

PHMSA IA-Desktop Basic Operations Workshop

Nov 2025

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IA Desktop Workshop Sequence

This workshop provides students with a guided series of exercises involving hands-on experience with the core components and functionality of the IA Desktop software and the system that supports it. IA supports several inspection methodologies, including Integrated Inspections, Standard Inspections, New Construction Inspections, etc. This workshop is not geared toward any specific methodology but is focused on the functional aspects of IA that, in turn, support the various inspection methodologies. For specifics on inspection process methodology, we refer you to process-specific documentation such as the Integrated Inspection User's Manual and to courses specific to those methodologies.

Objectives

The student will:

1. Launch, login, and get to the homepage of IA-desktop.
2. Understand the IA application architecture.
3. Set up an inspection with correct configuration, add assets, and establish a team.

4. Plan an inspection.
5. Navigate the planned questions.
6. Add inspector's notes and results for inspection questions.
7. Identify and resolve data conflicts with other team members.
8. Monitor progress toward plan completion.
9. Assign tasks to other team members, complete them, etc.
10. Upload files (attachments).
11. Set up requested items.
12. Run reports.
13. Use the Coverage Heatmap tool.

While this workshop is designed to be worked through in a small group it is also adaptable to solo learning. The ideal group size is 2-5, both for helping each other and to better simulate the team-based inspection process IA supports. IA works for inspection teams of one, but learning how to assign and accept tasks, resolve data conflicts, etc. will be easier and more meaningful in a group.

Assumptions

Depending on your learning scenario, the following are assumed to be true:

For classroom scenario (using TQ server)	For individual and/or non-TQ OJT
1. You have a functional IA account 2. Your password has not expired, and you remember it.	
A. Your account has been synced to the TQ server (this is typically done automatically prior to the workshop start). B. You have IA-EDU installed on your classroom laptop and iPad. The EDU installs have Orange branding.	A. You have IA PROD (Blue Icon) installed on your laptop and iPad. Important: When asked to create new inspections it's important to remember to flag them as "demo" so that they are not seen as actual inspections by the system. The instructions below will remind you to do this when the time comes.

If the items above are not yet true for you, please stop and get those things sorted out prior to moving on.

Before you start

The following pages include several lessons, each with multiple steps that will lead you through the key features and typical process checkpoints in IA. Some sections are to be worked alone; these are indicated by . Other sections involve a group effort; these are indicated by . From time to time, you'll see a **II** marker in places where you'll need to pause to let your team catch up, or where we intend to have a short presentation and Q&A on important points with the entire class. At most of these pause locations, there will be some optional challenges you can do while you wait.

If you have a question, let one of the workshop team members know and we'll assist you personally.

PHMSA IA-Desktop Basic Operations Workshop

For future reference, note that you can reach out to IA-support@dot.gov if you have any questions about using IA-Desktop. Additional training materials may also be seen at the following links. Use your IA credentials to log in there to view the materials:

- IA Quickstart Guide (a short refresher if you haven't used IA in a while):
<https://primis.phmsa.dot.gov/ia/training/docs/IA%20Desktop%20Quick%20Start%20Guide.pdf>

IA Training Videos and recorded Demo Sessions:

<https://primis.phmsa.dot.gov/ia/training/videos/index.htm>

Lesson 1: Preliminary setup



STEP 1.1: Meet your team

1. You should be arranged in groups of 2-4 people. Take a minute to get settled into your group and introduce yourselves.
2. If you are attending an in-person workshop, get seated such that each person can see their own screen and the screen of at least one other teammate. For remote options, feel free to have someone in the group share their screen while each person works on their own desktop.

Tip: For OJT single-trainees: Keep an eye out for specific instructions below for your situation. It will be a good idea to add your Supervisor to your inspection's team roster (instructions for that below) so they can easily find and help you with it.



STEP 1.2: Launch, login, and home tab

1. Launch IA-Desktop and sign in. IA Desktop is designed to keep you signed in over a long period of time, much like MS Outlook would typically do. However, if you are completing this workshop at TQ or on a shared laptop, be sure to sign out (top right button) of IA Desktop at the end of the day.
2. When you first log in to IA Desktop, you may see some notifications appear at the top right. If you have logged in to the orange EDU/training instance of IA Desktop, you will see a reminder that this version of IA Desktop is for *training only*. When logging into the blue, live production version of IA Desktop, these notifications will be pertinent messages or reminders from PHMSA.

Warning!

This server is for training purposes only.
For real inspection data, be sure to use
the production (blue) IA.

IMPORTANT: Before proceeding, please confirm that you are using an EDU instance of IA. You can verify this by confirming your header is **orange** and the Training Server tab appears at the top of the application window. If this is not the case, please get assistance now before proceeding.

ConocoPhillips Kenai LNG 2016
No Activity
TRAINING SERVER

Home
Settings
Overview
Planning
Inspection
Forms
Reports

2016
All Organizations
All SysTypes
All Available

Search Inspections
Showing 96 of 2011

2016 LNG
ConocoPhillips Kenai LNG 2016
CONOCOPHILLIPS ALASKA NATURAL GAS CORP.

EDU data is purposely isolated from production data. Any changes you make here will **not** be reflected in the actual (live) inspection data. Your workshop is an opportunity to dive into IA, experiment and learn, and try new things without fear of impacting actual inspection records.

|| *PAUSE here and wait for your group to be ready before proceeding with creating a new inspection. While you wait, you can try the following explorations:*

1. Review the Help/Tools tab content, note the various support options and contacts, and see the links for Topical IA Screenshots and a Quickstart help guide.
2. Note who your Regional IA Support Representative is, also via the Help/Tools tab.
3. Click on "Advanced tools" and note the location of the "Zip logs" button, which will send your IA Desktop application logs to the IA Support Team. There is no need to upload your logs right now, but it's helpful to note where this button is. If you are experiencing issues with IA, the IA Support Team may ask you to upload your logs to help troubleshoot your issue. Note that you should not use any advanced tools without instruction to do so by IA Support.
4. Explore the various filter options on the inspection list on the Home tab (years, org, system type, demo, locked, etc). Can you find any inspections that have different organizations for Reg (regulator organization) and Lead (lead organization)? (Hint: Look at inspections from regions with interstate agents.) Note that you will likely see many more locked inspections on the live, production version of IA Desktop. Because we are working on the training version right now, there are likely not a huge number of inspections to sort and filter through.
5. Try using the text-box filter to search for inspections with certain words in the names, or for certain lead inspectors, etc.

Lesson 2: Creating a new inspection in IA



STEP 2.1: Create a new inspection

1. Click the Create New IA Inspection button on the Home tab ().

	Reg: Western Region, Lead: Washington Utilities and Transp. Comm.	(31522)
2018 GT	Tesoro_IL_Unit ID_58335 Reg: Western Region, Lead: Western Region	TESORO SOCIAL PIPELINE COMPANY LLC (39013)
2018 GT	Insp-IPL-Construction-2018 Reg: Iowa Utilities Board, Lead: Iowa Utilities Board	ALLIANT ENERGY - INTERSTATE POWER AND LIGHT COMPANY (8170)
2018 GD	Insp-WestBend-2018 Reg: Iowa Utilities Board, Lead: Iowa Utilities Board	WEST BEND, TOWN OF, GAS (22371)
2017 GT	ANR Pipeline Company_15220 Reg: Southwest Region, Lead: Southwest Region	ANR PIPELINE CO (405)
2017 GT	Foundation Energy	FOUNDATION ENERGY MANAGEMENT, ▾



[Create New IA Inspection](#)

Tip: Both IA Desktop and IA Mobile are designed to be taken offline for work in areas where internet connections are not possible. However, the process of creating an inspection requires a connection so that the syncing server can set up the master records for the inspection and prepare for syncing to all team member devices.

2. Set up your inspection. Take care to follow the guidelines below. This will help us remain on the same page during the training. You can always circle back later and set up new inspections for other system types and operators.
 - a. Use the **current year** for the expected start year.
 - b. Select **GT (Gas Transmission)** for system type.
 - c. Select the **most recent federal PRS Set** (typically GT.20XX.OX) if more than one option is presented.
 - d. Choose an operator. *The workshop facilitators will provide a particular OpID to use in this class. If you're working through this workbook independently and would like to match your inspection with the screenshots here, choose 15007 as an operator.*
 - e. Give your inspection a name. **Important:** Include your own name in the name of the inspection. This is not a general requirement but will be helpful for training purposes.
 - f. Inspections can be flagged as Demo (meaning demonstration) which designates them as non-production and will keep them from being used in reporting and metrics tracking. This is not necessary for TQ (Orange) installations.

Important: If you are NOT using the TQ (Orange) version of IA, you should flag your inspection as Demo.

Tip: Per the Record Retention Policy, demo inspections (and associated files) in the blue/production instance of IA will be automatically removed after 90 days of inactivity. IA will provide a reminder on the "create inspection" screen when the demo box is checked:

Note: Demo inspections will be automatically removed after 90 days of inactivity. This rule does not apply to Training (TQ) or Test/UAT environments.

For more information on the IA Record Retention Policy, please reach out to your IAT representative or ia-support@dot.gov

Create IA Inspection

Select operator IDs involved in this inspection. Note: IA system is updated with operator/unit data twice weekly.

Expected Start Year ?

2025

System Type (Content Focus) ?

GT

Protocol Revision Set ?

GT.2025.03 - PHMSA HQ (Federal)

Primary Op ID (or Name)

PACIFIC GAS & ELECTRIC CO (15007)

Inspection Name

OKC 2025 MWF

Inspection setup: For training purposes, add your name to the inspection name. If you are NOT on the TQ Server (orange bar), check the Demo Flag.

3. Depending on the operator you have chosen, you may see a warning about similar inspections (perhaps ones your teammates have just created). This is normal and can be ignored today. The purpose of this warning is to help inspectors avoid unintentionally re-creating the same inspection more than once in IA.
4. Once you are ready, compare notes with your teammates (to ensure you have selected the same operator, etc.). Press the Create Inspection button to create your new inspection. Your teammates will do the same, and the result will be that each of you will have a separate but similar inspection to work with in the upcoming steps.



PAUSE here and wait for your team to be ready with their inspections. While you wait, explore the various sub-tabs on the configuration page (see below). Click on each help glyph to orient yourself to the purpose of each configuration control.

DEMO Training Workshop - D... - 2022 ▾ <No Activity> TRAINING SERVER - for training only

[Home](#)
[Settings](#)
[Overview](#)
[Planning](#)
[Inspection](#)
[Forms](#)
[Reports](#)
[Attachments](#)
[Library](#)

View and change inspection configuration here. Only Directors, Supervisors and Leads can change inspection configuration properties.

[Inspection Properties](#)
[Operator IDs](#)
[Target Assets](#)
[Relevant Inspection Links](#)
[Team](#)
[Tools](#)

Set the inspection's name, organization, and content presentation options

Name	Training Workshop - David King
Start Year	2022
Created by	David King
Create date	12/29/2022 (<1 month old)
System Type	GT
Workflow Version	v2.0.0
Primary Operator Name	PACIFIC GAS & ELECTRIC CO
Protocol Revision Set Title	GT.2022.04
Protocol Revision Set ID	GT.2022.04 (v26.0.1) ?
Regulating Organization	California Public Utilities Commission ▾ ?
Lead Organization	California Public Utilities Commission ▾ ?
Planning Presentation	INTEGRATED ▾ ?

Regulating Organization ✕

This field should correspond to the organization that will be doing regulatory enforcement stemming from this inspection (if any). For federally regulated assets this is always the PHMSA Region or PHMSA HQ.

Lesson 3: Configuring an inspection



STEP 3.1: Configuring a new inspection

Inspection configuration is done via the configuration (⚙️) tab. This screen has several sub-tabs. The purpose of each is described below.

OKC 2025 MWF - 2025 ▾ <No Activity> TRAINING SERVER - for training only

[Home](#)
[Settings](#)
[Overview](#)
[Planning](#)
[Inspection](#)
[Forms](#)
[Reports](#)
[Attachments](#)
[Library](#)

View and change inspection configuration here. Only Directors, Supervisors and Leads can change inspection configuration properties.

[Inspection Properties](#)
[Operator IDs](#)
[Target Assets](#)
[Relevant Inspection Links](#)
[Team](#)
[Tools](#)

Set the inspection's name, organization, and content presentation options

Name	OKC 2025 MWF
Start Year	2025
Created by	Matt Frost
Create date	9/22/2025 (<1 month old)
System Type	GT
Workflow Version	v2.0.0
Primary Operator Name	PACIFIC GAS & ELECTRIC CO
Protocol Revision Set Title	GT.2025.03
Protocol Revision Set ID	GT.2025.03 (v53.2.0) ?
Regulating Organization	California Public Utilities Commission ▾ ?
Lead Organization	California Public Utilities Commission ▾ ?
Planning Presentation	INTEGRATED ▾

Inspection Properties: View and set up the global properties of the inspection including name, regulating org, lead org, and if applicable, content presentation option.

Operator IDs: List relevant Operator IDs here. You'll need to include the OpIDs for every unit you intend to inspect. Some inspection systems have units from two or more OpIDs in them. You can always add more OpIDs here as needed.

Target Assets: Assets are the elements of the operator's infrastructure that will be targeted in this inspection. For federal inspections, these assets typically contain one or more inspection units. The results you collect will be applied to these assets. On this tab you can also select Exclusions to indicate certain topics that do not apply to or do not exist in the asset in question.

Relevant Inspection Links: IA can provide you a reference of past inspection results in your current inspection. This historical data can be used to pre-fill data forms and populate the Coverage Heatmap report. For this to work, you need to select inspections of interest on this tab. It is recommended that you check any recent inspection of relevance to your current inspection here. You can expand the set of available inspections by adding OpIDs to the List of OpIDs of interest on this tab.

Team: Set up your team and assign roles. Note that Workflow 2.0, which applies to many inspections processes in 2017 on, requires people in Lead and Director roles.

Tools: This tab offers an option to delete this inspection. If you've accidentally created a non-demo inspection in the production (blue) version of IA, you can delete it and start over here.

We are going to work through each of these tabs and make configuration changes on most. Here are the steps you should take with your inspection today:

STEP 3.2: Configuring a new inspection's properties

Set up the Regulating and Lead Organizations. For federal inspections, these will typically both be set to your region. For interstate inspections, the Regulating Organization will be the PHMSA region and the Lead Organization will be the state partner organization performing the inspection. For intrastate inspections, both will be set to the state organization.

The screenshot shows the 'Inspection Properties' configuration page in the PHMSA IA-Desktop application. The top navigation bar includes tabs for Overview, Planning, Inspection, Forms, Reports, Attachments, and Library. Below the navigation bar, a sub-header reads: 'View and change inspection configuration here. Only Directors, Supervisors and Leads can change inspection configuration properties.' The 'Inspection Properties' tab is selected, showing a form with the following fields:

Name	OKC 2025 MWF
Start Year	2025
Created by	Matt Frost
Create date	9/22/2025 (<1 month old)
System Type	GT
Workflow Version	v2.0.0
Primary Operator Name	PACIFIC GAS & ELECTRIC CO
Protocol Revision Set Title	GT.2025.03
Protocol Revision Set ID	GT.2025.03 (v53.2.0) ?
Regulating Organization	California Public Utilities Commission ?
Lead Organization	California Public Utilities Commission ?
Planning Presentation	INTEGRATED

Tip: It is important to get the Regulating and Lead Organizations set up correctly as other options in IA depend on them, and the data will be attributed to these organizations in downstream reporting.

The **Presentation option** may or may not be available depending on the system type of your inspection. For example, with Gas Distribution inspections, there are INTRASTATE and INTEGRATED presentations available. These Presentations drive the groupings and order in which the questions will be presented. The content is the same, the grouping and ordering of the questions is different. INTRASTATE organizes the material similar to how it was organized on legacy paper forms. INTEGRATED organizes the material according to **topic**. Unless you have a compelling reason to choose INTRASTATE, the INTEGRATED presentation is preferred as it places questions on related topics together which can help with the interview process. INTEGRATED presentation is also the standard (and only option) for HL and GT inspections and so if you work with those system types you will find it most familiar.

INTEGRATED is the only option for GT system type inspections, so that's what we will be using for this workshop.

Tip: The INTEGRATED presentation is simply a *topical ordering* of the content. It does not imply use of the Integrated Inspection process. That process does use the INTEGRATED presentation, but the presentation does not itself imply any particular process.

STEP 3.3: Configuring Operator IDs

On this tab you can add additional OpIDs if the assets you expect to inspect on this inspection span multiple parent Operating entities. For now, no changes. Leave the Primary OpID as is.

Inspection Properties
Operator IDs
Target Assets
Relevant Inspection Links
Team
Tools

* Select operator IDs involved in this inspection. Note: IA system is updated with operator/unit data twice weekly.

Primary OpID: PACIFIC GAS & ELECTRIC CO 31 GAS units, 1 LNG unit

Other OpIDs: ?

STEP 3.4: Configuring Target Assets

Here is where you establish which parts of the operator's infrastructure will be included in this inspection. Currently IA integrates with only one source for infrastructure: The Pipeline Asset Manager (PAM). The federal units are managed in this system, and State Organizations also have the option of entering and managing units here. One advantage of using PAM to manage assets is that the units, and the various data fields for each unit, will be available in IA. If your organization does not use PAM to manage assets, you can select Other as the Source System and create custom units.

If a unit that you will be inspecting is not in PAM, you may add it as a custom unit. In order to preserve data integrity and trending over time, all members of your organization should collaborate to ensure that inspectors are entering the External ID for that unit the *exact same way* on each inspection. If this is

done, you will be able to see historical result data on the Inspection tab and on the Heatmap report (from inspections specified on the Relevant Inspections tab), as demonstrated below.

Adding a custom unit on the “Target Asset” screen, ensuring its External ID is typed exactly the same across all inspections for that unit:

Custom Units

Unit-123
Add

External IDs

Unit-123

This will enable trending across inspections:

1
0

QUALIFICATION OF OPERATOR/VENDOR PERSONNEL WHO EVALUATE ECDA RESULTS
From the observation of selected integrity assessments, are operator
assessments or review assessment results, qualified for the tasks they
195.452(f)(8), 195.555) More...

Considerations
Attachments
Inspector Notes
Past Results (1, 5d)

HL 2024.01 PHMSA HQ, 2024
Final Value **Unsat** Unit-123 (Unit-123) (5d)

1 result(s) for units in this inspection, youngest age 5d

If you’re working through this workbook during a live workshop, please refer to the *Setup Guidance Sheet* provided to set up the assets for this scenario. Set exclusions as appropriate for these units. If you’re working through this workbook independently and would like to best match your inspection with the screenshots here, you may add the following assets:

1. 88723 - Pleasant Creek
2. 88725 - Los Medanos
3. 85398 - Sonoma Division (exclude Bottle/Pipe - Holders)

To aid in demonstrations later in the workshop, please make sure that at least one exclusion is set for Bottle/Pipe - Holders.

Exclusions ?

Excluded Topics ▼ remove

Excluded Topics ▼ remove

Excluded Topics (1) ▼ remove

Copy From...

Excluded Component

- ☐ Compressor Stations
- ☒ Bottle/Pipe - Holders
- ☐ Vault
- ☐ Service Line
- ☐ Gas Storage Field (Aboveground)

Exclusions can be modified at any time. In the end, your asset list should look something like this but perhaps with different unit numbers, labels, and exclusion counts.

Inspection Properties	Operator IDs	Target Assets	Relevant Inspection Links	Team	Tools
Assets are containers for one or more inspection units. If needed, you can create custom assets or placeholders for new construction or state inspections.					
Source System	External IDs ?	Long Name	Short Name	Exclusions ?	
PHMSA/PAM ▼	88723 ▼ ⓘ	Pleasant Creek	88723 (55600001)	Excluded Topics (3) ▼	remove
PHMSA/PAM ▼	88725 ▼ ⓘ	Los Medanos	88725 (43003001)	Excluded Topics ▼	remove
PHMSA/PAM ▼	85398 ▼ ⓘ	Sonoma Division	85398 (10)	Excluded Topics (1) ▼	remove

Add new Asset

One unit per asset

Leave one asset with no exclusions

Tip: It's a common error to create one asset with multiple units when you should make a separate asset for each. The only reason to cluster units into a single asset is when you are certain those units can be treated as one for all the questions you will ask. For example, a program inspection that only looks at procedure questions may be simplified this way.

Assets are containers for one or more inspection units. If needed, you can create custom assets or placeholders for new construction or state inspections.

Source System	External IDs ?	Full Name	Short Name	Exclusions ?	
PHMSA/PAM	12232	AR-1	12232	Excluded Topics (4)	delete
PHMSA/PAM	39334	CHAPARRAL SYSTEM - EAST	39334	Excluded Topics (2)	delete
PHMSA/PAM	3244	CHAPARRAL SYSTEM - WEST	3244	Excluded Topics	delete
PHMSA/PAM	34 Units	Other Units (Program)	Other Units	Excluded Topics	delete

Add new Asset

 A catch-all asset containing all other units to which process questions will apply

Another use for multi-unit assets is to accommodate all the units that you do not plan to visit in the field but for which the program/procedure questions will apply. This way, your inspection will give coverage on those questions to these un-visited units.

Note: Unless your inspection scope is large (10+ units) there is very little downside to creating separate assets for each unit so it is recommended to avoid multi-unit assets unless you know it is needed.

Tip: Assets may be re-ordered by dragging them up or down. The order your assets are presented here will be persisted throughout the application.

tion Properties Operator IDs Target Assets Relevant Inspection Links Team SMART Links Tools

re containers for one or more inspection units. If needed, you can create custom assets or placeholders for new construction or state inspections.

System	External IDs ?	Full Name	Short Name	Exclusions ?	
PAM	12232	AR-1	12232	Excluded Topics (4)	delete
PAM	39334	CHAPARRAL SYSTEM - EAST	39334	Excluded Topics (2)	delete
PAM	3244	CHAPARRAL SYSTEM - WEST	3244	Excluded Topics	delete

Asset

 Hover the mouse over a row's whitespace to see the moving cursor. Click-drag the row to a new position.

Tip: If you know you will be creating many single unit assets from PAM assets, you may select several in the checkbox and then click "Split into single unit assets". Clicking this button will create an individual single unit asset row for each unit you selected.

Define this asset by selecting inspection units below. Close



All Regulators ▼ Operator ▼

Search Active Units Only ▼

PACIFIC GAS & ELECTRIC CO (OPID: 15007) All/None

☒	Pleasant Creek	UID: 88723 (55600001) ⓘ	Type: GAS, Regulator: CA_OGG
☒	McDonald Island	UID: 88724 (45200001) ⓘ	Type: GAS, Regulator: CA_OGG
☒	Los Medanos	UID: 88725 (43003001) ⓘ	Type: GAS, Regulator: CA_OGG

PHMSA/PAM▼	88723 ▼ ⓘ	Pleasant Creek	88723 (55600001)	Excluded Topics ▼	remove
PHMSA/PAM▼	88724 ▼ ⓘ	McDonald Island	88724 (45200001)	Excluded Topics ▼	remove
PHMSA/PAM▼	88725 ▼ ⓘ	Los Medanos	88725 (43003001)	Excluded Topics ▼	remove

Tip: If your assets are built from PAM-managed units, clicking the information glyphs next to the assets will show the data in PAM for that unit. This information will be kept current with PAM and will be available offline in IA.

