Searching and Reporting

Octave OnSite Completions



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Contents

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These steps are for general searching, browsing or reporting, any user can follow these steps.

Jump to a topic by clicking the link:

- Searching Octave OnSite Completions
  - Search Tips
  - Search by Column Headings
  - Save Search
  - Browse Octave OnSite Completions
- Reports:
  - Reporting flow
  - Reports
  - User Dashboard

Click 🏠 from any page to return to the contents page.

Searching Octave OnSite Completions

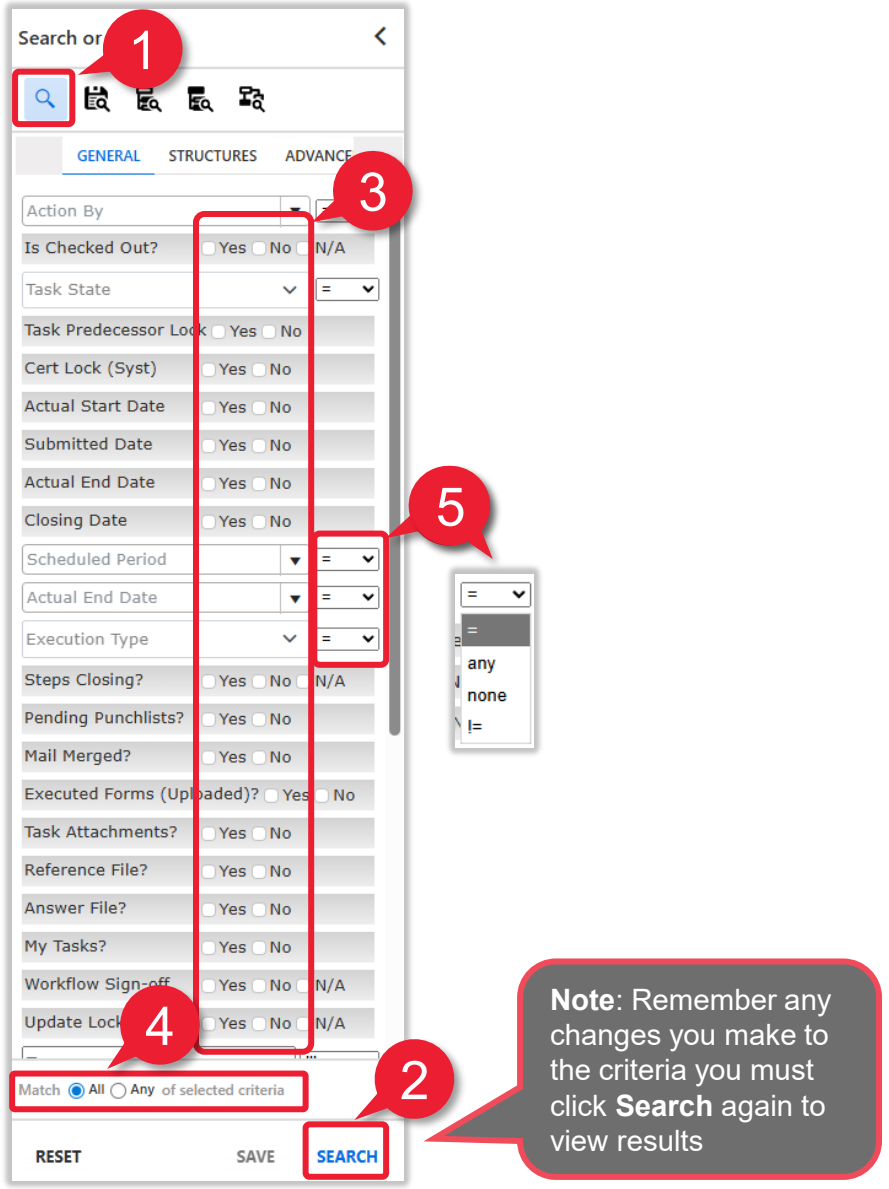
To search Octave OnSite Completions, you first need to select the module you need. Searching any module works the same way but with some different fields, for this example **Task Manager (Master List)** is used:

Access the module you wish to search using the navigation bar on the left, then a module button. Modules will not show any records until a search is performed.

1. On the search panel ensure the search icon is selected (it is the default)
2. Click **Search** to show a list of all records within the chosen module
3. Make any further selections you require in the search panel, you will need to click **Search** again to update results
4. If you have selected multiple filters at step 3, pay attention to the **Match** radio buttons, by default it will match **ALL** selected filters
5. Use the dropdown to change between making the applicable field
   - **=** equal to - search for an exact match
   - **any** – search for any of the selected choices
   - **none** – search for anything except the selected choices
   - **!=** not equal to – search for anything except

   This selection applies only to the applicable field.

For tips and tricks for common searches see the Search Tips page.



