

# 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 fields.

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

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.

Event title	Category	Event date	Event ID	Form name	Project/Organization	Reporter	Status
Post card - concrete	Checklist	12-29-2022	2022122800001	Concrete Placement Release Po...	Steel Structure Training Job (10...	Karen Loftus	Scheduled
Testing	Checklist	12-22-2022	2022122200001	Concrete Placement Release Po...	Steel Structure Training Job (10...	Michael Shaw@ineight	Scheduled

Event ID	Event title	Event date	Reporter	Status	Form name
2022122800001	Post card - concrete	12-29-2022	Karen Loftus	Pending	Concrete Placement Release Po...
2022122200001	Testing	12-22-2022	Michael Shaw@ineight	Scheduled	Concrete Placement Release Po...

## 📌 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.

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.

Event title	Category	Event date	Event ID	Form name	Project/Organization	Reporter	Status
Post card - concrete	Checklist	12-29-2022	2022122800001	Concrete Placement Release Po...	Steel Structure Training Job (10...	Karen Loftus	Pending
Testing	Checklist	12-22-2022	2022122200001	Concrete Placement Release Po...	Steel Structure Training Job (10...	Michael Shaw@ineight	Scheduled

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2022122200001	Testing	12-22-2022	Michael Shaw@ineight	Scheduled	Concrete Placement Release Po...



## 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' form. At the top, there's a summary bar with 'TEMPLATE HEADER' (PROJECT STRUC...), 'SECTIONS' (2), 'QUESTIONS' (10), 'ANSWERED' (1), and 'EXCEPTIONS' (0). Below this are 'Cancel', 'Save', and 'Save & close' buttons. The main form has two sections: 'Project Structure Header' and 'QUALITY HEADER'. The 'Project Structure Header' section contains four dropdown menus: 'Segment', 'Area', 'Subsystem', and another 'Segment'. The 'QUALITY HEADER' section contains three text input fields: 'Location of Quality area.', 'Supervisor's name', and 'Review date and time'.

## NEED SOME MORE HELP?



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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' form. It has several sections: 'Position ID' (1), 'Group' (Submittals), 'Activity description' (Design Mixes), 'Hold/Witness Point' (Not Applicable), 'Specification/Code' (Spec XXX - Sec XXX Mix Design), and 'Specification/Code Reference link' (Example: https://www.iso.org/). There are also 'Required records - Compliance Forms' and 'Required records - Other' sections. The 'Required records - Compliance Forms' section is highlighted with an orange box and contains a list of forms: 'Electrical Drawings Available Onsite', 'Loftus - Enable Dynamic Header', 'Reporting - Loftus Testing Form', 'Reporting - Shaw Testing Form', and 'SEC Utility Checklist'. A 'Save' button is at the bottom right.

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