State Workshop Relevant Ins Mission Division units

Overview Planning

View and change inspection configuration

Inspection Properties Operator

Assets are containers for one or more ins

Source System	External IDs ⓘ
PHMSA/PAM▼	85398 ▼ ⓘ
PHMSA/PAM▼	88725 ▼ ⓘ
PHMSA/PAM▼	86275 ▼ ⓘ

[Add new Asset](#)

Mission Division

Unit ID	86275
Unit Name	Mission Division
Unit Location	
Pipeline Type Code	DISTRIBUTION PRIVATELY OWNED
Operator ID	15007
Inspection System ID	
Inspection System Name	
Inspection System Type	
Regulator's ID	03
Created Date	2017-10-30T12:27:00Z
Created By	
Activation Date	2017-10-30T00:00:00Z
Unit Status ID	1 (Active)
Archived	NO
Updated By	
Updated Date	2018-01-25T18:45:00Z
PAM System Extract Date	2018-10-24T13:45:37Z
Record Location	
Regulator Name	CALIFORNIA PUBLIC UTILITIES COMMISSION
Jurisdiction Code	
IRA Status	
IRA Act Date	
IRA Comments	
IRA Rev Date	
Total Pipeline Miles	2844.87
Total Right Of Way Miles	0
Class Location Miles 1	0
Class Location Miles 2	0
Class Location Miles 3	0
Class Location Miles 4	0
Miles Of Bare Pipe	0
Non Rural Right Of Way Miles	0

Special Permits

Starting in 2025, some question sets include questions and subgroups related to special permits and the conditions under which they apply. If a unit is regulated under a special permit, choose the appropriate permit from the menu when adding the unit to the inspection.

Inspection Properties | Operator IDs | **Target Assets** | Relevant Inspection Links | Team | Tools

Assets are containers for one or more inspection units. If needed, you can create custom assets or placeholders for new construction or state inspections.

Source System	External IDs	Long Name	Short Name	Exclusions	Special Permits
PHMSA/PAM	74001	Maryland Line Section	74001	Excluded Topics	1 assigned remove

[Add new Asset](#)

- ☒ PHMSA-2019-0202: Columbia Gas
- ☐ PHMSA-2019-0202 DELETED DO NOT ASSIGN: Columbia ...

When you then add a new Plan Item that includes the Special Permit (SP) group, all of the questions from subgroups related to the special permit you selected will be added to the inspection plan.

[Home](#)
[Settings](#)
[Overview](#)
[Planning](#)
[Inspection](#)
[Forms](#)
[Reports](#)
[Attachments](#)
[Lib](#)

74001

[Collapse All](#)
[Expand Groups](#)
[Expand Subgroups](#)

☐ Filter to Planned Questions
 ☐ Filter to Selected

- ☐ Assessment and Repair (AR)
- ☐ CRM, SCADA, and Leak Detection (CR)
- ☐ Design and Construction (DC)
- ☐ Emergency Preparedness and Response (EP)
- ☐ Facilities and Storage (FS)
- ☐ Integrity Management (IM)
- ☐ Maintenance and Operations (MO)
- ☐ Public Awareness and Damage Prevention (PD)
- ☐ Reporting (RPT)
- ☐ Screening (SRN)
- ☐ Time-Dependent Threats (TD)
- ☐ Training and Qualification (TQ)
- ☐ Underground Natural Gas Storage (UNGS)
- ☐ Section 114 (114)
- ☐ Generic Questions (GENERIC)
- ☒ Special Permits (SP)

Plan Items

166	SP (CL-A-IM, CL-A-ASSESS, CL-A-SCC, CL-A-ILI, CL-A-R...	74001
-----	---	-------

[Add Plan Item](#)

A unit with a special permit displays a blue diamond at the top of its column.

Note: Many of the questions in the Special Permit group are repeated from other groups. When you select a special permit for a unit, the inspection's plan will likely show questions from outside the SP group, even if you have not directly planned those groups.

STEP 3.5: Configuring relevant inspection links

Relevant Inspection Links tab: Use the Relevant Inspection List section to check at least one relevant inspection. If you don't see any in the list, add OpIDs of interest to the textbox provided until one does appear. Note: Only locked inspections will appear for linking. This is one reason locking inspections as soon as possible is a good idea; the data becomes available to fellow inspectors (and you!) on other inspections immediately.

If you have set your inspection up with the suggested operator (PACIFIC GAS & ELECTRIC CO) and system type (GT), you'll see one inspection named "Pre-OKC Matt Frost" that has been populated with some results and locked for use in this workshop.

OKC 2025 MWF - 2025 Activity TRAINING SERVER - for training only Matt Frost, Lead

Overview Planning Inspection Forms Reports Attachments Library Help/Tools

View and change inspection configuration here. Only Directors, Supervisors and Leads can change inspection configuration properties.

Inspection Properties Operator IDs Target Assets Relevant Inspection Links Team Tools

Results from the completed inspections below may be of interest during your inspection. Select the ones you would like to cross-reference during this inspection.

Filter by year: All Years Operator IDs: List Op IDs of interest here System Type: All Types All / None: Select All

Include	Inspection	Lead Org/Lead Inspector	Year	Type	Primary Operator	Operator IDs
☐	Lauren's Dec 7	PHMSA HQ / Lauren Clarke	2020	GD	PACIFIC GAS & ELECTRIC CO	15007
☐	Justin Markham's IA Workshop Test Inspection	Railroad Commission of Texas / Justin Markham	2023	GT	PACIFIC GAS & ELECTRIC CO	15007
☐	Locked 15007	California Public Utilities Commission / Julie Pretzlaff	2025	GT	PACIFIC GAS & ELECTRIC CO	15007
☐	Relevant with summary	PHMSA HQ / Julie Pretzlaff	2024	GT	PACIFIC GAS & ELECTRIC CO	15007
☒	Pre-OKC Matt Frost	California Public Utilities Commission / Sally Tester	2024	GT	PACIFIC GAS & ELECTRIC CO	15007

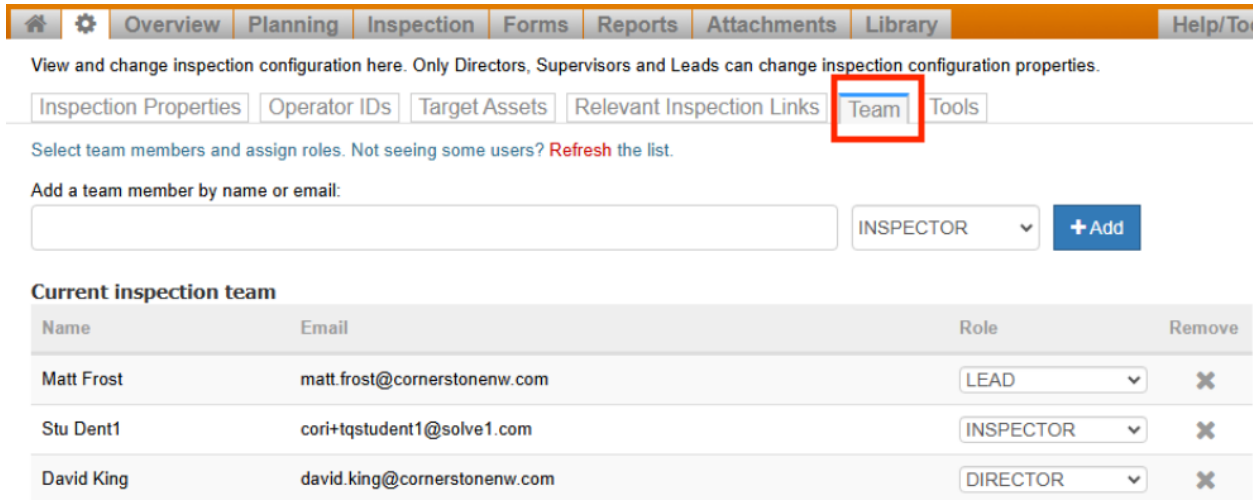
Note: If your Relevant Inspections list includes different inspection types (GD rather than GT, for instance), keep in mind that you will not see the results from that inspection associated with your new inspection's questions, even if the question IDs appear to be the same.



STEP 3.6: Configuring team and roles

Move on to the inspection team section and add a team member as Director to your inspection and all other group mates as Inspector roles. Leave yourself as Lead. Each of your group should do this to their own inspections. This will help us later, as you'll all be able to access each other's inspections to complete workflow tasks.

Before moving on to the next step, review the "Roles" table on this screen to get an idea of what each role has the ability to do within an inspection.



View and change inspection configuration here. Only Directors, Supervisors and Leads can change inspection configuration properties.

Inspection Properties Operator IDs Target Assets Relevant Inspection Links **Team** Tools

Select team members and assign roles. Not seeing some users? Refresh the list.

Add a team member by name or email:

INSPECTOR + Add

Current inspection team

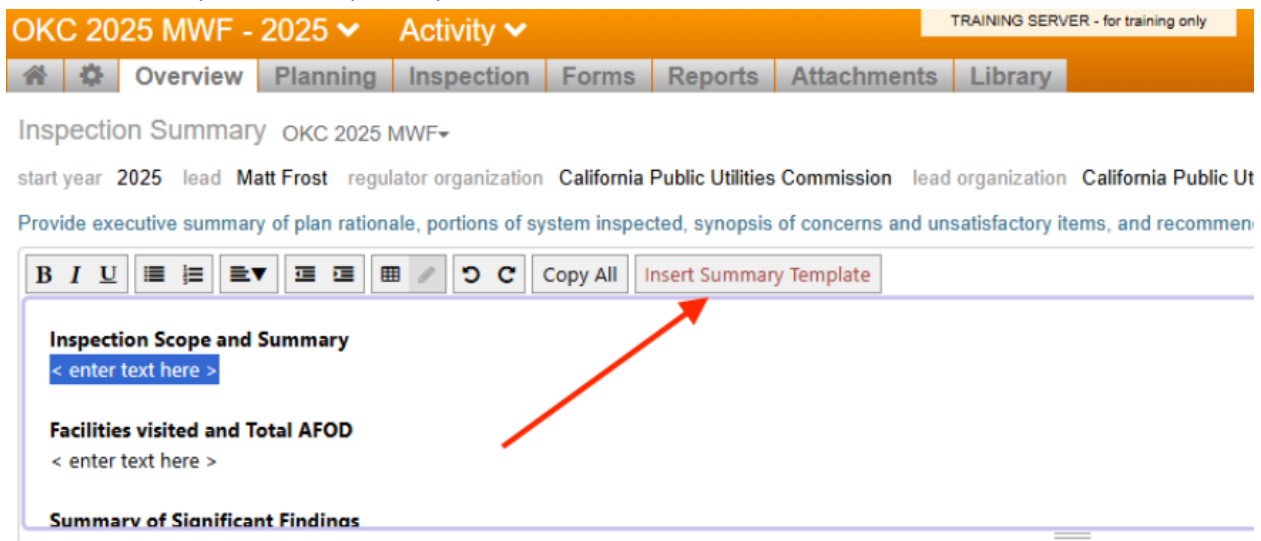
Name	Email	Role	Remove
Matt Frost	matt.frost@cornerstonenw.com	LEAD	✕
Stu Dent1	cori+tgstudent1@solve1.com	INSPECTOR	✕
David King	david.king@cornerstonenw.com	DIRECTOR	✕

Note: At present, the IA Workflow system expects at least a Lead and Director role for each inspection. Note that the Director role is an approval role and could suitably be filled by any supervisor or other person with approval authority. In other words, roles in IA do not necessarily have to align with a person's overall position/job title.



PAUSE and help your group members get to this point if they are not already here. Here are some additional exercises to try while you wait for the rest of the class.

1. Click the Overview tab and add some temporary summary text for this inspection. A template is provided to guide the summary creation if desired.
The Inspection Summary can be edited by each user on the inspection, but each inspector's summary is stored separately.



OKC 2025 MWF - 2025 Activity TRAINING SERVER - for training only

Inspection Summary OKC 2025 MWF

start year 2025 lead Matt Frost regulator organization California Public Utilities Commission lead organization California Public Ut

Provide executive summary of plan rationale, portions of system inspected, synopsis of concerns and unsatisfactory items, and recommen

B I U                                       

- Return to the configure (⚙️) tab, and check out each sub-tab. Click on each help glyph and read the contents.

View and change inspection configuration here. Only Directors, Supervisors and Leads can change inspection configuration.

Inspection Properties | Operator IDs | Target Assets | Relevant Inspection Links | Team | Tools

Set the inspection's name, organization, and content presentation options

Name	OKC 2025 MWF
Start Year	2025
Created by	Matt Frost
Create date	9/22/2025 (<1 month old)
System Type	GT
Workflow Version	v2.0.0
Primary Operator Name	PACIFIC GAS & ELECTRIC CO
Protocol Revision Set Title	GT.2025.03
Protocol Revision Set ID	GT.2025.03 (v53.2.0) ?
Regulating Organization	California Public Utilities
Lead Organization	California Public Utilities Commission ?
Planning Presentation	INTEGRATED

Help glyph

Protocol Revision Set ID

This is the identifier for the specific set of questions available in this inspection. Inspections with different PRS IDs will have different question content available.

Tip: You can quickly access your five most recently visited inspections via the menu in IA's header. This is useful if you are switching between a few inspections frequently.

DEMO Training Workshop - D... - 2022 ▾ <No Activity>

DEMO Training Workshop - David King - 2022

DEMO Training Workshop - Sally Smith - 2022

DEMO GT.2022.04 Test - 2024

Training Manual - Janeal - 2022

Historical GT Inspection - 2022

Reports Attachments Libra

Supervisors and Leads can change inspection c

ets Relevant Inspection Links Team

tion options

op - David King

Start Year 2022



Presentation: Inspection Content and Planning Overview

Notes:

Lesson 4: Planning Your Inspection

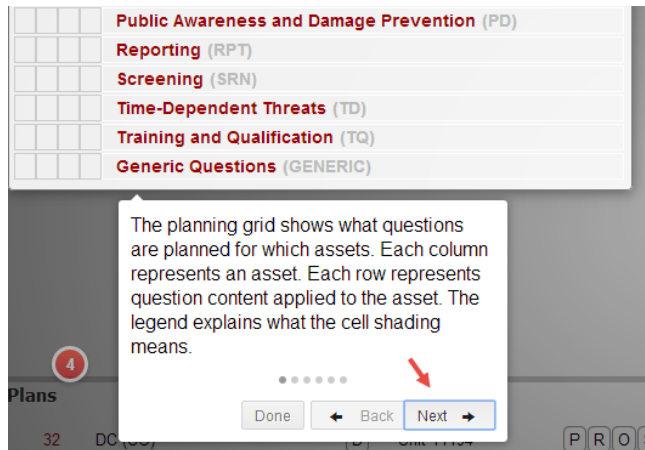
STEP 4.1: Planning interface orientation

You will now plan your inspection. This is done on the Planning tab. Planning is one area where the inspection methodology you are using will have a significant impact on what you do.

The screenshot displays the PHMSA IA-Desktop interface with the 'Planning' tab selected. The top navigation bar includes tabs for Overview, Planning, Inspection, Forms, Reports, Attachments, and Library. Below the navigation bar, there are links for 'Collapse All', 'Expand Groups', and 'Expand Subgroups', along with checkboxes for 'Filter to Planned Questions' and 'Filter to Selected'. The main content area is divided into two sections: a grid of question counts on the left and a list of inspection categories on the right.

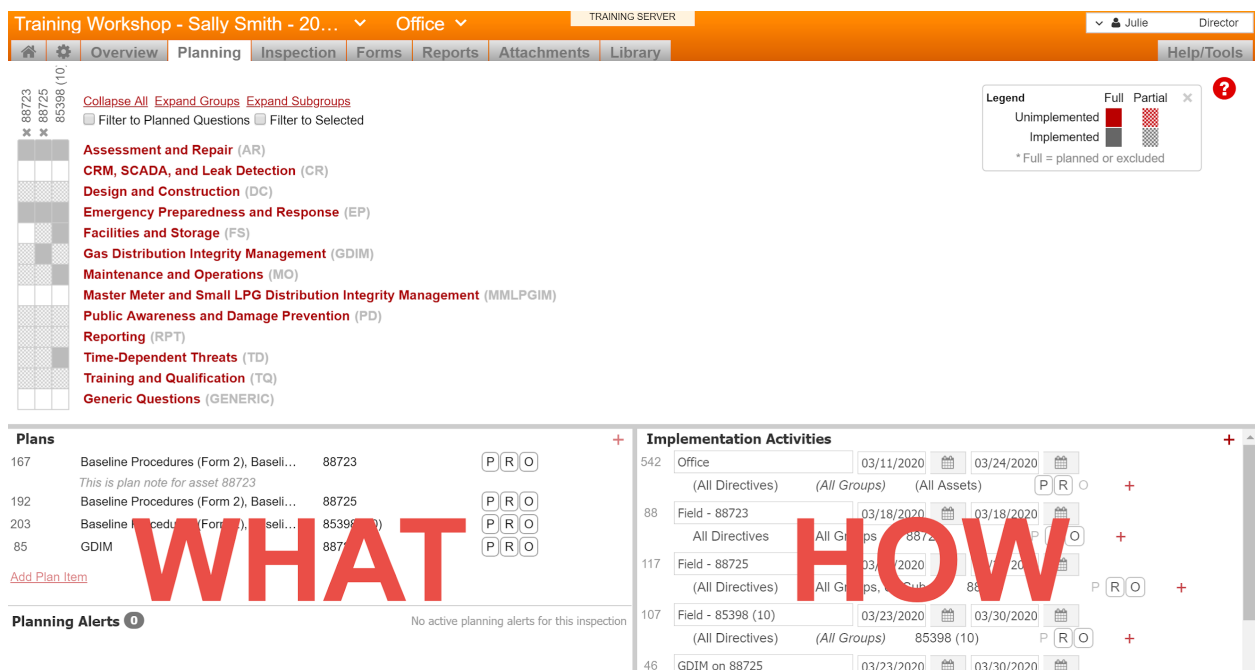
Question Count	Category
88723 (556..)	Assessment and Repair (AR)
88725 (430..)	CRM, SCADA, and Leak Detection (CR)
85398 (10)	Design and Construction (DC)
	Emergency Preparedness and Response (EP)
	Facilities and Storage (FS)
	Integrity Management (IM)
	Maintenance and Operations (MO)
	Public Awareness and Damage Prevention (PD)
	Reporting (RPT)
	Screening (SRN)
	Time-Dependent Threats (TD)
	Training and Qualification (TQ)
	Underground Natural Gas Storage (UNGS)
	Section 114 (114)
	Generic Questions (GENERIC)

First, orient yourself to the planning interface by pressing the top-right help button  and reading the annotations for each.



After reading each annotation, click the Next button to move onto the next part of the interface.

In some inspection methodologies, setting up a plan is a matter of picking a single directive for a single unit. In others, the plan depends on your preliminary assessment of the operator's strengths and weaknesses and could involve numerous targeted topic areas. As such, planning can be a complex, iterative process. IA takes a divide-and-conquer approach by separating the strategic plan (content applied to assets) and the tactical plan (implementation of the strategic plan). It can be helpful to think of the left-hand pane as the WHAT and the right-hand pane as the HOW of your overall plan. These are separate concerns and IA keeps them separate.



STEP 4.2: Strategic plan – method 1

In this workshop we will not produce a targeted plan typical for the Integrated Inspection methodology. We will also not create the simplest possible plan. Instead, for the purposes of pragmatic training on IA operations, we will select a plan somewhere in the middle of the spectrum. We will create the same strategic plan two different ways and discuss the pros and cons of each.

For the moment, we intend to perform a baseline inspection on all three of our assets. Let's set that up.

Steps:

1. Click the Add Plan Item link to create a new plan item.

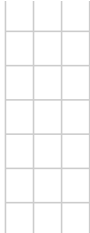
Plan Items

To start planning, [add a plan item](#).

Planning Alerts 0

 Connected  0  0 All items are up-to-date with the server.

2. Select all three of the 'Baseline' Directives. Note that the "baseline" directives will only be available for selection if the regulating organization (as seen on the Inspection Properties tab) is a state organization.

	Reporting (RPT)
	Screening (SRN)
	Time-Dependent Threats (TD)
	Training and Qualification (TQ)
	☐ 2019 Gas Rule
	☐ Field Observations Review
	☐ Initial Inspection
	☐ Small System Key Risks
	☐ New Construction
	☐ GT IM Implementation
☐ Gas Storage Field Inspection (Aboveground)	
☐ Control Room Management	
☐ GT IM	
☐ Core	
☐ Pipeline Commissioning	
Plan Item	☒ Baseline Procedures (Form 1) ☒ Baseline Records (Form 1) ☒ Baseline Pipeline Field Inspection (Form 1)

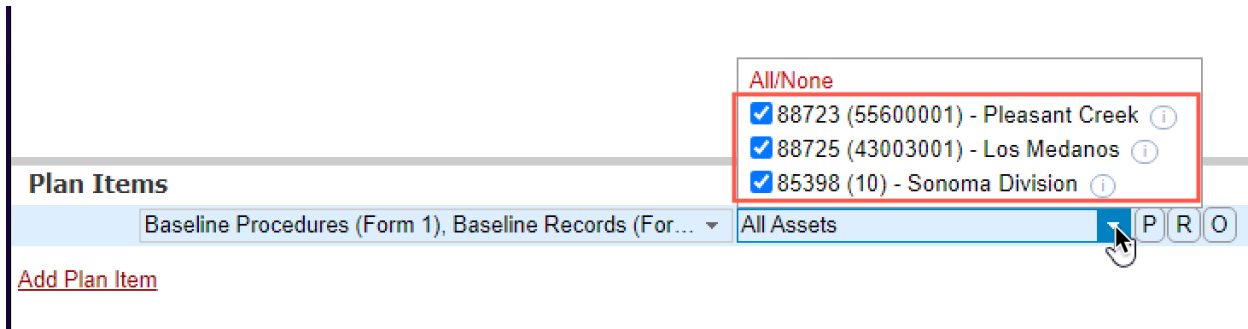
Baseline Procedures (Form 1), Baseline Records (For...

[Add Plan Item](#)

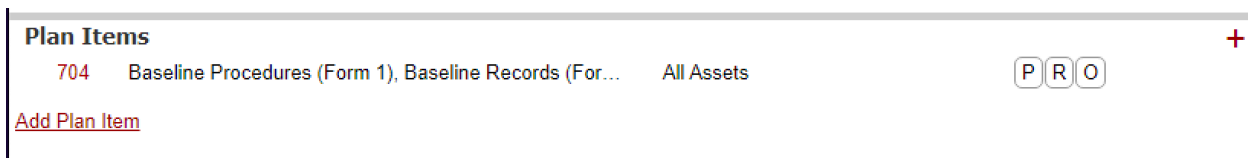
Select Asset(s)

P R O S

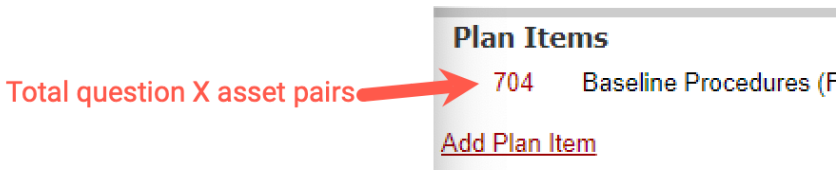
3. Select all three assets.



Your plan item list should now look something like this:



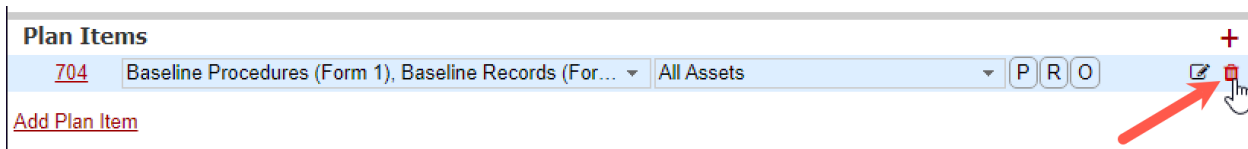
The red number on the left may differ in your case. This is the total count of question * asset results that must be collected to complete this plan. This number corresponds to the question-level cells in the planning grid that have been planned.



