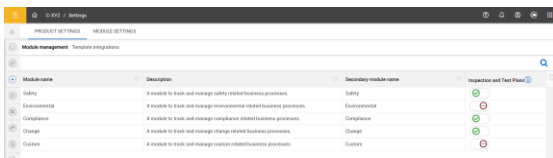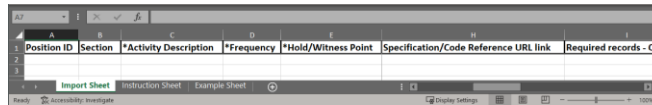# ITP SET-UP & CREATION

SQC

⬡ ENABLE ITPs (ORG-LEVEL)

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

⬡ SET UP AN ORG-LEVEL ITP

1. 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.

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.

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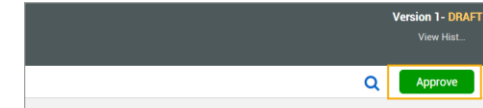2. To see all ITPs, click the Inspections & Test Plans tab.

OPTION C: SAVE

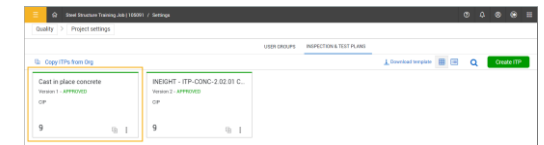Used when you want to build the ITP one line item at a time.

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

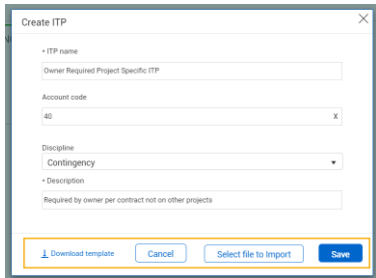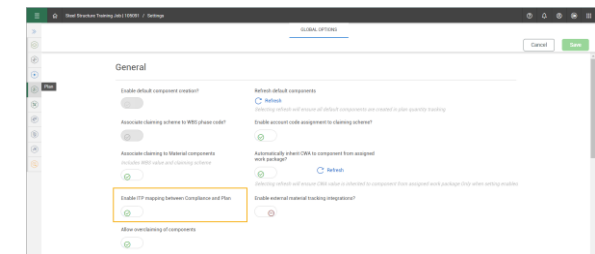2. Once all parties approve, click **Approve** to make the ITP available.

   • The ITP is now approved and ready to be used on the project.
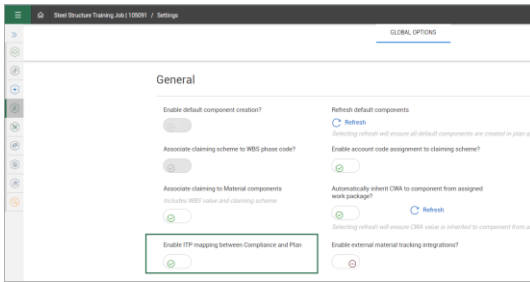
⬡ ENABLE ITP MAPPING TO PLAN

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

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

MAP THE ITP IN PLAN

InEight® PLAN

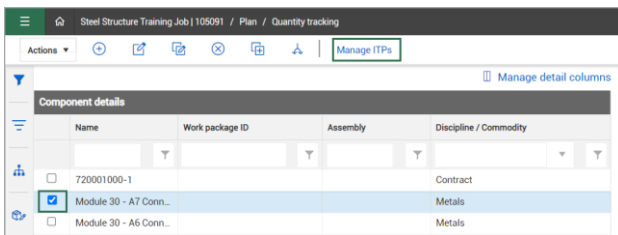## ⬡ ENABLE PROJECT SPECIFIC ITP MAPPING

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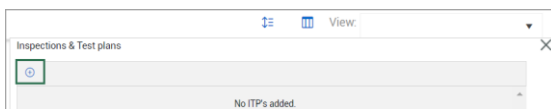

2. Click **Save**.
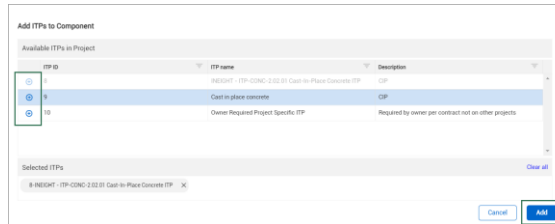
⬡ ADD ITPs TO INDIVIDUAL COMPONENTS

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**.

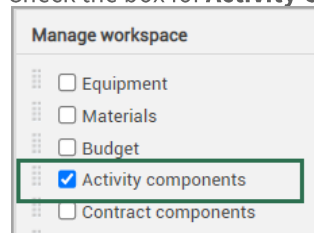4. Click the **Add ITPs to Component** button.

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

6. Select 1 or more Activities.
   - The ITP(s) will now show as associated with the component and the details will appear.
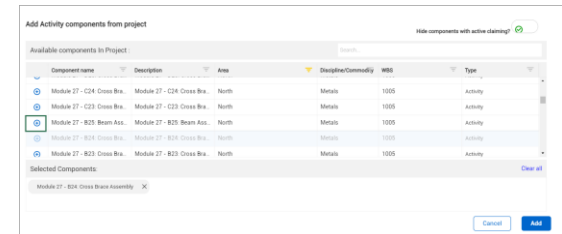
⬡ ASSOCIATE AN ITP TO A WORK PACKAGE

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**.

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 and/or Completions, ITP Forms can now be scheduled in those respective products.

NEED SOME MORE HELP?

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learn.ineight.com

🖱 Take a course at InEight U
university.ineight.com