

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.

Contents

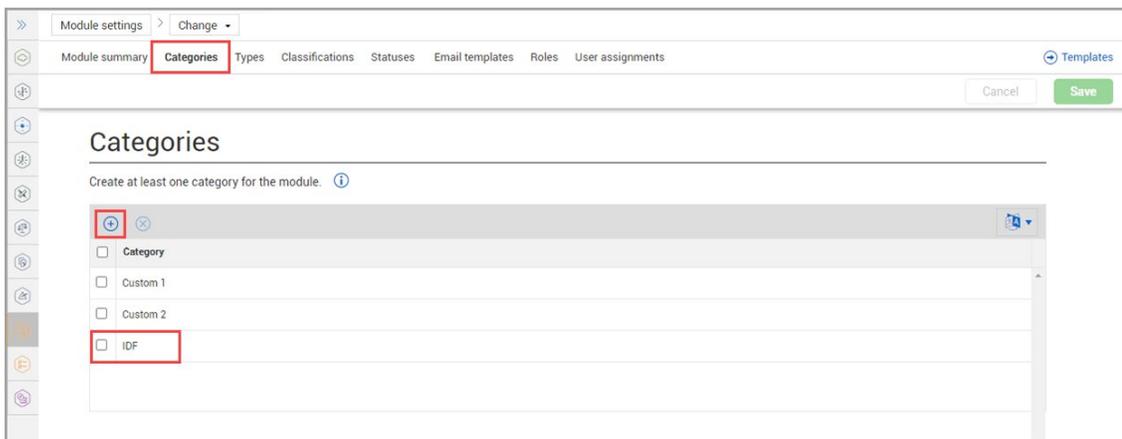
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Introduction

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**.

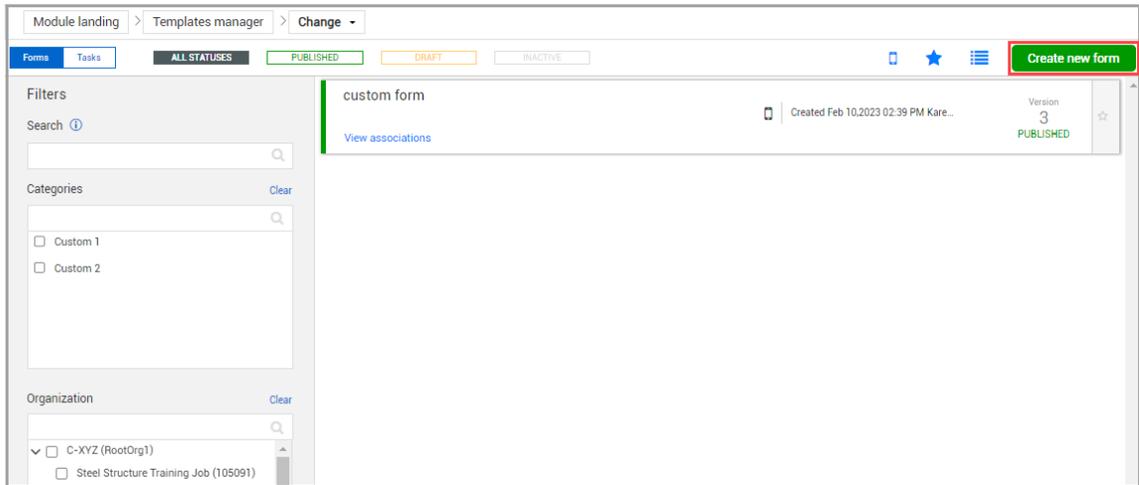


NOTE: To add the category to an existing form, go to the template's properties tab.

