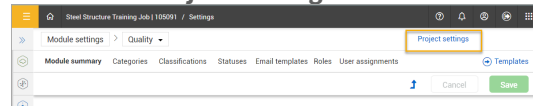## ⬡ SET UP PROJECT SPECIFIC ITP

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**.

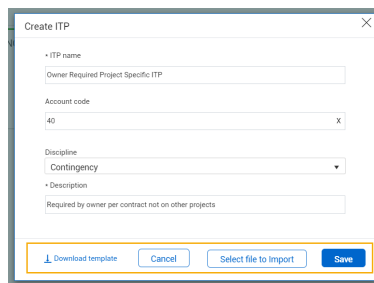5. Click on **Inspection & Test Plans**.

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

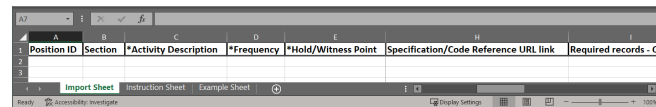1. From within the project settings, on the Inspection & Test Plans tab, click the **CREATE ITP** button.
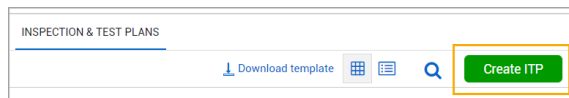
2. Complete the required information.

3. Use one of these options to continue.

① 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.

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.
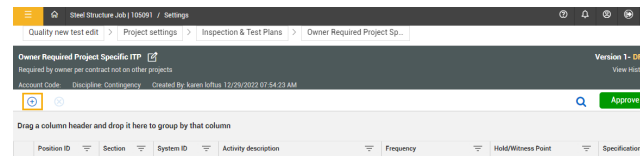
1. Select the import file from your computer.

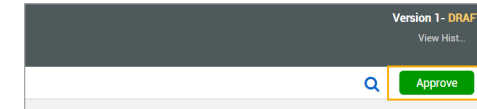2. To see all ITPs, click the Inspections & Test Plans tab.
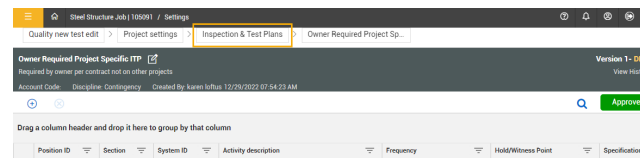
③ SAVE

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

1. Select the ⊕ icon to add a line item.

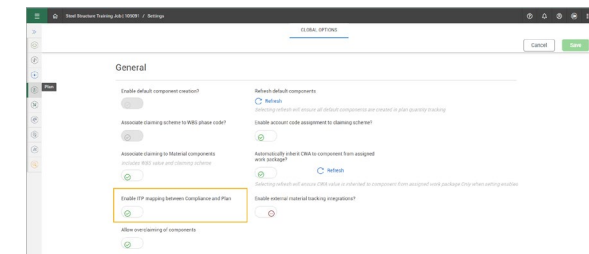2. Once all parties approve, click **Approve** to make the ITP available.

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


⬡ 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.

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

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MAP THE ITP IN PLAN
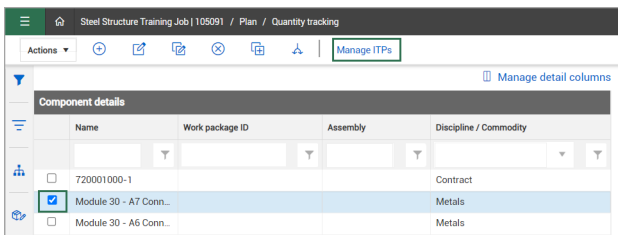
● ENABLE PROJECT SPECIFIC ITP MAPPING