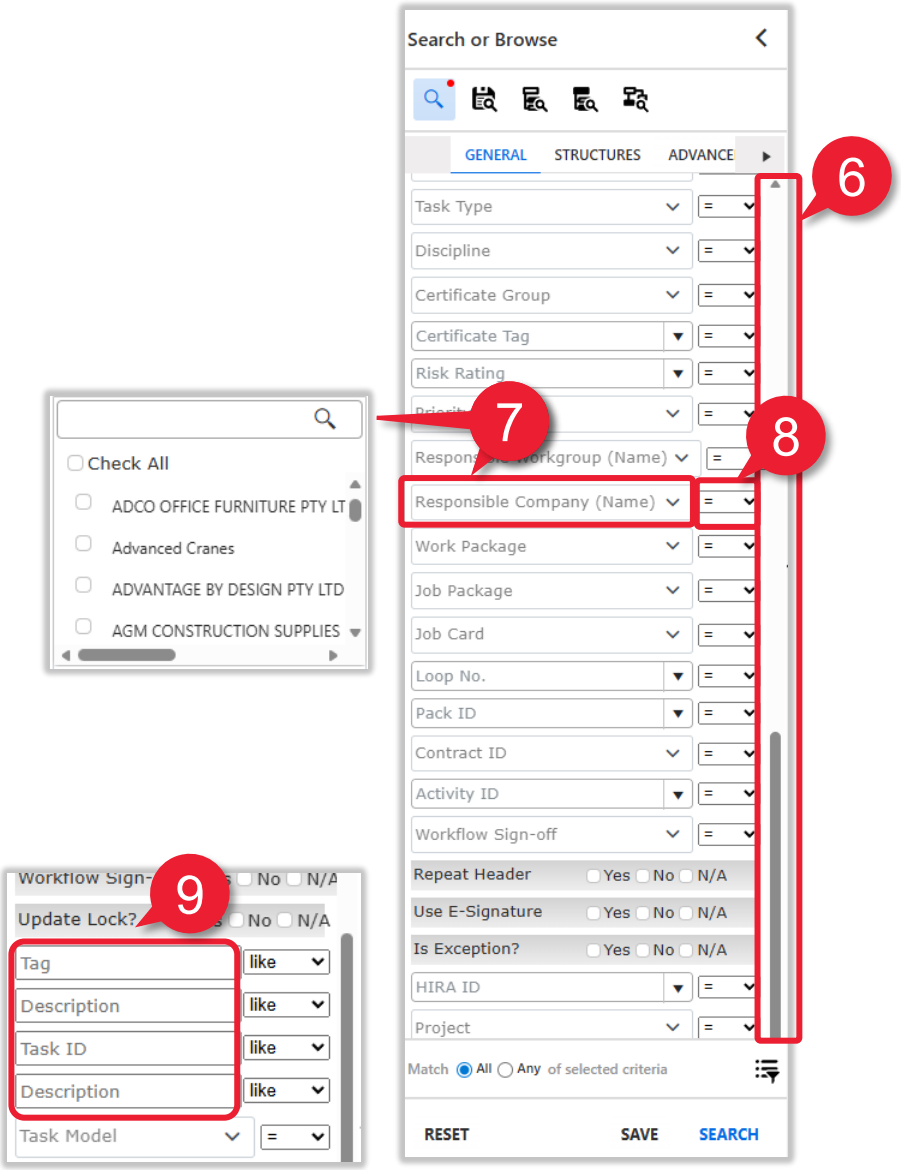
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Searching Octave OnSite Completions (continued)

For a specific search you can select key items from the relevant drop-down lists, like **Responsible Company**, **Scheduled Period** or **Discipline**. The example below shows Responsible Company.

6. Scroll down to access more search fields
7. From the **Responsible Company (Name)** field, click the dropdown and select company name – you can select more than one company
8. Select the appropriate search option to confirm if it should search for:
   - **=** equal to - search for an exact match
   - **any** – search for any of the selected choices
   - **none** – search for anything except the selected choices
   - **!=** not equal to – search for anything except
9. There are also some free text search fields like Tag, Description, or Task ID

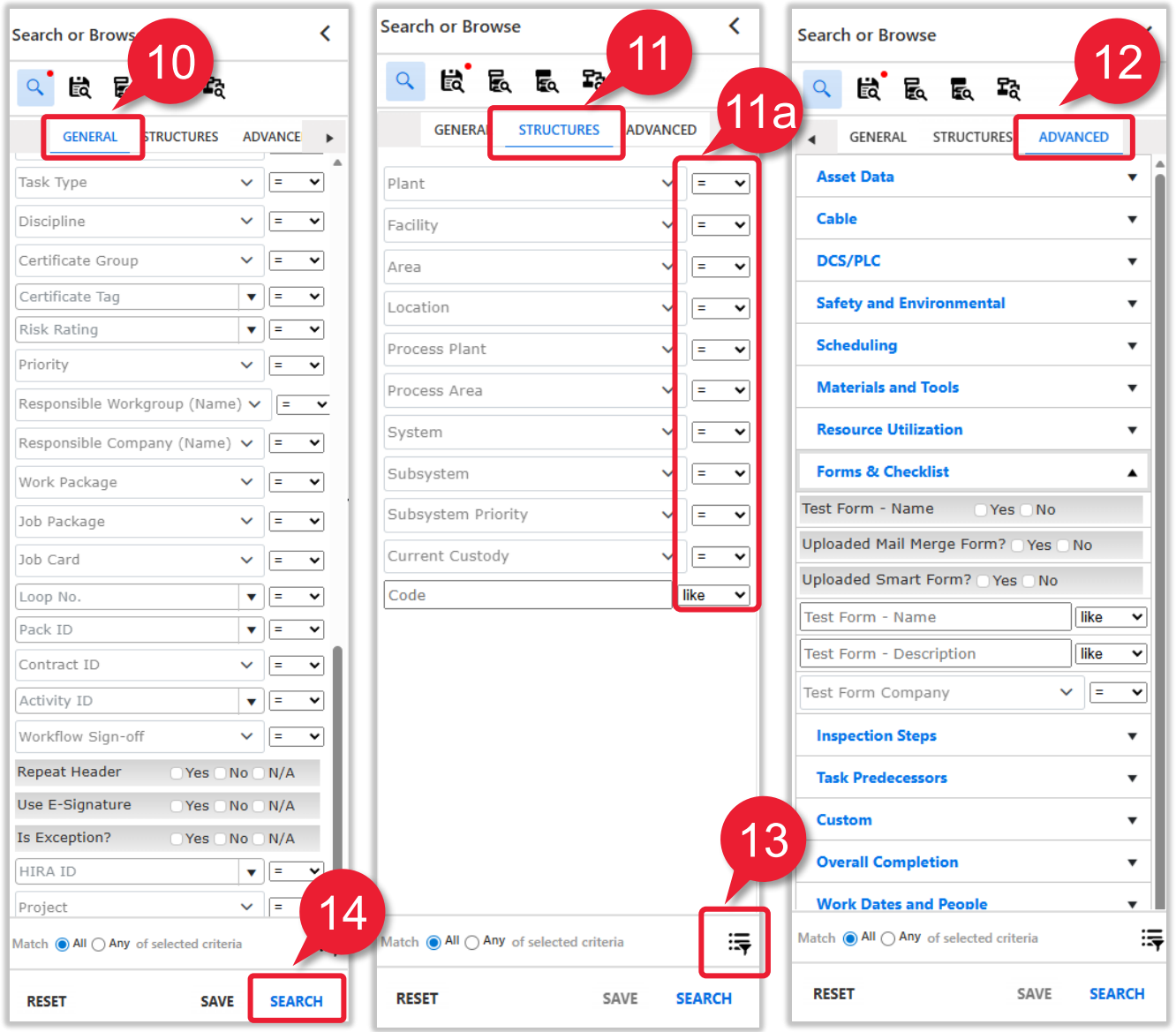
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Searching Octave OnSite Completions (continued)

