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 MODULE SETTINGS			
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• м	oblerane	Description	Secondary module name	Inspectice and Test Plane()
2 8	Mety	A module to track and manage safety related business processes.	Safety	0
. 0	nvironmental	A module to track and manage environmental related business processes.	Environmental	Θ
⁸ 0	ompliance	A module to track and manage compliance related business processes.	Compliance	0
© a	sange	A module to track and manage change related business processes.	Change	0
8 0	alban	A module to Yack and manage custom related business processes.	Oustone	0

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 Pro	oject Specific ITP	
Account code		
40		х
Discipline Contingency		•
Description		
Required by owner p	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.

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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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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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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 🔠 🗃	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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Image: ConstructionImage: Construction<th></th><th>General</th><th></th><th></th><th></th><th>Í</th>		General				Í
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		Allow exercisioning of components	٥			

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

Phone: In United States: +1 800 801 1426 In Australia: 1 800 727 102 Worldwide: +61 3 9291 0820 Email: support@ineight.com

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?
Associate claiming to Material components Includes IRES value and claiming scheme	Automatically inherit CINA to component from assigned work package?
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.

	\$≡ III View:	•
Inspections & Test plans		×
	No ITP's added.	-

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

Add (Thy to Component Available (Thy to Project) The Second Seco

- 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	
1	🗌 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.

Aral	able components in Project :						
	Component name	Description $\overline{\neg}$	Area 🔫	Discipline/Commodily	W85	Type	$\overline{\gamma}$
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 - B25: Beam Ass.	North	Metals	1005	Activity	
۲	Module 27 - 824: Cross Bra	Module 27 - 824. Cross Bra	North	Metals		Activity	
۲	Module 27 - 823: Dross Bra	Module 27 - B23: Cross Bra	North	Metals	1005	Activity	
Selec	ted Components:						Ciear a
Mo	dule 27 - 824. Cross Brace Assembl	ły ×					

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

Add Activity components by WBS							
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- 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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