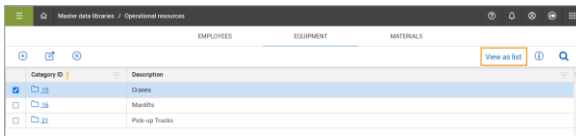


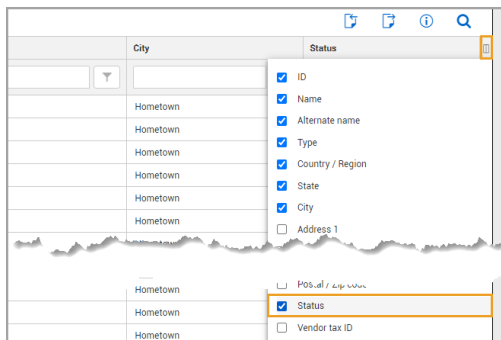
## VIEW MASTER DATA LIBRARIES

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.

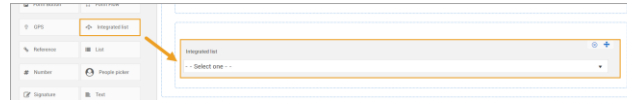


- Return to the Master Data Libraries and scroll down to select a Master Data Library, such as **Operational Resources > Equipment** or **Vendors**.
- You can click on the **Column Chooser** to select any additional columns you would like to include in your view.

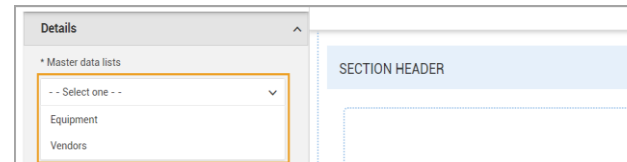


## ADD AN INTEGRATED TEXT QUESTION

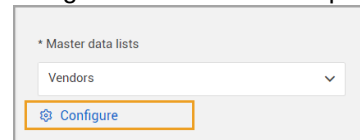
- In an unpublished form or task, add the **Integrated List** question type.



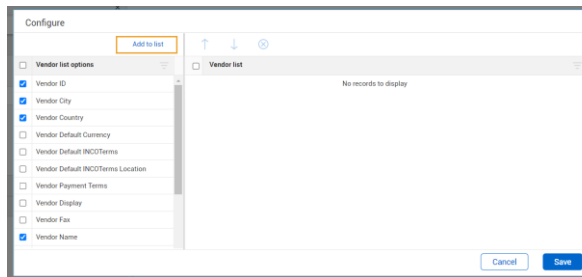
- Click on the Integrated list question to open the left slide-out panel.
- Select one of the options under the Master Data Libraries drop-down.



- 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**.

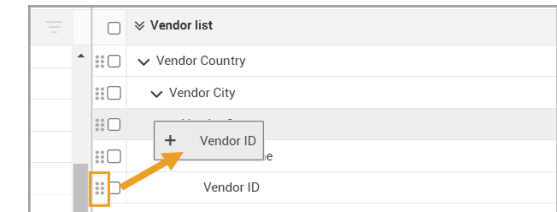


- Each field selected will convert to a drop-down question in the form/task.

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

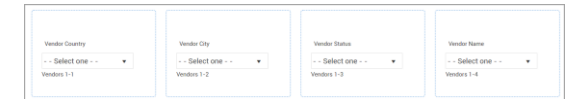


- You can also drag and drop the items into a new position.

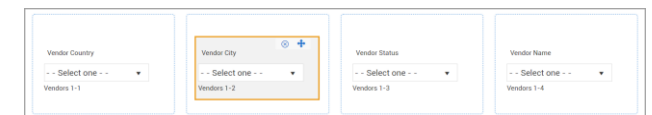


- When complete, click **Save**.

- 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**.



QUICK GUIDE

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?



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