InEight Document-Platform

Application Integrations

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	16-JUL-2024	Initial release
2.0	29-APR-2026	Added setup for Model and Design. Multiple changes made to bring up to date.

Contents

Cloud platform integration setup

The instructions provided in this guide are required for the following product integrations:

- Change – Link supporting documents, create forms in Document
- Contract – Link supporting documents
- Document – Create issues from form in Change issue log
- Model – View and link from the documents register in Model
- Plan – Link documents to IWPs, create packages in Document, upload IWP report to Document
- Platform – Enable the product navigation from the left-navigation

For setting up Design and link documents to scope items to automate claiming, refer to the Design Documents topic in the InEight Knowledge Library.

Considerations

Confirm with your InEight representative that the Document admin and standard APIs are activated on required projects. The InEight representative needs to have the ability to activate these items via the project service portal.

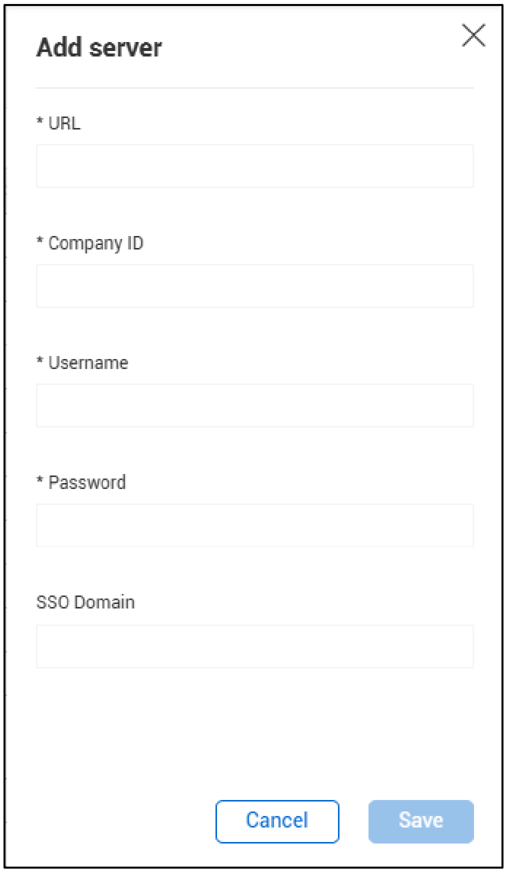
A Service account must be created in Document from the company that is using the integration, and the account must have access to those projects that will be mapped and require integrations in Document. Full access and upload permissions to Document register are required for Plan integration to upload IWP report.

Add Document server

To set up the Document mappings, from the Main menu, go to Suite administration > **Applications integrations**. The page opens to show the InEight Document URL.

Click the **Add server** icon in the toolbar to open the Add server slide-out panel. Complete the following information:

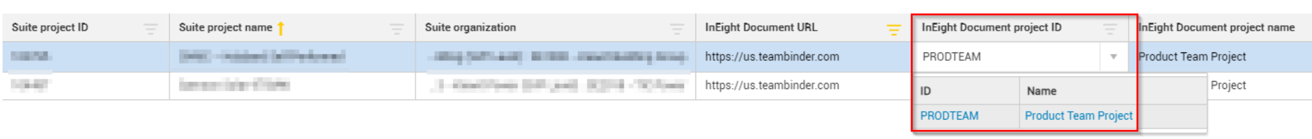
- URL – Document server URL (for example: Au1.doc.ineight.com, us.teambinder.com).
- Company ID/Username/Password – The credentials of the Document service account.
- SSO Domain – If the client has SSO enabled for Document, this field typically matches the client's email address format (for example: Ineight.com, testcompany.com).



Map Document-Cloud platform projects

In Platform > Suite administration > **Application integrations**, select the Suite project name from the list that you want to map. In the InEight Document URL field, select the applicable URL.

In the InEight Document project ID field, select the applicable Document project from the drop-down list. The list shows all available projects based on the URL selected and the access of the service account.



Document-Change issue integration setup

This process enables the integration to create and link an issue from a Form in Document to the Issue log in InEight Change.