You can also use the top menu Search tabs to access to more search criteria:

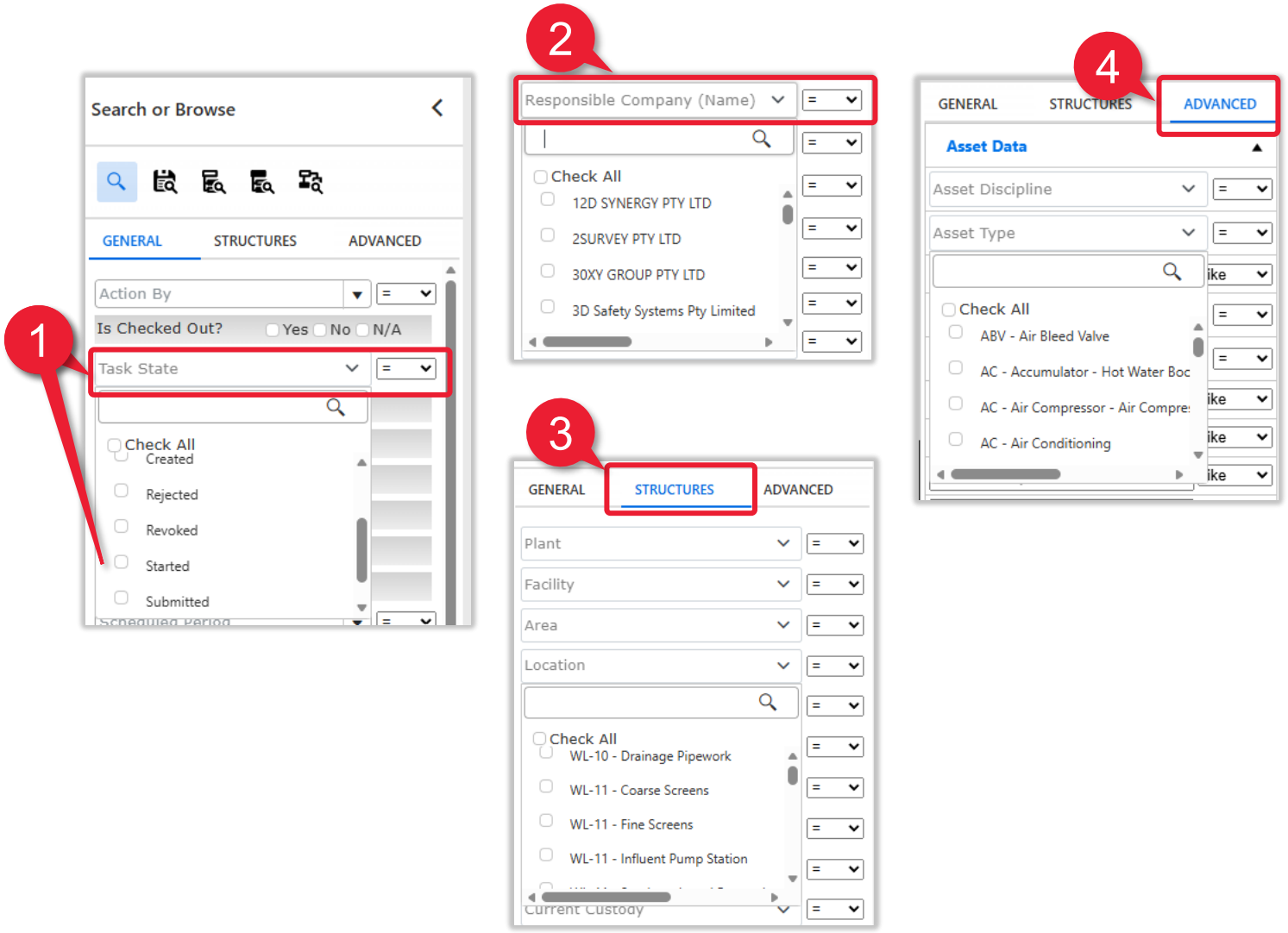
10. **General** is the default tab
11. **Structures** tab enables quick access to filtering by physical location and process breakdown (systemisation)
    a) Remember to select your search option if you add filters under structures
12. **Advanced** tab allows for specific and detailed filtering within grouped dropdowns
13. You can review the current search criteria by clicking the filter icon at anytime to view the active search criteria
14. Once you've selected all required options click **Search** to show results



