⬡ ENABLE ITPs (ORG-LEVEL)
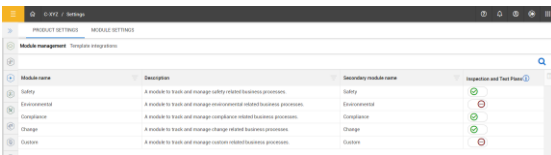
1. At the root organization level, select **Settings > Completions or Compliance**.
2. On the Product Settings > Module Management page, turn the **Inspection and Test Plans** toggle on for those modules using the functionality.

⬡ SET UP AN ORG-LEVEL ITP

1. At the root organization level, select **Settings > Completions or Compliance > Module Settings**.
2. Click on the desired module.
3. Click on **Inspection & Test Plans** tab.
4. Click the **Create ITP** button.
5. Complete the required information.
6. Use one of these options to continue.

⬡ CREATE AN ITP

1. Click **Create ITP**.
   - The Create ITP dialog box opens.

2. Enter the ITP information, then click **Save**.

SELECT FILE TO IMPORT OPTIONS

• OPTION A: DOWNLOAD TEMPLATE

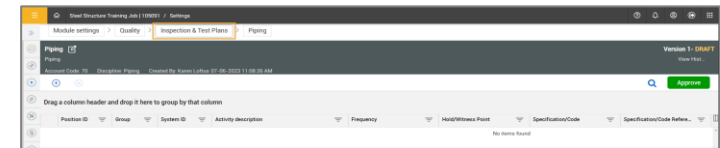As a starting point, this downloads an Excel template to be filled out.

An Import Sheet tab, Instruction Sheet tab, and Example Sheet tab are provided for your assistance.

• OPTION B: SELECT FILE TO IMPORT

Used when the Inspection and Test Plan Import Template has already been filled out, and you have access to it.

1. Select the import file from your computer.
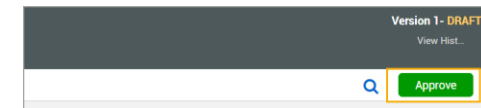2. To see all ITPs, click the Inspections & Test Plans tab.

• OPTION C: SAVE

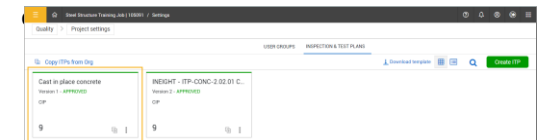Used when you want to build the ITP one line item at a time.

1. Select the ⊕ icon to add a line item.

2. Complete fields and click **Save**.
3. Once all parties approve, click **Approve** to make the ITP available.
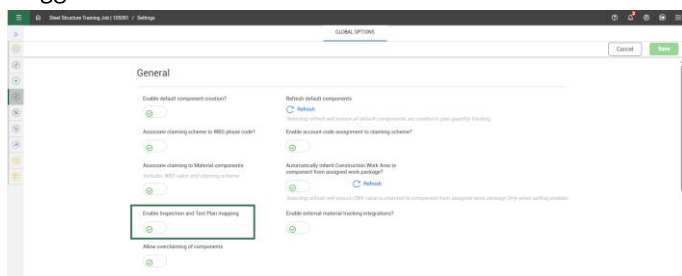

   - The ITP is now approved and ready to be used

MAP THE ITP IN PLAN
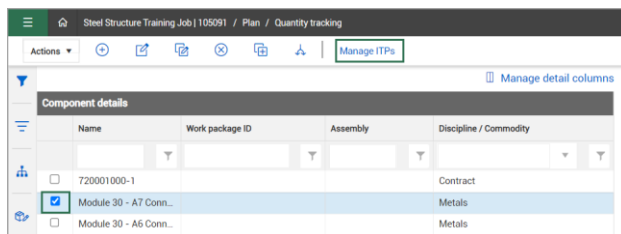
⬡ ENABLE PROJECT SPECIFIC ITP MAPPING

1. From within the project settings, on the Plan tab, ensure the **Enable Inspection and Test Plan mapping** toggle is turned on.
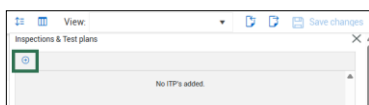

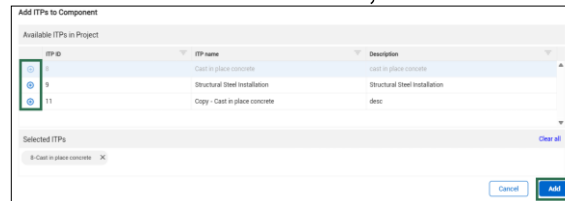2. Click **Save**.

⬡ ADD ITPs TO INDIVIDUAL COMPONENTS

1. Ensure the Enable ITP Mapping toggle is turned on as shown above.
2. From within a project, in Quantity Tracking, select a component.
3. Click **MANAGE ITPs**.

4. Click the **Add ITPs to Component** button.

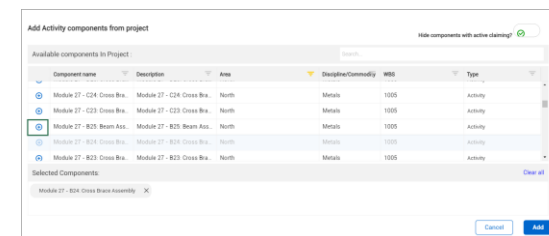5. Select one or more available ITPs; then click **ADD**.

6. Select 1 or more Activities.
   • The ITP(s) will now show as associated with the component and the details will appear.
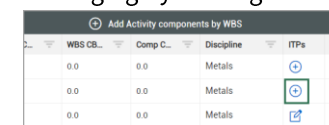
⬡ ASSOCIATE AN ITP TO A WORK PACKAGE

1. Ensure the Enable ITP Mapping toggle is turned on as shown above.
2. From within a project, in Work Packaging, open an Installation Work Package.
3. Click on the **Workspace** tab.
4. From the Activity Components data block, click the ⊕ **Add Activity components by WBS** icon.

6. In the pop-up window, click the ⊕ icon to select the component with the associated ITP.

7. Once complete, click **ADD**.
   • ITPs can also be associated to components in Work Packaging by clicking in the ITP column.

   • The ITP(s) will now show as associated with the work package and the details will appear.
   • Assuming project-specific ITPs are already set up and mapped within Compliance and/or Completions, ITP Forms can now be scheduled in those respective products.

NEED SOME MORE HELP?

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