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.

三	ing Job 105091 / Completions		
Completions > Quality -			
Links			
All events	My To Do List		
All tasks	Sun	Mon	Tue
All components	9	10	11
Inspection & Test Plans			
Inspection & test plan report			
Administration			
Templates manager			
User assignments			
Settings	Forms		
Create notifications	1 01113		

3. Turn on the **Project Structure** toggle.

≡	Steel Structure Training Job 105091 / Settings					
	Module settings > Quality •					
0	Module summary Categories Types Classifications Statuses Email templates Roles User assignments Project Settings			۲	Templa	ites
(P)			ncel		Save	
•	Project Settings					ĺ
	Inspection & Test Plans Evaluate improvements for the project will allow the project to create and manage ITPs.	with even	fs.			
	Project Structure When project structure is making the structure and metadata defined in Care will be made visible and can be used to sort and filter data. The Project Structure models are be instead and added to forms to bild forms to project anywhere needed.	sture Hea	oder			
	Llear Groupe					_

TWO WAYS TO ACCESS THE PROJECT STRUCTURE HEADER TEMPLATE



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.

\rightarrow Go to Header Templates



A. Open a project's **Templates Manager** page.

B. Click on the Headers link.



NEED SOME MORE HELP?



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QUICK GUIDE 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.

	♡ ↓ ⊗ ₪
INEIGHT®	View Contractor (Default)
K Karen Loftus	Control C
Assigned users Assigned contacts Assigned vendors Billing classes Division tentors	Project structure definition Project structure definition Project value type relationships for your project. Definition
Project structure Project structure Operational rate codes Assigned operational resources	Segnent L Area L System
Auxigned field attribules	L-> Subsystem

1. Click to open the draft Project Structure header.

	/ Compliance		Ø 4	® ⊛ ≣
Module landing > Templates mar	nager 🖂 Safi	ty •		
Forms Tasks Headers				
Organization		Training Job (Training Job)	() Manap	associations
Search	9	Project Structure Header Training Job (Training Job)	Created Jul 06,2023 09:10 AM Karen Loftus	Version 1 DRAFT
C-XYZ (PootOrg1) Steel Structure Training Job (105091)		ITP Header Training Job (Training Job)	Created Jul 06,2023 09:10 AM Karen Loffus	Version 1 DRWFT
Training Job (Training Job)				

- 2. Click to open the first question.
- 3. Click Configure.

Project Structure Header Steel Structure Training Job (105091)					
Settings > Templates manag	er 🗧 Header build	er			
Segment	×	BUILD F	ROPERTIES HISTORY		0
	*				Cancel Saw
Details	· · ·				
* Question text	1		PROJECTION		
Segment		Broiget Structure Head	las.		
© Configure		Project su ucture riedu	¢1		
 Add supporting text 		0			
Mandiatory		Segment	Area	System	Subsystem
		Select ene	Select ene	Select ene	Select ene
Question display ID :	1450	Project Structure -	Project Structure -	Project Structure -	Project Structury -
		Level 1	Level 2	Lovel 3	Level 4

• 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.

IG N	lanage associations			:	×
St	eel Structure Training Job (105091)				
ZR A	ctions v				
	Template name	Template Type	Header associations	Default header	
	Action Task	Task	Select header associations	Not set	^
	PREPARATION & PLACEMENT FOR STRUCTURAL CONCR	Form	Project structure x ITP x x	ITP	
0	STRUCTURAL STEEL ERECTION	Form	Project structure x ITP x x	Project structure	
					÷
				Cancel Save	

7. Click Save.

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

Organization		Steel Structure Training Job (105091)		B 🕸 Manage associations
Search		Project Structure Header	Created Aug 16,2023 03:45 PM Karen Loftus	Version
* Collapse all	Clear	Steel Structure Training Job (105091)		PUBLISHED
 C-XYZ (RootOrg1) 		ITP Header	Created Aug 16,2023 03:45 PM Karen Loftus	Version 1
Steel Structure Training Ju	ж (105091)	Steel Structure Training Job (105091)		PUBLISHED