Search Tips

For common searches there are a few settings to be aware of:

1. **Task State: Started**, using the search option **Any** will result in almost every task, and **None** will result no results - because all tasks have a state.
2. **Responsible Company**: you can select one or many, selecting many will search for any of the chosen options
3. If you want to search by **location** or **systemization,** navigate to the **Structures** tab. Any selections made under the General or Advanced tabs will also be included when you click **Search**
4. **Asset Types** are under the **Advanced** tab, dropdown **Asset Data**. Any selections made under the General or Structures tabs will also be included when you click **Search**

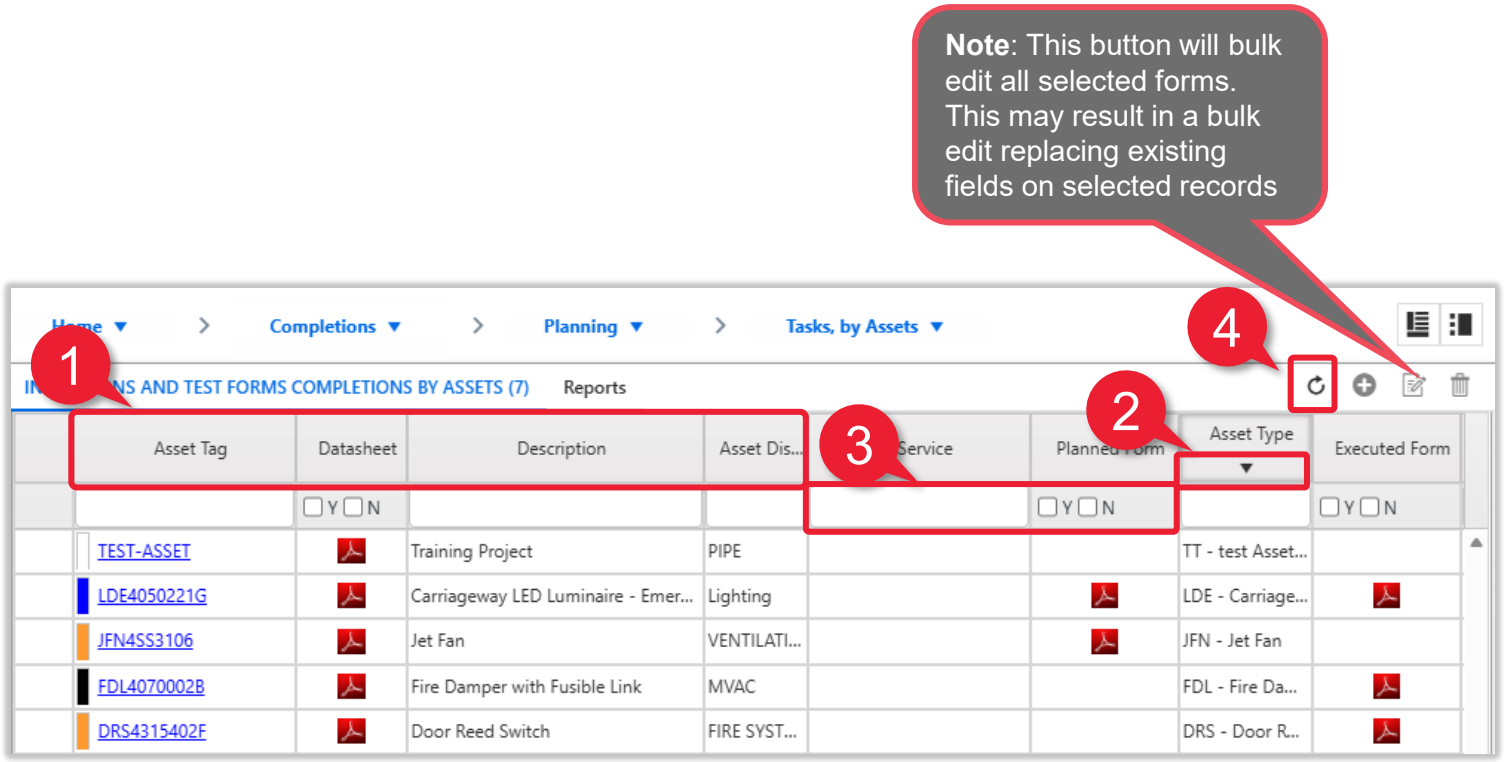


Search by Column Headings

Once you have some items displayed in the Primary Panel, you can further filter, organise or search using the column headings.