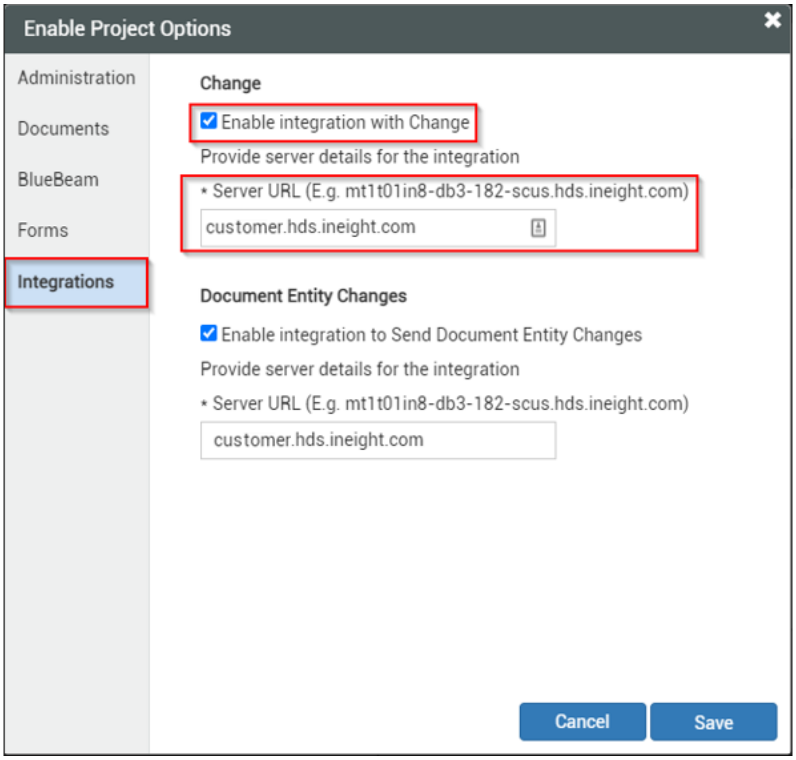
Considerations

The project must be mapped in Platform > Suite administration > **Application integrations**.

Project service portal setup

Using the project service portal, you can activate the Change integration on the required projects. You must know the URL details related to the server Project Suite is hosted on.

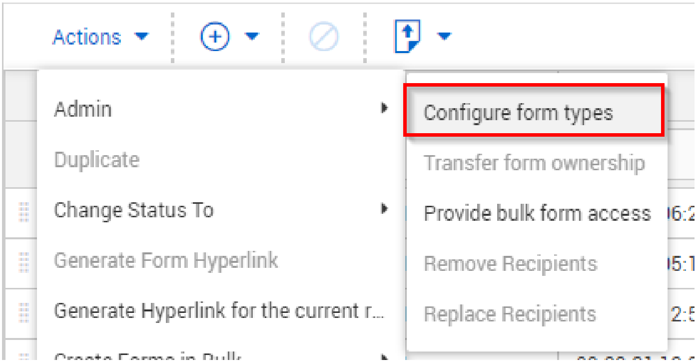
In the Project Service Portal, select the project from the list. Open Enable Project Options > **Integrations**. Select the **Enable integration with Change** check box and enter the suite tenant URL (for example, customer.hds.ineight.com).



