VIEW MASTER DATA LIBRARIES ADD AN INTEGRATED TEXT QUESTION 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function within a Compliance or Completions form or task, you must first understand where the data comes from In an unpublished form or task, add the Integrated List or task, and the Integrated List question type.

INTEGRATING MASTER DATA FROM CORE

1. From the home page, click on **Master Data** Libraries.

QUICK GUIDE

- Over time, more of these libraries will become available for use.
- 2. Click on Operational Resources > Equipment.
- 3. Toggle between the **View as List** or **View as Panel** options, as desired.

	Moster data libraries /	Operational resources						
		EMPLOYEES	S EQUIPMENT	MATERIALS				
۲) 🖻 🛞				View	as list	0	2
	Category ID	Description						
	010	Oranes						
	CD 16	Maniifta						
	CD 21	Pick-up Trucks						

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

			5		()	Q
	City		Status			Π
T and a state	Hometown Hometown Hometown Hometown Hometown		D Jame Jternate name Jype Country / Region State State Jity kddress 1	~	÷.,	
	Hometown	J	POStal / Zip cour			
	Hometown	2 S	itatus			
	Hometown		/endor tax ID			



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

Details	^	
* Master data lists		SECTION HEADER
Select one	~	
Equipment		
Vendors		

4. Using Vendors as an example, click on Configure.

* Master data lists		
Vendors	~	
段 Configure		

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

	-			
	Add to list		$\uparrow \downarrow \otimes$	
	Vendor list options		Vendor list	
2	Vendor ID	ŝ	No records to display	
~	Vendor City			
2	Vendor Country			
	Vendor Default Currency			
	Vendor Default INCOTerms			
0	Vendor Default INCOTerms Location			
	Vendor Payment Terms			
٥	Vendor Display			
	Vendor Fax			
2	Vendor Name			

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

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

1	$\uparrow \downarrow \otimes$	
]	
::0) 🗸 Vendor ID	
::0) Vendor City	
	Vendor Country	
::0) Vendor Name	
::0	Vendor Status	

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

		∀ Vendor list
-	**	✓ Vendor Country
	:::□	✓ Vendor City
	:: 🗆	
	::0	e venaor iD
	#P	Vendor ID

- 8. When complete, click Save.
 - As a result, the questions appear in the order selected.

Vendor Country	Vendor City	Vendor Status	Vendor Name
Select one 🔹	Select one 🔹	Select one 💌	Select one ·
Vendors 1-1	Vendors 1-2	Vendors 1-3	Vendors 1-4

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

Vender Country Select one	Vendor City	Vendor Status Select one •	Vendor Name Select one
Vendors 1-1	Vendors 1-2	Vendors 1-3	Vendors 1-4

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 predefined 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 dropdown field, as they are tied to the cascading logic defined when the form was created.

SECTION HEADER							
* Types							
Туре В							,
Vendor Country		Vendor City		Vendor Status		Vendor Name	
,							
United States Of America	•	Select one	*	Select one	Ψ	Select one	1
Vendor ID		Select one	۹				
		Hometown	^				
Select one		Phoenix					
		Schofield					

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

Integrated List Sample				SECTION	a questions	answered 6	EXCEPTIONS 0
					Cancel	Save Sa	Save & close -
SECTION HEADER							
* Types							
Type B							•
Vendor Country	Vendor City		Vendor Status		Vendor Name		
United States Of America 💌	Phoenix	٠	Available	*	PTI Manitold		*
Vendor ID							
30							•

CHANGE A RESPONSE

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

Vendor Country	Vendor City		Vendor Status		Vendor Name	
United States Of America	Phoenix	*	Available	*	PTI Manitold	*
Vendor ID	Select one					
	Hometown	^				
30	Phoenix					•
	Schofield	÷				
		IN	арит®			

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

			×
Δ	Are you sure you want to change this response? If changed, all responses in the questions listed below will be removed.		
	Associated Sections/Questions		
	SECTION HEADER		
	Vendor Status		
	Vendor Name		
	Vendor ID		
		Change Cancel	

- 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.





Learn more in our Knowledge Library learn.ineight.com



Take a course at InEight U university.ineight.com