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Complete Tasks & Punchlists

Hexagon Smart Completions

Quick Reference Guide



July 2026

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Contents

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This guide covers steps for laptop use. If you're using a tablet, see the [Tablet Guide](#).

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Job Card Module

Job Cards are a way for tasks and punchlists to be bundled together for action by specific trades, companies or workers at specific times. Job cards can make accessing your tasks easier. Job cards are optional.

If you are given a Job Card number, you can use this to search and filter tasks from **Task Manager** module as well.

To access tasks from the Job Cards module, once you've logged in:

1. Select the project using the project selector
2. Click **Completions**
3. Click **Job Cards**
4. Search or browse as required, click **Search** with no selections to see all job cards that your permissions allow
5. Select the relevant Job Card for tasks to appear in the secondary window
6. Click the **Task Number** for each item you need to work on

Progress to [Action & Complete a Task](#).

The screenshot shows the 'SWITCHBOARD' interface with a sidebar on the left containing various modules. The 'Completions' module is highlighted in the sidebar. The main area displays a grid of task categories, with 'Job Cards' highlighted. Below this, the 'Job Cards Manager' window is open, showing a search and browse section on the left and a table of job cards on the right. The table lists job cards with their status, descriptions, and task numbers. The 'Task Number' column is highlighted, and the 'SEARCH' button is visible at the bottom.

Status	Job Card...	Job Description	Work Category	Card	Work Type	Job Pack...	# Isolations	# Perm...
	JC-000006	Fire System Group- Physical Locati...		☐ Y ☐ N			0	0
	JC-000004	Electrical Installation	L2 - JHG - CLIE...	☐ Y ☐ N			0	0
	JC-000007	Fire system- Company X	L2 - JHG - CLIE...	☐ Y ☐ N			0	0

Task Status	Actions	Task ID	Description	Is Exce...	Execution ...	Discipline	Task Ty
Created	Check Out	T-02726-0001	Potable Water Hydrotest	☐ Y ☐ N			
Started	Check Out	T-02726-0002	Potable Water Hydrotest	☐ Y ☐ N			
Created	Check Out	T-02726-0003	Potable Water Hydrotest	☐ Y ☐ N			



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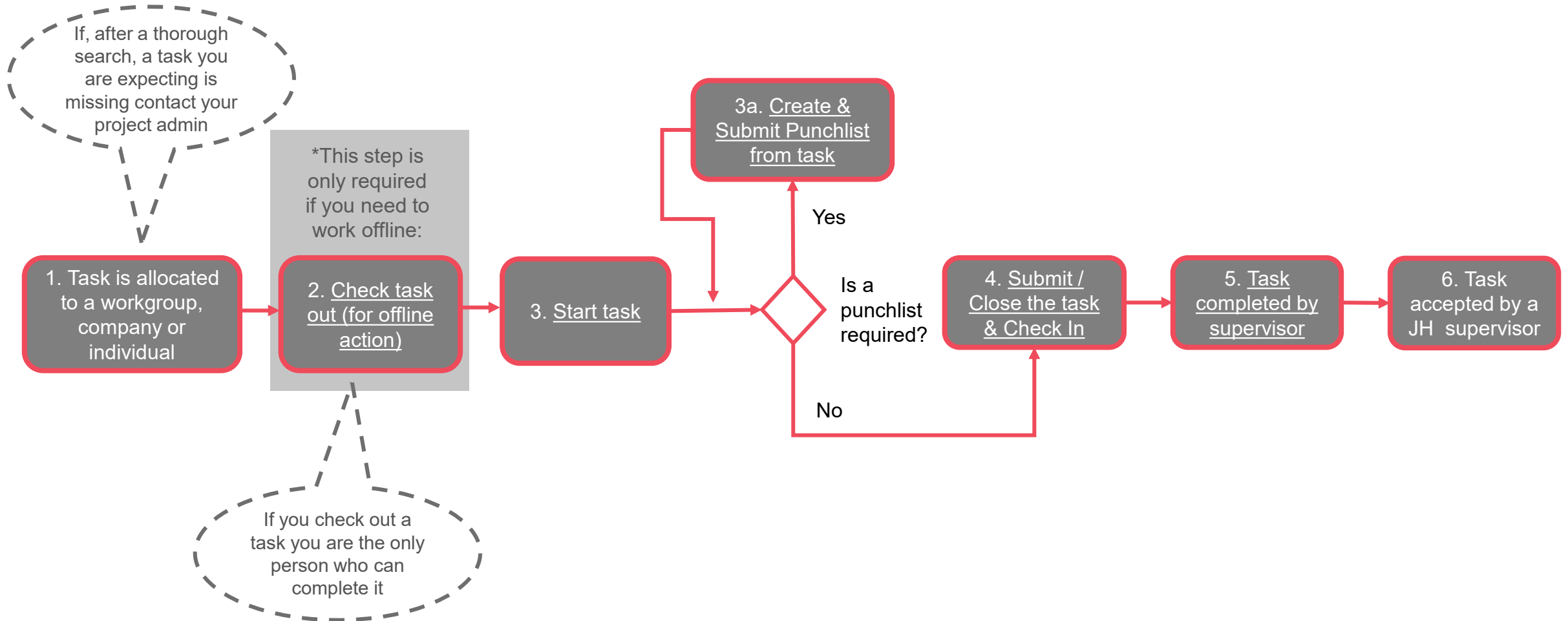
Task (ITR): Action and Complete