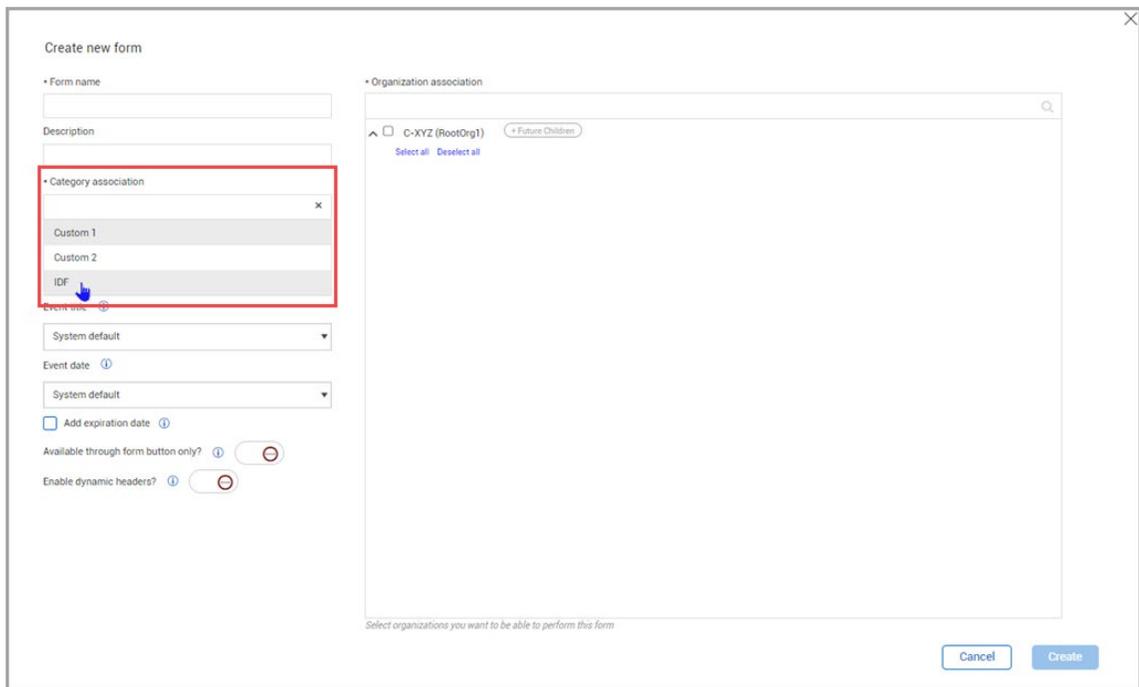
5. Go to the **User assignments** tab. Verify at least one user has administrator roles for the project or organization in the Change module, specifically for the IDF category.

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:

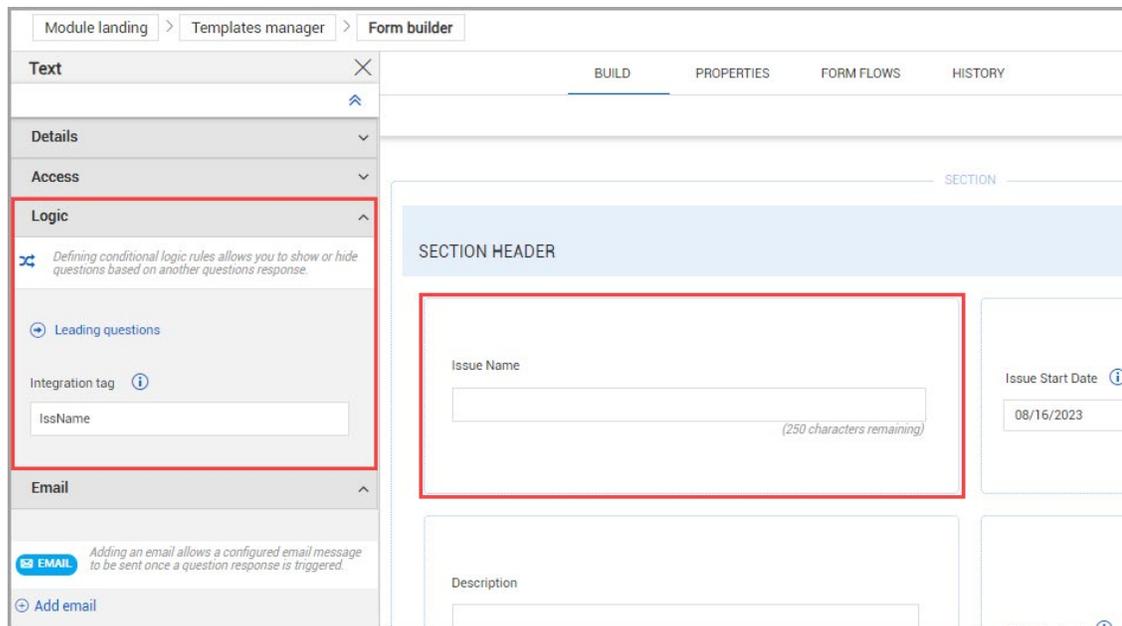
Any field name can be used. The standard Change fields of the same name are filled in. You cannot change the integration tags in the table below.

