

## ITR Creation Process

### Populating PDF

1. Open in word
2. Adjust text boxes (if needed)
3. Save as PDF
4. Open in Adobe
5. Prepare Form
6. Copy fields from template (check the headings haven't changed)
7. Save

### Populating Excel

Copy ITPs, ITR no. and heading from word or adobe to excel

### ITR Matrix

ITR Matrix is used to input the ITR Nos and names. To do this, download and follow the template, adding the ITR No, ITR title/name, Norm hours.

ITR Name	ITR Title	Norm Hours
P17A	BOLTED JOINT INTEGRITY VERIFICATION	0

Copy green section and paste into import field. Once imported, publish if entry is correct.

ITR Matrix ⌵ +

X

➤

Options : Copy and paste from MS Excel.

ITR Name,Title,Norm Hours,MS1,MS2,MS3,MS4,MS5,MS6

Template 
Import

### ITR Designer

ITR Designer is used to attach intelligent ITR files (developed by MODS) to the Matrix entries previously made. A PDF, Excel and C&P of the questions must be added to proceed.

The screenshot shows the ITR Designer interface. At the top, there's a search bar with a dropdown menu (A) and a plus icon (B). Below it, a list of ITRs is shown, with 'M01A PRESSURE VESSEL' selected. To the right, there's a 'Choose File' button (C) and an 'Upload PDF' button. In the center, there's a large text area for editing (D) and a 'Copy and paste from EXCEL' button (E). At the bottom, there's a 'Saved Template For M01A' section with a 'Choose File' button (F) and an 'Upload File' button. On the right, a preview of a MODS ITR form is shown, titled 'M01A MECHANICAL Mechanical Completion Pressure Vessel / Tank'.

- A: ITR selected
- B: Edit icon
- C: Choose PDF
- D: Paste field for questions
- E: Choose excel
- F: ITR preview

### Tag Type List

In Tag Type List we add generic tag types using suffixes, tag type and hard/softs. To do this, download and follow the template.

Suffix	Description	SoftHard	Discipline	Complete
A	AGITATOR	H		
AAH	ANALYSER ALARM HIGH	S	EL	YES

Copy green section and paste into import field. Once imported, publish if entry is correct.

The screenshot shows the Tag Type List interface. At the top, there's a search bar with a dropdown menu and a plus icon. Below it, there's a list of tag types with columns for Suffix, Description, SoftHard, Discipline, and Complete. An 'Add' button is visible. Below the list, there's a section for 'Options : Copy and paste from MS Excel.' with a text area containing 'Suffix,Tag Type,Hard Soft,Discipline'. At the bottom, there's an 'Export List' button, a 'Template' button with an Excel icon, and an 'Import' button.

Tag List

In Tag List we add a more specific tag, adding all the information we have. To do this, download and follow the template completing as many fields as possible.

Equipment > Tags > +: will take you to the template and import sheet. The template is a considerable size; therefore you may have to navigate via the scroll bar to access the template.



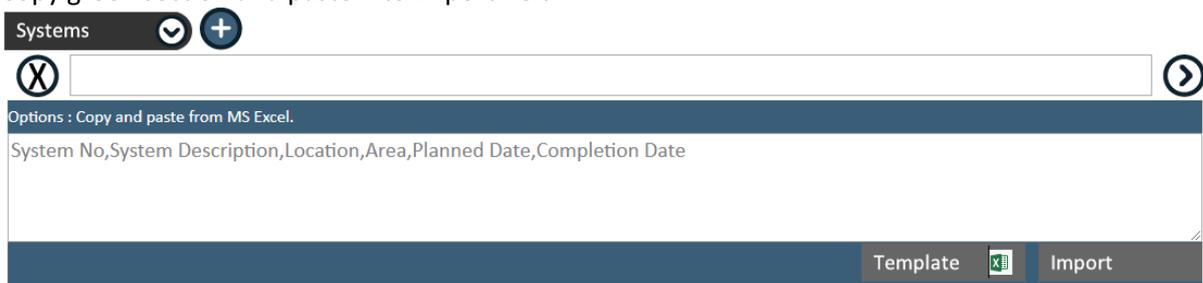
Copy green section and paste into import field

Systems

In systems we create systems and sub-systems. We do this by following the template, inputting the necessary fields.