1. Click anywhere on the column heading to activate search and filters
2. This arrow will appear on the selected column, click to reorder the list in ascending or descending order by the selected column
3. Type into an open field or make a section to add a filter to the results in the primary panel, results are displayed immediately
4. Click the circle arrow to clear column filters and reset the search

You can add multiple column filters and searches at a time if required



Save Search

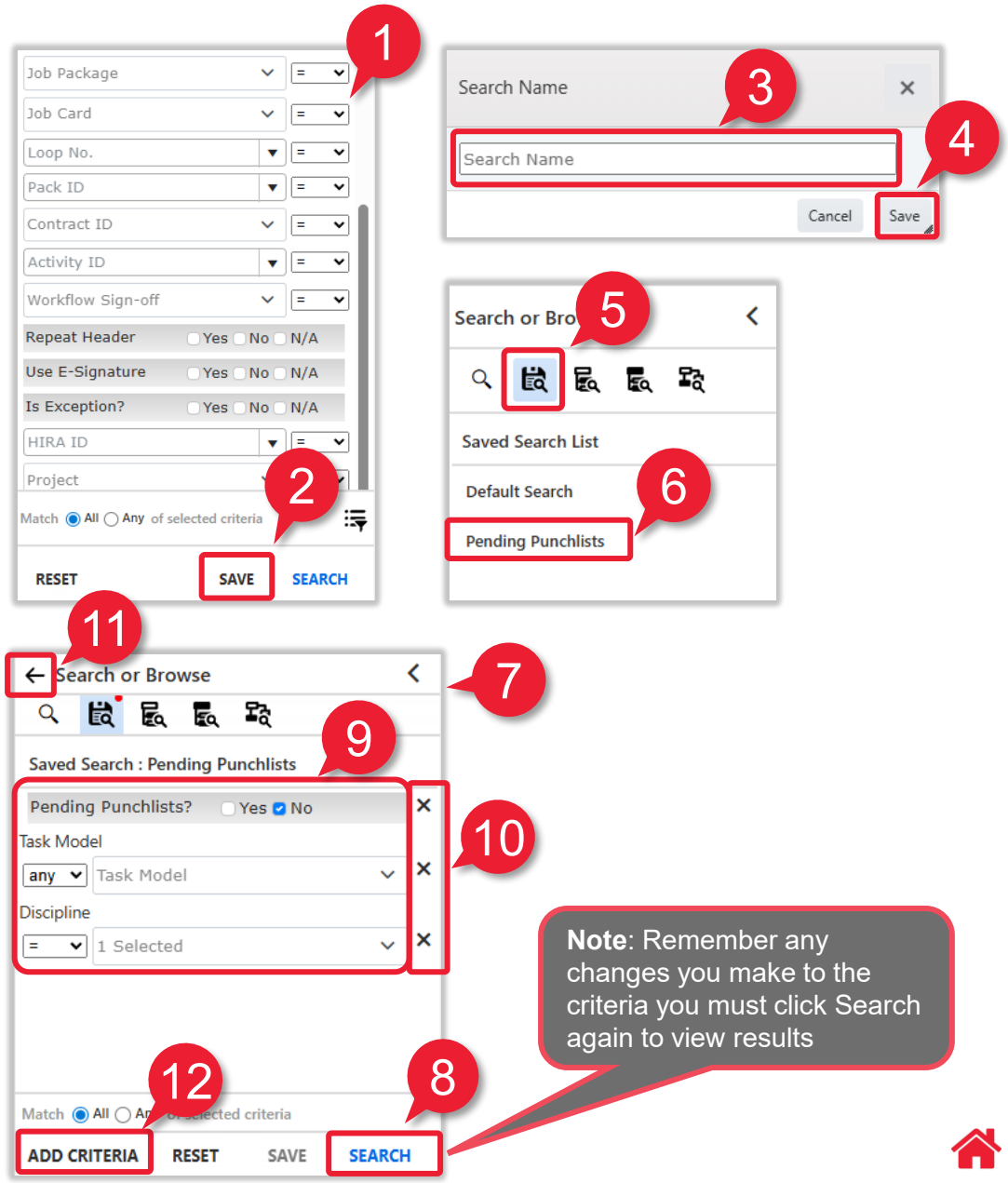
In each module you can Save Searches that you will frequently perform

Save a new search:

1. In the module required, make all the selections for the search
2. Click **Save,** a pop up will appear
3. Type a name for the search
4. Click **Save**

Use existing saved search

5. Saved Searches can be found by clicking the saved searches icon at the top of the search panel
6. Click on the saved search you want to use
7. A search edit screen will open showing the saved search criteria
8. Click **Search** to activate the saved search
9. You can edit any of the saved search criteria by clicking into the fields
10. Click **X** to remove any criteria
11. Click the arrow to go back, this retains the search criteria
12. Click **Add Criteria** to see the general search tab and select additional criteria as from step 1 finishing by clicking **Save** again

