# QUICK GUIDE AUTOMAPPING SETUP



#### **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.

MODULE	EVENTS	ROLES/USERS	TEMPLATES	PROJECT SETTINGS	HISTORY
🛃 Enable/ D	isable Project S	tructure			Manage Project Inspection and Test Plans
🛃 Edit he	ader template				Create and edit Inspection and Test Plans
					Edit header template
🛃 Manage A	utomapping				

# 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** option.

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	Desired Osthings
	Project Settings
	Inspection 6 Test Plans busines registrate ad bins pass for the pagest will also the pagest to reset and managed EPs.
	Open Impection and Test Plans
	Heggete with Plan components Drabing the integration with Plan components for the project will allow for the consultance of templates with rIP broaders and associating components with events.
	Six to Header Templates
	Drow installation Work Package indiget on motivit anding page
Γ	Automapping When advances on a water water water and the sality to map treasister to Project Waters in Components, (Project Waters and/or integrate with Prior Component must be enabled)
	O - Ge to Automopping D Automopping setup
	Project Structure When project installars is enabled, the shuckers and evaluation defined in Cure will be made visible and can be same for and fiber date. The Project Structure installer implade can be counted and added to forms to indefine to project absorber records.
	User Groups Enabling one proper for the project will allow core groups to be consider and rearranged as well as associated with desired events/haids.
	O

### **B** SET UP MAP VALUE

- 1. Select Automapping setup.
- 2. Select the Add icon.
- 3. Type in Value Names and Descriptions and select **Save**.

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	Map value name	Description	Ŧ
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	Electrical	Electrical	
	Pumps	Pumps	
	Structures	Structures	

### ADD MAP VALUES TO PROJECT STRUCTURE

1. Select Map project structure.

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	Map value name	Desc	ription			
	Electrical	Elect	trical			

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

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### D ADD MAP VALUES TO TEMPLATES

1. Select Map templates.

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2. Select one or many of the Map Values for each desired template and select **Save**.

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	pg Map proje	ct structure 🛞 Mana	ge associations 🎁 📑 Q 👔 Cancel	Save
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1	Checklist	Type A (AITR), Type C (	Structures	
			System	

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# **E** MAP TEMPLATES TO PROJECT STRUCTURE

1. Select Automapping setup.



- 2. Toggle back to the project's Settings > Project Settings.
- 3. Select levels of project structure hierarchy by selecting **Go to Automapping.**

Automapping	
When automapping is enabled, users will have the ability to map templates to Project Values in the Project Structure or Components. (Proje Structure and/or Integrate with Plan Components must be enabled)	et

- 4. On the left side of the screen:
  - A. Complete the Automapping drop-downs.
  - B. Select the levels of the hierarchy.
- 5. Select the check box next to the Template Name(s).
- 6. Update the Default Quantity as needed.

## 7. Select Run.

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itap Value	Clear 🛞 Setup	Steel Structure Training Job (105091)					
Structures					③ Manage associat	ions 🛛	Run
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ype	Clear						
- Select one -	•						
Project Structure							
Search							
Steel Structure Training Job (1	(05091)						

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

#### Create selected activities? Tou are about to create 1 activities against 1 pieces of project structure. Tou will receive a confirmation email once automapping complete. Would you like to proceed? No Yes

# **F** EDIT EVENTS TO ASSIGN REPORTER & DATE

- 1. From the module's All Event 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**.

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

	* Property			Value	
9	Reporter	•	=	Karen Loftus	• ⊗
)	Event date	•	=	01-05-2024	₿ ⊗

- 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.

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- 2. Filter or search for the event.
- 3. Open the event and perform the form.

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- 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.