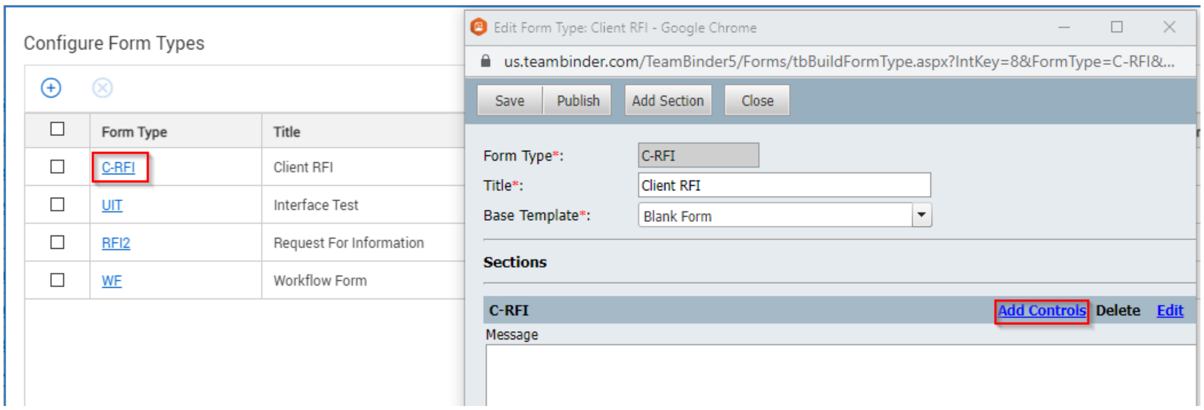
Add issue control from Form builder

After the integration has been activated, the issue control needs to be added using Form builder.

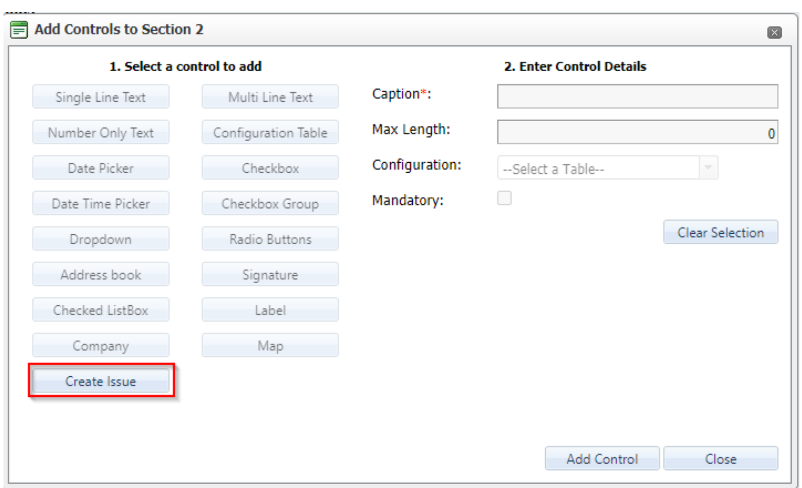
1. Go to the project in Document and then open the Forms module. In the Actions menu, select Configure > **Configure form Types**.



2. In the Configure Form Type dialog box, select the check box for the form type that requires the Create Issue control. Select the section of the Form where the control is activated, and then click **Add Controls**.



3. In the Add Controls dialog box, select **Create Issue**, and then click **Add Control**.



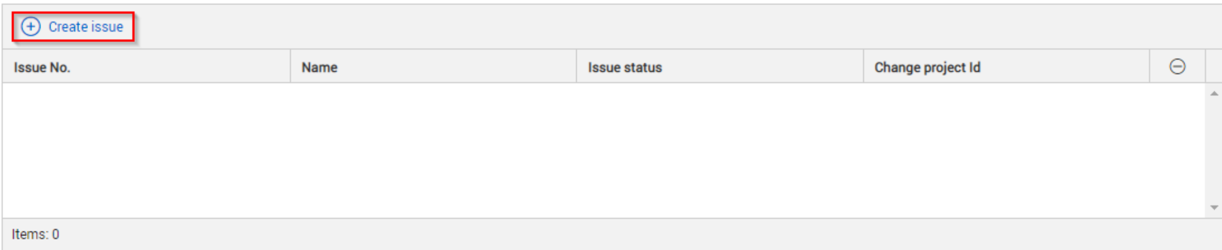
4. Publish the form with the saved changes.

