

QUICK GUIDE

SCHEDULE & COMPLETE ITP FORMS OR TASKS



◆ SCHEDULE OR COMPLETE ITP FORMS/TASKS

Only after setting up and approving a project specific ITP, creating and approving a new ITP, and then mapping the ITP in Plan, can the following steps be completed.

1. In the desired module, select **Schedule Form or Schedule Task**
 - Alternatively, start a form and perform the form/task.
2. Select a form/task that is linked to an ITP and complete the field

3. If the form/task is reoccurring, click the **Schedule** button and set up the schedule information to create multiple forms/tasks.

Schedule form

Form name	Category
Concrete Placement Release Pour Card	Checklist
Event title	Reporter
	- Select one -
ITP properties	
Discipline	Claiming scheme
- Select one -	- Select one -
WBS	Component
- Select one -	- Select one -
Number of form to create	
1	
Event date	Importance
01-04-2023	!
<input type="checkbox"/> Schedule	
<input type="button" value="Cancel"/>	
<input type="button" value="Save & start new event"/>	
<input type="button" value="Save"/>	

4. When done, click **Save**.
 - When done, the scheduled event or task will appear in both the Components tab and the All Events/All Tasks tabs.

Steel Structure Training Job (10509) / Compliance							
Quality		Events		Global Events/Tasks			
				View: My view			
Event title	Category	Event date	Event ID	Form name	Project/Organization	Reporter	Status
<input type="checkbox"/> Pour card - concrete	Checklist	12-29-2022	2022122800001	Concrete Placement Release	Steel Structure Training Job	Karen Loftus	Scheduled
<input type="checkbox"/> Testlist	Checklist	12-29-2022	2022122900001	Concrete Placement Release	Steel Structure Training Job	Michael Shaw@inight	Scheduled

Steel Structure Training Job 100091 / Compliance						
Quality		Components				
#	Event ID	Event title	Event date	Reporter	Status	Form name
100091	2021120800001	Post cast - concrete	12-08-2022	Karen Lofthus	Resolving	Concrete Placement Release Post Cast...
	2021120800001	Testing	12-08-2023	Michael Shawwright	Scheduled	Concrete Placement Release Post Cast...

◆ COMPLETE THE SCHEDULED ITP FORM/TASK

1. From either the Calendar or All Events/All Tasks tab, open the scheduled form or task.
 - The opened form/task has the applied ITP header section and information at the top.

Quality review - Dynamic Header Enabled
TEMPLATE HEADER
SECTIONS
QUESTIONS
ANSWERED
EXCEPTIONS

2
20
1
0

Cancel
Save
Save & close

ITP Header

* Component	Discipline	WBS Code / WBS Description	Installation Work Packages - IWP
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account Code and Name	Turnover Package	Construction Area	Construction Segment
System	Subsystem	<ul style="list-style-type: none"> * Inspection and Test Plan Name <div style="margin-top: 10px;">- Select one -</div>	<ul style="list-style-type: none"> * Inspection and Test Plan Activity Description <div style="margin-top: 10px;">- Select one -</div>
Acceptance Criteria		Specification	

2. Fill in the form/task, as normal.
3. Once complete, click either **Save** or **Save & Close**.
 - If updated, both the All Events and Components tabs will indicate the new status.

Steel Structure Training Job 105091 / Compliance								
Quality		Events						
		Global Events/Tasks						
		View						
My view								
① Automatic date filter applied - to clear, use the event date column filter ✉ Global Events/Tasks View My view Edit properties 🔕 📝 ⓘ 🔍 Clear all filters								
Event title	Category	Event date	Event ID	Form name	Project/Organization	Reporter	Status	
<input type="checkbox"/> Pour card - concrete	Checklist	12-29-2022	202212280001	Concrete Placement Release Po.	Steel Structure Training Job [10]	Karen Lofthus	Pending	...
<input type="checkbox"/> Testing	Checklist	11-22-2022	202212220001	Concrete Placement Release Po.	Steel Structure Training Job [10]	Michael Shaw@height	Scheduled	...

Steel Structure Training Job 105091 / Compliance						
Quality	Components	Edit properties				
		Event ID	Event title	Event date	Reporter	Status
		105091				
<input type="checkbox"/>	<input type="checkbox"/>	202121200001	Base-Card-Complete	12-09-2021	Karen Lethin	Pending
<input type="checkbox"/>	<input type="checkbox"/>	202121200001	Testing	12-02-2022	Michael Shaw@wright	Scheduled

PRO TIP: MISSING COMPONENT VALUES



PRO TIP

In the event you are missing component values as an option in your form/task, check to ensure these steps were taken:

The screenshot shows the 'Quality review' interface. At the top, there's a header with 'TEMPLATE HEADER' and 'PROJECT STRUC...' buttons, and a summary table with 'SECTIONS: 2', 'QUESTIONS: 10', 'ANSWERED: 1', and 'EXCEPTIONS: 0'. Below this is the 'Project Structure Header' section, which contains dropdown menus for 'Segment', 'Area', 'Subsystem', and 'Supervisor's name'. The 'Supervisor's name' dropdown is highlighted with a yellow box. Below that is the 'QUALITY HEADER' section with fields for 'Location of Quality area.', 'Supervisor's name', and 'Review date and time'.

1. Create your ITPs.
2. Create your Templates.
 - Ensure ITP header is mapped for your project on the appropriate templates.
3. Finalize and Approve both ITPs and Templates, by ensuring the templates to be used for the project are selected as part of the required records.
4. Associate your ITPs to Components.

The screenshot shows the 'Edit ITP Item' screen. It includes fields for 'Position ID' (1), 'Activity description' (Design Mixes), 'Frequency' (45 Days Prior to Placement), 'Hold/Witness Point' (Not Applicable), 'Acceptance Criteria' (Submit mix design for each concrete class), 'Specification/Code' (Spec XXX, Sec XXX Mix Design), 'Specification/Code Reference link' (Example: https://www.iso.org/), and 'Required records - Other' (Supplier Submittal). At the bottom, there's a 'Save' button.

5. Schedule and Perform the forms/tasks.
 - As a result, the component values will display as options.

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