

Compliance to Change Integration Setup Guide



Changelog

This changelog contains only significant or other notable changes to the document revision. Editorial or minor changes that do not affect the context of the document are not included in the changelog.

Rev	Date	Description
1.0	21-MAY-2020	Initial Release
2.0	01-NOV-2023	Updated to show Compliance with current images and paths.

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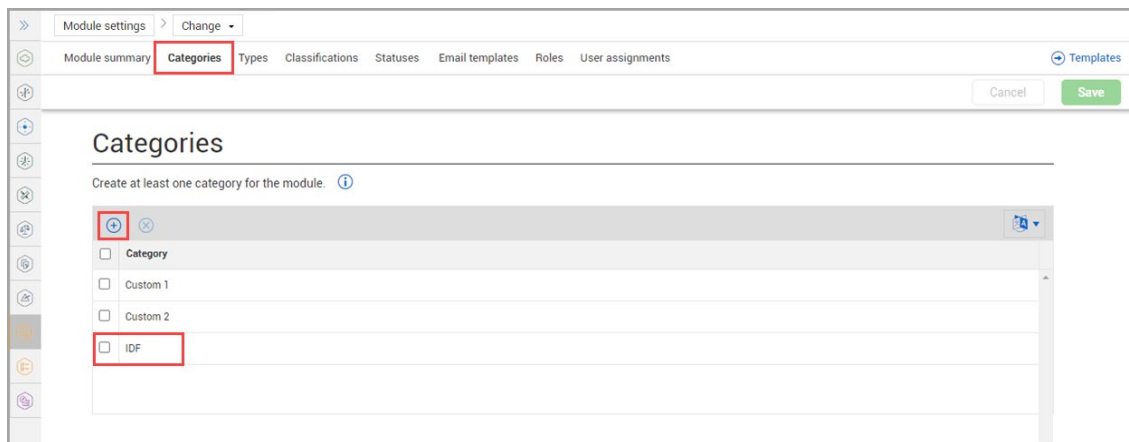
Change form with associated tags in each field 8

Introduction

This document describes how you can set up a form to create an issue from InEight Compliance and integrate that information to create an issue line item in InEight Change. Tags define the information that is sent to Change to fill in the issue details.

Set up organization settings

1. Go to organization > Settings > Compliance > **Module Settings**, and then select the **Change** module.
2. Click the **Categories** tab.
3. Click the **Add category** icon. Add a new category and name it **IDF** (Issue Documentation Form).
4. Click **Save**.

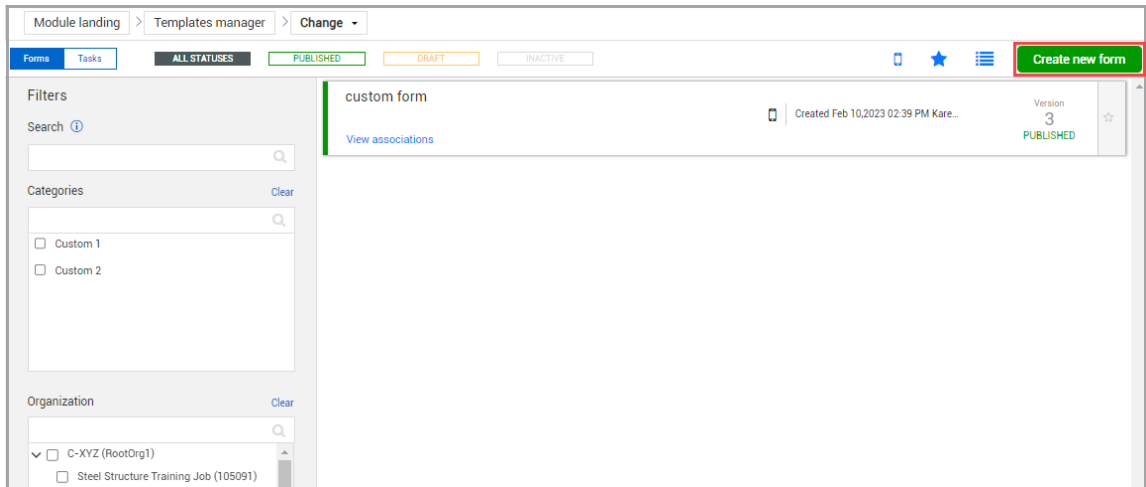


NOTE: To add the category to an existing form, go to the template's properties tab.