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

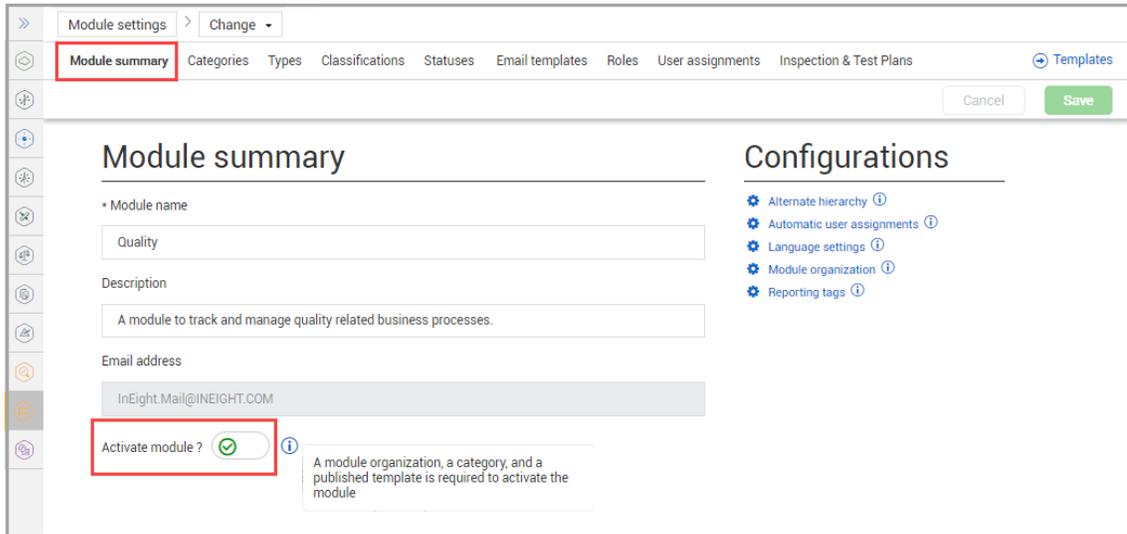
NOTE:

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.



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.



The screenshot displays the 'Module summary' configuration page. The 'Module name' field contains 'Quality'. The 'Description' field contains 'A module to track and manage quality related business processes.' The 'Email address' field contains 'InEight.Mail@INEIGHT.COM'. A red box highlights the 'Activate module?' toggle, which is currently turned on. To the right, there is a 'Configurations' section with links for Alternate hierarchy, Automatic user assignments, Language settings, Module organization, and Reporting tags. A 'Save' button is visible in the top right corner.

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 [redacted] on 08/16/2023
- via Compliance

• Issue name **IssName** • Issue start date **IssSDate**

KL TEST 08/16/2023

Hint: Date of the start of impact

Description of change **Desc**

Format **B I U**

Add description of change here.

Issue description

Source/cause Change condition

None None

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

Scope Allowance category

None None

Photo gallery and image selection

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

mm,mm,mm

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

Request for information ▼

Field information ▲

Construction area Field contact **FCon**

Select 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 ▼