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Process Flow Tasks (ITR) and Punchlist

The diagram below shows a high-level overview of the steps involved in completing a digital task or punchlist. Contact your Project Administrator for any project specific information.

Step by Step instructions are contained in the pages that follow.



Find & Check Out a Task

Detailed instructions for searching and browsing can be found in the [Search & Reporting](#) guide. This is a quick reminder of one option, however tasks can be searched from many modules such as **Job Cards**. Once you've logged in:

1. Select the project using the project selector
2. Click **Completions**
3. Click **Task Manager (Master List)**, this will allow a search of all tasks
4. Search or browse as required, click **Search** with no selections to see all tasks
5. Refine search results by clicking and typing into the column header filters if needed

Optional: If you need to complete a task offline or need to ensure no one else can edit a task while you are working, you will need to check the task out as per step 6 below. If you are just going to action right away proceed to [Complete a Task](#).

6. Click **Checkout** for each item you need to check out

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The screenshot shows the SWITCHBOARD interface. At the top right, a project selector is set to 'JHG - Training Project' (labeled 1). On the left sidebar, the 'Completions' menu item is highlighted (labeled 2). In the main area, the 'Task Manager (Master List)' tile is selected (labeled 3). A note states: 'Note: Checking out a task locks it to you for completion and allows downloading on the app to work offline.' Below this, the 'Inspections and Test Forms Completions By Tasks (Planned Tests) Manager' screen is shown. It features a search bar and various filters on the left (labeled 4). The main table lists tasks with columns for Task Status, Task ID, Description, Is Executed, Execution Date, Discipline, Task Type, Planned Form, Executed Form, Punchlists, and Jobs. The 'Check Out' button is highlighted for a task (labeled 6). A note states: 'Note: This checkout is for assigning to a different person or group.' At the bottom, the 'SEARCH' button is highlighted (labeled 5).

Task Status	Task ID	Description	Is Executed	Execution Date	Discipline	Task Type	Planned Form	Executed Form	Punchlists	Jobs
Closed	T-02692-0002	Damper & Grille Installation	☐		Digital Exec...	MECH				
Completed	T-02692-0001	Light Fitting & Bracket Installat...	☐		Digital Exec...	Lighting				
Started	T-02692-0001	Jet Fan Installation	☐		Paper Form	VENTILATION	Installation			IC-000
Submitted	T-02692-0001	Door Switches DRS-EDS-RDS	☐		Digital Exec...	FIRE SYSTEM				
Started	T-02692-0002	Door Switches DRS-EDS-RDS	☐		Digital Exec...	FIRE SYSTEM	Inspection Test Record			
Created	T-02713-0001	Cable Pull Sheet	☐		Digital Exec...	CABL	Inspection Test Record			
Started	T-02714-0001	Lighting Circuit	☐		Digital Exec...	Electrical	Inspection Test Record			



Action & Complete a Task

Once you have found the task (see steps on prior page):

1. Select a task by clicking the **Task ID**, this will open a pop up
2. To see asset details, click the **Asset ID** to open the linked asset
3. To view the asset datasheet, click **View Datasheet**
4. If this is the first time you are starting a task, click either of the below (if you've started a task before, skip to step 5:
 - a) **Start Task** - indicates on reports that work has begun, or;
 - b) The **PDF icon** (under Planned Form) - if you only want to view the steps and not begin work
5. Starting a task will open a new **Completions Tab**
6. Task and asset information is displayed in the header and the top right of the inspection test record (ITR)
7. This tab contains the form and checks that need to be completed, scroll down to view everything
8. Click **Save** or **Exit** at any time to save where you're up to and close the task, this will not finalise the task

Continued on next page...

