

SCHEDULE & COMPLETE ITP FORMS OR TASKS



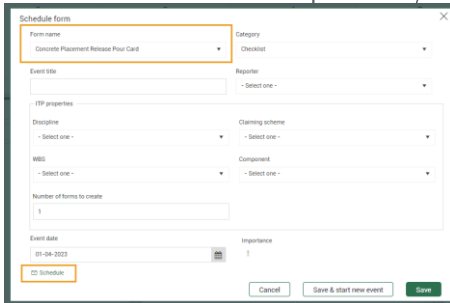
◆ SCHEDULE OR COMPLETE ITP FORMS/TASKS

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.

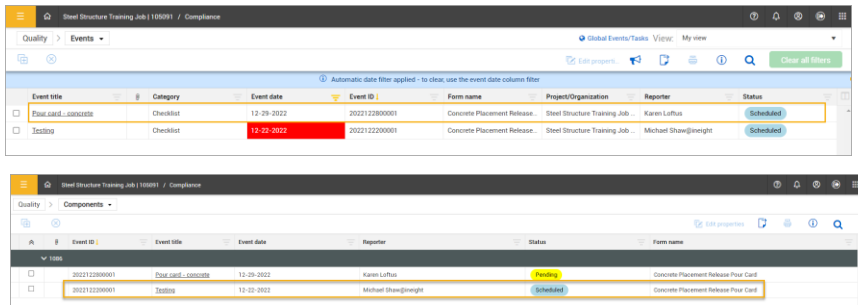
1. In the desired module, select **Schedule Form or Schedule Task**.
2. Alternatively, start a form and perform the form/task.
3. Select a form/task that is linked to an ITP and complete the fields.



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

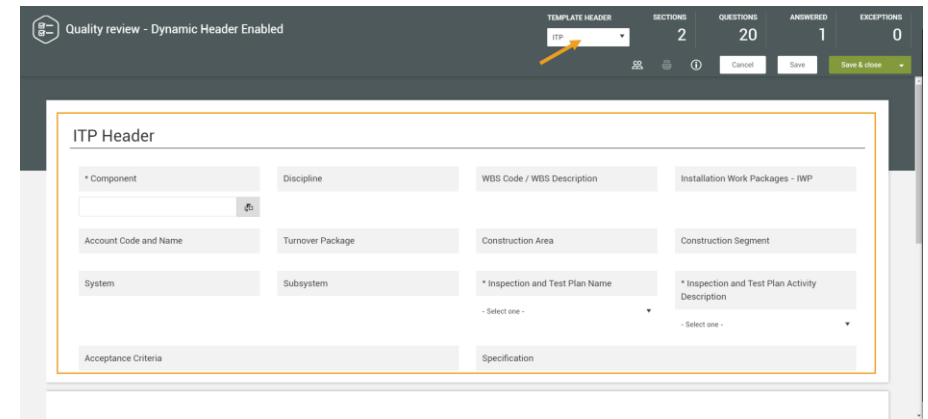


5. When done, click **Save**.
 - When done, the scheduled event or task will appear in both the Components tab and the All Events/All Tasks tabs.

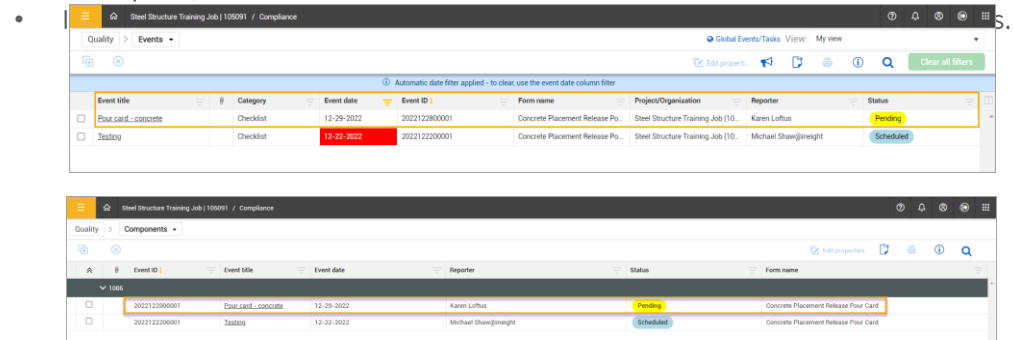


◆ COMPLETE THE SCHEDULED ITP FORM/TASK

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**.





PRO TIP

In the event you are missing component values as an option in your form/task, check to ensure these steps were taken:

The screenshot shows a 'Quality review' form. At the top, there are tabs for 'TEMPLATE HEADER', 'SECTIONS', 'QUESTIONS', 'ANSWERED', and 'EXCEPTIONS'. Below these are buttons for 'Cancel', 'Save', and 'Save & close'. The main section is titled 'Project Structure Header' and contains several dropdown menus labeled 'Segment', 'Area', and 'Subsystem', each with the text '-- Select one --'. Below this is a 'QUALITY HEADER' section with fields for 'Location of Quality area.', 'Supervisor's name', and 'Review date and time'.

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

The screenshot shows an 'Edit ITP Item' form. It has several sections: 'Position ID' (1), 'Group' (Submittals), 'Activity description' (Design Mixes), 'Hold/Witness Point' (Not Applicable), 'Specification/Code' (Spec XXX - Sec XXX Mix Design), and 'Specification/Code Reference link'. There are also fields for 'Frequency' (45 Days Prior to Placement), 'Acceptance Criteria' (Submit mix design for each concrete class.), and 'Required records - Other' (Supplier Submittal). At the bottom, there is a 'Required records - Compliance Forms' section with a list of forms: 'Electrical Drawings Available Onsite', 'Loftus - Enable Dynamic Header', 'Reporting - Loftus Testing Form', 'Reporting - Shaw Testing Form', and 'SEC Utility Checklist'. A 'Save' button is visible at the bottom right.

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

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