Document-Change create issue and sync

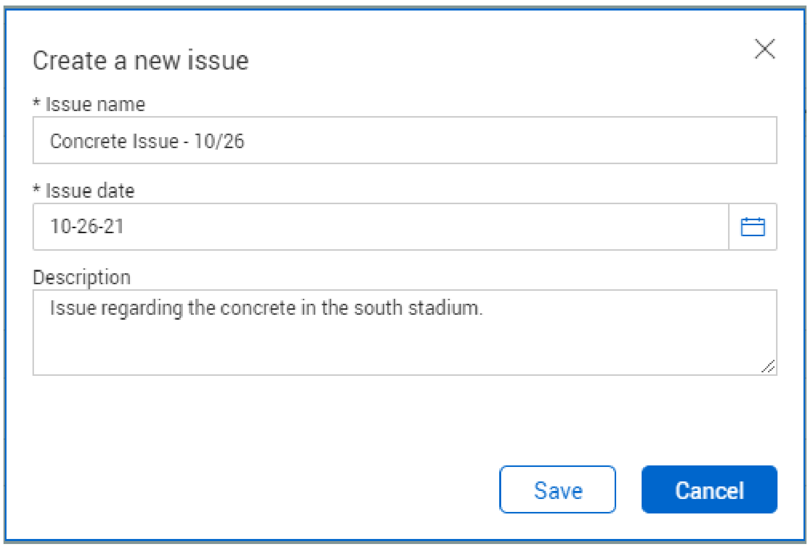
Create issue from form

After the control is added, open the form type. In the Create issue section where the control is added, click the **Create issue** icon.

NOTE:	The control is only enabled when the section for the Form is active and is only available to the reviewers of that section.



You can enter the issue name, issue date, and description.



Sync issue data

The issue is created in Change with the issue number, issue status and Change project ID, which is synced to the form in Document. The issue status will continue to sync to Document as it is updated in Change.

Create issue

Issue No.	Name	Issue status	Change project Id
27	Concrete Issue - 10/26	New	104487

Items: 1

The Form will also show in the Supporting Documents tab for the Issue that was created in Change.

Actions

DETAILS PRICING SUPPORTING DOCUMENTS

Title	File/Link	Document type	Subtype	External docume...	External document status	Document source	Added on
Drawing dimensions - 10/26/21	INEIGHT-C-RFI-000016	Request for information		Forms - C-RFI	OUTSTANDING	InEight Document	10/26/2021

Document-Compliance integration setup

This process enables the integration to transfer and upload the PDF version of Compliance forms to Document.

Considerations

Document APIs must be activated for the required projects. The project does not require mapping in Application integrations, which is currently done in the middleware.

A service account is created in Document projects that require mapping. The service account is used for uploading the PDF forms to the register and requires the following permissions:

- Access to upload rules to document register
- Full access to document module

For current state of the middleware, a non-production project for the client needs to be identified for the middleware to be uploaded to. The middleware is uploaded as a document to the register and is where users access it to update and manage the project mappings.

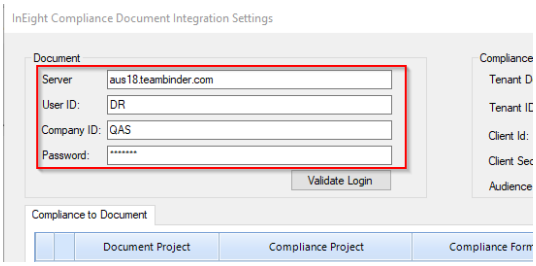
Project delivery should discuss the following with the client:

- Which Forms are required for transfer?
- For each Form type, what status should trigger in transfer?
- For each Form type, what fields need to have data mapped and stored in Document?
- For fields being mapped for each Form type, validate those fields exist in Document?

Connecting to Document-Compliance environments

Access the Compliance middleware from the location as referred to in the setup and enter the following information in the Document integration settings:

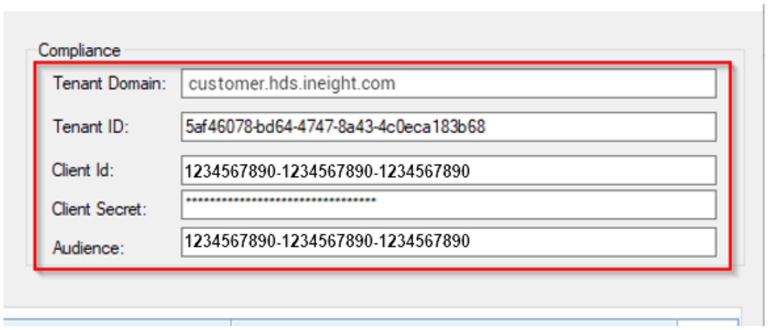
- Server: Document server URL
- User ID/CompanyID/Password: Credentials for service account used to connect and upload forms into Document