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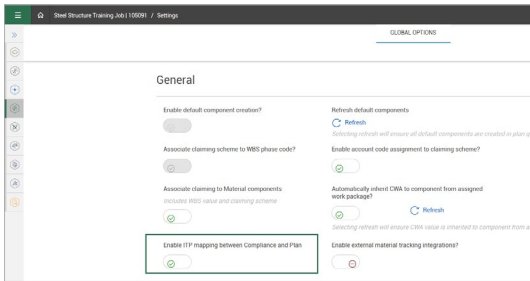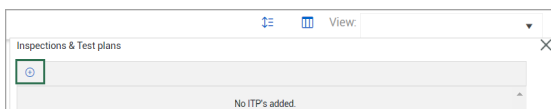

2. Click **Save**.

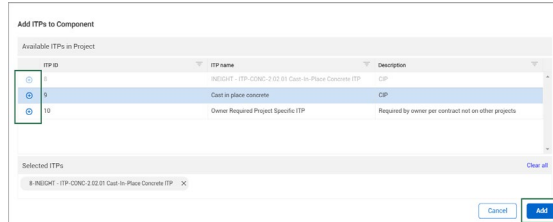## ● ADD ITPs TO INDIVIDUAL COMPONENTS

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**.

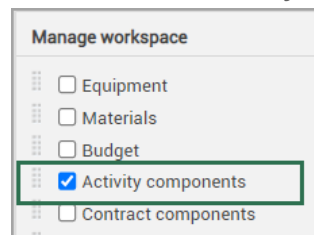4. Click the **Add ITPs to Component** button.

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

4. Select 1 or more Activities.
   • The ITP(s) will now show as associated with the component and the details will appear.
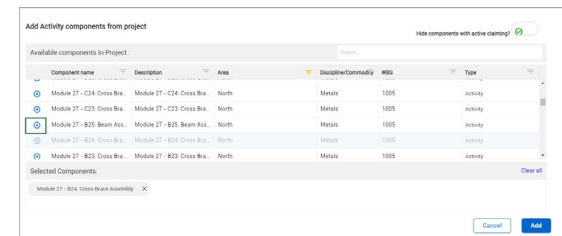
● ASSOCIATE AN ITP TO COMPONENTS IN A WORK PACKAGE

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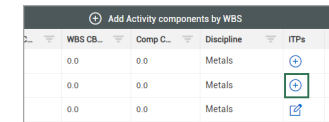4. Check the box for **Activity Components**.

5. Click the ⊕ **Add Activity components by WBS** icon.

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

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

   • 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?

📖 Learn more in our Knowledge Library
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QUICK GUIDE
SCHEDULE & COMPLETE ITP FORMS

InEight® COMPLIANCE

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.

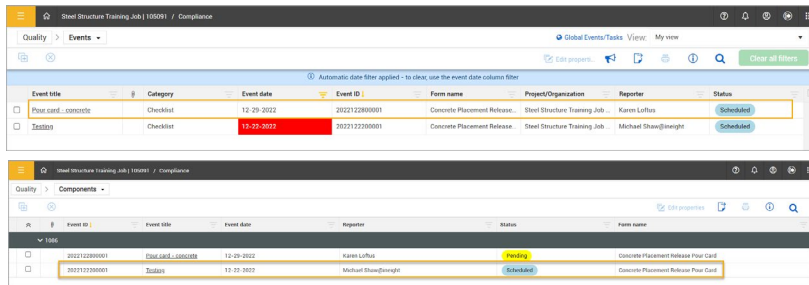1. In the desired module, select **Schedule Form**.
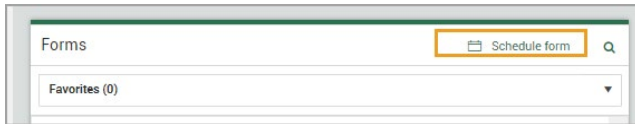
2. Select a form that is linked to an ITP and complete the fields.