At this point our strategic plan is done, and we could move on to creating our tactical (implementation) plan. However, there are some downsides to how this plan is set up. Let's set it up another way, with one plan item for each asset.

STEP 4.3: Strategic plan – method 2

1. Delete the plan created in the previous step by hovering over the row and clicking the trashcan icon that appears on the far right.



2. Create a new plan item.
3. Select all three Baseline directives.
4. Select only one of the three assets.

Repeat steps 2-4 for each asset.

Your plan should now look like the following. Again, the numbers on the left may differ; that's OK.

Plan Items				+
224	Baseline Procedures (Form 1), Baseline Records (For...	88723 (55600001)	P R O	
241	Baseline Procedures (Form 1), Baseline Records (For...	88725 (43003001)	P R O	
239	Baseline Procedures (Form 1), Baseline Records (For...	85398 (10)	P R O	
Add Plan Item				

In this case the exact same questions have been planned for the same assets as in Method 1 in the previous step. However, this approach has the following benefits:

1. You can see the different counts (explained below) for each asset.
2. You can create asset-specific notes for each plan item. Let's do that now. Click the note icon for your first plan item.

Plan Items				+
224	Baseline Procedures (Form 1), Baseline Records (For...	88723 (55600001)	P R O	
241	Baseline Procedures (Form 1), Baseline Records (For...	88725 (43003001)	P R O	
239	Baseline Procedures (Form 1), Baseline Records (For...	85398 (10)	P R O	
Add Plan Item				

Enter plan notes here for your inspection team to read while collecting results for this plan item.



Once at

3. Enter a plan note and close the edit window.

Plan Items				+
224	Baseline Procedures (Form 1), Baseline Records (For...	88723 (55600001)	P R O	
	<i>This is the plan note for asset 88723.</i>			
241	Baseline Procedures (Form 1), Baseline Records (For...	88725 (43003001)	P R O	
239	Baseline Procedures (Form 1), Baseline Records (For...	85398 (10)	P R O	
Add Plan Item				

Of course, you could extend this approach to a total of ten different plan items if you wanted to address each directive/asset pair separately. It's up to you; the resulting plan is the same either way.

The disadvantage of creating many planning items is that, for large plans, the list can become long and difficult to manage.

STEP 4.4: Understanding planning counts

Let's address the numbers we are seeing to the left of the plan items. As mentioned above, these are counts of question * asset pairs. If you click on any of these numbers, the planning grid will expand and filter to just the rows (questions) planned in that plan item.

PHMSA IA-Desktop Basic Operations Workshop

The screenshot displays the PHMSA IA-Desktop software interface. On the left, a vertical grid shows various assessment categories like 'Assessment and Repair (AR)', 'Repair Criteria (O&M) (AR.RCOM)', and 'Predicted Failure Pressure (AR.PFP)'. A legend in the top right corner indicates 'Unimplemented' (white), 'Implemented' (solid red), 'Full' (dotted red), and 'Partial' (dotted black). Below the grid, a table lists 'Plan Items' with columns for item number, description, and status (P, R, O). Three items are listed: 224, 241, and 239, all related to 'Baseline Procedures (Form 1), Baseline Records (For...)'. To the right of the table, a section titled 'Implementation Activities' contains a note: 'Once at least one plan has been created, add implementation activities to implement your plan.'

If you scroll down through the grid, you'll see the reason behind the different counts. IA is following the exclusions you set up during Asset configuration and is automatically avoiding creating plans for items that are not relevant for the specific assets. In this case, the MO.GM subgroup holds the excluded items, and the exclusion only applies to one asset.

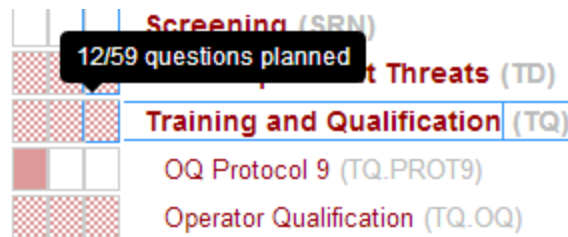
This screenshot shows a closer view of the planning grid. A tooltip is visible over a red-shaded cell, stating: 'This question is excluded for 85398 (10) due to exclusion settings for Component: Bottle/Pipe - Holders'. The grid lists questions 9 through 20, with some items marked as excluded (indicated by an 'X' in a red box) and others as included (indicated by a solid red box). The questions are related to inspection and testing procedures for transmission line valves and pipe-type or bottle-type holders.

Two questions are excluded for the second asset in this example, leading to a different question * asset pair count for that plan item.

Spend some time expanding the planning grid to see what the effects of your plan are on the cell shading of the grid. Solid shading indicates that every question below that level is included in the plan. Checked shading indicates that only some of the questions are included.



Cell shading indicates partial or full coverage.



Hover over any cell to see how many questions are planned for that asset/content combination.

You'll notice that all your cells are colored red at this point. This is because your strategic plan has not yet been included in a tactical implementation plan. In fact, at this point, you have no implementation plan at all. Let's set that up next.

STEP 4.5: Implementing the plan

We will now *implement* the plan. That is, set up implementation activities that capture various parts of the plan until every asset/question pair is captured by at least one activity.

Click Add Implementation Activity to add each activity.

1. Add activities as follows:
 - a. One Office activity for all assets for the P and R questions.
 - b. A Field activity for each of the single-unit assets covering the R and O questions.
 - c. Enter some start and end dates for all your activities. This can help with planning awareness among your team members and is required for inspection validation.

After this, your implementation activities should look like this:

Implementation Activities						
590	Office	12/29/2022		12/31/2022		
	(All Directives)	(All Groups)	(All Assets)	P	R	O +
95	Field - 88723	01/02/2023		01/04/2023		
	(All Directives)	(All Groups)	88723 (556000...	P	R	O +
104	Field - 88725	01/05/2023		01/07/2023		
	(All Directives)	(All Groups)	88725 (430030...	P	R	O +
103	Field - 85398	01/16/2023		01/19/2023		
	(All Directives)	(All Groups)	85398 (10)	P	R	O +

Important: When setting up activities it is best to set up the *minimum* filters that capture what you want to cover during that activity. You do not need to match your strategic plan exactly. Think of your Implementation plans as a net to capture your plan. It is ok to over-implement certain aspects of your plan (as we have done with the R questions here). You will not have to answer questions more than once, and some results may require multiple visits to set up.

Tip: As you add activities, the question/asset counts for your plan will transition from red (unimplemented) to grey (implemented). You can click the grey and red numbers to see the corresponding questions highlighted in the grid.

Plan Items			
193	31	Baseline Procedures (Form 1), Baseline Records (For...	88723 (55600001)
This is the plan note for asset 88723.			
241		Baseline Procedures (Form 1), Baseline Records (For...	88725 (43003001)
200	39	Baseline Procedures (Form 1), Baseline Records (For...	85398 (10)

Unimplemented count

Implemented count

The total counts of question/asset pairs will change from unimplemented (red) to implemented (grey) as the plan is captured by your implementation plan. IA will expect results for all planned questions, so the goal is for all numbers to be grey - signifying that all planned questions are included in an implementation activity.



PAUSE and help your group members get to this point if they are not already here. Here are some additional explorations to try while you wait.

1. Try to expand and collapse groups and subgroups of questions, and explore the filter checkboxes above the grid.
 - “Filter to Planned Questions” only shows questions covered by a Plan Item.
 - “Filter to Selected” shows the questions in the plan item or implementation activity that was most recently clicked on.
 - “Filter to New Questions” displays only questions added in the year prior to the inspection’s PRS year
 - “Filter to Screen Indicated” only shows groups and subgroups that have been identified in screening results as a “Relevant Topic.”

2. See if you can find additional excluded questions in the planning grid (it will display as an X). These questions will not be planned for the corresponding assets even if there is a plan item that would normally plan them. Excluded topics are automatically blocked from planning.

3. Try Ctrl+click on a grid cell that corresponds to a Group, Subgroup, or question. What effect does it have for each?

STEP 4.6: Modifying the plan

Since we’ve already done planning via directive, let’s select the content via subgroup this time. And on top of that, we’ll use a shortcut to create the plan item.

Let's suppose you were later asked to also perform a Construction Weld Inspection on one of the assets in your inspection. Let's augment the strategic and implementation plans to accommodate this request.

1. Expand the planning grid to show the DC group.

	Design and Construction (DC)
	Compressor Station Construction (DC.COCMP)
	Construction (DC.CO)
	Construction Weld Inspection (DC.WELDINSP)
	Construction Welding Procedures (DC.WELDPROCEDURE)
	Design of Pipe (DC.DP)
	Design of Compressor Stations (DC.DPCCMP)
	Design of Pipe - Overpressure Protection (DC.DPCOPP)
	Design of Pipe Components (DC.DPC)
	Gathering (DC.GA)
	Maintenance and Operations (DC.MO)
	Materials (DC.MA)
	Pressure Testing (DC.PT)
	Spike Hydrotest (DC.SPT)
	Pressure Testing - Low Pressure (DC.PTLOWPRESS)
	Special Permits (DC.SP)
	Training and Qualification (DC.TQ)

Note how the Construction Weld Inspection (DC.WELDINSPI) subgroup is already showing as partially implemented for all assets. This is because there are questions in the planned baseline directives present in the Weld Inspection subgroup. Our next step is to plan the *entire* subgroup for one of our assets.

2. Place your mouse pointer over one of the DC.WELDINSP cells, and press Ctrl (on the keyboard) then click the mouse button. This will automatically create a new plan item for that asset.

5/9 questions planned

9/9 questions planned

Ctrl + Mouse click

Plan	Items		
224	Baseline Procedures (Form 1), Baseline Records ...	88723 (55600001)	P R O
	<i>This is the plan note for asset 88723.</i>		
241	Baseline Procedures (Form 1), Baseline Records ...	88725 (43003001)	P R O
239	Baseline Procedures (Form 1), Baseline Records ...	85398 (10)	P R O
9	DC (WELDINS)	88725 (43003001)	P R O

Add Plan Item

The question * asset pairs corresponding to the WELDINS questions applied to the 88725 asset have already been implemented via the Office activity (P/R questions) and the 88725 Field visit activity (R/O questions). The implementation counts for those activities have risen accordingly.

Implementation Activities						
591	Office	12/29/2022		12/31/2022		
	(All Directives)	(All Groups)	(All Assets)	P	R	O +
95	Field - 88723	01/02/2023		01/04/2023		
	(All Directives)	All Groups	88723 (556000...	P	R	O +
108	Field - 88725	01/05/2023		01/07/2023		
	(All Directives)	All Groups	88725 (430030...	P	R	O +
103	Field - 85398	01/16/2023		01/19/2023		
	(All Directives)	All Groups	85398 (10)	P	R	O +
Add Implementation Activity						

Even though our strategic plan is fully implemented, in certain situations you may wish to send an SME out on a separate activity to perform the Construction Weld inspection. An activity focused on those questions can be set up as follows:

1. Click the Add Implementation Activity link.
2. Create a separate activity for the DC.WELDINSP subgroup content against the asset in question.

Implementation Activities

591 Office (All Directives)

95 Field - 88723 (All Directives)

108 Field - 88725 (All Directives)

103 Field - 85398 (All Directives)

708 Activity Name (All Directives)

DC (WELDINS) (All Assets) (All Types) +

[Add Implementation Activity](#)

It is important to note a limitation here. IA does not separate the implementation plans. The Weld Inspection on 88725 plan overlaps with the Field – 88725 plan. This may be problematic, especially if the Weld Inspection activity comes after the Field activity. While it is expected at times for different inspectors to develop results over multiple activities, this sort of overlap can be confusing.

Implementation Activities

591 Office 12/29/2022 12/31/2022 (All Directives) (All Groups) (All Assets) P R O +

95 Field - 88723 01/02/2023 01/04/2023 (All Directives) All Groups 88723 (556000... P R O +

108 Field - 88725 01/05/2023 01/07/2023 (All Directives) All Groups 88725 (430030... P R O +

103 Field - 85398 01/16/2023 01/19/2023 (All Directives) All Groups 85398 (10) P R O +

19 WELDINS on 88725 01/01/2023 01/04/2023 (All Directives) DC (WELDINS) 88725 (430030... (All Types) +

[Add Implementation Activity](#)

Here are some mitigation approaches when this situation arises:

1. Arrange for the more specialized inspection activity to occur first.
2. Ensure good communication between the teams performing these activities; make them aware of the overlap and establish a consensus on how they will handle it.
3. Set up an inspection note on the respective plans to communicate intentions in-field.

241	Baseline Procedures (Form 1), Baseline Records ...	88725 (43003001)	P R O
<i>Please leave any DC.WELDINSR results as 'pending' until the SME finalizes them.</i>			
Remove Note			Close
239	Baseline Procedures (Form 1), Baseline Records ...	85398 (10)	P R O
9	DC (WELDINSR)	88725 (43003001)	P R O

4. Use the Pending result value to ensure both teams see the questions during inspection (if that is intended).
5. Set up more specific plan implementations to better isolate the content to the respective assets (not always possible, but it is in this case).

Implementation Activity

591 Office
(All Directives)

95 Field - 88723
(All Directives)

108 Field - 88725
(All Directives)

All/None

☐ AR

☐ CR

☒ DC

☐ EP

☐ FS

☐ IM

☐ MO

☐ PD

☐ RPT

☐ SRN

☐ TD

☐ TQ

☐ UNGS

☐ 114

☐ GENERIC

All/None

☐ CR.CRMEXP

☐ CR.CRMTRAIN

☐ CR.CRMCOMP

☐ CR.LD

DC - All/None

☐ DC.COCMP

☐ DC.CO

☐ DC.WELDINSR

☐ DC.WELDPROCEDURE

☐ DC.DP

☐ DC.DPCCMP

☐ DC.DPCOPP

☐ DC.DPC

☐ DC.SA

Done

Cancel

01/07/2023

01/07/2023

01/07/2023

One way to isolate implementation activities is to filter out the questions intended for others.



Presentation: Planning System Review, Q&A and wrap-up

Notes:

Lesson 5 Overview Tab

Now that we have completed the plan for our inspection, let's back up a moment and have a look at the overview of the inspection as it stands now.

The screenshot displays the 'Overview' tab of the PHMSA IA-Desktop application. The top navigation bar includes tabs for Overview, Planning, Inspection, Forms, Reports, Attachments, and Library. The 'Overview' tab is active, showing an 'Inspection Summary' section with a 'Click to edit' button and a 'Training workshop summary' text area. Below this is the 'Progress And Tasks' section, which is divided into two main areas. On the left, a 'Progress' section shows a bar chart for 'Overall Inspection' (708) and 'Office' (591), with a 'More...' link for each. Below this, a list of 'Field' inspections is shown, including 'Field - 88723' (95), 'Field - 88725' (102), and 'Field - 85398' (103), each with a 'More...' link. At the bottom, 'WELDINSP on 88725' is listed with a value of 19. On the right, a 'Workflow tasks' section lists four tasks: 'Approve Setup/Pre-plan Analysis', 'Approve Inspection Plan', 'Supervisor Approval of Inspection Result...', and 'Finalize Inspection'. Each task has a 'Request' button. A green 'Create Task' button is located below the task list. A red arrow points from the 'Create Task' button to the 'Workflow tasks' section, and another red arrow points from the 'Progress' section to the 'Progress against plan' label.

The inspection overview tab provides a summary of progress against the plan and tasks. At this point, we see a plan with no progress and no assigned tasks. Since we are done with planning, let's request approval.

Lesson 5 IA Workflow



Step 5.1: IA Workflow: Assigning tasks

On the main Overview tab, IA provides a workflow system that allows team members to assign tasks (to themselves or others) and to track the completion of those tasks. In addition to the four required tasks, the workflow system allows teams to create ad-hoc tasks and track their completion.

For GT and HL, IA has four built-in tasks, standard for all federal inspections. For other system types (GD, LNG) there are three default tasks. Teams may also create and assign ad-hoc tasks via the Create Task button.

		All Tasks ▼
Approve Setup/Pre-plan Analysis ?		Request ▼
Approve Inspection Plan ?		Request ▼
Supervisor Approval of Inspection Result..?	← Default tasks	Request ▼
Finalize Inspection ?		Request ▼

Create Task ← Create custom tasks here

v2.0.0

The workflow system helps teams track what phase an inspection is in and who has responsibility for the next step(s).

Since we are done with Inspection Planning, let's request approval for our plan.

Tip: Before we request approval of our first two steps, it would be wise to first run a Validation report to see if our inspection violates any business rules. The validation report will find potential issues in your inspection and provide you with links to the places where you can fix them. Over the course of an inspection the Validation report will be run numerous times. Note that it is not always possible to clear all the validation issues immediately, but all should be cleared by the end of the inspection.

DEMO Training Workshop - D... - 2022 ▼ Office ▼ TRAINING SERVER - for training only

Home Settings Overview Planning Inspection Forms **Reports** Attachments Library

Local Reports

- [Export Questions](#)
List planned questions, or all questions in modules that include planned questions, for the current inspection/activity.
- [Inspection Search](#)
Search the current inspection (question set PRS version GT.2022.04) for any word or phrase.
- [Coverage Heatmap](#)
View and navigate all results from this inspection and linked relevant inspections. Also locate conditions such as missed follow-up, old results, or uncovered content areas that may indicate the need for additional attention.

Validation Report

- [Inspection Validation](#)
Lists any inspection aspects not complying with required business rules

Results Reports

- [Inspection Results \(IRR\)](#)
Provides tabular listing of results across entire inspection
- [Results and Notes Review](#)
All results and notes presented for review in document format

Requesting approval is accomplished by selecting an approver from the list of team members.

Approve Setup/Pre-plan Analysis ?

Approve Inspection Plan ?

Supervisor Approval of Inspection Result... ?

Finalize Inspection ?

Create Task

Request ▼

Request ▼

Julie (Lead)

David (Director)

Other...

Tip: Inspection Plans and Results Approval can be done by either Supervisors or Directors, but only the person in the Director's role can approve the Finalize Inspection step, so if you can just have one other team member, give them the director's role.

To understand which team members can request and approve each workflow task, you can visit the configuration (⚙️) tab and then the Team tab. There you may view a chart outlining this information:

Note: roles in IA do not necessarily have to align with a person's overall position/job title. See below for more information:

Role	Inspection Access	Can request these workflow tasks	Can approve or reject these workflow tasks
Assignee	Can view, but cannot modify any records in the inspection.	Can only create <i>custom</i> tasks	Only <i>custom</i> tasks to which they've been assigned
Observer	Can view, but cannot modify any records in the inspection apart from their own inspector notes.	None	None
Inspector	Can view and modify records in the inspection.	None	None
Lead	Can view and modify records in the inspection.	- Approve Setup/Pre-plan Analysis - Approve Inspection Plan - Supervisor Approval of Inspection Results	None
Supervisor	Can view and modify records in the inspection. When the "Supervisor Approval of Inspection Results" task is pending, can create and modify "Final Results".	Finalize Inspection	- Approve Setup/Pre-plan Analysis - Approve Inspection Plan - Supervisor Approval of Inspection Results
Director	Can view and modify records in the inspection. When the "Finalize Inspection" task is pending, can create and modify "Final Results" and "Regulatory Actions".	Finalize Inspection	- Approve Setup/Pre-plan Analysis - Approve Inspection Plan - Supervisor Approval of Inspection Results - Finalize Inspection



Step 5.2: IA Workflow: Completing tasks

Go to your Home tab and look for pending tasks from your group's inspections. You may not see any if you do not occupy the supervisor or director role on any inspections.

Home Overview Planning Inspection Forms Reports Attachments Library Help/Tools

All Years All Organizations All SysTypes All Available

Search Inspections Showing 43 of 43

2022 GT Training Workshop - David King (DEMO) PACIFIC GAS & ELECTRIC CO (15007)

1 Assigned Actions/Tasks

Approve Inspection Plan (DEMO)

Initiated by last modified a year ago

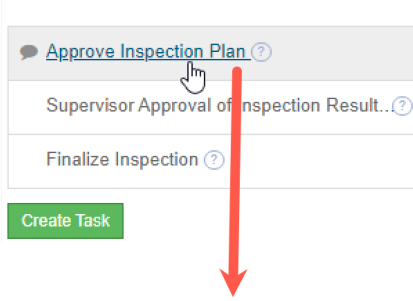
Requested Nov 2 Workshop

Tasks assigned to you will appear here. You can click on them to open the inspection and complete the task

To complete any tasks assigned to you, do the following. If you don't have a task assigned, don't worry; you will in the next step.

1. Click on the task in the Assigned Actions/Tasks (this will open the corresponding inspection).
2. Review the task(s) assigned to you and accept or reject them as appropriate.

Commenting on tasks: It is also possible to leave a comment without actually approving or returning a task. To do this, drill down into the task by clicking the link on the task's title.



Approve Inspection Plan ?

Supervisor Approval of Inspection Result...?

Finalize Inspection ?

Create Task

◀ Back to Tasks

Approve Inspection Plan

Supervisory approval of inspection plan

Status: Requested

Assigned to: David King

Leave a comment...

Add Comment

Approve Forward Return

Once the plan has been approved, it cannot be changed. Implementation activities, however, can still be updated as needed to account for scheduling, travel, etc.

At this point in the workshop, please do not request Supervisor Approval of Inspection Results or Finalize Inspection tasks. Doing so will prevent your team from being able to add and edit results in later lessons. If you have already requested one of these tasks, don't worry; see the next paragraph for instructions on undoing a task request and/or approval.

In some cases these workflow tasks may need to be reversed/unapproved. For example, if the Supervisor has already approved the Supervisor Approval of Inspection Results task, but an inspector needs to modify a result note, the approval of this task will need to be undone. This can be achieved by the following steps:

1. The Supervisor can Unapprove the task.
2. The person who originally requested the task can un-request it.
3. From there, changes to the inspection can be made.

- Once appropriate changes have been made, the task should be re-requested.



Step 5.3: IA Workflow: Custom Tasks

For custom tasks, IA supports two workflow types: Basic and Approval. Basic tasks are simple assign-start-finish tasks, while the Approval tasks follow a Request – Forward/Accept/Return cycle. Try both to become familiar with the differences.

