QUICK GUIDE



ENABLE ITPs (ORG-LEVEL)

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

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PRODUCT SETTINGS	RODULE BETTINGS		
Module management Template in	ringrations		
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Module name	Description	Secondary module name	Inspectice and Text Plans()
B Safety	A mobile to track and manage safety related business processes.	Salety	0
Environmental	A module to track and manage environmental related business processes.	Environmental	Θ
Compliance	A module to track and manage compliance related business processes.	Compliance	0
Change	A module to track and manage change related basiness processes.	Change	0
Outers	A module to track and manage custom related business processes.	Oustone	Θ

SET UP AN ORG-LEVEL ITP

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

* ITP name		
Owner Required Project	tt Specific ITP	
Account code		
40		х
Discipline		•
Description		
Required by owner per	contract not on other projects	

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.

Position ID	Section	*Activity Description	*Frequency	*Hold/Witness Point	Specification/Code Reference	LIRI link	Required records
POSICIONE	Jecuon	Activity Description	riequency	Hold/ Withess Politic	specification/code Reference	ORLINIK	Required records

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.

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>	Module settings > Quality > Inspection & Test Plans > Piping				
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	Drag a column header and drop it here to group by that column				
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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.

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»	Module settin	gs >	Quality >	Inspectio	n & Test	Plans > Piping										
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2. Once all parties approve, click **Approve** to make the ITP available.



• The ITP is now approved and ready to be used on the project.

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Quality > Project settings									
		USER CROUPS	INSPECTION & TEST PLANS						
B Copy ITPs from Drg				L Coverkeat template 🔠 🗃	0	2	Gree	te ITP	
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ENABLE ITP MAPPING TO PLAN

- 1. From within a project, click Settings.
- 2. Select Plan.
- 3. Ensure the **Enable ITP mapping between Compliance and Plan** toggle is turned on.

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 ITPs can be mapped to a component in Quantity Tracking or in Work Packaging.

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QUICK GUIDE MAP THE ITP IN PLAN

ENABLE PROJECT SPECIFIC ITP MAPPING

1. From within the project settings, on the Plan tab, ensure the **Enable ITP Mapping Between Compliance and Plan** toggle is turned on.

	GLOBAL OPTIONS
General	
Enable default component creation?	Refresh default components
	C Refresh Selecting refresh will ensure all default components are created in plan que
Associate claiming scheme to WBS phase code?	Enable account code assignment to claiming scheme?
	0
Associate claiming to Material components	Automatically inherit CWA to component from assigned work package?
Includes IMSS value and claiming scheme	C Refresh Selecting refresh will ensure CVRA value is inherited to component from ass
Enable ITP mapping between Compliance and Plan	Enable external material tracking integrations?

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.

	t≡ III View:	•
Inspections & Test plans		×
	No ITP's added.	*

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

Add 11Ps to Component AuditAls (IPs is Project 100 100 cm / 10

- 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. Check the box for **Activity Components**.

M	anage workspace	
	Equipment	
	Materials	
	🗌 Budget	
	Activity components	
	Contract components	

5. Click the • Add Activity components by WBS icon.

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

Avail	able components In Project						
	Component name 👻	Description -	Area	Discipline/Commodily	W86 -	Туре	Ŧ
۲	Module 27 - C24: Cross Bra	Module 27 - C24: Cross Bra.	North	Metals	1005	Activity	
۲	Module 27 - C23: Cross Bra	Module 27 - 023. Cross Bra.	North	Metals	1005	Activity	
۲	Module 27 - 825: Beam Ass	Module 27 - 825: Beam Ass.	North	Metals	1005	Activity	
•	Module 27 - 824: Cross Bra	Module 27 - B24: Cross Bra.	North	Metals		Activity	
۲	Module 27 - 823: Cross Bra	Module 27 - B23: Cross Bra.	North	Metals	1005	Activity	
Selec	cted Components:						Clear all
Mo	dule 27 - 824. Cross Brace Assemb	hy ×					

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

L =	WBS CB 👻	Comp C 👻	Discipline =	ITPs
	0.0	0.0	Metals	•
	0.0	0.0	Metals	\odot
	0.0	0.0	Metals	19

- 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.





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