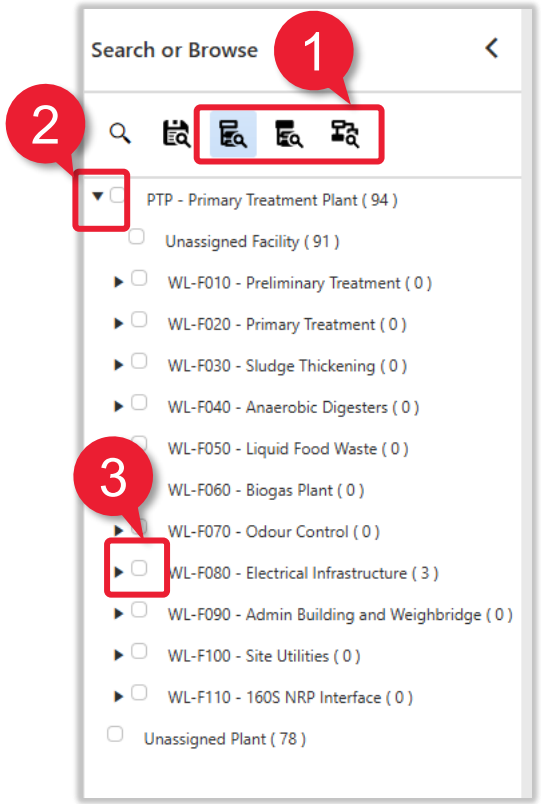


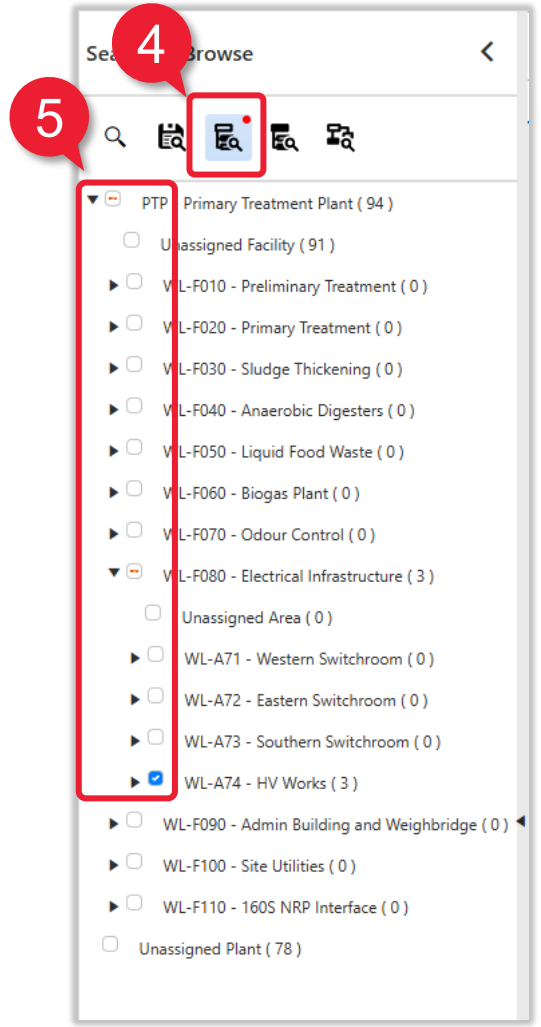
Browse Octave OnSite Completions

Browsing is an additional option in the search panel.

Browsing works differently to searching - as soon as you start browsing, any active search will be cleared and the browse activates automatically.

1. These three icons are **Browse** options, all behave in the same way, in order from left to right:
   - Browse by Location
   - Browse by Systemization
   - Browse by WBS (Work Breakdown Structure)
2. Click the **arrow** to open and drill down on the browse options
3. To select an option to browse mark the checkbox, you can select many options, the browse will update with each selection you make
4. Once a browse is activated, a red dot on the icon will indicate which browse or search option is currently displayed
5. Selected options show a blue checkbox, with red marks on the parent options.





Note: to return to a search after browsing you must click the search icon and click **Search** again

Reports

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Reporting flow

The first consideration for reports, is what module you are reporting from and what search filters are active. If you want to report on every task in a module leave the search blank. Step by Step instructions are contained in the pages that follow.