Enter the following information in the Compliance settings:

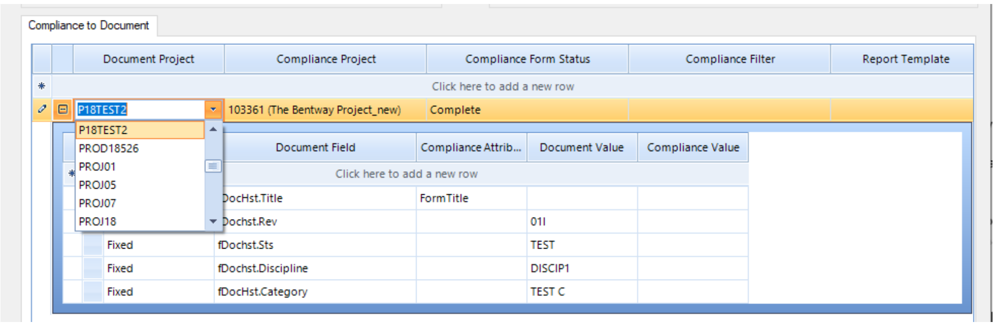
- Tenant Domain
- Tenant ID
- Client ID
- Client Secret
- Audience

This information needs to be provided by the InEight product team.



Mapping projects

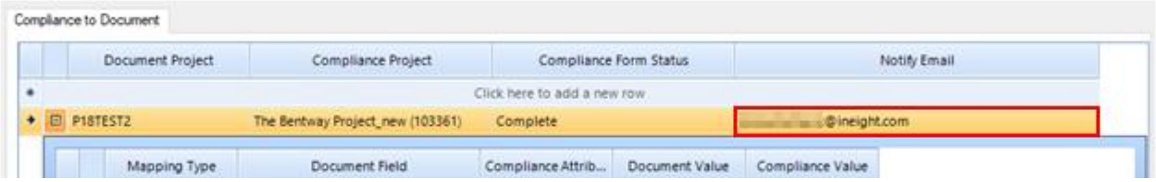
To start a new mapping for a form type for a specific project, in the Document Project field, select a project from the list. In the Compliance Project field, enter the Compliance project number.



To define the Compliance status that triggers the transfer of the form to Document, enter the *InspectActivityStatus* from Compliance in the Compliance Form Status field.

If a custom report template is required, enter the template name in the Report Template field. If a custom report template is not required, leave the field empty and the general compliance form report is used.

Use the Notify Email field to set up specific users to receive notifications for errors regarding the mapping. Enter the user's email in the field.



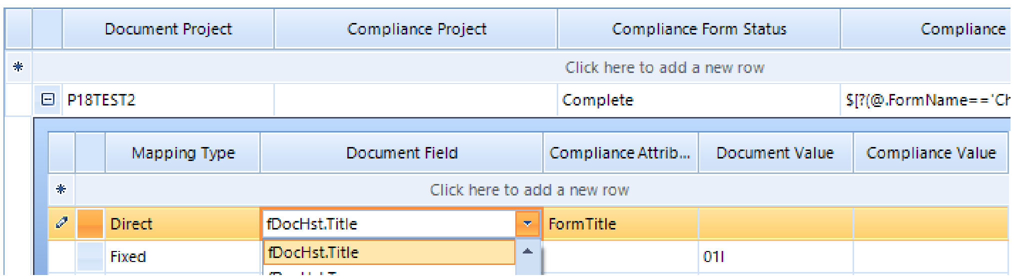
Mapping form data

After the initial project information has been completed, you can begin mapping the data fields. Select the type of mapping to use:

- Direct – Takes the exact value exactly as is from Compliance and is input into Document.
- Translate – Enables mapping of a Compliance value to a specific Document value (for example, CIV to Civil).
- Fixed – Ignores the Compliance value and inputs a specified value.