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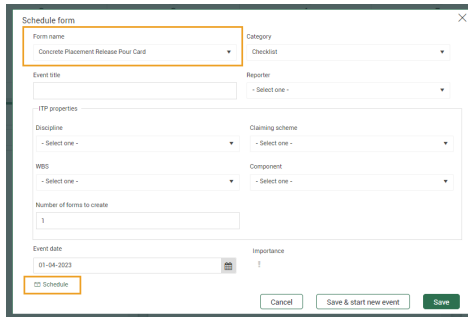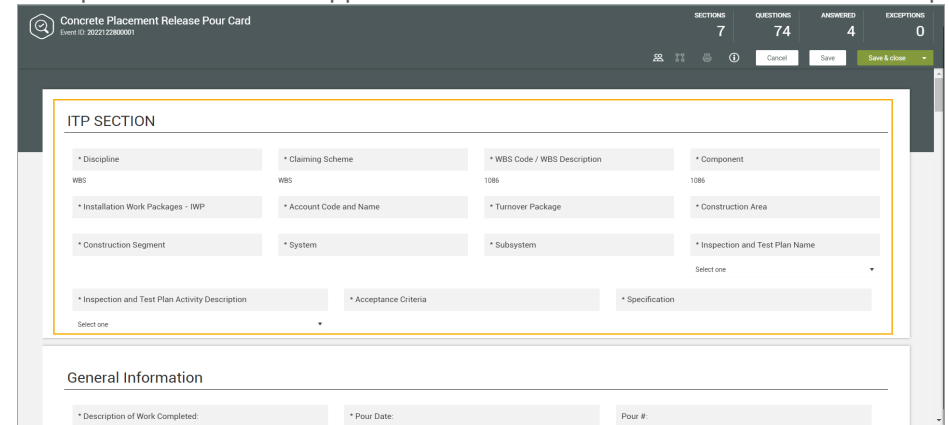

4. When done, click **Save**.

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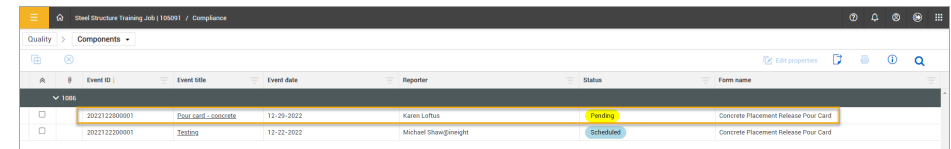

COMPLETE THE SCHEDULED ITP FORM

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.

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.