Note: If you've accessed a module other than the **Task Manager (Master List)**, your screen may look different. Clicking on a **Task ID** will always open a task.

Note: Cancel Task will finalise a task without it being completed. Only an Administrator can reset if this is done in error.



Action & Complete a Task (continued)

9. Complete the required information - every Inspection Test Record (ITR task) might look different as every asset type and test requires different information to be recorded. Below shows steps to complete some of the fields you might see:

- a) Click **OK** or **N/A** against a line item and the system will automatically record the date, time and user stamp on the right. Note: Clicking **Reject** or **No** can trigger a [punchlist creation](#)
- b) There could be reference information included in the ITR Task
- c) These fields can be typed into, or use the up/down arrows
- d) Click **N/A** at any point and record a comment explaining the N/A
- e) Use the **Search** function to fill details
- f) Click **Choose File** to select and insert an image where required
- g) Free text can be added in **Comments and Observations** field, if a task is ever rejected the reason is recorded here

The screenshot displays a multi-section form for an Inspection Test Record (ITR) task. Annotations a through g highlight specific features:

- a:** Points to the 'INSPECTION' table with columns for OK, Reject, N/A, Initials / Date, and PL. The 'OK' column has a selected radio button for item 1.1.
- b:** Points to the 'Reference Info' section, which includes instructions on how to transfer defects and classify them (A: Safety critical, B: Significant, C: Minor).
- c:** Points to the 'Primary Winding Resistance Test' section, specifically the 'A - B' table with input fields for Amps and mΩ.
- d:** Points to the 'Result' table, where the 'N/A' option is selected for item 17.
- e:** Points to the 'Search' function in the 'Record Test Equipment' section.
- f:** Points to the 'Choose File' button in the 'Image' section.
- g:** Points to the 'Comments and Observations' field at the bottom of the form.

Note: Clicking Reject or No can trigger Punchlist creation from task.

Note: please contact your project admin if you require test equipment to be added to the register.

Item No.	Step Action	OK	Reject	N/A	Initials / Date	PL
1.1	Confirm nameplate / equipment type details are correct as per latest revision of pre-IFC / IFC Drawings.	☒	☐	☐	TP / 20-Apr-2026	☐
1.2	Confirm all equipment tag numbers are correct as per the latest IFC/ Pre-IFC approved drawings.	☐	☐	☐		
1.3	Confirm equipment has been correctly located as per latest general arrangement pre-IFC / IFC Drawings.	☐	☐	☒	TP / 20-Apr-2026	☐

Item No.	Step Action	Result	Initials / Date	PL
17	Primary - Ground	☒	TP / 20-Apr-2026	☐
17.1	Discharged	☒	TP / 20-Apr-2026	☐
17.2	Pass	☒	TP / 20-Apr-2026	☐

Item No.	Search	Equipment	Make	Model	Serial No.	Calibration Expiry	N/A
		TNK	153w5d	23			☐

Item No.	Step Action	Image	N/A	Initials / Date
	Installation Photograph Choose File No file chosen		☐	TP / 15-Apr-2026

