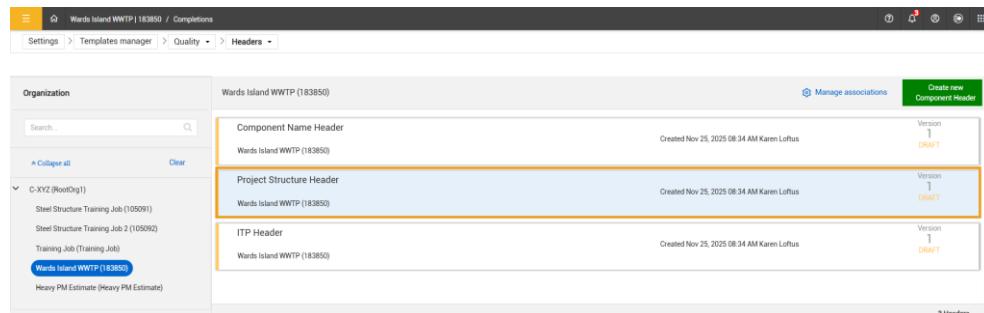
## PUBLISH THE PROJECT STRUCTURE HEADER

To complete the publishing process for the Project Structure Header, your Admin must have already set up your Project Structure within InEight Platform at the project level.



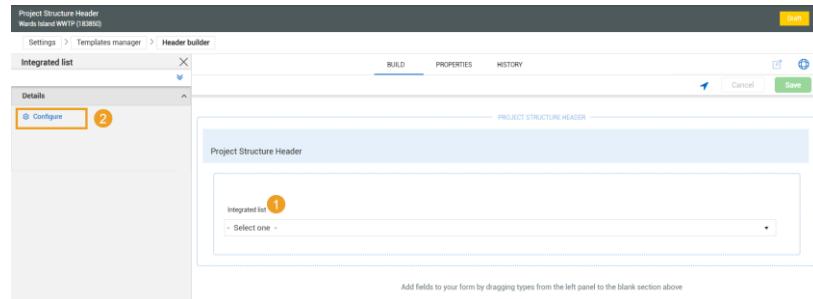
The screenshot shows the 'Project structure' section of the InEight Platform. On the left, a sidebar lists various project settings and components. The main area displays a table of project structures with columns for 'Project structure' (Building 1 - Building 1, Building 2 - Building 2, Garage - Garage) and 'Status' (Available, Available, Available). A map and an image are also visible in the background.

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



The screenshot shows the 'Headers' section of the InEight Platform. The 'Organization' dropdown is set to 'Wards Island WWTP (183850)'. The main list shows three headers: 'Component Name Header' (Version 1, DRAFT), 'Project Structure Header' (Version 1, DRAFT), and 'ITP Header' (Version 1, DRAFT). The 'Project Structure Header' is highlighted with an orange border.

- Click to open the first question.
- Click **Configure**.



The screenshot shows the 'Header builder' interface for the 'Project Structure Header'. The 'Details' panel on the left has a 'Configure' button highlighted with an orange border. The main panel shows the 'Project Structure Header' configuration with a 'Select one' dropdown and a note to 'Add fields to your form by dragging types from the left panel to the blank section above'.

- Review Project Structure Definition and click **Save** to close the Project Structure Definition page.
- the draft Project Structure Header appears.
- Click **Save** and then **Publish**.



The screenshot shows the 'Headers' section again, but now the 'Project Structure Header' is listed with a green 'PUBLISHED' status and a 'Version 1' status, indicating it has been published.

# MANAGE HEADER ASSOCIATIONS



## ◆ MANAGE PROJECT STRUCTURE HEADER ASSOCIATION

### 1. Click **Manage Associations**.

- For each template that requires a Project Structure Header, click in the **Header associations** column.
- Check the box for the Project Structure Header.

- 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.

- 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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