Workflow Type

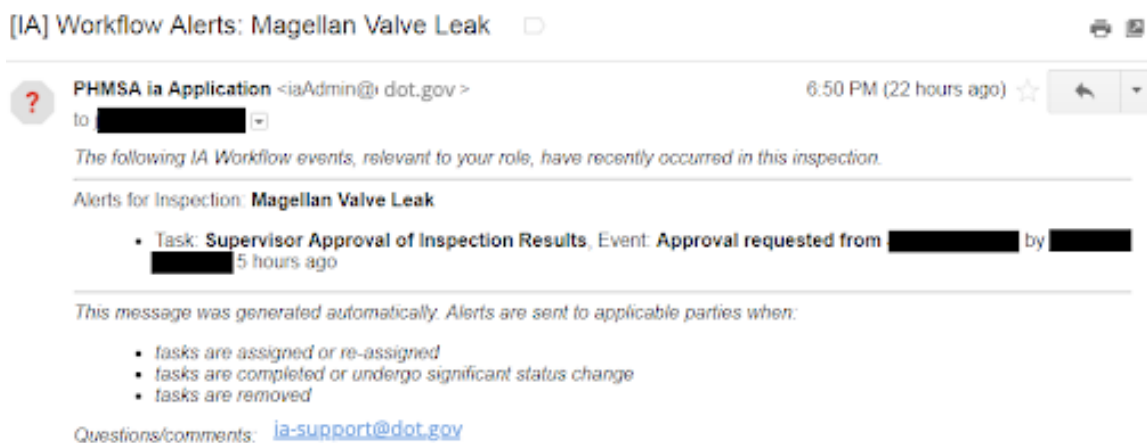
Basic Task (Assign - Start/Finish) ▼

☒ Basic Task (Assign - Start/Finish)
☐ Approval (Request - Forward/Accept/Return)

Work as a team and perform the following steps:

- Have each team member create a task (using the Create Task button) and assign it to another team member. Make sure everyone gets at least one task assigned to them.
- If everyone is connected to the internet, you should see your tasks appear on the task list.
- You can also see your assigned tasks on the **Home tab**.
- Find a task assigned to you by a group member and add a comment to it (see step 5.2 above for instructions on how to do this).
- Assign an approval-type task to yourself and then forward it to a team member. Note: Basic tasks cannot be forwarded, only Approval tasks.
- Take a trip to the Home tab and see all your pending tasks (across all inspections) listed in the right hand pane. Note that clicking on them opens the related inspection.
- It's OK to assign custom tasks to yourself. Try it.

Tip: Tasks are synced in IA immediately, so you will become aware of task assignments and completions immediately. In addition, IA Workflow Alerts are sent out twice daily via email. See an email example below.



At this point your group should be familiar with the IA Workflow system.



PAUSE here and wait for other groups to complete the step above. Here are some exercises to try while you wait.

1. Now that your plan is approved, modify your plan and see what effect that has. Unless you are only adding a comment, you will be warned that your plan approval will be removed, requiring re-approval.
2. Go ahead and change the plan, and then request re-approval from a group member.
3. Have a group member assign you an approval task, reject it, and see what happens.
4. Add some comments to tasks.



Presentation: Question Data Structure

Notes:

Lesson 6: Inspection Tab Operations



Step 6.1: Inspection Tab Operations

Now that we've set up and planned our inspections, let's get ready to collect some results. Most of your inspection result collection will be done in the Inspection tab. Let's look at the layout and function of various controls on this tab.

1. Switch back to your personal inspection.
2. Select the Office activity from the activity selector in the header.

Note: *The Activity selected in the header will determine what you see in many different screens. If you aren't seeing the questions or results you expect to see, confirm that you've selected the appropriate activity in this menu.*

DEMO Training Workshop - D... - 2022

Office

Office

Field - 88723

Field - 88725

Field - 85398

WELDINSP on 88725

3. Doing this will move you to the Inspection tab, where all the results are collected. It will also cause inspections planned for the Office visit to be displayed as planned.

Overview Planning Inspection Forms Reports Attachments Library Help/Tools

Group: [All groups with planned questions] Subgroup: All Subgroups Plan: Planned All result values All Types

Qst: 203 Rlt: 0 Rlt-Asset: 0

Search Inspection

Office

	P	R	O	
Planned	402	189	0	591
Done	0	0	0	0
Pending	0	0	0	0
Missing	402	189	0	591

Recent Questions

For user support options see the Help/Tools tab.

4. Explore the question filters provided at the top of the question list.

See if you can get the following question sets displayed via the filters:

- The **planned** questions for the current activity for all groups with planned questions. (Hint: This should be easy; it's the default.)
- The questions in the FS.FG (Facilities and Storage/Facilities General) subgroup (**planned** and **unplanned** and **ALL**).
- All **planned** questions of type **procedure** or **records**
- The **planned** questions of type **observation**. (Hint: There will be zero of these in Office, per our implementation filters.)

Implementation Activities

Office Start End 495

(All Groups) (All Assets) (P) (R) (O) (All Directives)

- e. The **planned** questions in the **Time-Dependent Threats – External Corrosion – Coatings (TD.COAT)** subgroup.

5. Clicking the star next to a few questions will flag them as favorites. Once checked, you can use the favorites filter to isolate them. *Note: Favorites are local only to the machine you are working on. They are not synced to your team or other devices like your iPad.*

4 Performance Metrics ★

R Do records indicate that performance metrics are p
IM.QA.IMPERFMETRIC.R - 195.452(l)(1)(ii) © (195
Considerations Attachments Inspector

6. Find an excluded question. *Note: Excluded questions are unplanned, so you will have to change your plan filter to All and may need to select an unplanned group to see these.* It should look something like the example below.

2 Breakout Tank Inspection ☆

R Do records document that breakout tanks that are not steel atmospheric or low pressure tanks or HVL steel tanks built according to API 2510 have been inspected at the proper interval and that deficiencies found during inspections have been corrected? FS.TSAPIINSPECT.BOINSPECTION.R - 195.404(c)(3) © (195.432(a))

Excluded Question Indicator → This question is excluded for assets: **Unit 24755** as it has been identified as being exclusive to the following attributes: **Component: BOT/RT**

Considerations Attachments Inspector Notes Legacy Form

Add a Result ▾

Hint: Another way to find an excluded question is to return to the planning grid, expand it, and find a question that is planned for some assets but excluded for others. Then click the link for that question provided in the planning grid.

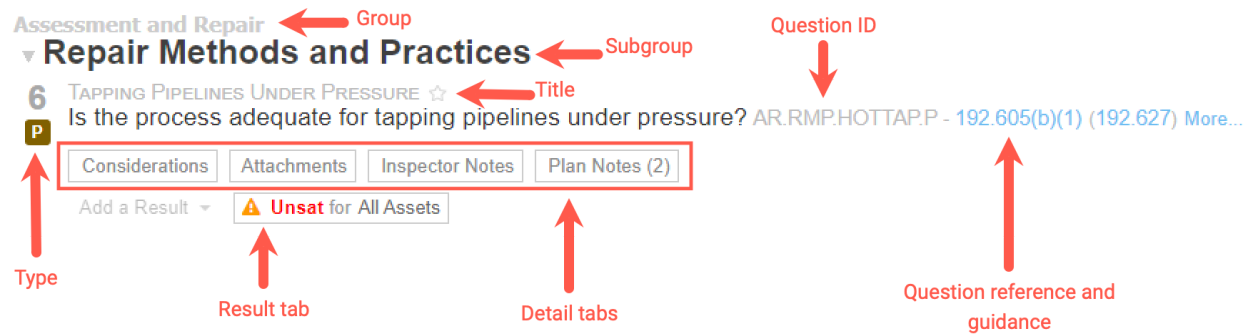
11. Do records indicate Safety-related Condition reports were filed as required? (191.23(a)) RPT.RR.OPCR.R	
12. Does the process require reports to be submitted within 60 days after completing inspection of underwater pipelines in GOM and its inlets? (191.27(a)) RPT.RR.OPCR.P	
13. Do records indicate reports were submitted within 60 days of completing inspections of underwater pipelines? (191.27(a)) RPT.RR.OPCR.R	
14. Do the process require PHMSA notification when federal or state permits cannot be obtained in time? (192.605(b)(1)) RPT.RR.NOTIFYPERMITGOM.P	
15. Do records indicate required notification was provided when permitting delayed reburial of pipe in Gulf of Mexico waters found to be a hazard to navigation? (192.612(c)(3)(ii)) RPT.F	



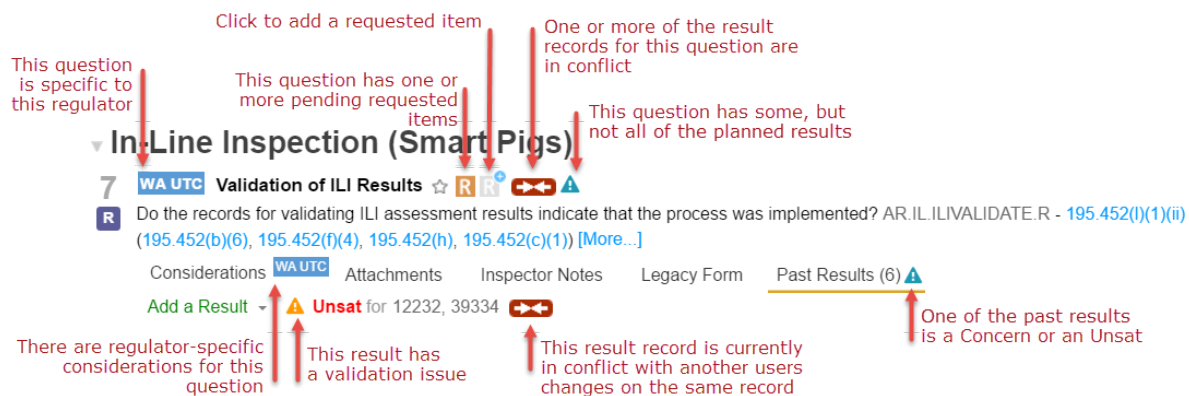
Step 6.2: Question Layout

In IA, each question is organized in a similar format. Let's look at the various components.

1. The basic layout of each question in IA is as seen in the figure below.



- There are also many glyphs that are displayed when certain conditions are true of the plans or results for a given question. The figure below shows the possible additional glyphs and their meanings.



Let's explore the questions and related content.

- Select a question and click on the **More...** link to see available reference materials. Explore the reference materials for that question.

Assessment and Repair

▼ Repair Methods and Practices

1 SAFETY WHILE MAKING REPAIRS ☆

P Does the process ensure that repairs are made in a safe manner and are made so as to prevent damage to persons and property? AR.RMP.SAFETY.P - 192.605(b)(9) (192.713(b)) More...

References

Primary Federal Reference

192.605(b)(9)

Secondary Federal Reference(s)

192.713(b)

Enforcement Guidance

O&M 192.605(b)

O&M 192.713

FAQ

GASBATCH1: 1 General - Rule Implementation Dates

GTIMP: 70 Remediation

GTIMP: 225 Remediation

3

P

on where gas presents a hazard of fire or explosion?
1(b), 192.751(c)) More...

4. Read the **considerations** for several questions.
5. Find a question with Past Results and read them. (Hint: Have a look in the AR.PTI subgroup. These are results from the previous inspection you have checked as a Relevant Inspection in your inspection configuration (see Lesson 2 above).

OKC 2025 MWF - 2025 ▼ Activity ▼ TRAINING SERVER - for training only

Overview

Planning

Inspection

Forms

Reports

Attachments

Library

Group: Subgroup:

Assessment and Repair (AR) ▼ / Integrity Assessment Via Pressure Test (AR.PTI) ▼ Plan: All

THIS QUESTION IS NOT PLANNED FOR ACTIVITY ACTIVITY.

3 TEST ACCEPTANCE CRITERIA AND PROCEDURES ☆

P Were test acceptance criteria and processes sufficient to assure the basis for an acceptable
AR.PTI.PRESSTESTACCEP.P - 192.503(a) (192.503(b), 192.503(c), 192.503(d), 192.505(a), 192.505(b), 192.507(b), 192.507(c), 192.513(a), 192.513(b), 192.513(c), 192.513(d), 192.921(a)(2)) More...

Considerations

Attachments

Inspector Notes

Past Results (1,10m)

Add a Result ▼

4 PRESSURE TEST RESULTS ☆

R Do the test records validate the pressure test? AR.PTI.PRESSTESTRESULTS.R - 192.517(a) (192.507(a), 192.507(b), 192.507(c), 192.513(a), 192.513(b), 192.513(c), 192.513(d), 192.517(b), 192.617, 192.617(b), 192.617(c), 192.617(d), 192.617(e), 192.617(f), 192.617(g), 192.617(h), 192.617(i), 192.617(j), 192.617(k), 192.617(l), 192.617(m), 192.617(n), 192.617(o), 192.617(p), 192.617(q), 192.617(r), 192.617(s), 192.617(t), 192.617(u), 192.617(v), 192.617(w), 192.617(x), 192.617(y), 192.617(z)) More...

Considerations

Attachments

Inspector Notes

Past Results (1,10m)

Add a Result ▼

6. Some questions are repeated (displayed in more than one subgroup context). For example, see TD.CP.RECORDS.P. Repeated questions are indicated via a counter link which allows quick navigation to the other locations. See the Tip below for more details on repeated questions.

20

CORROSION CONTROL RECORDS ☆

P

Does the process include records requirements for the corrosion control activities listed in 192.491? TD.CP.RECORDS.P - 192.605(b)(2) (192.491(a), 192.491(b), 192.491(c)) More...

Considerations

Attachments

Inspector Notes

Legacy Form

Plan Notes (2)

Add a Result ▾

21

CORROSION CONTROL RECORDS ☆

R

Do records indicate the location of all items listed in 192.491(a)? TD.CP.RECORDS.R - 192.491(a) More...

Considerations

Attachments

Inspector Notes

Legacy Form

Plan Notes (2)

Add a Result ▾

Repeated Question (2)

Repeated Question

This question is presented in multiple places. Results collected for this question are available for review at these locations.

1. TD.CP #14

2. TD.CP.MONITOR #20

3. TD.CP.EXPOSED #5

7. Use the search tool to locate questions that reference a certain word, phrase or code section.

Presentation View: INTEGRATED ▾

All Types ▾ ☆ ▾

192.491 Q

Office

	P	R	O	
Planned	291	251	0	542
Done	12	8	0	20
Pending	3	0	0	3
Missing	276	243	0	519

1 Requested Item(s) not yet received

Recent Questions

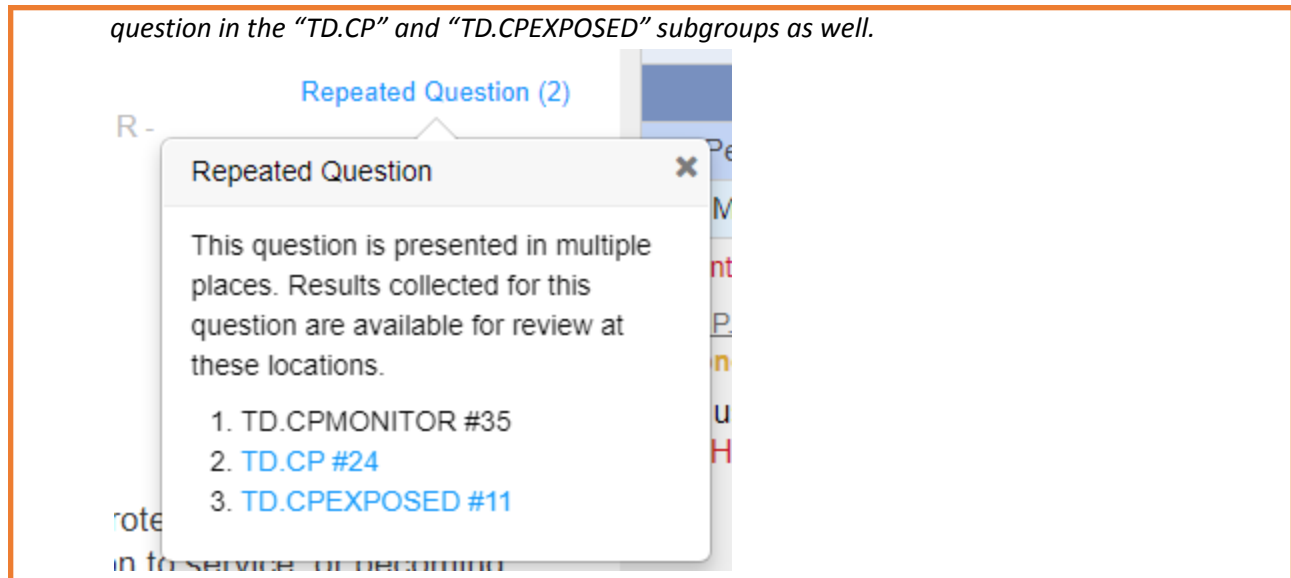
AR.RMP.SAFETY.P
Sat- 88723, 88725, 8539...

For user support options see the [Help/Tools](#) tab.

Tip: The search tool will search the entire inspection, including question content and user-entered results.

Tip: If a particular question is deemed relevant to multiple topical subgroups, it may be “re-presented” or repeated across those multiple subgroups. If this is done, you will see a “Repeated Question” note to the right of the question. Clicking that will display all of the presentations for that question, with links to its other presentations. In this case of the screenshot below, we see a single question appear in 3 subgroups.

However, it is still just one single question, and assigning a result to the question in one subgroup will display that result in the other subgroups as well. For example, if you provide a result for the below question in its “TD.CP.MONITOR” subgroup, you will see the result when you view that



Step 6.3: Question change tracking

Looking through the Inspection tab, you might see additional, blue icons to the left of some questions. These icons denote that a question was added or updated in a previous PRS/question set. A plus icon signifies it was added as a new question, and an arrow icon signifies it was updated in some way.

1. Find a question that has one of these icons (questions that were added in the year prior to the current question set can be found on the Planning tab with the “Filter to New Questions” option). The Plastic Pipe Construction subgroup in Design and Construction contains some questions that were modified in the year before this workshop’s 2025 question set. Click the icon.



OKC 2025 MWF - 2025 ▾ Activity ▾ TRAINING SERVER - for training only

Overview Planning Inspection Forms Reports Attachments Library

Group: Design and Construction (DC) ▾ Subgroup: Plastic Pipe Construction (DC.PLASTIC) ▾ Plan: Planned ▾ All result values ▾

Expand | Collapse Qst: 28 Rlt: 0 Rlt-Asset: 0

▼ Plastic Pipe Construction

3 PLASTIC PIPE SPECS ☆
Does the operator have specifications that require plastic pipe meet the requirements of §192.53, §192.59, and other applicable requirements of this sub-part? DC.PLASTIC.PLASTICSPECS.P - 192.53 (192.59) More...

Considerations Attachments Inspector Notes

Add a Result ▾

4 PLASTIC PIPE SPECS ☆
Do records indicate that plastic pipe installed is qualified in accordance with 192.59? DC.PLASTIC.PLASTICSPECS.R - 192.53 (192.59) More...

Considerations Attachments Inspector Notes

Add a Result ▾

2. Clicking this icon will open a Question Comparison window, where you may view how this question has changed since some previous version (selected in the left sidebar). Text that has been removed is struck through in red, while text that has been added is green:

IA Question History

Current

GT.2025.03
v53
Released 2025-06-20

History

GT.2025.01
v47
Released 2024-12-20

GT.2023.02
v32
Released 2023-06-30

GT.2019.01
v14
Released 2019-03-22

GT.2018.02
v13
Released 2018-09-12

Question Comparison

PLASTIC PIPE SPECS

Does the operator have specifications that require plastic pipe meet the requirements of §192.53, §192.59, and other applicable requirements of this sub-part? DC.PLASTIC.PLASTICSPECS.P - 192.53 (192.59)

1- Do the specifications require that the materials for pipe and components ~~Operator~~ must ~~meet~~ consider the requirements of 192.53 to be:

(a) Able to maintain the structural integrity of the pipeline under temperature and other environmental conditions that may be anticipated?

(b) Chemically compatible with any gas that they transport and with any other material in the pipeline with which they are in contact? and,

(c) Qualified in accordance with the applicable requirements of this sub-part?

2- Do the specifications require that the plastic pipe be qualified as required by 192.69?

a- New plastic pipe is qualified for use under this part if:

i- It is manufactured in accordance with a listed specification: product compatibility and

ii- It is resistant to chemicals with which contact may be anticipated:

b- Used plastic pipe is qualified for use under this part if:

i- It was manufactured in accordance with a listed specification;

ii- It is resistant to chemicals with which contact may be anticipated;

iii- It has been used only in natural gas service;

iv- Its dimensions are still within temperature when choosing the tolerances type of the specification to which it was manufactured; and,

v- It is free of visible defects;

c- For the purpose of paragraphs 192.59(a)(1) and (b)(1), of this section, where pipe of a diameter included in a listed specification is impractical to use, pipe of a diameter between the sizes included in a listed specification may be used if it:

i. Meets the strength and design criteria required of pipe included in that listed specification; and

ii.

3. Additionally, you may view the history of any question, even if it has not been modified recently. Hover over a question on the Inspection tab and you'll see a small blue clock icon appear. Click it to view the question's history.

CONTROL ROOM

View question history

Considerations

Add a Result ▾

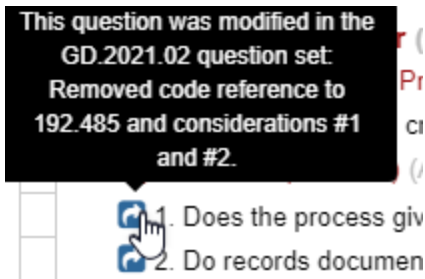
Note: You can select which of these new/updated icons you'd like to see (all, none, new only, etc.) by visiting the Help/Tools tab and then clicking Options. Your selection here will persist across inspections.

Display Question Change Tracking Icons:

All

☒ All
 ☐ None
 ☐ New only
 ☐ Updated only
 ☐ Annotated with question editor's change note only

Tip: If these icons are filled/solid, it means the change is substantive and the content team and/or question editor has added a specific note regarding this change. You can hover over the icon with the mouse to see this “editor’s change note” as well as view it in the Question Comparison window by clicking the icon.

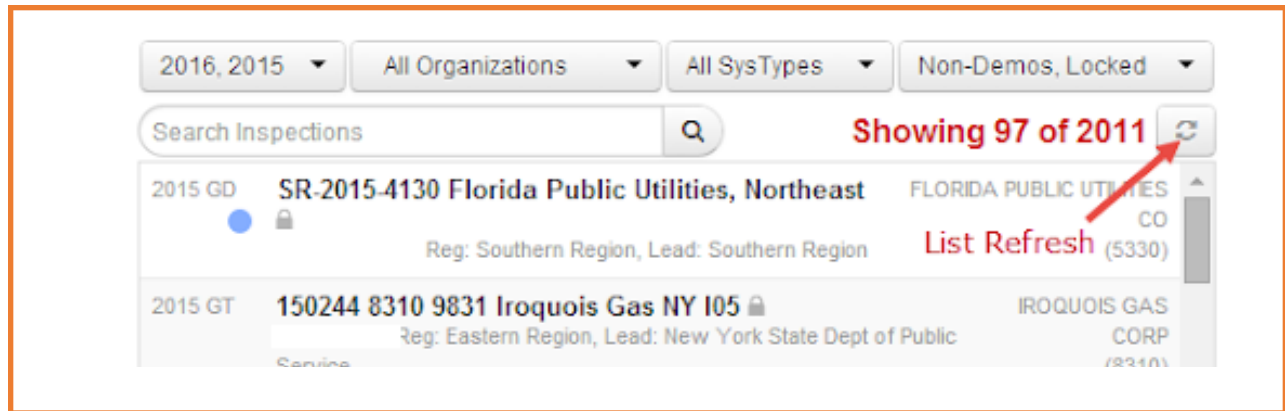


Step 6.4: Join your team on a single inspection

At this point we will switch your group to working on a single inspection together. **Select one member’s inspection as your shared inspection, and make sure each person in your group is added to the team for that inspection.** Then all other group members should find it on their home tab and open that inspection.

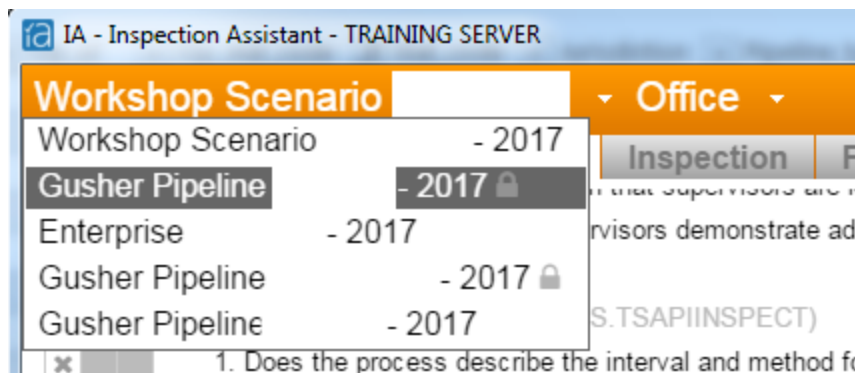
- Find and load the target inspection from the Home tab list. You may need to refresh the list and/or adjust the filters to find it.

