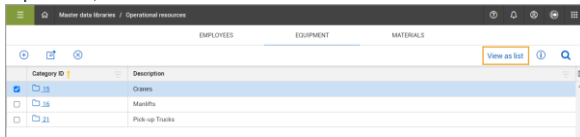




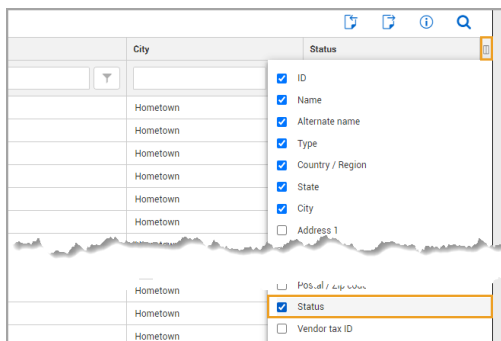
VIEW MASTER DATA LIBRARIES

To be able to leverage the Integrated List function within a Compliance or Completions form or task, you must first understand where the data comes from.

- From the home page, click on **Master Data Libraries**.
 - Over time, more of these libraries will become available for use.
- Click on **Operational Resources > Equipment**.
- Toggle between the **View as List** or **View as Panel** options, as desired.

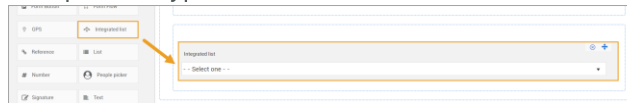


- Return to the Master Data Libraries and scroll down to select a Master Data Library, such as **Operational Resources > Equipment** or **Vendors**.
- You can click on the **Column Chooser** to select any additional columns you would like to include in your view.

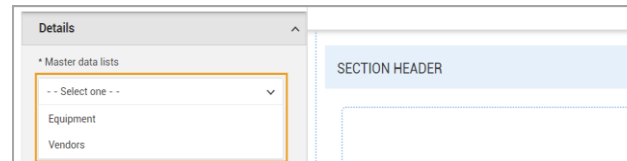


ADD AN INTEGRATED TEXT QUESTION

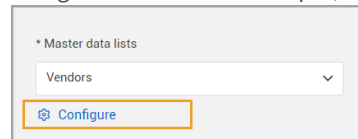
- In an unpublished form or task, add the **Integrated List** question type.



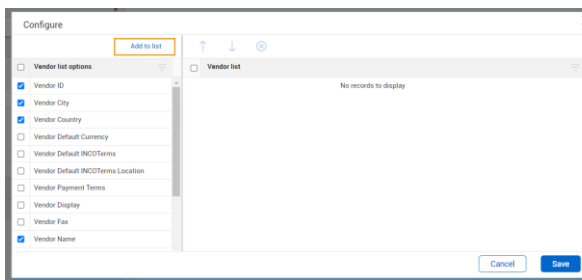
- Click on the Integrated list question to open the left slide-out panel.
- Select one of the options under the Master Data Libraries drop-down.



- Using Vendors as an example, click on **Configure**.



- Select the fields you would like to include in the form/task, then click **Add to List**.

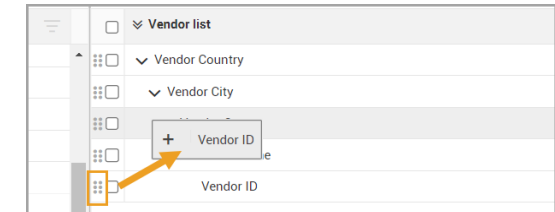


- Each field selected will convert to a drop-down question in the form/task.

- Items appear in a cascading manner. Modify the columns in a logical manner using the **Up and Down arrows**.

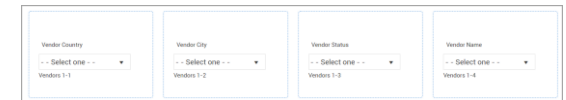


- You can also drag and drop the items into a new position.

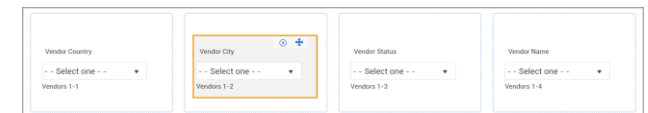


- When complete, click **Save**.

- As a result, the questions appear in the order selected.



NOTE: Edit the configuration of the questions at any time by clicking on any of the list attributes, then click **Configure**.



APPLYING AN INTEGRATED LIST QUESTION



PERFORM THE FORM OR TASK

Performing an event or task in Compliance or Completions that uses an Integrated List question type means the form/task was created using data from the Master Data Library, using pre-defined cascading logic to streamline user responses.

1. Select the published form/task that includes an Integrated List question type.
2. Begin answering the form/task.
3. When you get to the first Integrated List question, make your desired selection.
 - That response will drive the number of responses that are available in the next drop-down field, as they are tied to the cascading logic defined when the form was created.

4. Continue selecting options from the subsequent drop-down lists.
5. When complete, select **Save**, **Save & Close**, or **Save and Start New Event/Task**.

CHANGE A RESPONSE

1. Select the drop-down for the response you want to change.

- Once the drop-down field is changed to another option, a pop-up will appear.

- NOTE: changes or updates to integrated question responses will clear the following integrated questions in the series to ensure desired responses are displayed and captured.
2. Select **Change** and proceed with your updates.

NEED SOME MORE HELP?

Learn more in our Knowledge Library learn.ineight.com

Take a course at InEight U university.ineight.com