### Image: Section 2012/220001 Section 12-22-2022 Mathem Disamplement for Concerner Reserves From Card

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# 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.
- 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 <u>information to create multiple forms/tasks</u>.



- 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.

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### • 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 Heade	r Enabled		sections questions answered 2 20 1
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ITP Header			
* Component	Discipline	WBS Code / WBS Description	Installation Work Packages - IWP
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Account Code and Name	Turnover Package	Construction Area	Construction Segment
System	Subsystem	* Inspection and Test Plan Name	* Inspection and Test Plan Activity Description
		- Select one -	
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.

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# QUICK GUIDE 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:

#### TEMPLATE HEADER EXCEPTIONS (물그) Quality review 2 10 n PRO JECT STRUC <u> 8</u> Cancel Save Project Structure Header Area Segment - Select one - Select one -Subsystem - Select one - Salactiona - Select one OUALITY HEADER Location of Quality area. Supervisor's name Review date and time

## **NEED SOME MORE HELP?**



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- 1. Create vour 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

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	Position ID	Group ①					^	
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	Activity description	* Frequency						
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	* Specification/Code							xx-
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- 5 Schedule and Perform the forms/tasks
  - As a result, the component values will display as options ٠