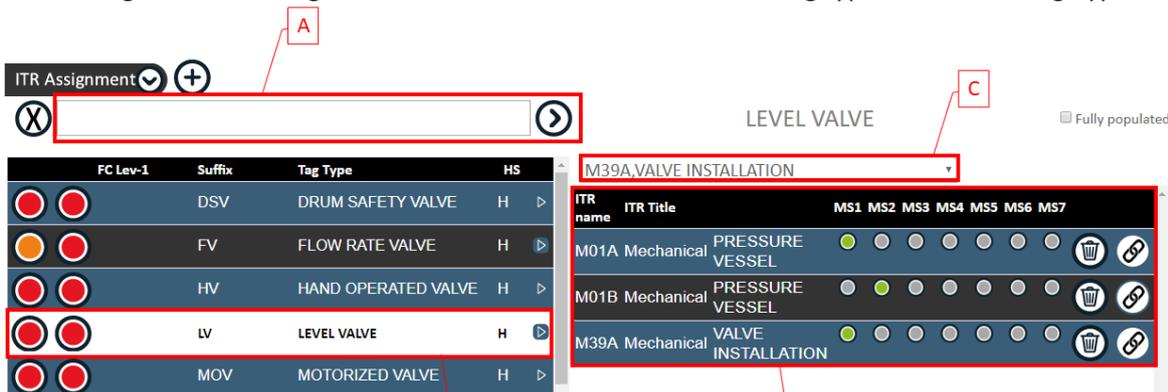
System No.	System Description	Location	Area	Planned Date	Completion Date
202	Topsides Inlet Manifold	KOS	EXAMPLE	15/Jul/2016	09/Sep/2016

Copy green section and paste into import field



ITR Assignment

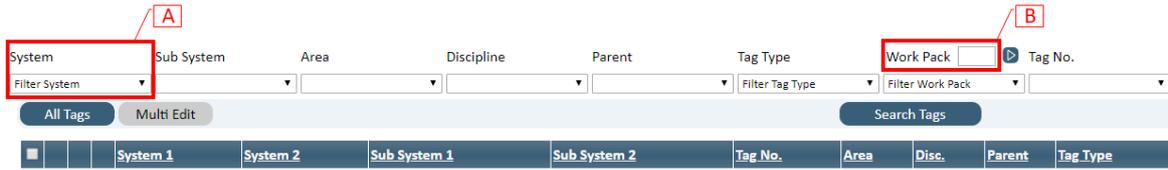
In ITR Assignment we assign the ITRs we created in Matrix to the tag types created in Tag Types List.



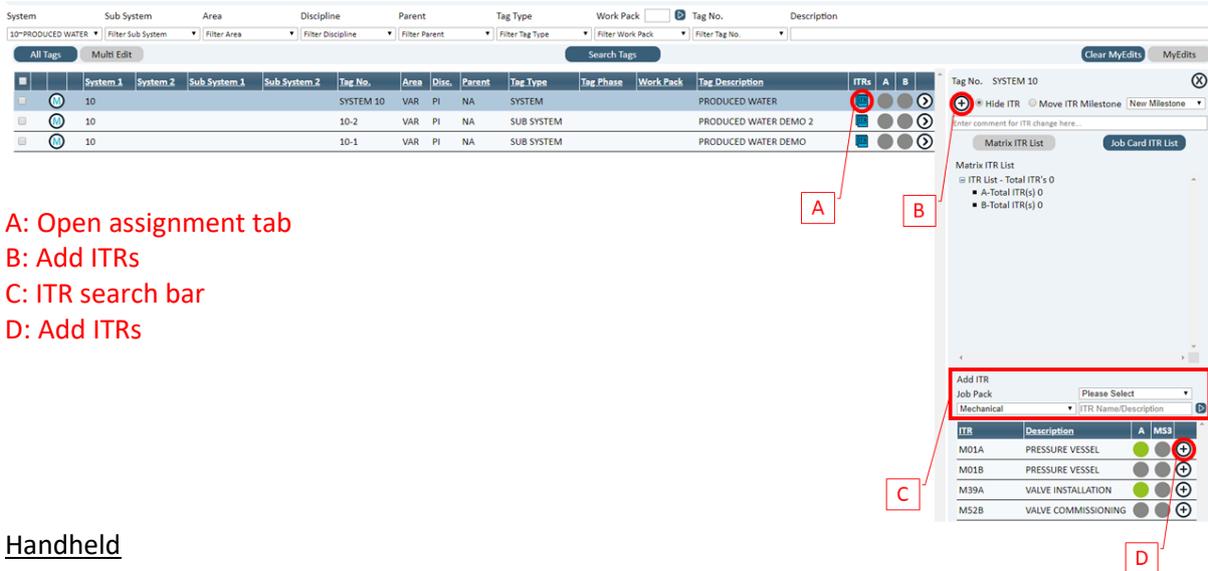
- A: Tag search bar
- B: Tag selected
- C: ITR search bar
- D: ITRs selected

## Tag Editor

Tag editor is used to assign the tags with the ITRs to a work pack or system. Filter by system or work pack to assign.



- A: System filter
- B: Work pack filter



- A: Open assignment tab
- B: Add ITRs
- C: ITR search bar
- D: Add ITRs

## Handheld

1. Log in (to correct server)
2. Select module (CMP for ITRs)
3. Select project
4. Sync by work pack or system (download)
5. Tag Register
6. Select ITR
7. Populate ITRs
8. Sign off ITR (using log in details)
9. Sync by work pack or system (upload)

