

QUICK GUIDE

PROJECT STRUCTURE

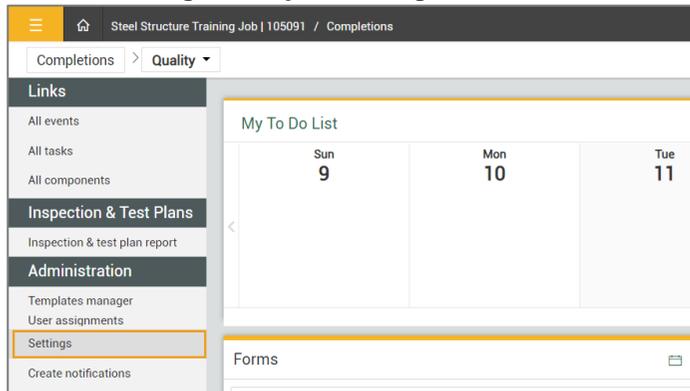


ENABLE THE PROJECT STRUCTURE HEADER

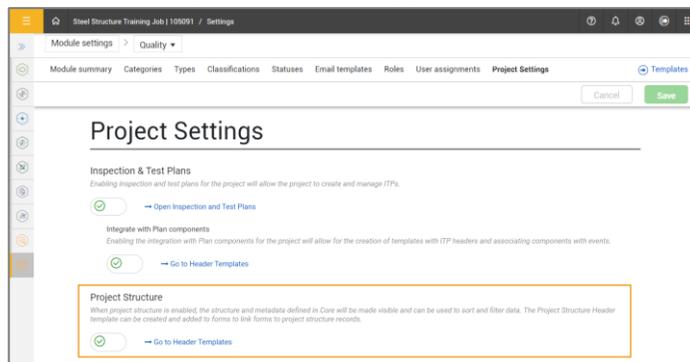
When you enable the Project Structure Header feature in Project Settings, the system automatically generates the Project Structure Header template.

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.



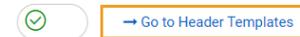
TWO WAYS TO ACCESS THE PROJECT STRUCTURE HEADER TEMPLATE

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 Template Headers** link.

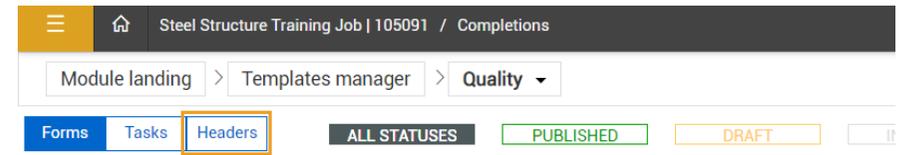
Project Structure

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 **Headers** link.



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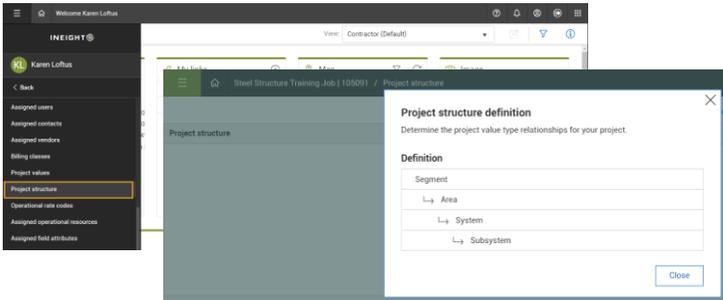
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PUBLISHING THE HEADER

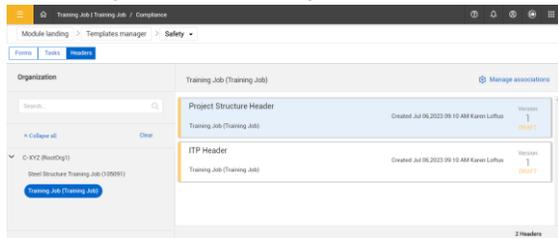


◆ PUBLISHING THE PROJECT STRUCTURE HEADER

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

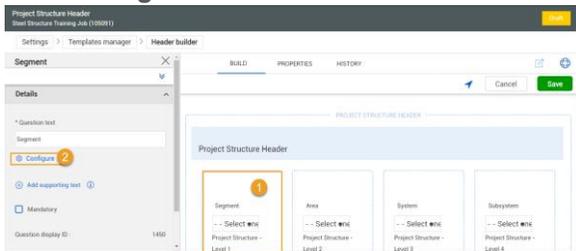


1. Click to open the draft Project Structure header.



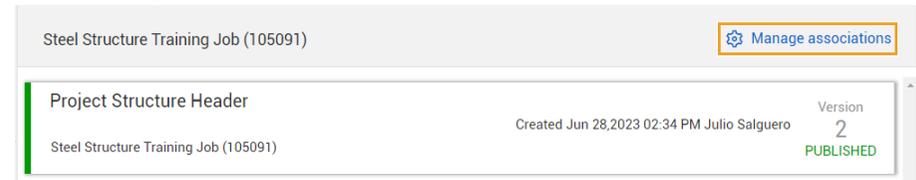
2. Click to open the first question.

3. Click **Configure**.

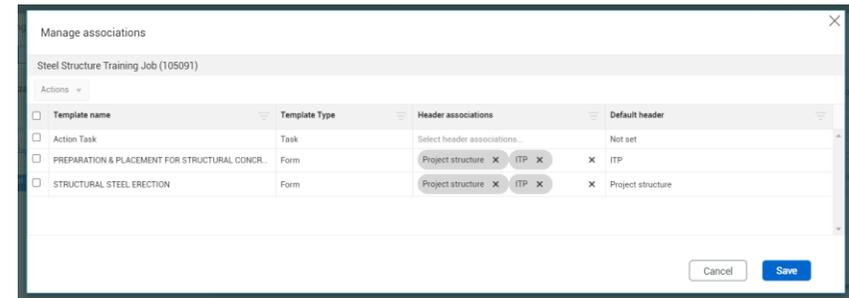


- The list on the right side should match what is shown in Settings > Project Structure.

4. Click **Save** and **Publish**.
5. Click **Manage Associations**.



6. Select the Headers Association column, and in the drop-down select the **Project Structure** checkbox (and/or ITP if available).
 - If only one Header Association is made, it will become the Default Header. Otherwise, select which Header you prefer as the default.



7. Click **Save**.

Use the organization structure on the left side to manage your header templates and template associations, where your user has permission.