Tip: If you have been recently added to an inspection, you may not see it in your Home tab inspection list. To be sure you are looking at all inspections you have access to, click the refresh button at the top of the inspection list.



From this point forward, the instructions assume your group is looking at the same inspection. It's fine to switch back to your own inspection later if you want to try some explorations on your own; just remember to switch back to your group's selected inspection before proceeding with the next steps.

Tip: Remember that you can use the recently-used-selector to quickly switch between recently loaded inspections.



Lesson 7: Inspection Tab Operations

Step 7.1: Creating and finding Inspector's Notes

Each inspector can record his or her own temporary scratch notes for any question. Each team member can see the other's notes but cannot edit them. Inspector's notes are a good place to work if you have multiple team members working on the same questions at the same time as there will be no conflicts between them. If you attempt to work directly in the results records for the same questions at the same time you are more likely to create conflicts that will have to be resolved manually (we will do this purposely shortly).

1. Select a question with your group to work with, each person should get that question open in their IA Inspection tabs.
2. Click the Inspector Notes tab and add a note. Each team member should do this.

Group: [All Groups] / Subgroup: All Subgroups

Plan: Planned All result values

Expand | Collapse Qst: 203 Rlt: 1 Rlt-Asset: 3

Assessment and Repair

▼ Integrity Assessment Via Pressure Test

3 TEST ACCEPTANCE CRITERIA AND PROCEDURES ☆

Were test acceptance criteria and processes sufficient to assure the basis for an acceptable pressure test?

AR.PT1.PRESSTESTACCEP.P - 192.503(a) (192.503(b), 192.503(c), 192.503(d), 192.505(a), 192.505(b), 192.505(c), 192.505(d), 192.507(a), 192.507(b), 192.507(c), 192.513(a), 192.513(b), 192.513(c), 192.513(d), 192.921(a)(2)) More...

Considerations Attachments Inspector Notes Plan Notes (2)

Add a Result ▼

- Wait for the other team members' notes to sync and view them.
- Each question accommodates an inspection note for each implementation activity. Create notes for additional activities and view other activity-specific member notes.

Important: *Inspector's notes are temporary 'scratch' notes. They are not part of the inspection record. They will be automatically removed when the inspection is locked, so it is important to record the final documentation in result records, not inspector's notes.*

- Inspector's notes and result text can be searched along with all other content. You can use this feature to tag things you want to find later. For example, add "#followup" to one of your inspector's notes. And then search for that "#followup" using the search text box in the sidebar. In this way you can easily locate things you wish to revisit.

#followup

Important: *At this time, only inspector's notes and results are searched in the search report. Attachments, requested items, planning notes, etc. are not part of the search set.*

Tip: *In most text fields in IA, if you enter a question's ID, it will be converted to a link that can be used to navigate to that question quickly later.*

Considerations

Attachments

Inspector Notes (1)

Preliminary team-member notes. These notes are not part of the inspection record and will not be retained after the inspection is locked.

Lauren's notes for activity: **Office** Unit 5632 Field Unit 2132 Field

B

I

U

Copy Note

Delete Note

See related response here: [FS.FG.SIGNAGE.O](#)

|| *PAUSE here for other groups to finish the steps above. In the meantime, here are some extension exercises to perform.*

1. Try the Recent Questions links on the sidebar and see how they work.
2. Use the Search report to locate questions that reference the Abnormal Operations. (Hint:.402 (Liquid) or .605 (Gas Transport) or .631(g))
3. You can also control how IA acts when results are created. Go to the Help/Tools tab and click the Options link in the sidebar. Check (or uncheck) the “Always expand results on create” option and experiment with the difference when creating SAT results.

Presentation: Result value types and structures

Notes:

Page 53 | 87



For the next step, we will **switch back to working on individual inspections**. To do this, return to the Home tab, locate the inspection with your name on it and load it. Alternatively, you can use the header menu to select your inspection from the list there.



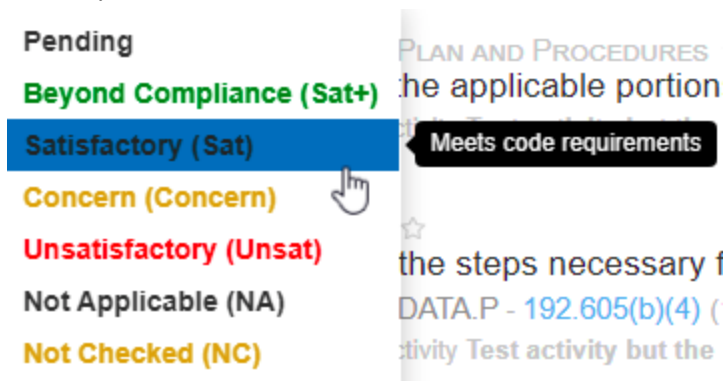
Lesson 8: Creating Results, tracking progress



Step 8.1: Creating Results

In your own inspection, select a series of planned questions and record the following results.

1. Record a result of type PENDING, SAT+, SAT, CONCERN, UNSAT, NC and NA respectively. Note the requirements are not the same for each. If you are in need of a refresher on what each result means, you can hover over it in the list to see a brief definition.



2. Note that your results are each assigned to specific assets and *the assets planned for the current activity are shown in bold and selected by default*.

Assessment and Repair

▼ Integrity Assessment Via Pressure Test

4

R

G

PRESSURE TEST RESULTS ☆ R+ !

Do the test records validate the pressure test? AR.PTI.PRESSTE
 192.513(a), 192.513(b), 192.513(c), 192.513(d), 192.517(b), 192.617, 192

Considerations

Attachments

Inspector Notes

Plan Notes (1)

Add a Result ▼

⚠ Sat for No Assets

Sat ▼

for 88725 (430030...

Text entered

All/None

Result Note

Click to edit

- ☐ 88723 (55600001) - Pleasant Creek ⓘ
- ☒ **88725 (43003001) - Los Medanos** ⓘ
- ☐ 85398 (10) - Sonoma Division ⓘ

Record when this insp

The assets planned for the current activity are selected by default and are shown in bold.

Important: The bold assets are in the plan for the current activity, this does not necessarily mean that the question is not planned for other assets in other activities.

3. Add at least one Standard Issue to the Unsat result you have created.
4. Record a result for an **unplanned** question.
5. Observe how your sidebar progress matrix changes in response to result creation for planned question/asset pairs.
6. Two areas of common confusion in first-time IA users is the following: The difference between a question and a result, and the difference between an asset and an activity. Think back over what you've done so far in this workshop. Do you know the differences? If not, ask your group members and/or an instructor. It's important to have these concepts clearly understood.
7. Finally, IA typically disallows the collection of multiple results for the same question/asset pair. Go ahead and assign a result to all assets. Then try to create a new result for that same question. You should see the Add a Result link disabled like in the figure below.

53 INTERNAL CORROSION CONTROL: DESIGN AND CONSTRUCTION (192.476) ☆ R+ ⓘ
 Do records demonstrate the transmission line project has features incorporated into its
 of 192.476? DC DPC INTCORRODE.R - 192.476(d) (192.476(b), 192.476(c), 192.476(a)) More...

There are already results for all available assets.

Comments Inspector Notes Plan Notes (1)

Add a Result Pending for 88725 (43003001) Unsat for 88723 (55600001) Sat for 85398 (10)

Add a Result link is disabled if there is already a result for all available assets

- You can also add a result for unplanned questions. Simply hover over the question and click Expand to add a result:

CONTROL ROOM MANAGEMENT CRITERIA ☆ R+ ⓘ
 Do procedures adequately address the process and criteria to
 This question is not planned for activity Field. **Expand** to provide a result anyway

Tip: The PENDING result value exists to allow you to start a result without having to commit to a (Sat/Unsat) value. Later on, it is easy to return to these pending results, finalize the result findings and select a value. PENDING results are not considered “done” in progress monitoring.

It is a good idea to use PENDING for any result you expect to be developed over multiple visits and in different contexts. Otherwise, it might be missed in subsequent interactions with the operator.

Note that while the “Supervisory Approval of Inspection Results” and the “Finalize Inspection” workflow tasks are pending (when either of those tasks have been requested but not yet approved), the Supervisor and Director may create a Final Result that differs from the result that the inspectors recorded. This Final Result will override the team result in data exports and downstream reporting. Both results will be stored with the inspection and will be available to specialized reports such as the coverage heatmap.

Note fields related to questions and results:

Inspector Notes: Information entered into this box will be purged after the inspection is locked. These notes are temporary in nature and are not part of the inspection record.

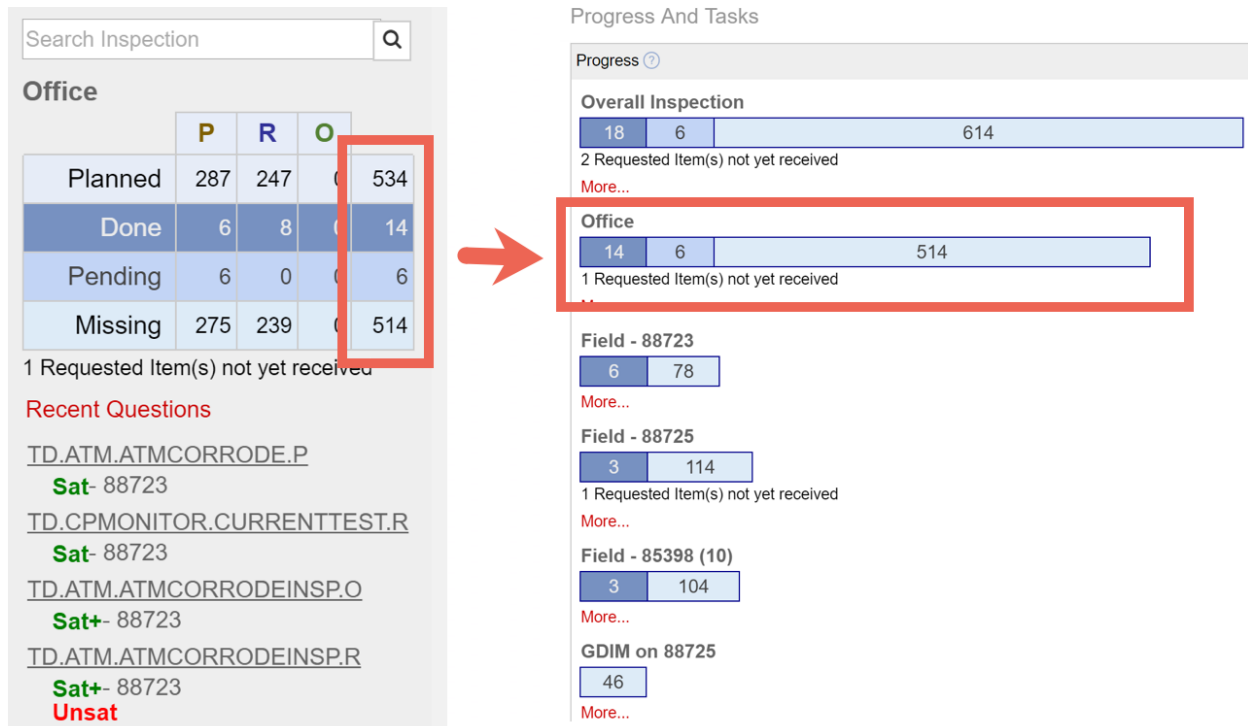
Result Notes: Information added here is part of the permanent inspection record. These should be detailed enough to describe what was reviewed, operator responses, and discussion summaries.

Result Summary/Result Issue Summary: Also part of the permanent inspection record. When the question has an Unsat or Concern result, this field must be filled out as well. It is a shorter summary of the specific issue(s) found. Often this field will contain draft language to be used in future enforcement communications.

Step 8.2: Tracking Progress

The progress matrix in the Inspection Tab's sidebar is a valuable guide to your progress in completing the set of questions designated to the current activity.

For each question type, the grid shows the total Done, Pending, and Missing asset-specific results. The counts in each cell represent the number of question-asset pairs that exist in each condition.



The right-hand totals on the progress matrix correspond to the activities progress bar on the overview tab.

▼ Integrity Assessment Via Pressure Test

1 TEST ACCEPTANCE CRITERIA AND PROCEDURES ★

P Were test acceptance criteria and procedures/processes sufficient to assure the basis for an acceptable pressure test? [AR.PTI.PRESSTESTACCEP.P - 192.503\(a\)](#) ([192.503\(b\)](#), [192.503\(c\)](#), [192.503\(d\)](#), [192.505\(a\)](#), [192.505\(b\)](#), [192.505\(c\)](#), [192.505\(d\)](#), [192.505\(e\)](#), [192.507\(a\)](#), [192.507\(b\)](#), [192.507\(c\)](#), [192.513\(a\)](#), [192.513\(b\)](#), [192.513\(c\)](#), [192.513\(d\)](#)) [More...](#)

Considerations Attachments Inspector Notes Legacy Form Past Results (1,1y)

Plan Notes (1)

Add a Result ▼ **Pending for All Assets**

Office

	P	R	O	
Planned	291	251	0	542
Done	9	8	0	17
Pending	3	0	0	3
Missing	279	243	0	522

1 Requested Item(s) not yet received

Recent Questions

In this example, the 3 in Pending [P]rocedure questions corresponds to a single result in which all three assets are selected.

You can use the matrix links to quickly find questions that need attention and also to be aware of what types of questions need attention. For example, if you are thinking about going inside to review

procedures, you might want to: a) confirm there are no remaining [O]bservation questions requiring results and that there are, in fact, remaining [P]rocedure questions that are Missing or Pending.

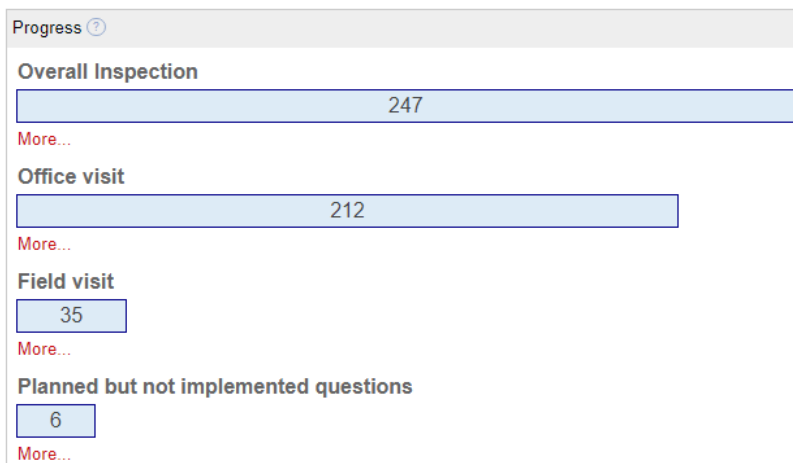
You can see here how leaving results as Pending is important if you expect to revisit them. Doing so will ensure they stay out of the Done row and in view for all inspection teams.

Each cell in the progress matrix is also a link that will modify the inspection tab's filters to display the corresponding set of questions and results. The same is true for the segments of the activity-specific progress bars. Try clicking these links to see how they affect the Inspection tab filters.

Finally, create a few more results and see how the result value (Pending or other) and the selected assets affect the way the numbers in the progress matrix and progress bars change.

Tip: *If there are any red numbers remaining on the Planning interface (which indicate questions that were planned but not included in an implementation activity), those corresponding questions will appear on the Overview tab in the "Progress And Tasks" section as "Planned but not implemented questions". Hovering over this progress bar will display a reminder to include these questions in an implementation activity (which can be done even if the plan is already approved and locked).*

Progress And Tasks



II *PAUSE here for your group to complete the result exercises above and then switch back to working on a single inspection together.*



Lesson 9: Creating and resolving conflicts

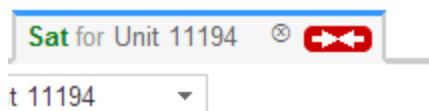
Step 9.1: Resolving Conflicts



When working together as a team on a single inspection, it is possible to get into situations where users edit the same result notes (or other record) at the same time and the system needs human intervention to resolve the conflict. In this step, we will purposely create conflicts and then resolve them. It is important to be working together on the same inspection for this next section.

Important: All group members will need to have an active internet connection for these next steps.

1. In pairs (or group of 3 if needed), select a specific question with a result and open it on your respective computers. *Note that these next steps need to be followed with the same result on both computers, not two separate results. If you need to create a result first, have one person do that and let it sync to both computers. Then continue with editing that result.*
2. Together, make a small, unique change to the results notes (e.g., write your name).
3. Together, as a group, collapse the result (close the tab) or otherwise move off the text area to cause the changes to sync.
4. One or more of your group should see a conflict icon appear on the result.



Click the icon (or the button on the alert box that also appears) and resolve the conflict by selecting one of the options.

	Local		Server
	Keep Local (Sally Tester's)		Keep Server []'s)
Version	4.1		5
Node	AR.IL.ASSESSSCHEDULE.R		AR.IL.ASSESSSCHEDULE.R
Value	Sat		Sat
Notes	This is a conflict test. I wrote this. st		This is a conflict test. I wrote this. lc
Summary			
Assets	BAYTOWN CRUDE SYSTEM		BAYTOWN CRUDE SYSTEM

5. It's very important to understand what happens when you have a conflicted record:
 - a. The conflict will keep your changes from being recorded by the server and seen by others.

- b. You can resolve the conflict (in fact you must in order to be able to participate in future revisions of the conflicted record), but take care when doing so. Select the record version with the most value. In some cases, you may wish to copy/paste text out of the record you are rejecting prior to resolution. This way, you can return to that result and paste in the text you wished to preserve.
6. Attempt to create and resolve conflicts until your entire team has seen and resolved at least one conflict on their own machine.
7. Conflicts are very rare when all members have stable internet connections and take basic precautions (see below) to avoid double entries. However, they can occur more easily when a team member is disconnected from the internet. In that case, the probability of un-synced changes on the disconnected machine conflicting with changes made by others increases.

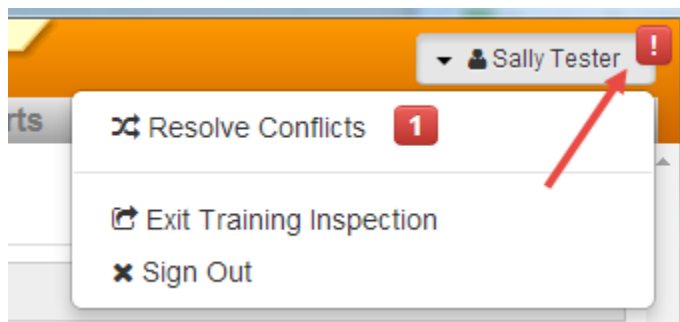
|| *PAUSE here for all groups to complete the conflict exercises. Here are some exercises to try while you wait.*



1. Disconnect one team member (press F6 to do this). Change the same results on both the connected machine(s) and the disconnected one.
2. Then, restore the connection on the disconnected team member's computer (press F6 again to do this).
3. Resolve the conflicts.
4. Repeat the steps above, but before reconnecting, close IA on the disconnected machine. Then restart IA and notice the conflict warnings in the home tab inspection list. When you see this, it is important to re-open the inspection and resolve those conflicts. Otherwise, your changes will never be synced, and you will also not get the latest changes for the conflicted records from your team members.



5. Finally, conflicts are also notified in the upper right-hand side of the IA window. You can click on the user button and resolve them. Try it.

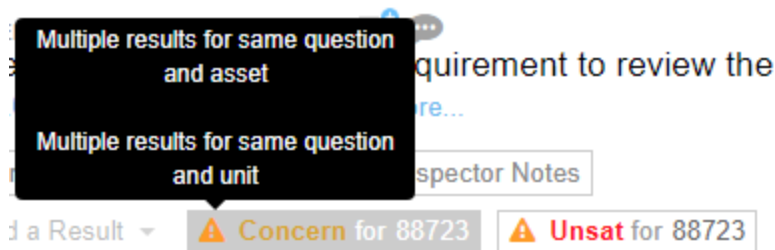


6. Think about and discuss everyday scenarios that could increase the potential for data conflicts and what steps you can take to eliminate and/or mitigate them.

Summary

1. Avoid conflicts by designating a scribe (who alone does results entry) and/or using inspector-specific notes to capture findings which are later used to create the final result.
2. Re-connect your device and re-open your inspection as soon as possible if you have collected results while disconnected.
3. If you see conflict warnings, deal with them right away. They won't go away by themselves and the longer you wait, the greater the chance your input will not be useful in the development of results.

Tip: In the above examples, a conflict occurs when two team members edit the same set of “result notes” (on the same result record) at the same time. However, if two team members each added a **new** result to the same question, for the same asset, at the same time, IA will accept both independent results. IA will provide a warning glyph in situations like this, so that the team can be sure to select the most appropriate result and remove the other.





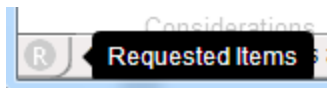
Lesson 10: Attachments

In addition to results, IA can also collect, link, and track other entities, collectively called Attachments. At present there are eight different types of attachments, let's look at a few of them.

Step 10.1: Requested Items

During an audit, there are often documents requested that are not available at the time they are requested. IA provides a means to track these requests, link them to relevant questions, and confirm when they have been received and reviewed.

1. Requested items can be linked to any question, or to multiple questions. The simplest thing is to click the  glyph that appears when you hover over a question.
2. Click the "add requested item" link to add the item (note how the question ID of the selected question is automatically provided.)
3. Add a description, notes, but leave date received blank.
4. Note the "R" glyph that now appears next to the question, indicating there is a requested item pending for this question.
5. You can Click the R to open the requested item list with that item highlighted, from there you can receive it (which will stamp the current date on the record), or click 'edit' to make further edits to the item.
6. You can also click the R tab in the lower left to see a list of requested items

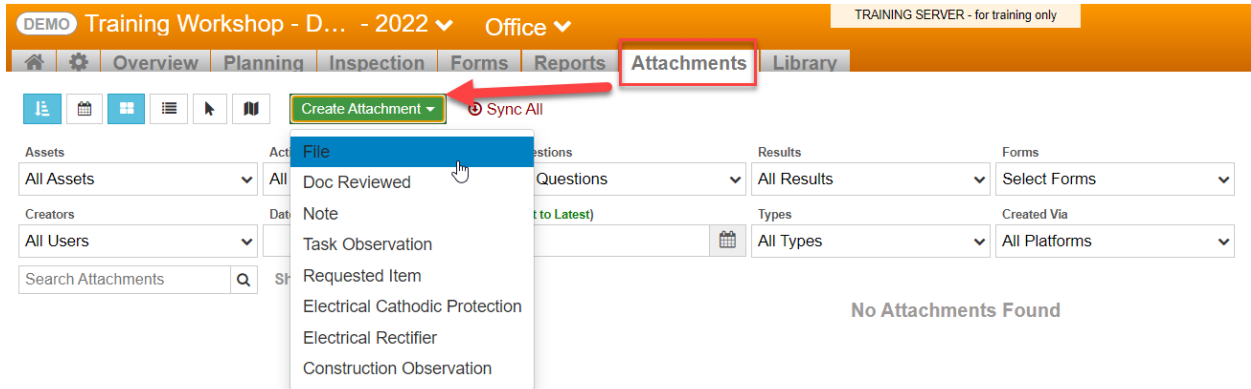


7. Add several more requested items for different questions.
8. Finally, there is a requested item report that we will look at later.