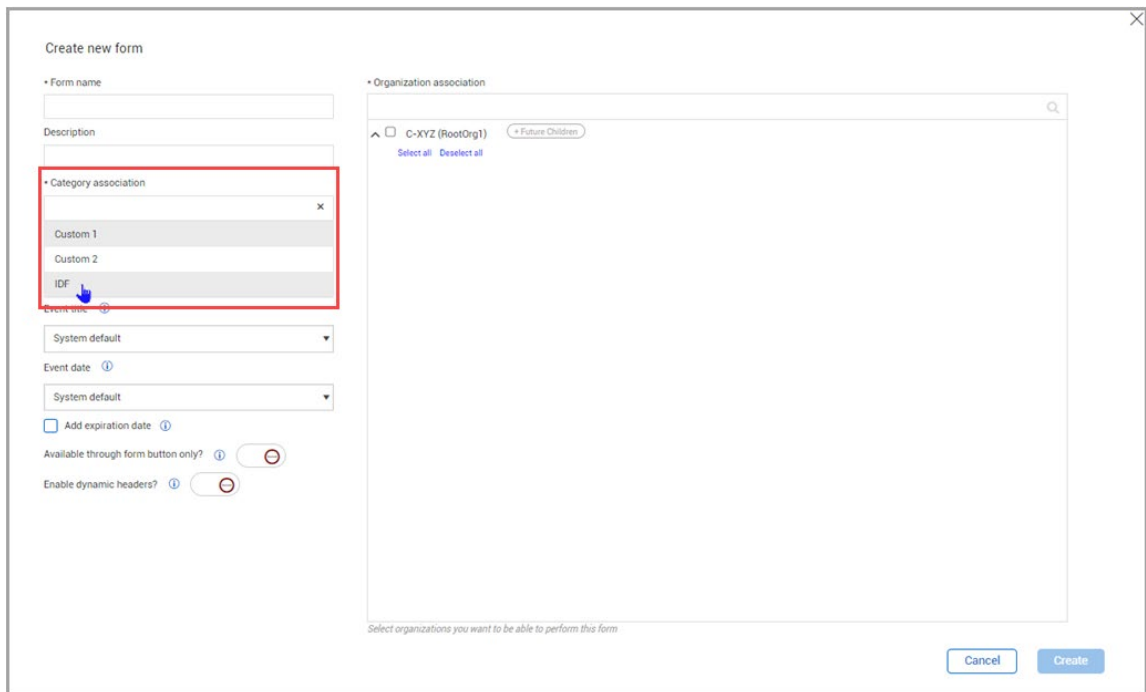
5. Go to the **User assignments** tab. Verify at least one user has administrator roles for the project or organization in the Change module, specifically for the IDF category.

Create form

1. On the module landing page, go to **Templates manager**.
2. Click **Create new form**.



3. In Category association, select **IDF**.



Map IDF codes

1. Create the fields in the table below and map the integration tags as follows.

NOTE:

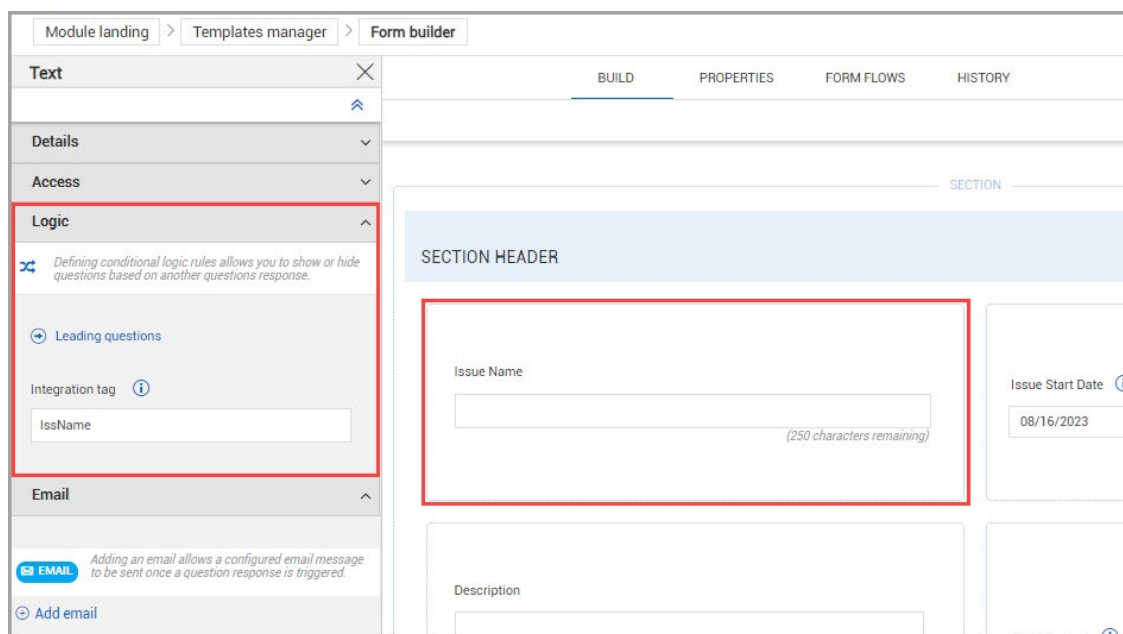
Any field name can be used. The standard Change fields of the same name are filled in. You cannot change the integration tags in the table below.

