⬢ 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**.

2. Alternatively, start a form and perform the form/task.

3. Select a form/task that is linked to an ITP and complete the fields.

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

5. 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.

⬢ 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.

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:

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

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

NEED SOME MORE HELP?

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