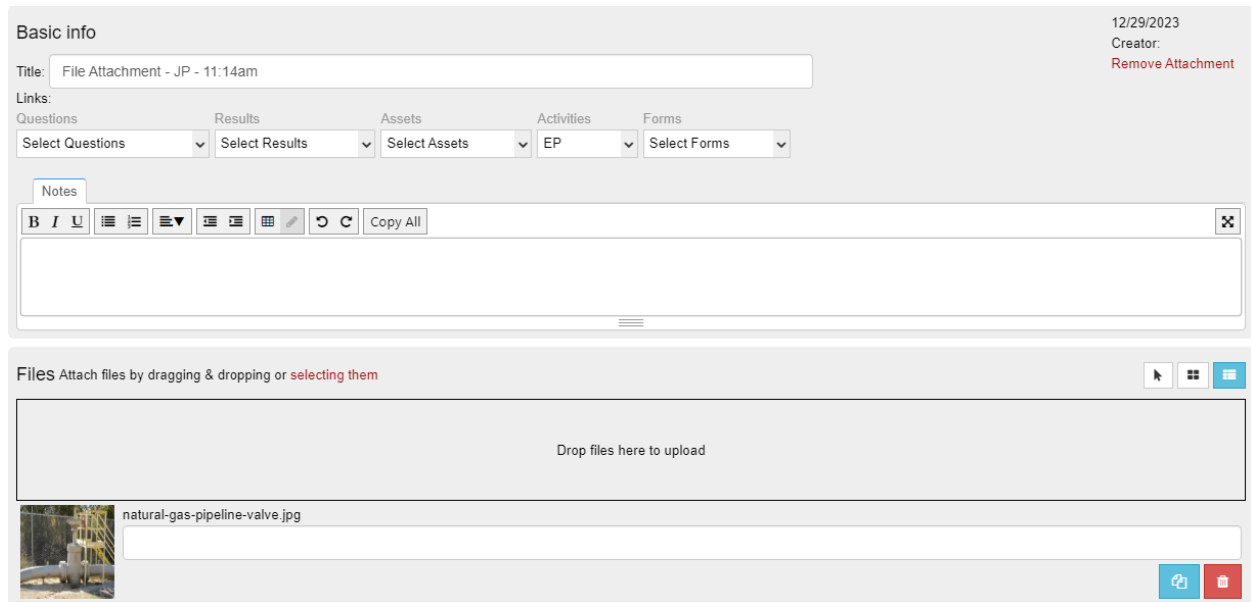
Step 10.2: File Attachments

A requested item (above) is a specific example of a more general "file" attachment. The basic file attachment does not have the additional fields needed to track requested items. Files can be photos, pdfs, Word documents, and other sorts of files that may be generated during an inspection. Let's create a file attachment.

1. Locate a suitable file (you may have been provided a sample file to work with)
2. Open the Attachments Tab, click the Create Attachment button and select "File" type.



3. Select or drag-and-drop a file (photo, pdf etc) into the File Attachment. If you wish, you can add multiple files.



4. Add a title and perhaps some notes to complete the File attachment.

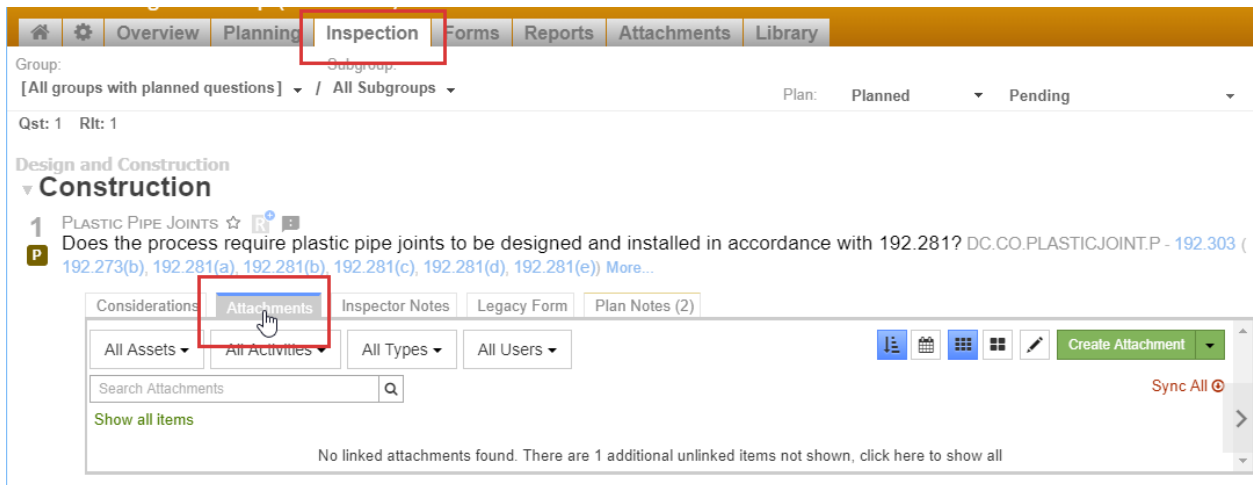
When a “photo observation” is created in IA Mobile, it comes in as a “File” attachment in IA Desktop.

Note: Most iPhones capture images as .heic files. IA Desktop only accepts web-compatible image file formats like .jpg and .png. If you use your iPhone to take pictures at an inspection and then download them for use in IA Desktop, please make sure to export them to a compatible format in a manner that preserves any metadata you hope to keep, like geographic coordinates.

Step 10.3: Attachment linking in context

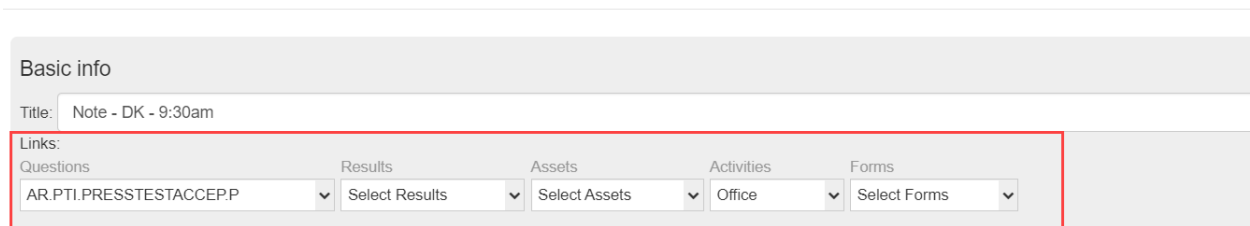
IA also supports “attachments” which can be linked to nothing except the inspection, or further linked to questions, results, assets, activities and forms. Attachments can be files, photos, notes or structured observations such as CP readings. Let’s create a few more attachments to practice linking.

1. Move to the Inspection tab
2. Click the “Attachments” tab on any question.

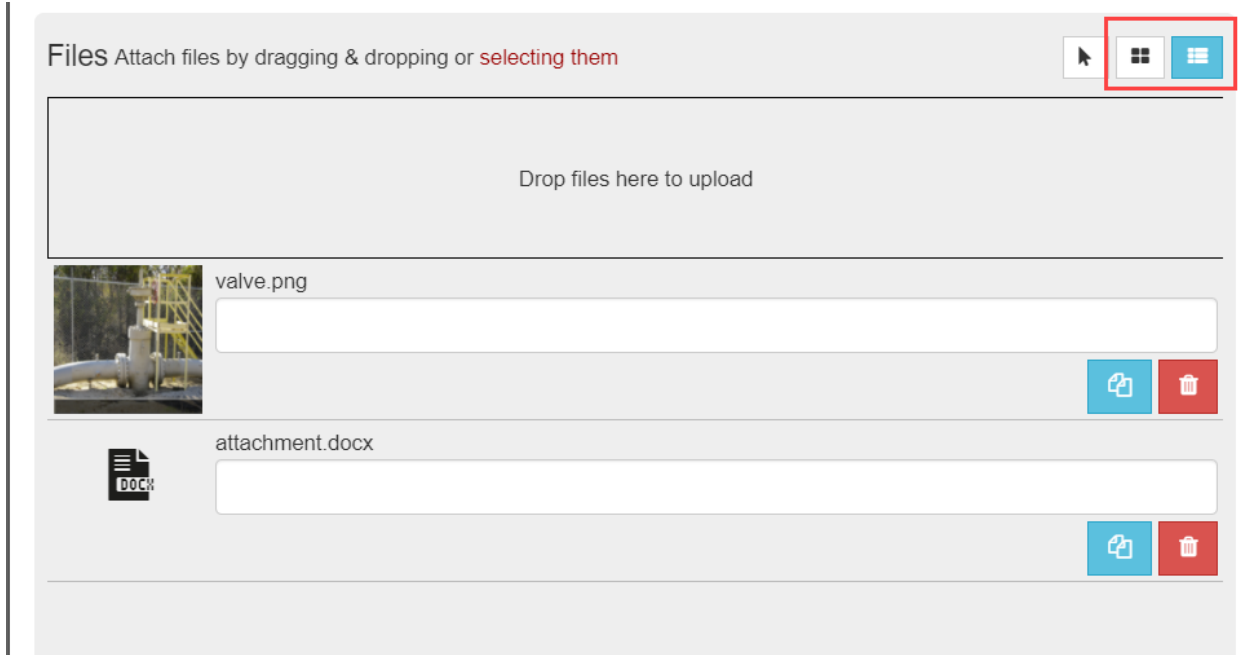


3. Click the green “Create New Attachment” button and select “Note”
4. Each attachment can be “linked” to multiple entities via the link selectors at the top

Attachment Details



5. Attachments can be added at the inspection-level on the “Attachments” tab, at the question level on the “Inspection” tab and at the result level on any result tab. Try navigating to each of these levels and adding an attachment from that point. Note how the default links change depending on where you are adding it from.
6. You can control how much space is allotted (and how much information is displayed) for each attachment via the buttons provided. Try the different settings to see the different effects.



7. You can link and unlink attachments to the current context (question, result etc) with one click via the links provided on the attachment tile.

Assessment and Repair

▼ Integrity Assessment Via Pressure Test

3

P

G

TEST ACCEPTANCE CRITERIA AND PROCEDURES ☆ R !

Were test acceptance criteria and processes sufficient to assure the basis for
 192.503(a) (192.503(b), 192.503(c), 192.503(d), 192.505(a), 192.505(b), 192.505(c), 192.505(d),
 192.513(c), 192.513(d), 192.921(a)(2)) More...

Considerations Attachments (1) Inspector Notes Plan Notes (2)







 Create Attachment ▼ Sync All

Assets	Activities	Questions
All Assets ▼	All Activities ▼	AR.PTI.PRESSTESTACC..
Creators	Date Range (Set to Earliest)	(Set to Latest)
All Users ▼		

Search Attachments 🔍 Showing 1 of 2 Show all attachments ⬇️ ?



Note - DK - 9:30am 12/30/2022 (DK)

2 Files  1 Link   

Th Unlink this attachment from this question

8. Link an attachment to two different questions and then click the '2 links' link to see what is displayed. You should be able to navigate quickly between the two questions that share an attachment. Attachments are not "owned" by any link-point, they are simply pointed to. Before removing (or modifying) an attachment, it is a good idea to check these links to confirm it would not be better to just leave the attachment and unlink it from the current context instead.
9. Linking to a question and linking to a result are different things. Link an attachment to a question, and then link it to one of the question's results. Check the link list to see the difference.

PHMSA IA-Desktop Basic Operations Workshop

Design and Construction
Construction

PLASTIC PIPE JOINTS
Does the process require plastic pipe joints to be designed and installed in accordance with 192.281? DC.CO.PLASTICJOINT.P - 192.303 (192.273(b), 192.281(a), 192.281(b), 192.281(c), 192.281(d), 192.281(e)) More...

Considerations Attachments (1) Inspector Notes Legacy Form Plan Notes (2)

All Assets All Activities All Types All Users

Search Attachments

Show all items

Comments ab... 2 links | Unlink 10/25/2018 (ST)

This is my note.

There are 1 additional unlinked items not shown, click here to show all

Add a Result Pending for All Assets

Pending for All Assets

Text entered here will be part of the permanent inspection record when this inspection is locked.

Result Notes

Click to edit.

Attachments

Attachment items linked to this result are highlighted in yellow. Click the link/unlink on each item to change link status. Open the item to see more linking options.

All Assets All Activities All Types All Users

Search Attachments

Show only items linked to this result

Comments ab... 2 links

This is my note.

Linked to

- Questions DC.CO.PLASTICJOINT.P
- Results DC.CO.PLASTICJOINT.P - Pending

Link 10/25/2018 (ST)

Sync All

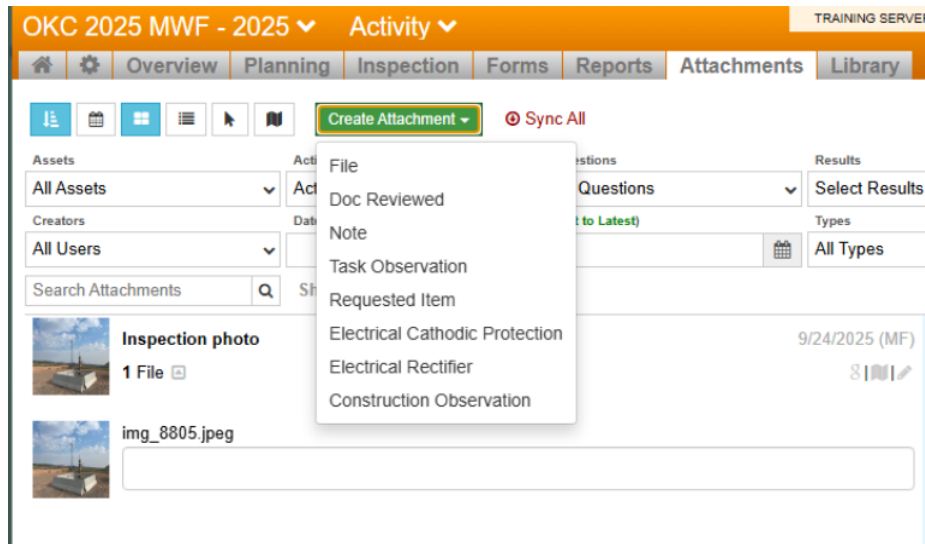
Delete this result

This note is attached both to the question and the Pending result. There is only one note, it is presented in both contexts because it is linked to both contexts.

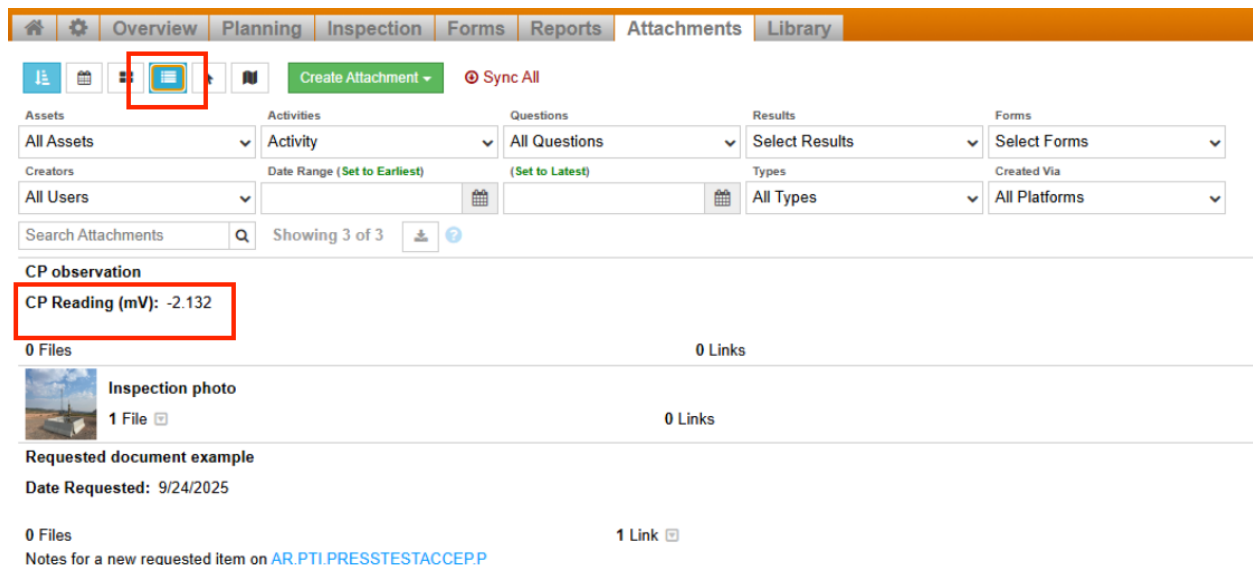
10. Link an attachment to an UNSAT result. After that, have a look at the attachment's representation in the lists. You should see an "evidence" marker next to it. Attachments related to UNSAT or CONCERN results are marked as evidence and if the inspection is linked to PHMSA's Work Management System (WMS), the attachments will be imported into WMS when the inspection is locked.

Step 10.4: Other Attachment Types

Specialized attachment types have attributes for recording CP readings, construction observations, or other data types that inspectors have requested. If your inspections involve collecting these types of records, experiment with adding them and share any questions or suggestions with the instructors.



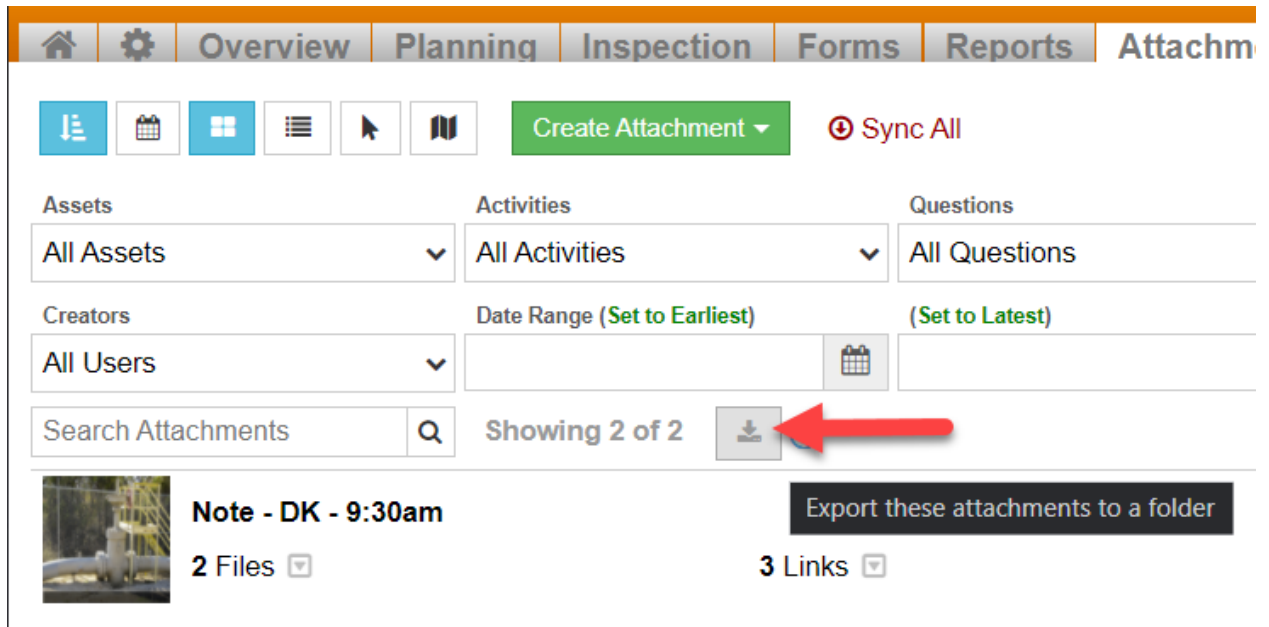
Some attachment types have additional fields to store type-specific data. An Electrical Cathodic Protection attachment, for example, can record the electrode potential in mV. An Electrical Rectifier attachment has input fields for current and voltage. These additional values are not visible in the “Compact View” but can be seen in the “Detailed View.”



Step 10.5: Exporting Attachments

Most inspection information can be exported from IA Desktop via the Reports tab, however there is one export feature that can be found on the Attachments tab. If you wish to export attachments and associated files, you can do so by following these steps:

Using the controls above the attachment list on the attachment tab, filter attachments to those you wish to export, and then click the “download” icon to begin the export process:



1. When a Windows File Explorer window appears, you will be able to select a location to save the Attachment Export. Please note that exporting to a shared/network drive can take an extremely long time and at times may not complete successfully. Because of this, we highly recommend saving the Attachment Export to your Desktop. When the export is complete, you may then move it from your Desktop to the desired location.
2. After selecting a location to save the Attachment Export, you will see the “Attachment Export Progress” modal appear. Note that all attachment files need to be downloaded from the server. If this has not been done already, the export process may take longer (see “Downloading Files: ... files remaining”)

Attachment Export Progress

Please wait while your export is compiled

You will be prompted to save the export when the required data is loaded.

Process Checklist

☒	Syncing Inspection	100% complete
☐	Downloading Files	83 files remaining
☐	Writing Metadata	
☐	Copying Files	
☐	Requesting Directory	
☐	Saving Export	

Note: The attachment export feature is in "beta" and changes are expected.
Your feedback is welcomed at ia-support@dot.gov.

Cancel

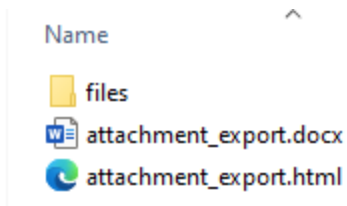
- When the Export is complete, IA Desktop will alert you via the progress modal and you may click the "Open Folder" button to be taken to the Export folder.

Export Complete

The attachments were exported successfully.

Open Folder

- The Word document will contain links to any associated attachment files (images, Word docs, PDFs, etc). These full-sized files are included in the export folder, in the "files" folder. **For the links in the Word document to function, the entire folder must be present and kept in the same order/structure as when it was exported from IA Desktop, and internal folders/files should not be renamed.**



5. Open the Word document to get familiar with this export.

Important: If you wish to share the attachment export with others, please ensure you copy/send the entire attachment export folder. The MS Word document produced by the export may include links to files and images. In order to preserve those links, do not move or rename any files/folders within the attachment export folder.

It is highly recommended to only run the Attachment Export when IA Desktop is connected to the internet. Since your local machine may not yet have all the associated files downloaded, the exporter will fetch the files. Without an internet connection, the export may be incomplete due to missing attachment records or missing files/images. If you attempt to run the export while disconnected, you'll see the following message:

Tip

You are currently disconnected. Running the attachment export offline may result in missing attachment records or missing files/images. Are you sure you want to continue with the export?

Cancel

Yes, continue

Step 10.6: Attachment locations

Inspectors may add location information to attachments in multiple ways:

1. By creating an attachment in IA Mobile (and having appropriate location settings in place).
2. By applying GIS information from an image to the attachment (in IA Desktop or in IA Mobile).

If an attachment has location information associated with it, that information will appear in IA Desktop. It may be removed/cleared out by clicking the “Remove Location Data” link.