In the Document Field field, select from the drop-down list.

In the Compliance Attribute column, enter the field name from the form with the backend name (for example, Title would be FormTitle).



If *Translate* or *Fixed* is selected as the mapping type, enter the value in the Document Value field.

Model-Reporting integration

This process enables the integrations with both Report and Model.

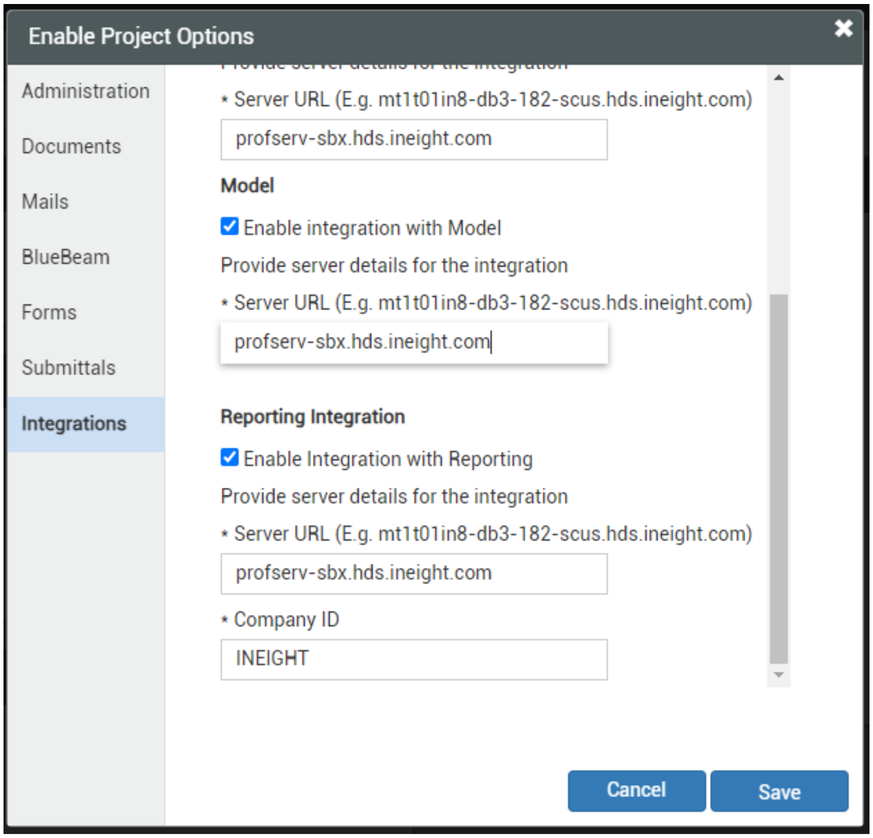
Considerations

Project must be mapped in Platform in Application integrations as mentioned in the previous steps, and the Document APIs must be activated.

Project service portal setup

Using the project service portal, users can activate the integrations on the required projects. The user needs to know the URL details related to the server that Project Suite is hosted on, along with the company ID of the company using the reporting data.

In the Project Service Portal, select the project from the list. Open Enable Project Options and click the **Integrations** tab. Select the **Enable integration with Model** or **Enable integration with reporting** check box and enter the suite tenant URL and/or company ID (for example, customer.hds.ineight.com).



Common Issues

General

- Incorrect projects are shown in the project list in Platform's Application integrations
    - Service account used in the URL setup either has too much or not enough access to InEight Document projects.
    - Document APIs are not activated.
- Integration is not working for linking supporting documents, creating document packages, and other objects.
    - Document APIs are not activated.

Compliance

- Forms failing to transfer
    - Not all mandatory Document fields are mapped. This could be due to changes made by the project team to mandatory fields after mapping is complete.
    - Mapped values are incorrect between Compliance and Document. For example, if the mapping type is Direct and the value from Compliance is *Civil*, but the value in Document is *CIV*.

Change

- User is unable to create forms from an issue.
    - User does not have correct access to Forms module in Document.