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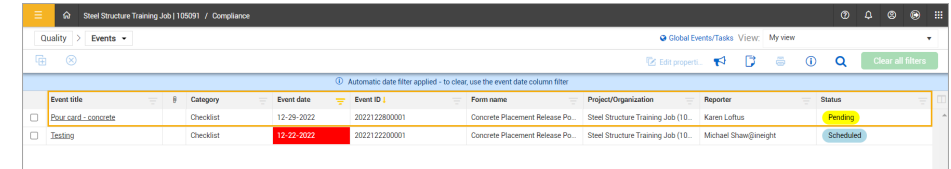
Steel Structure Training Job | 105091 / Compliance
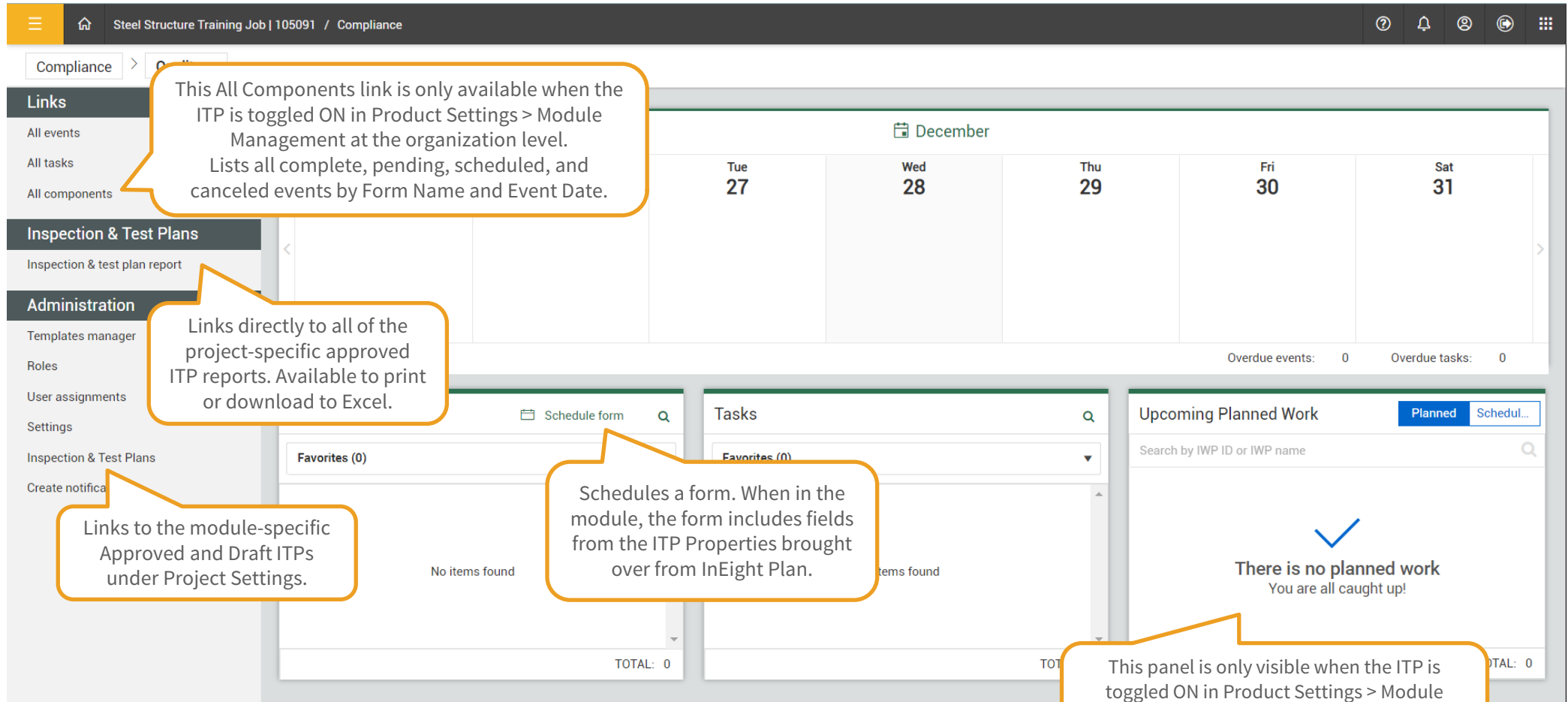
Compliance

Links

All events

All tasks

All components

This All Components link is only available when the ITP is toggled ON in Product Settings > Module Management at the organization level.
Lists all complete, pending, scheduled, and canceled events by Form Name and Event Date.

Inspection & Test Plans

Inspection & test plan report

Administration

Templates manager

Roles

User assignments

Settings

Inspection & Test Plans

Create notifica...

December

Tue 27	Wed 28	Thu 29	Fri 30	Sat 31

Overdue events: 0   Overdue tasks: 0

Links directly to all of the project-specific approved ITP reports. Available to print or download to Excel.

Links to the module-specific Approved and Draft ITPs under Project Settings.

Schedule form

Favorites (0)

No items found

TOTAL: 0

Tasks

Favorites (0)

items found

TOT

Schedules a form. When in the module, the form includes fields from the ITP Properties brought over from InEight Plan.

Upcoming Planned Work   Planned | Schedul...

Search by IWP ID or IWP name

✓
There is no planned work
You are all caught up!

TOTAL: 0

This panel is only visible when the ITP is toggled ON in Product Settings > Module Management at the organization level. Shows either Planned or Scheduled IWPs.

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