# QUICK GUIDE



#### • SET UP PROJECT SPECIFIC ITP

- 1. At the root organization level, select Settings > Compliance > Product Settings.
- 2. For the desired module, turn on the Inspection and Test Plans toggle.
- 3. Go into a project. Within Settings, select Module Settings, then select the module chosen in the previous step.
- 4. Click on the **Project Settings**.

	Steel Structure Training Job   105091 / Settings						
»	Module settings > Quality •	Pro	ject se	ttings	1		
	Module summary Categories Classifications Statuses Email templates Roles User assignments	_			•	Template	19

5. Click on Inspection & Test Plans.

#### CREATE A NEW ITP (ORG or PROJECT-LEVEL)

1. From within the project settings, on the Inspection & Test Plans tab, click the **CREATE ITP** button.

INSPECTION & TEST PLANS				
	▲ Download template	⊞ 0	Q	Create ITP

- 2. Complete the required information.
- 3. Use one of these options to continue.

Crea	ite ITP	×
	* ITP name	
	Owner Required Project Specific ITP	
	Account code	
	40	х
	Discipline	_
	Contingency ·	·
	Required by owner per contract not on other projects	

### **OOWNLOAD 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.

A7	•	×	f <sub>t</sub>												
2	Α														
1	Position ID	Section	*Activity	Descrip	tion	*Frequ	iency	*Hold/Witness Point	Specif	fication/Code R	eference	e URL	link	Required reco	ords - (
2															
8															
1	) Impo	ort Sheet	Instruction	Sheet	Example	e Sheet	÷		:						D
leac	h 😨 Accessibili	ts: investigate			_					Display Setting	5 III	(B)	m		+ 100

### **2** 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.

wner Required Proje equired by owner per co				-			_	
ccount Code: Discipl			en loftus 12/29/2022 07:54:23 /	414				n <b>1- DRAF</b> tw Hist
	inter one interpreter	around by no				Q	Ap	prove

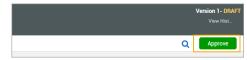
#### **3** SAVE

Used when you want to build the ITP one line item at a time.

1. Select the  $\oplus$  icon to add a line item.

E A Steel Structure Job   105091 / Settings	i i				Ø	۵	8 🖻	
Quality new test edit > Project settings > Ins	spection & Test Plans	Owner Required Proje	ct Sp					
Owner Required Project Specific ITP							Version 1- I	
Required by owner per contract not on other projects								st.
Account Code: Discipline: Contingency Created By: karen lof	tus 12/29/2022 07:54:23 AM							
<ul> <li>(●)</li> </ul>						۹	Approv	е
Drag a column header and drop it here to group by that co	ılumn							
Position ID 😇 Section 😇 System ID 😇	Activity description	-	Frequency	- Hold/Witness Po	int	Ŧ	Specificati	on/Cor

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.

	🖨 Steel Structure Training Job   10505									
Π	Quality > Project settings									_
			USER GROUPS	INSPECTION & TEST PLANS						
	E Copy ITPs from Org				🛓 Deventoud template 🔠 🚦	8	۹	Cre	ate ITP	
	Cast in place concrete Version 1 - APPROVED CIP	INEIGHT - ITP-CONC-2.02.01 C Version 2 - APPROVED CIP								
	9 🕲 i	9 💿 i								

#### **MAP ITP 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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		CLOBAL OPTIONS			
			Cancel		Same
	General				
Par	Enable default component creation?	Rufersh default components.			
	Associate claiming scheme to WBS phase code?	Enable account code assignment to claming scherve?			
	Associate claming to Material components includes IRSS sality and claming scheme	U Astronomically black CMA to component has assigned and packaged C Antronomical Society operation at event CMI and a released to component from assigned well package Cmy when setting southers			
	Enable ITP mapping between Compliance and Plan	Enable external material tracking integrations?			
	Allow overslaining of components				

• ITPs are mapped to the component, but can also be mapped to a component not associated to a work package through Quantity Tracking.

# 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 qu
Associate claiming achierne to WBS phase code?	Enable account code assignment to clasming scheme?
Associate claiming to Material components includer WIDS value and claiming scheme	Automatically infernit CNA to component from assigned work package? C Referant Selecting refrest will ensure CNA value is interned to component from as
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.