Field name	Field type	Integration tag
Issue Name	Short Text	IssName
Issue Start Date	Date	IssSDate
Description	Long Text	Desc
Field Contact	People picker or Short Text	FCon
Has the work started?	List (Yes/No)	WrkStrtd
Does this impact the schedule?	List (Yes/No)	SchImp
Schedule Comments	Long Text	SchImpDet
Have you verbally notified the client?	List (Yes/No)	VerNClient
Client conversation summary	Long Text	IssSum

NOTE:

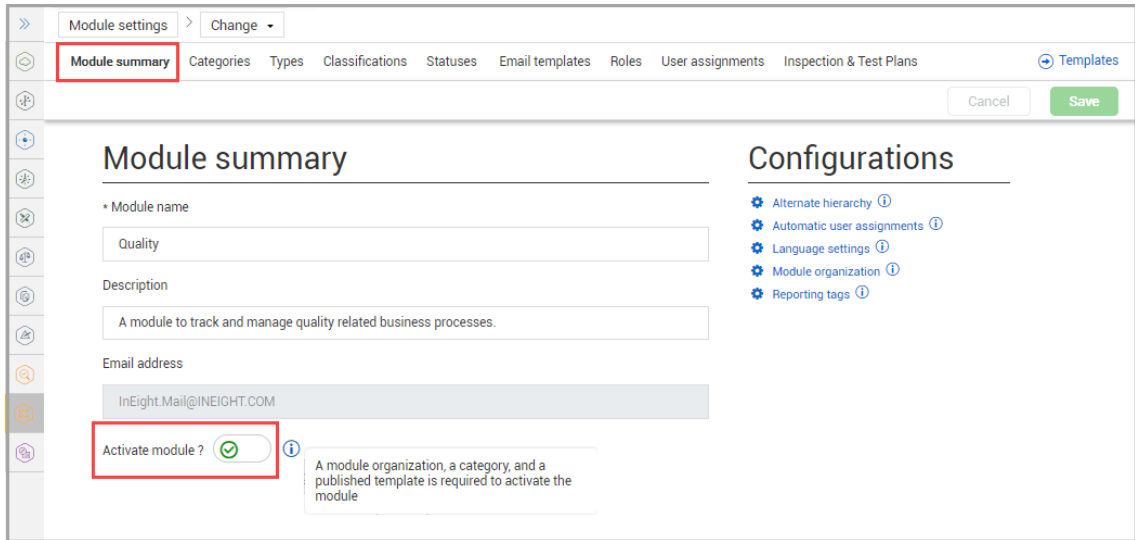
In Change, you can find the integration tag fields in Project Settings > Change > Configurations > **Compliance Response Codes**.

2. For each field you add to the form, go to **Logic**, and then add the integration tag name.



The screenshot shows the InEight Form Builder interface. On the left, a sidebar contains a list of configuration options: Text, Details, Access, Logic, and Email. The 'Logic' option is selected and highlighted with a red box. Below it, the 'Integration tag' field is set to 'IssName'. On the right, the main form editor shows a 'SECTION HEADER' with a red box around the 'Issue Name' field. The 'Issue Start Date' field is also visible, showing the date '08/16/2023'. The 'Description' field is partially visible at the bottom.

3. Add a button at the bottom of the form to complete the form and set Change status to **Complete**.
4. Publish the form.
5. If this is the first form, go to **Module summary** and set **Activate module?** to on.



Module settings > Change

Module summary Categories Types Classifications Statuses Email templates Roles User assignments Inspection & Test Plans Templates

Cancel Save

Module summary

• Module name

Quality

Description

A module to track and manage quality related business processes.

Email address

InEight.Mail@INEIGHT.COM

Activate module? ☒ ⓘ

A module organization, a category, and a published template is required to activate the module

Configurations

- ⚙️ Alternate hierarchy ⓘ
- ⚙️ Automatic user assignments ⓘ
- ⚙️ Language settings ⓘ
- ⚙️ Module organization ⓘ
- ⚙️ Reporting tags ⓘ

For the form to be available on the mobile application, the *Available on Mobile* toggle must be enabled when the form is created. When you complete the form, the new issues are shown in Change with the data you have captured in the event.

Change form with associated tags in each field

The images below show examples of a Change issue with associated fields and tags.

Issue: 9 - details

Created by Karen on 08/16/2023
- Via Compliance

Issue name **IssName**

KL TEST

Issue start date **IssSDate**

08/16/2023

Hint: Date of the start of impact

Description of change **Desc**

Format **B** **I** **U** **Text** **Link** **Image** **Table** **Code** **Quote** **Unlink** **Undo** **Redo**

Add description of change here.

Issue description

Source/cause

None

Hint: Select what prompted the source/cause of the Iss...

Scope

None

Change condition

None

Hint: Select the condition of the change

Allowance category

None

Please do not delete this section

Change orders

[Associate to Potential change order](#)

[Associate to Client change order](#)

Additional details

Control budget change

Schedule impact

Has work started? **WrkStrtd** Delay days

No

Does this impact the schedule? **SchImp**

No

Schedule impact comments **SchImpDet** 466

Add schedule impact comments here.

Responsible parties

Correspondence

Have you verbally notified the Client? **VerNClient**

No

Conversation summary **IssSum** 491

ntmLmL

Correspondence	Date	File/Link
Date client notified		
Date price to client		

Request for information

Field information

Construction area **FCon**

Select

Field contact **FCon**

Karen Loftus

Hint: Type employee name

Daily plan ID of impacted work

Hint: Enter "123"

+ Add daily plan ID of impacted work

Latitude

Longitude

Design information