Attachment Details Done Cancel

Basic info

9/24/2025
Creator: Matt Frost
[Remove Attachment](#)

Title:

Links:
Questions Results Assets Activities Forms

Notes

B I U

Location:

[\(View on Google Maps\)](#)
Latitude: 41.33804444444445
Longitude: -110.61660833333333
GPS Accuracy: ~4 meters
Timestamp: Thursday, August 8, 2024 at 7:49:47 AM Pacific Daylight Time
Altitude: ~2051 meters

[Remove Location Data](#)

If an image on an attachment contains location data, that information will be displayed as well. Not all images will have location information, it depends on the source of the image and the source’s settings.

Attachment Details

Files Attach files by dragging & dropping or **selecting them**

Drop files here to upload

img_8805.jpeg

Date added: 9/24/2025, 5:42 PM
Added by: Matt Frost
Date taken: 8/8/2024, 7:49 AM
Latitude: 41.33804444444445
Longitude: -110.61660833333333
GPS Accuracy: 3.800543243410087
Altitude: 2050.266689607708
[\(View on Google Maps\)](#)
[Replace attachment's location with this information](#)

Note that each attachment may have multiple images on it. The attachment itself may have a location (which is saved to IA) and each image may have a different location of its own. These image locations are not saved to IA, they are simply data that is bundled into the images themselves.

In IA Desktop, you may opt to use the location from an image and apply it to the attachment. This can be done with the “Replace attachment’s location with this information” button next to an image.

Try out these steps to experiment with attachment locations:

1. Obtain an image with location information (either from Workshop facilitator, from IA Mobile, or perhaps from sending yourself one from your phone).
2. Create a new attachment in IA Desktop. By default in IA Desktop, this new attachment will have no location.
3. Add the image to your new attachment, see the location information for this image displayed.
4. Click the “Replace attachment’s location with this information” button and see that the attachment now contains this image’s location information.
5. Click “Done” in the top right to save this change.
6. Click the “g” icon for this attachment in the attachment list to see the attachment’s location on a Google map.

OKC 2025 MWF - 2025 ▾ Activity ▾ TRAINING SERVER

Overview Planning Inspection Forms Reports Attachments Library

Create Attachment ▾ Sync All

Assets	Activities	Questions	Results
All Assets ▾	Activity ▾	All Questions ▾	Select Results
Creators	Date Range (Set to Earliest)	(Set to Latest)	Types
All Users ▾			All Types

Search Attachments Showing 2 of 2

Inspection photo 9/24/2025 (MF)

1 File 0 Links

Files Sync 1/1

img_8805.jpeg

Step 10.7: Viewing Attachments on a Map

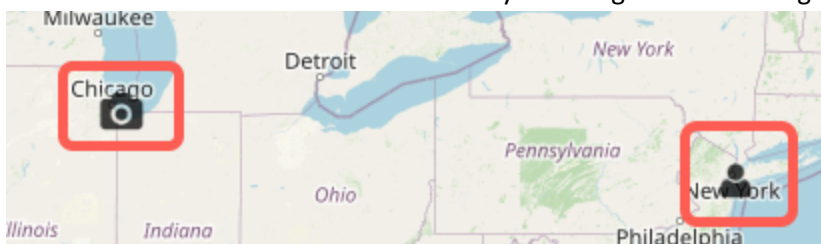
If you or a teammate has been using IA Mobile or images to add locations to attachments, these can be seen by clicking the “map” icon at the top of the attachments tab:

Overview Planning Inspection Forms Reports Attachments Library

Create Attachment ▾

View Map

You can interact with these attachments by hovering over or clicking the icons on the map:





Lesson 11: Reporting

Step 11.1: Reporting

IA can generate many reports. Except for the Supervisor's report, the reports available in IA are focused on the execution of a single inspection, not cross-inspection review.

Reports in IA are divided into two categories

- a) Local– these reports function without a connection and are based solely on local data
- b) Remote – these reports require a connection to function (they are executed on the server, not the client).

Each report has a set of links that allow export to external documents and options settings. You'll need to use these links in the next exercise.

[◀ Back to Reports](#) [Print](#) | [Export to Word](#) | [Export to Excel](#) | [Show Options](#)

The following exercises can be performed individually or as a group.

Export Questions

1. Use the Export Questions report to create a Word document of all the planned questions in your inspection.
2. Use the Export Questions report, and the Display Type = Tabular to create an Excel workbook of all the planned questions in your inspection.
3. Use the Group/Subgroup selector in the Export Questions report to winnow your report down to a single subgroup (click "Show options" to see these filters plus others)
4. Explore what the other options on the Export Questions report will do (start by using some of the presets provided).
5. Ask your IAT member what your region's policy is on providing exported questions to Operators.

Tip

Try the "Recently created and updated questions" preset on the Export Questions report. This will include considerations and filter the report to questions that were added or updated during the calendar year of the PRS/question set selected for the current inspection. For example, in an inspection using GT.2024.02, selecting this option would only include questions which were added or updated in GT.2024.01 and GT.2024.02. Like the [Question change tracking feature](#) seen on the Planning and Inspection tabs, this preset will also display green/red styling to represent text that has been changed during that calendar year.

+ 8. Field Inspection - Gas Gathering Remedial Actions

Is operator's remediation and documentation of remediation adequate? (AR.RCOM.GGREMEDIATION.O) 192.485(a) (192.453;192.459;192.485(b))

CRM, SCADA, and Leak Detection - Change Management

5. Coordination of Field Changes Does the process require field personnel and SCADA support personnel to contact the control room when making field changes (for example, example operating a valve, moving O&M, inspections/calibrations, valve RTU/PLC modifications) that affect control room operations? (CR.CRMCMGT.FIELDCONTACT.P) 192.631(f)(2)

Apart from the preset, these options can be toggled by using these controls:

Highlight Recent Changes

☐ No

☒ Yes

This requires an internet connection and might take several minutes.

Select Questions by Change Status Added in 2024, Updated in 2024

All/None

☒ Added in 2024

☒ Updated in 2024

☐ Unchanged questions

Validation Report

Tip

The validation report is the most important report in IA. It helps assure the quality of your inspection data. Use it often.

1. Run the validation report. Find the issues and correct them.
2. Run the validation report with the "Include Rule Inventory" option checked. Create violations of at least three rules in your inspection. Then, re-run the report, see the items and fix them.

Inspection Results Report

6. Use the IRR report to list your results. Use the links in the report to jump to the results.

Results and Notes Review

This report is intended for review of long text, and is recommended for review prior to requesting approval of the inspection.

Inspection Output (IOR)

Tip

The IOR is the replacement for the PIM (Post Inspection Memo) as a final report for the inspection.

1. Run the IOR, test the various options.

2. Add an inspection summary (on the overview tab) and then re-run the IOR
3. Note the planned and required columns in the Scope (Assets) table. They are probably the same value for each row.

Supervisor's Report

This report is primarily targeted at users who oversee multiple inspections. However, it can be useful for others as well. To view the Supervisor's Report, click the "More Reports" button at the end of the list, and then select "Supervisor's Report" from the "Select a Report" dropdown.

Planning and Status Reports

1. Requested Items

Requested Item status information (current/all activities)

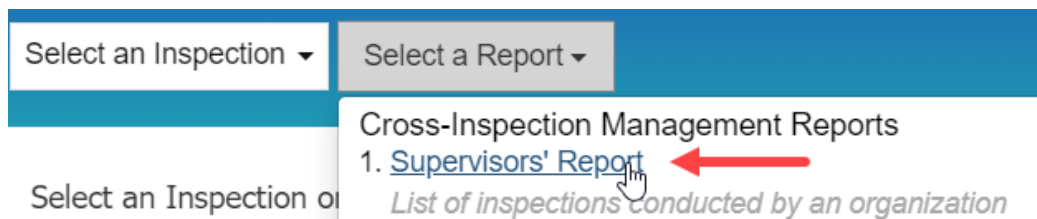
2. Construction Daily Report

Construction Daily Reports and Observations

More Reports



Open a report window with access to reports from other inspections and cross-inspection reporting. Including Supervisor's reports.



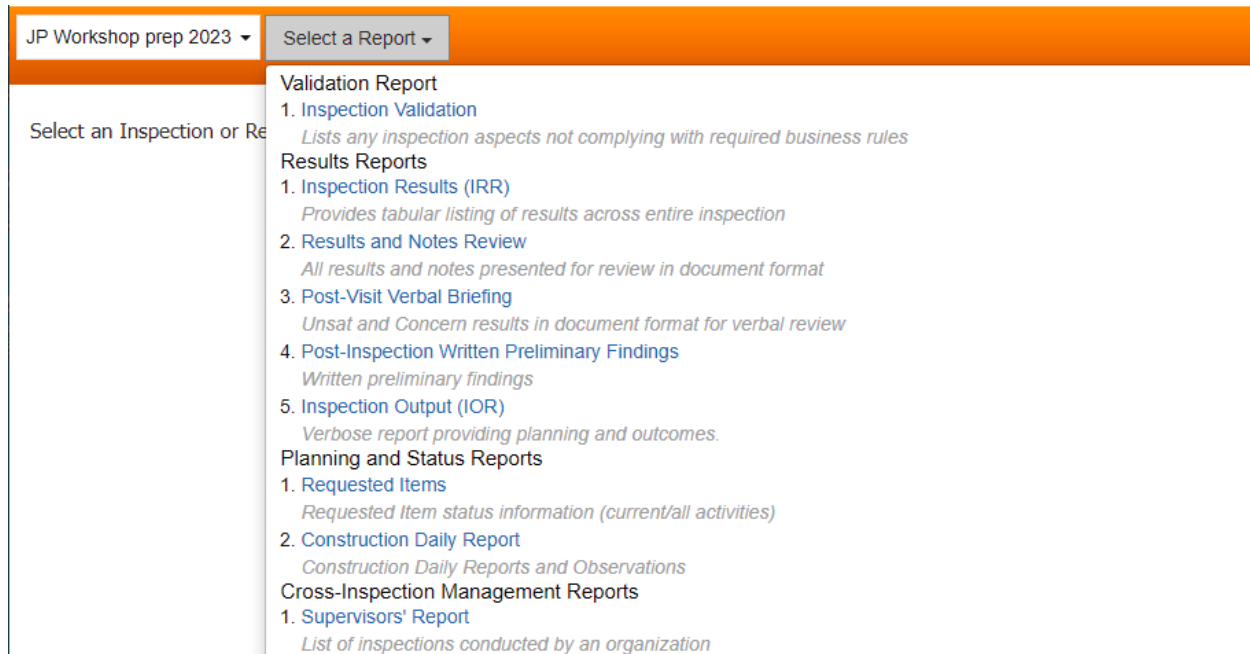
1. Run the supervisor's report, test the various options.
2. Note how the "Inspection Name" column is a link for some inspections, while "Reports" is a link for all.

More Reports

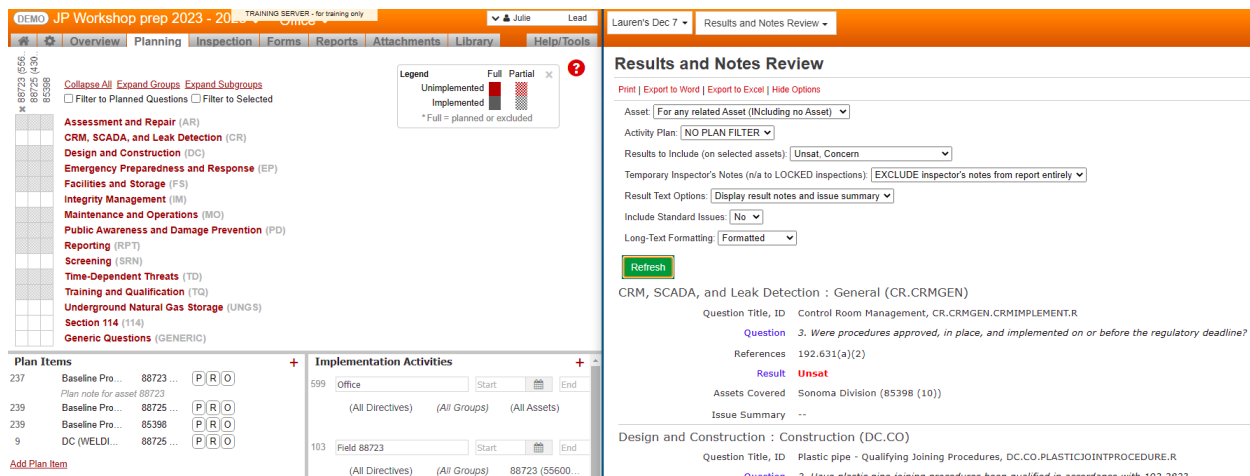
While we have this "More reports" window open, let's see how else we can utilize it.

In addition to running the Supervisor's Report, from this window you can select to run any IA report for an inspection other than the one that you have currently open in the main IA window. For example, you can select an inspection that you are a team member of (or a locked inspection) via the "Select an Inspection" dropdown. From the "Select a Report" dropdown, you can then choose a report you'd like

to run on the selected inspection.



You now have the advantage of having two IA Desktop windows open - each looking at data from a different inspection. For example, you can have the current inspection open in one window, planning this inspection. In the second window, you can have a report from a relevant, locked inspection open to help inform your planning. See below for an example of how IA can be used side-by-side to compare information from two different inspections:



Try any reports you have not yet tried and then move on to the next step.

On many reports in IA Desktop, you will see a checkbox to “Suppress repeated result output for re-presented questions”. If you recall from Lesson 6.2, questions can be re-presented across multiple subgroups. When this happens, reports will typically display all presentations of that question, and recall that all presentations will share the same result(s). To prevent the same question/results from appearing multiple times on the report, you may check this box.

The “IRR” report displaying all presentations of a question separately:

Row	Assets	Result	(Note ¹)	Sub-Group	Qst #	Question ID
1.	88723	Concern	3	TD.CP	24.	TD.CP.RECORDS.R
2.	88723	Concern	3	TD.CPMONITOR	35.	TD.CP.RECORDS.R
3.	88723	Concern	3	TD.CPEXPOSED	11.	TD.CP.RECORDS.R

Tip

The “IRR” report suppressing repeated output, because the box has been checked:

☒ Suppress repeated result output for re-presented questions

Refresh Report

88723 (1)						
Row	Assets	Result	Sub-Group(s)	Qst #	Question ID	
1.	88723	Concern	TD.CP	24.	TD.CP.RECORDS.R	
			TD.CPMONITOR	35.		
			TD.CPEXPOSED	11.		

Tip

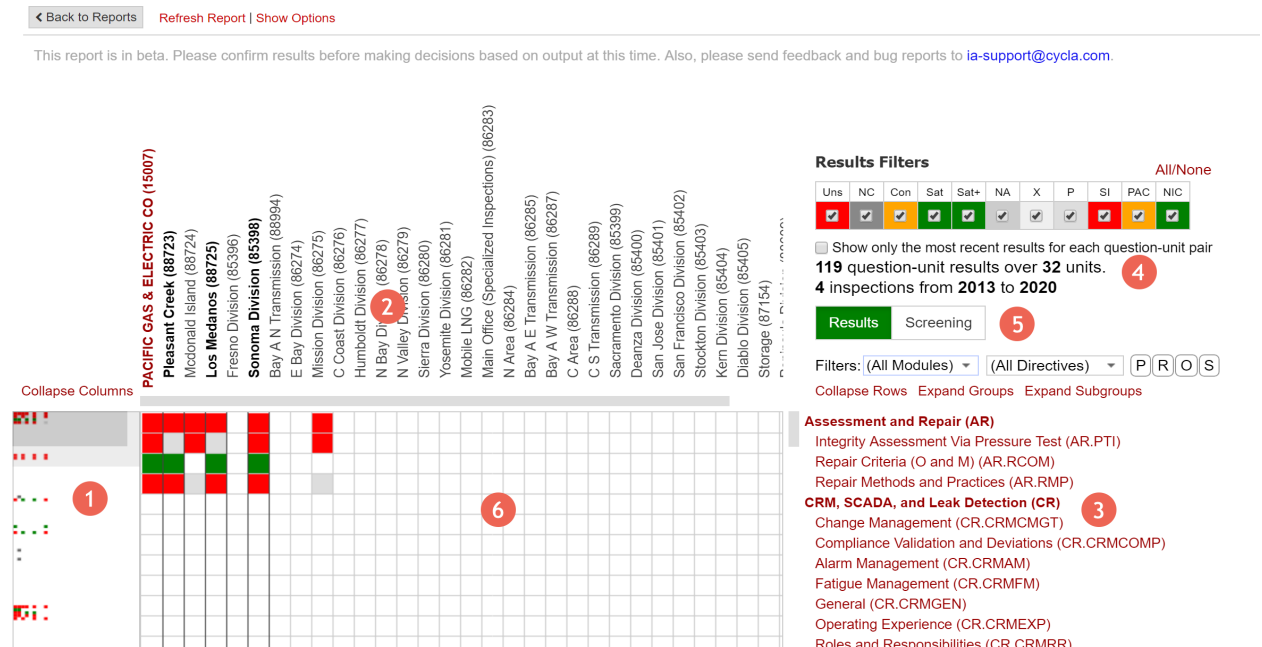
The Monthly Open Inspection Report (MOIR) is generated on a monthly basis for each regulating organization. It is emailed to active IA account holders who are listed as LEAD, SUPERVISOR, or DIRECTOR on any open inspection for which that organization is the designated regulator. This report provides information on inspections that have been open for more than 12 months, so that the organization can ensure those are finalized and locked in IA when complete.

Step 11.2: Reporting – Coverage Heatmap report

The Coverage Heatmap report is more of a tool than a report. Let’s look at it specifically.

1. Run the report for your inspection and have a look at the results. Depending on where you recorded your results, your display will differ, but the layout should look similar to the image

below.

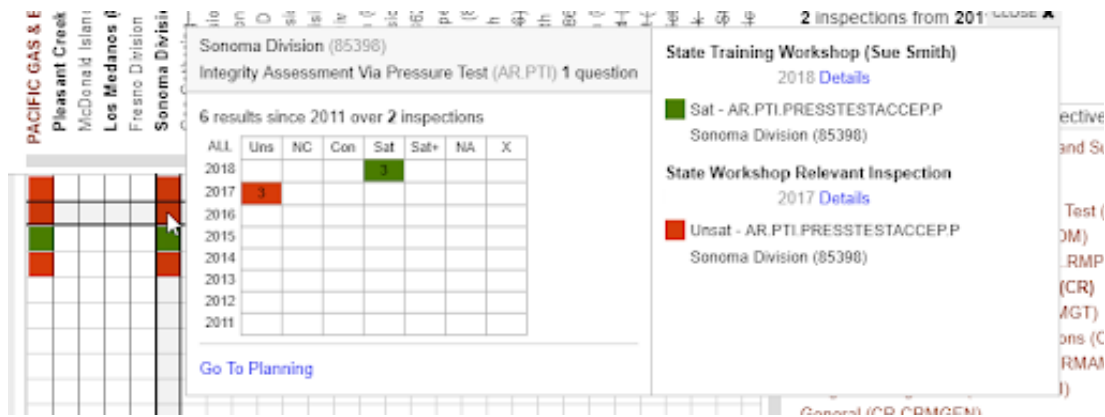


Coverage heatmap layout.

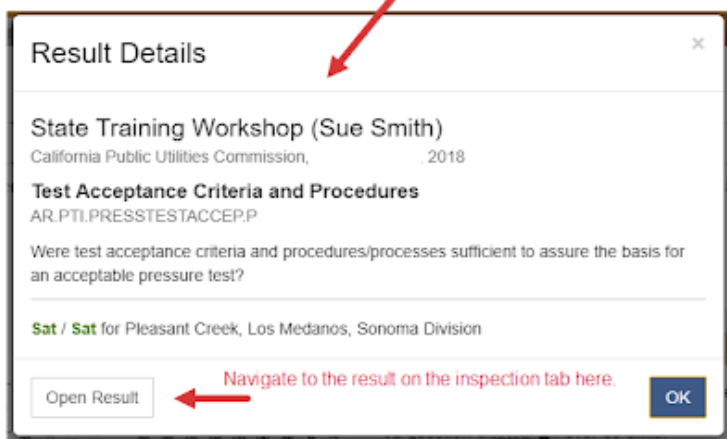
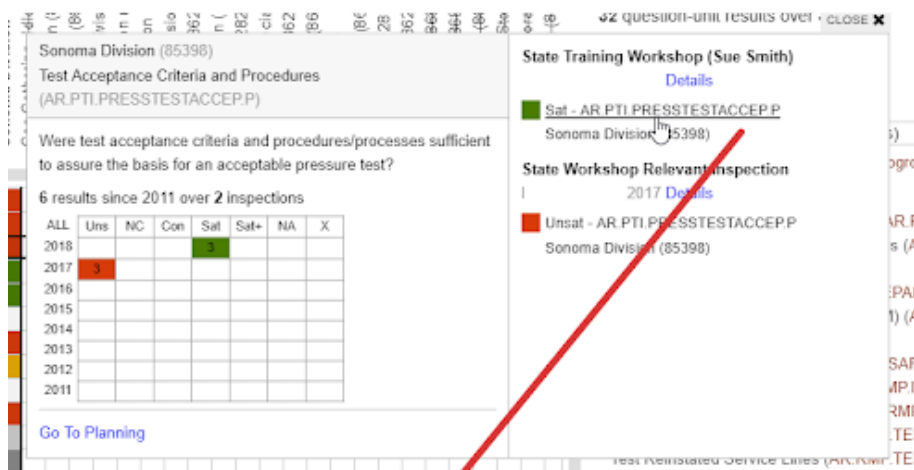
- 1) Navigation grid, slide the grey region around to scroll up/down left/right.
- 2) Units (Note: these are UNITS or External Unit Ids, not Assets (which can be a combination of multiple units))
- 3) Question Content (organized by Module/Submodule/Question)
- 4) Filter Controls
- 5) Result-display mode (see below)
- 6) Result grid

The Coverage Heatmap is a tool to look at your inspection's results along Unit X Question coordinates. Consider it a "map" of results collected. Each cell represents a "location" where results can be collected. Some cells, such as those corresponding to Operators or Modules and Submodules are representative of the aggregation of all the results collected "under" them. Just like the planning grid, you can expand and collapse the question content rows to "drill down" into the results.

Also, the results under each cell can be viewed by hovering over it, and drilled-into by clicking.



Finally you can see a summary of the result (notes etc) by clicking on the item in the result list.