		Steel Structur	e Training .	Job   105091 /	Plan / Q	uantity trac	king					
A	ctions 🔻	•	c (	è 🛞	Œ	☆	Manage ITP	s				
T									🗍 Mana	ge deta	il col	umns
-)	Comp	onent details		_								
Ŧ		Name		Work packag	e ID		Assembly		Discipline / Commodity	<i>(</i>		
			т			Т		Т			v	Т
ሐ		720001000-1							Contract			
¢,		Module 30 - A	7 Conn						Metals			
49		Module 30 - A	6 Conn						Metals			

4. Click the Add ITPs to Component button.

t≡ III View:	•
Inspections & Test plans	×
۲	
No ITP's added.	<b>^</b>

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

Avail	able ITPs in Project					
	ITP ID		ITP name	Ŧ	Description	
•	8		INDIGHT - ITP-CONC-2.02.01 Cast-In-Place 0	Concrete ITP	CIP	
۲	9		Cast in place concrete		CIP	
•	10		Owner Required Project Specific ITP		Required by owner per contract not on oth	er projects
Sele	ted ITPs					c
8-1	NEIGHT - ITP-CONC-2.02.01 Cast-In-Pla	ace Concrete ITP X				

- 4. 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 COMPONENTS IN A WORK PACKAGE

- 1. Ensure the Enable ITP Mapping toggle is turned on as shown above.
- 2. From within a project, in Work Packaging, drilldown as needed to click to open a Work Package.
- 3. Click on the **Workspace** tab.
- 4. Check the box for Activity Components.

Ma	anage workspace	
1	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.

		Description 👻	Area	*	Discipline/Commodily	was 👻	Type 👻
		Module 27 - C24: Cross Bra	North		Metals	1005	Activity
0	Module 27 - C23: Cross Bra	Module 27 - C23: Cross Bra	North		Metals	1005	Activity
0	Module 27 - B25: Beam Ass	Module 27 - B25: Beam Ass	North		Metals	1005	Activity
۲	Module 27 - 824. Cross Bra	Module 27 - 824: Cross Bra	North		Metals		Activity
•	Module 27 - 823: Cross Bra	Module 27 - 823: Cross Bra	North		Metals	1005	Activity
Selec	ted Components:						Clear

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

	( bbA 🕀	Activity componer	nts by WBS		
2. Ŧ	WBS CB 👻	Comp C	Discipline 👘	ITPs	
	0.0	0.0	Metals	÷	4
	0.0	0.0	Metals	$\oplus$	
	0.0	0.0	Metals	Ľ	

- 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/Completions, ITP Forms can now be scheduled in Compliance/Completions.

### **NEED SOME MORE HELP?**



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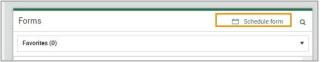
# QUICK GUIDE SCHEDULE & COMPLETE ITP FORMS



#### SCHEDULE ITP FORMS

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.

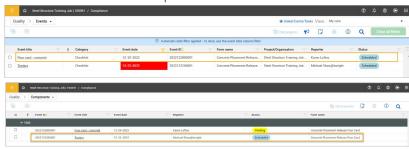
1. In the desired module, select **Schedule Form**.



- 2. Select a form that is linked to an ITP and complete the fields.
- 3. If the form is reoccurring, click the **Schedule** button and set up the schedule information to create multiple forms.

redule form		Category
Concrete Placement Belease Pour Card		Checklist
Contract Placement Penalec Pool Card		CIRCUIN .
Event title		Reporter
		- Select one -
ITP properties		
Discipline		Claiming scheme
- Select one -	*	- Select one -
WBS		Component
- Select one -	*	- Select one -
Number of forms to create		
1		
Event date		Importance
01-04-2023	<b>#</b>	1
ED Schedule		
		Cancel Save & start new event Save

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



#### COMPLETE THE SCHEDULED ITP FORM

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

Concrete Placement Release Pour Card				SECTIONS	questions 74	answered 4		l
					Cancel	Save	Save & clos	-
								l
ITP SECTION								
* Discipline	* Claiming Scheme	* WBS Code / WBS Description		* Component				
WBS	WBS	1086		1086				
* Installation Work Packages - IWP	* Account Code and Name	* Turnover Package		* Construction	n Area			
* Construction Segment	* System	* Subsystem		* Inspection a	nd Test Plan Na	ime		
				Select one				
* Inspection and Test Plan Activity Description	* Acceptance Criteria		* Specification					
Select one	•							
General Information								
* Description of Work Completed:	* Pour Date:		Pour #:					

- 2. Fill in the form, 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.

Q	uality	Events -									Global E	vents/Tasks V	/iew: My view	w			
											😢 Edit proper		0 0	()	Q	Clear al	l filters
							0	Automatic date filte	r applied - to cle	ar, use the event date column filter							
	Event titl	e	Ŧ	8 Category	-	Event date	Ŧ	Event ID	-	Form name	Project/Organization	Reporter		Ŧ	Status		-
0	Pour cars	i - concrete		Checklist		12-29-2022		2022122800001		Concrete Placement Release Po	Steel Structure Training Job (10	Karen Loftu:	s		Pending		
	Testing			Checklist		12-22-2022		2022122200001		Concrete Placement Release Po	Steel Structure Training Job (10	Michael Sha	aw@ineight		Scheduled		
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## QUICK GUIDE ITP: MODULE LANDING PAGE