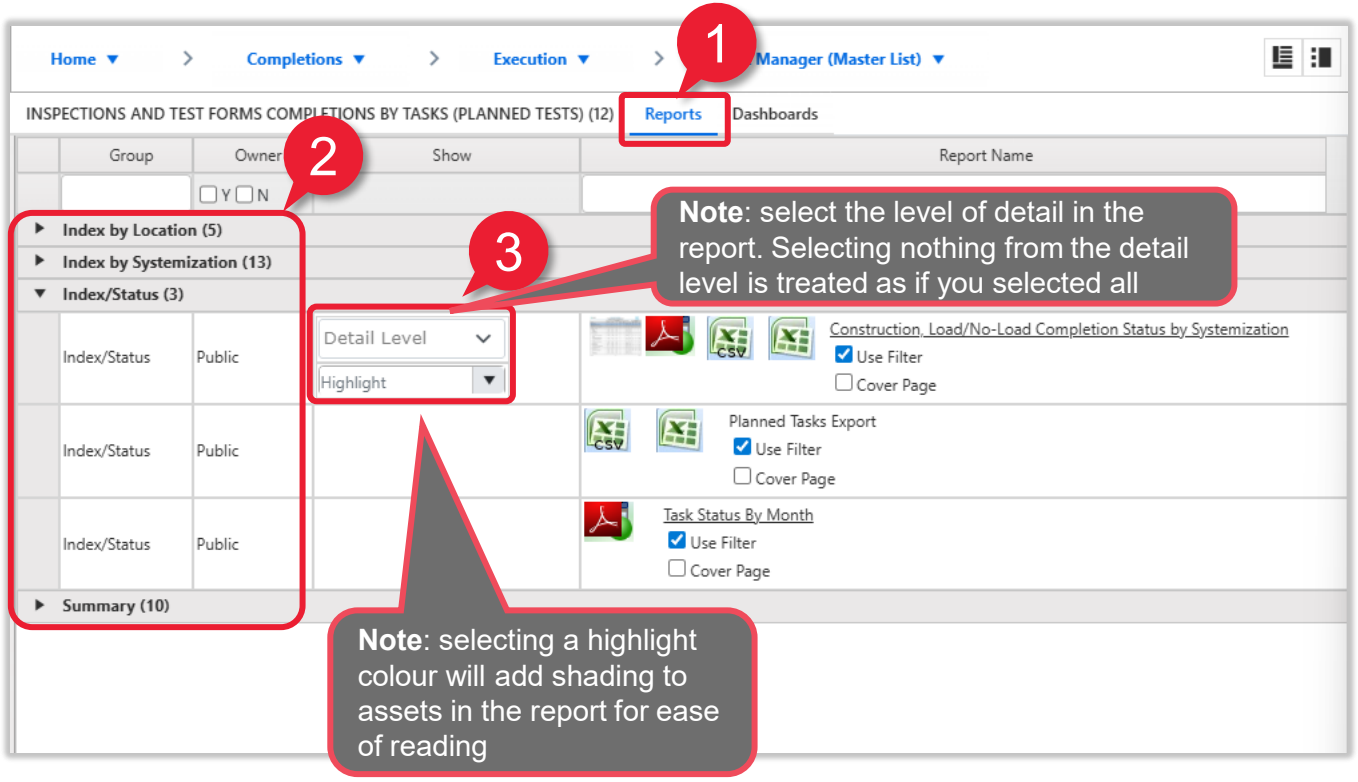


Reports

If you need specific data for a report, first complete a search on your required data (see steps from page 3). You can then proceed to the Reports tab:

1. Click **Reports** tab
2. Options are grouped for how the report is indexed/categorised, including
   - **By Location** first then more detail
   - **By Systemization** first then more detail
   - **Index/Status** no grouping applied, is best used for reporting needed to track individual tasks
   - **Summary** is best used for overall progress reports where drilling down to individual tasks is not required

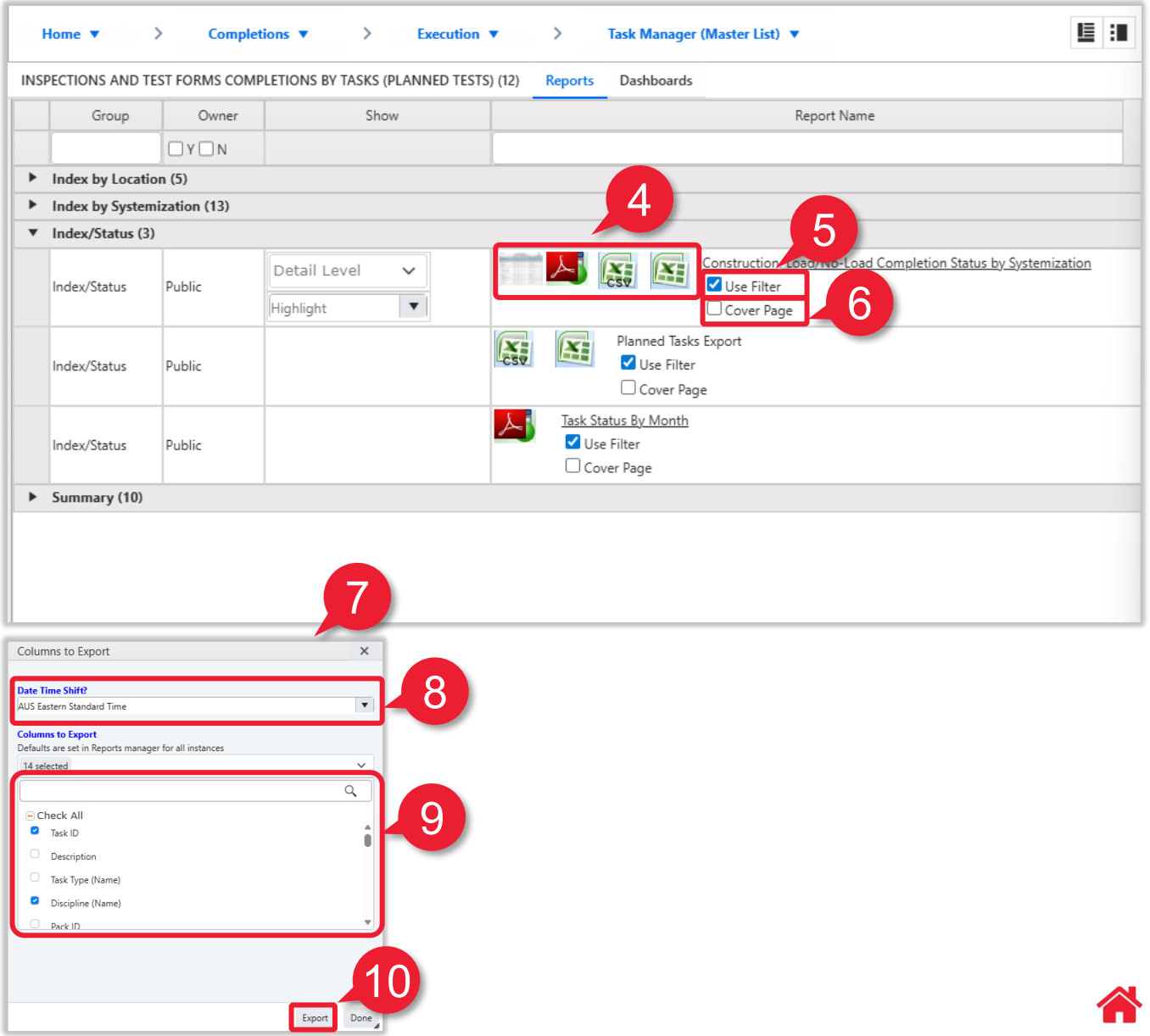
   Click the arrow to see all options for your selection
3. Select the **Detail level** and **Highlight** colour



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Reports (continued)