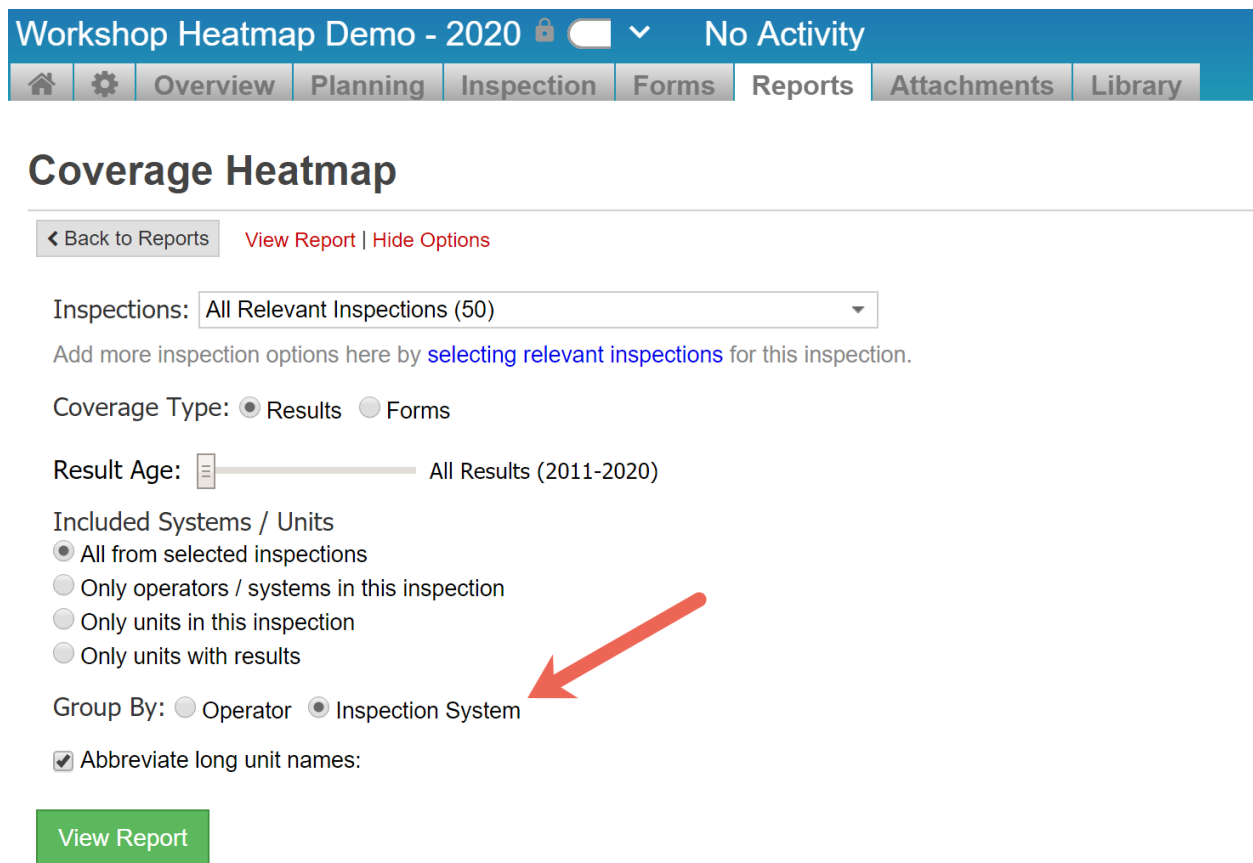
So, in summary the heatmap provides a way to look over the entire set of results for your inspection.

However, the primary purpose for the Coverage Heatmap is actually to look at *previous* inspections results. If you expand the reports Options, you'll see that all the relevant inspections flagged for this inspection are available. In our example here, we have only one other relevant inspection. It is difficult to review this feature without real data, so let's watch an instructor demo and follow along in 11.3 and 11.4. .

Step 11.3: Reporting – Coverage Heatmap report part 2

In order to see how this works, your instructor will give a demo of the following steps (there is no need to complete these steps on your own, just follow along with the instructor's demo). In this inspection, we have flagged around 50 previous inspections for review.

Before running the report, select the "Inspection System" option in "Group By:"



Workshop Heatmap Demo - 2020   No Activity

  Overview Planning Inspection Forms Reports Attachments Library

Coverage Heatmap

[< Back to Reports](#) [View Report](#) | [Hide Options](#)

Inspections:

Add more inspection options here by [selecting relevant inspections](#) for this inspection.

Coverage Type: ☒ Results ☐ Forms

Result Age:  All Results (2011-2020)

Included Systems / Units

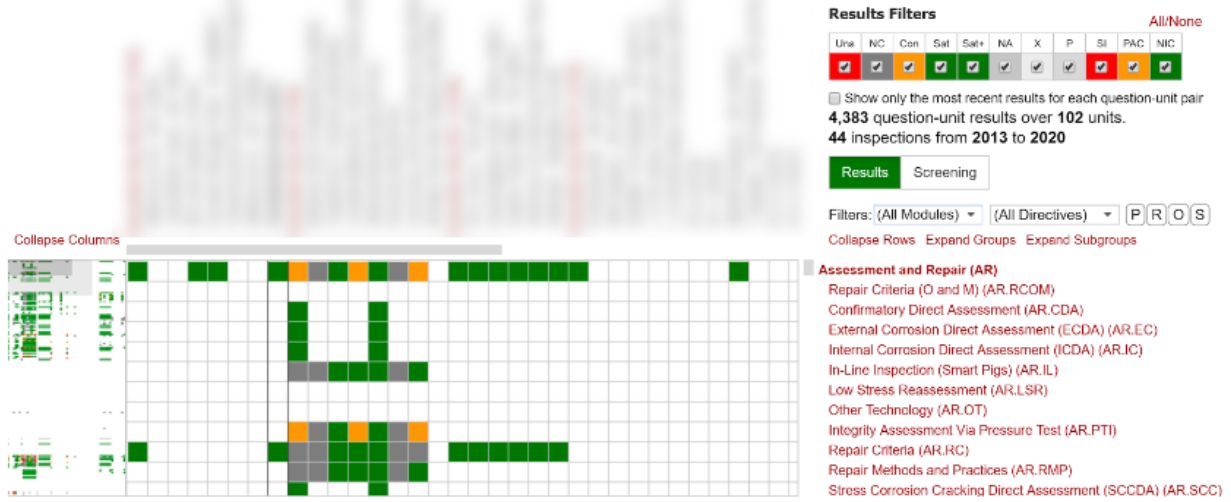
- ☒ All from selected inspections
- ☐ Only operators / systems in this inspection
- ☐ Only units in this inspection
- ☐ Only units with results

Group By: ☐ Operator ☒ Inspection System

☒ Abbreviate long unit names:

[View Report](#)

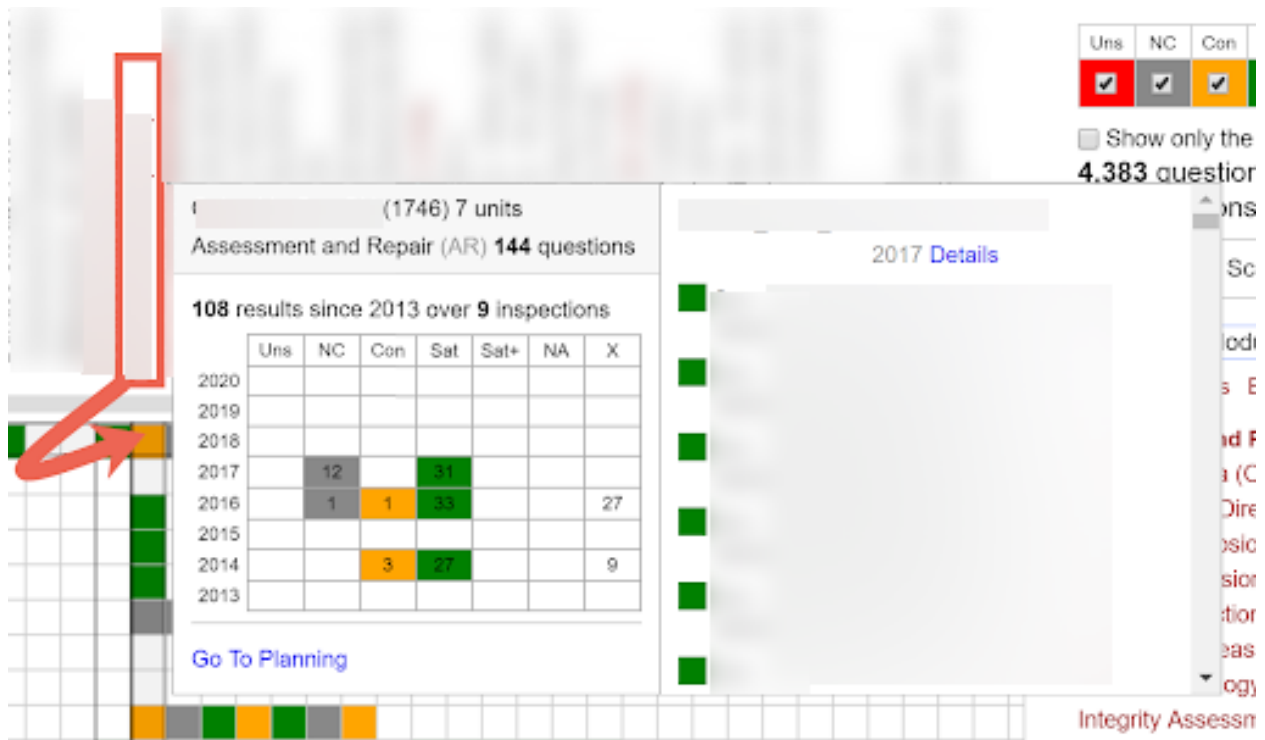
Run the report and you should see the following:



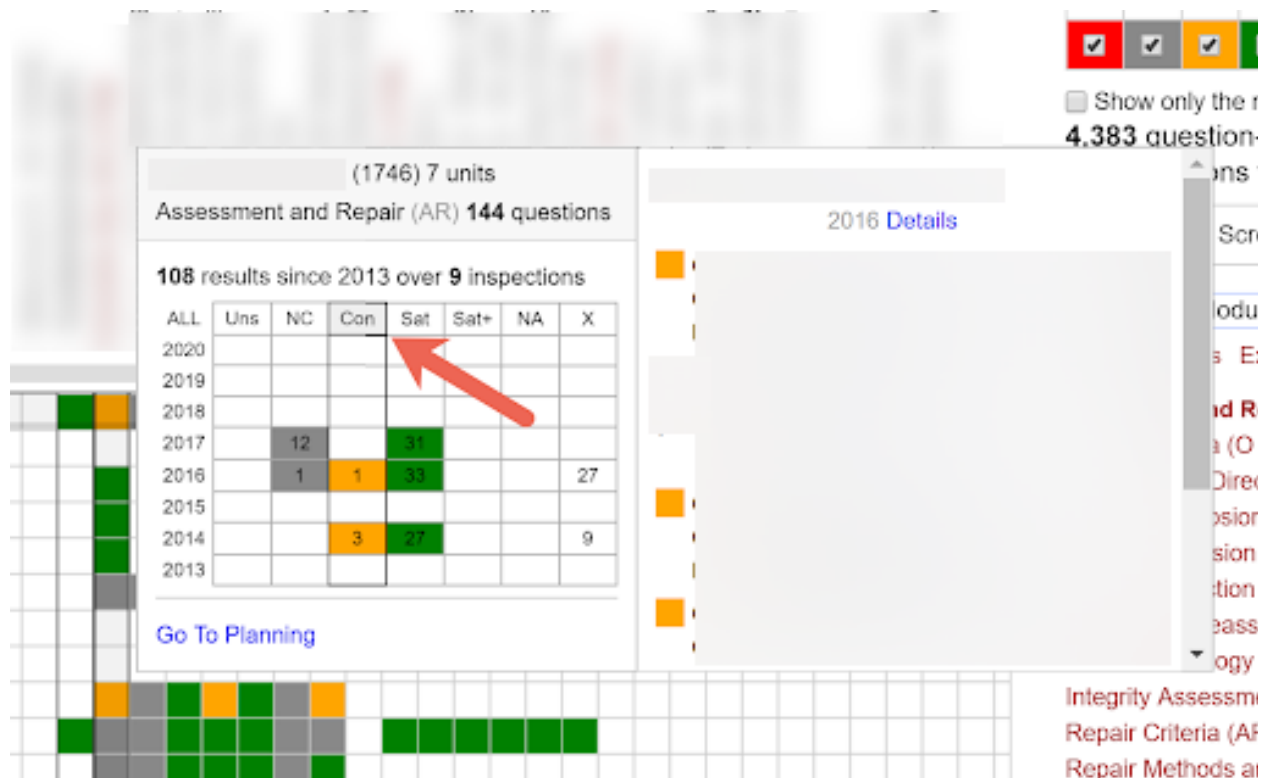
Over 4K until-level results displayed in the heatmap, collected over 44 inspections.

Explore the heatmap by taking the following steps

1. Drill down into a system-level cell by clicking on a cell under one of the System column headers.



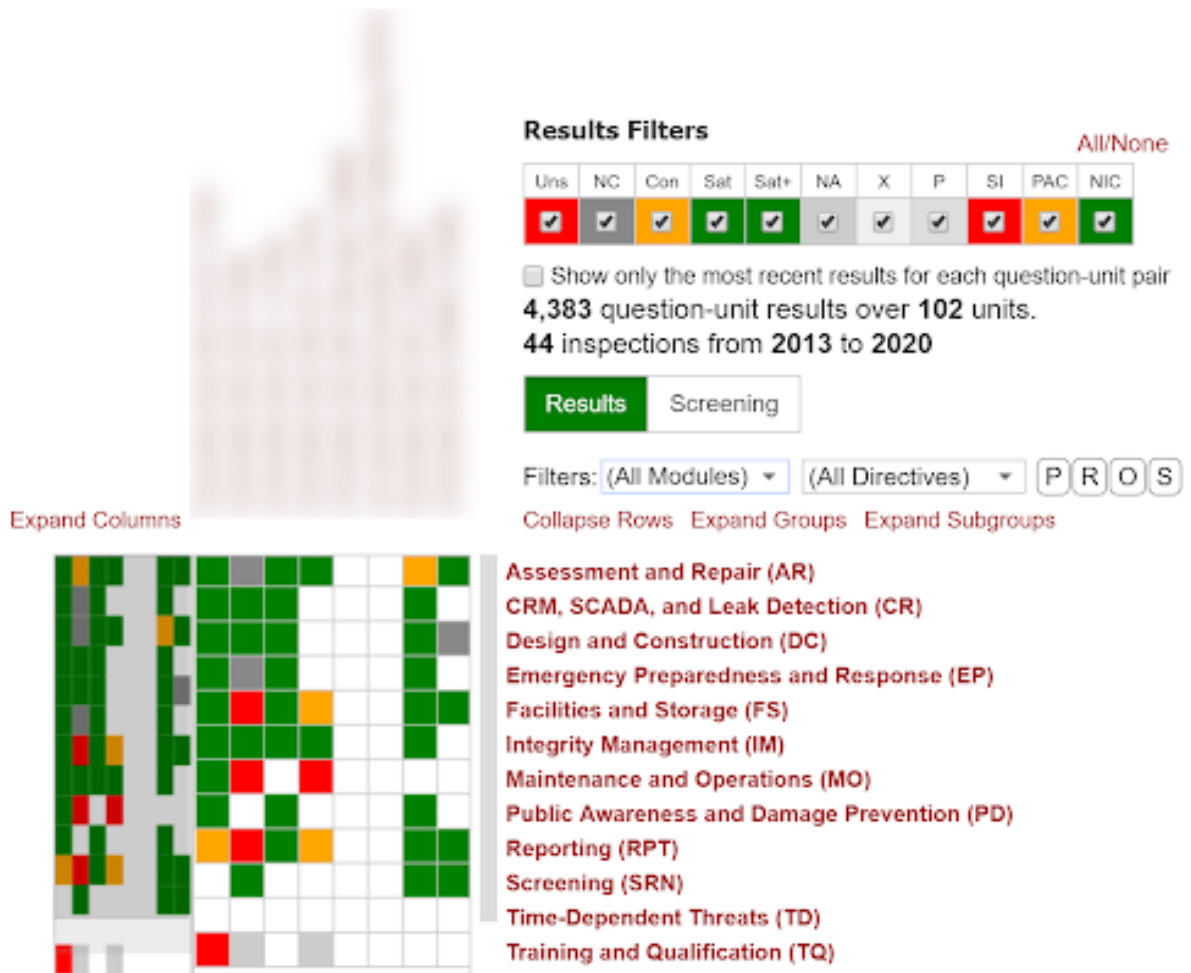
- Filter the list of results by clicking on cells (including row and column headers)



Here, we have filtered to just Concern valued results by clicking the column header.

- Reset the filter by clicking the "All" cell in the upper left of the result grid.
- Drill down into some individual level results.

- Experiment with the expand/collapse options for rows and columns. Can you make the display look like this?

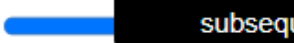


The Coverage Heatmap can also help you find specific conditions in the data that may indicate the need for additional inspection activity.

Step 11.4: Reporting – Coverage Heatmap report part 3

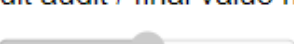
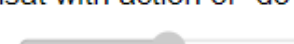
Click the “Screening” mode selector to put the display in Screening mode. This changes the display and reveals a set of target condition options.

Target Conditions

Average age of most recent result [?] ☒  50	Excluded with results [?] ☒  50
Concerns without follow-up [?] ☒  50	NCs without follow-up [?] ☒  50
Result audit / final value mismatch [?] ☒  50	Unsat with action of "do not proceed" [?] ☒  50

1. Hover over each ? marker to see what condition is being represented by each control.
2. With the checkboxes, turn off all the conditions except “Concerns without follow-up” and “NCs without follow-up”.

Target Conditions

Average age of most recent result [?] ☐  50	Excluded with results [?] ☐  50
Concerns without follow-up [?] ☒  50	NCs without follow-up [?] ☒  50
Result audit / final value mismatch [?] ☐  50	Unsat with action of "do not proceed" [?] ☐  50

The idea behind the screening condition heuristics is to find conditions that may warrant additional inspection activity. In this case, we are looking for Concern and NC results for which there has not been (as yet) a subsequent result collected for the same question and unit. These situations may warrant a follow up review on subsequent inspections. If your inspection planning process allows for targeted inspection, you may wish to use the coverage heatmap in this way to locate potential areas for review.

3. Experiment with the various screening condition filter heuristics.



Presentation: IA Reports Overview

Notes:



Lesson 12: Data Forms

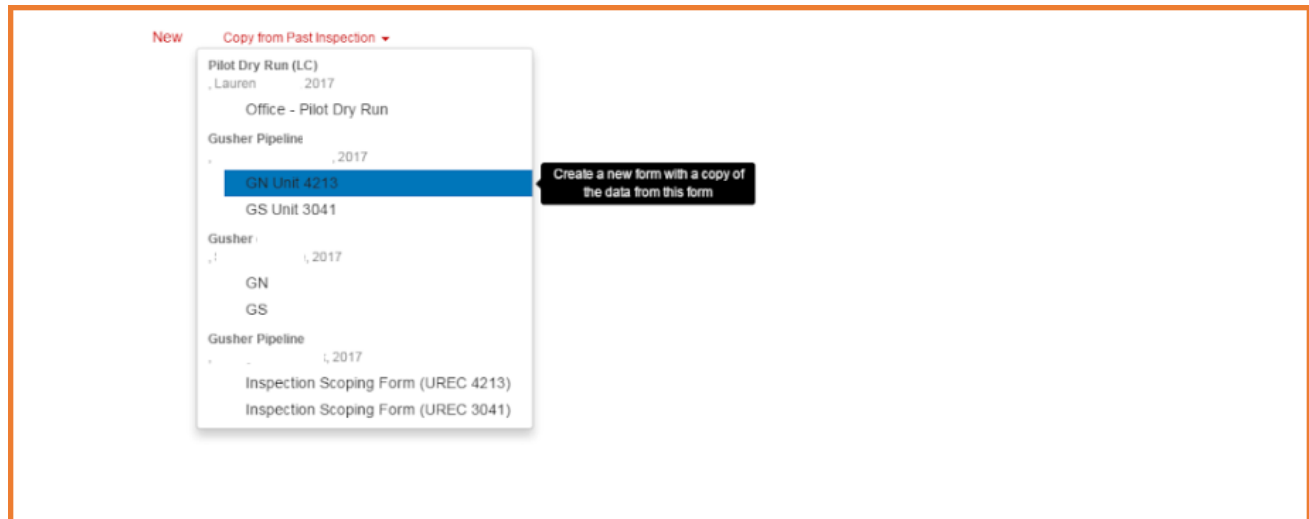
Step 12.1: Creating Data Forms

IA contains several data forms. All are housed under the “Forms” Tab.

Navigation Bar: Home, Settings, Overview, Planning, Inspection, **Forms**, Reports, Attachments, Library

- ▼ **Attendance** (0/0)
- ▼ **OPA** (0/0)
- ▼ **OPA Exercise** (0/0)
- ▼ **Breakout Tanks** (0/0)
- ▼ **Control Room Management** (0/0)
- ▼ **Construction Daily** (0/0)

Tip It is possible to copy form data both from this current inspection's forms, as well as from previous related inspections. The inspections available for recall are configured in the “relevant inspections” sections on the configuration page.



1. Create at least one instance of each form to become acquainted with the content in each.



Lesson 13: Final Challenges

You are almost done, here are a few challenges to test your knowledge of the concepts you have learned in the steps above.

1. Start from scratch
 - a. Create a new inspection
 - b. Configure it (and select a few relevant inspections)
 - c. Run the Heatmap report to gain information on areas of potential risk
 - d. Plan it (any way you want)
 - e. Get the plan approved by someone in your group
 - f. Answer two questions on desktop
 - g. Add a requested item from desktop
 - h. Add an attachment from desktop
 - i. View the heatmap report
 - j. Run the validation report
 - k. Fix any validation issues
 - l. Run the IOR

Congratulations! You've completed the objectives of this workshop. Remember that you can reach out to IA-support@dot.gov if needed.

IA Glossary

Activity (also see Implementation Activity): A tool for dividing the plan into separate, scheduled sections during which inspectors will have contact with the operator. Activities typically correspond to 'visits' to the operator.

Attachment (also known as observation): An item such as a note, OQ task, requested item, electrical reading, etc that is related to the inspection. These can be linked to particular activities, assets, forms, questions or results, and thus used as evidence for unsatisfactory results. (referred to as "attachments" in IA Desktop and "observations" in IA Mobile)

Asset: A "container" for one or more units to be investigated during the inspection.

Directive: A predefined set of questions that assist the inspector in consistently evaluating specific compliance topics.

Implementation Activity (also see Activity): A tool for dividing the plan into separate, scheduled sections during which inspectors will have contact with the operator.

Inspection Assistant (IA): The PHMSA Data System used for reviewing trends from past inspections, planning an inspection, and conducting an inspection. Users primarily interact with this system via two 'client' applications: IA Desktop (IAD) and IA Mobile (IAM).

Multi unit asset (MUA): An asset that contains multiple units (as opposed to a single unit asset). MUAs are typically used for planning procedure (P) and records (R) questions that will apply to multiple units. Setting up a MUA for these sorts of questions can make planning and assigning results easier, and generally ensure that appropriate 'coverage' is assigned for questions asked.

Observation (also known as attachment): An item such as a note, OQ task, requested item, electrical reading, etc that is related to the inspection. These can be linked to particular activities, assets, forms, questions or results, and thus used as evidence for unsatisfactory results. (referred to as "attachments" in IA Desktop and "observations" in IA Mobile)

Observation questions: Questions that involve the observation of operator personnel performing various tasks and/or observing various locations of the pipeline and associated facilities.

Operator: The operator of the pipeline unit(s) to be investigated. Each inspection in IA has a 'primary operator' and may also have one or more secondary operators when the assets under review are held under multiple operator IDs.

Plan: A selection of question content that will be used to conduct the inspection.

Procedure questions: Questions that involve process oriented reviews such as programmatic and/or procedural requirements.

Records questions: Questions that specify the review of operator records, regardless of where the records may be maintained.

Single unit asset: An asset that only contains a single unit (as opposed to a multi unit asset). In general this is the preferred way of collecting results.

SMART: SMART activities were once linked to IA inspections and implementation activities and used by PHMSA to track time/resources. This internal PHMSA system has been replaced by WMS which interoperates with the IA System directly, reducing the need for manual linkage.

Unit: A segment of a pipeline system (or in some cases, if the system is small, an entire pipeline system).

WMS (Work Management System): WMS activities are linked to federal inspection activities and used by PHMSA to track time/resources

Please, help us improve this workshop.

Please jot down responses to the following questions and hand to your instructor.

1. What topic areas do you feel you are strongest on now?
2. What is the most important/useful thing you learned today?
3. What areas did we miss or should have spent more time on?
4. Generally, what should we do differently next time?