4. Click an icon for the format of the report you want, from left to right:
   - An Image
   - A PDF
   - A CSV
   - An Excel spreadsheet
5. **Use Filter** is selected by default, this checkbox applies your current search filters to the report
6. Check **Cover Page** if you want to add a cover page to your report
7. If you select **CSV** or **Excel** at step 4 this popup will appear
8. The **Date Time Shift** defaults to GMT, change this to your preferred location ie: **AUS EST**
9. Select the columns for your report, the options will change based on the report type you have selected
10. Click **Export**



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Reports (continued)

11. A **CSV** or **Excel** will download to your downloads folder, open and save the document to your preferred location. An Image or PDF report will open in your browser

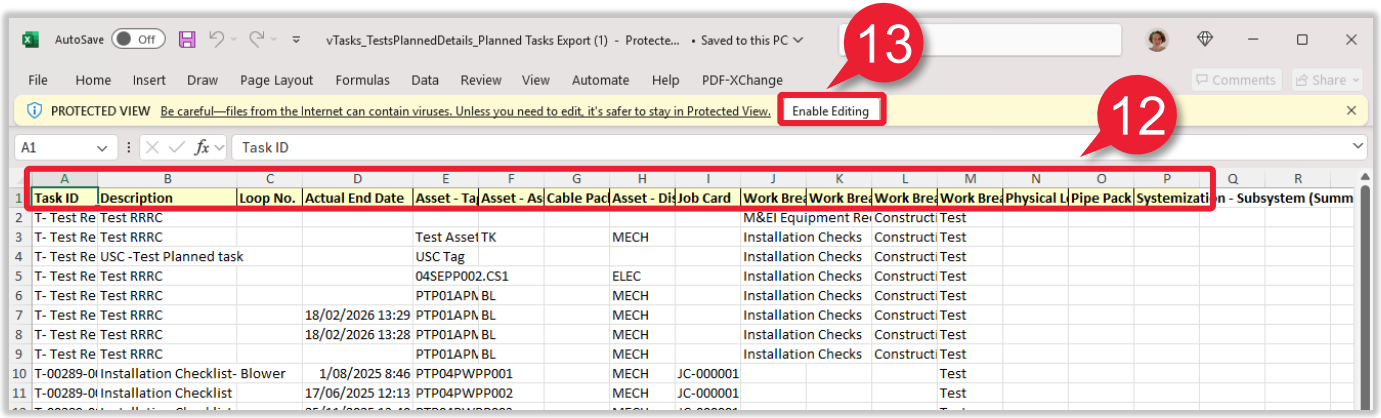
Here is an example report based on Index/Status: **Planned Tasks Export** with default columns selected:

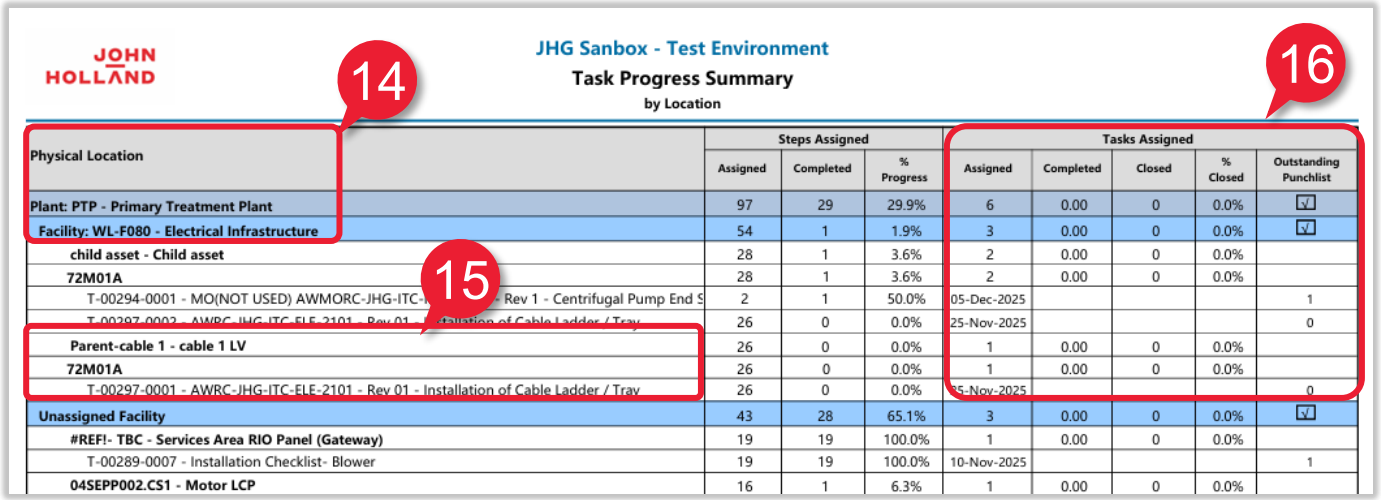
12. These are the default columns pulled into this report, if you need to add columns make additional selections at Step 9
13. Click **Enable Editing** and ensure you save your report as per step 11.

Here is an example report based on - indexed by Location: **Task Progress Status by Location,** with all detail levels selected:

14. Indexed by Location, task locations display to the level of detail selected
15. Under location is individual assets and tasks
16. Specific details of an individual task are shown here, this information is rolled up to total counts for assets and locations







User Dashboards

Dashboards are preconfigured reports with graphics and can be accessed by anyone.

The data displayed is dependent upon your permissions.

1. Click the **Dashboard icon** on the header bar
2. Click **User Dashboard** - the dashboard module will open in a new tab
3. Change between the different dashboards by clicking the grey tabs
4. Filter and customise the data displayed by adjusting the options under each graphic