Comments and Observations

Comment

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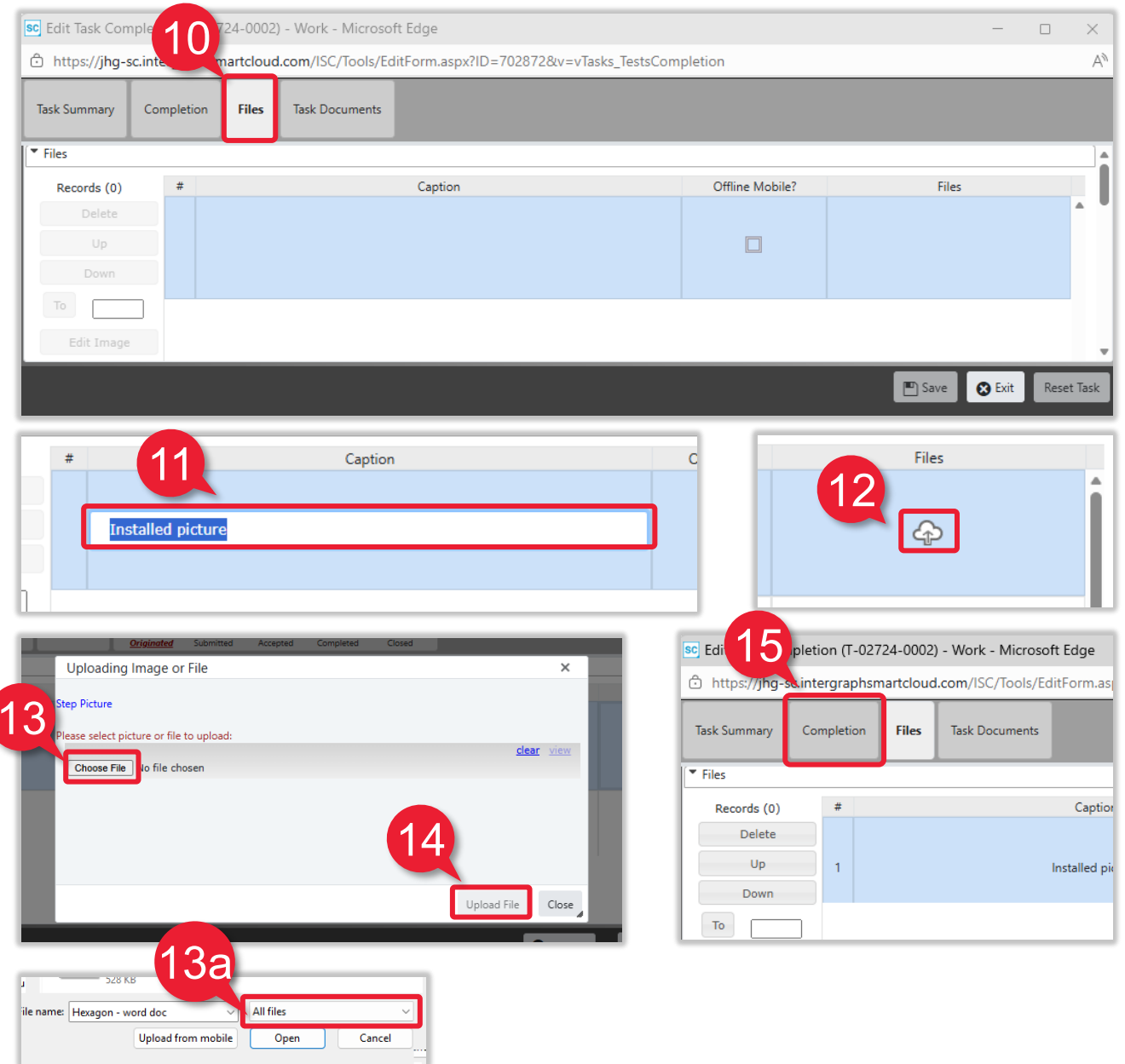
Add Files to a Task

If you want to add additional files or include pictures beyond what is required in the form, you can follow the steps below, otherwise skip the [Submit a Task](#).

Any file type can be uploaded this way: Excel, PDFs, videos, images etc

10. Click the **Files** tab at the top of the form
11. Click into the **Caption** field and type a caption for the file or image
12. Click the **Cloud Icon**, a pop up will open
13. Click **Choose File** and use file selector to select a file
 - a) You may need to ensure you've selected **all Files** to upload your file
14. Click **Upload File**
15. Navigate back to the **Completions** tab to continue

Continued on next page...



Submit a Task

Once all fields on an ITR Task are completed and you are ready to finalise the task.

16. Click **Submit** at the bottom of the form
 - a) If anything is incomplete, an alert will appear, click **OK** - all outstanding items will display in red for you to complete
17. After clicking Submit it may take a few seconds to process. Once it has processed, **Submit** will change to **Edit** – the task will now go to the next person in the workflow for completion
18. Click **Exit** or close the window

If the task was **Checked Out**, it will be automatically checked in when you click Submit.

The task will have a **Submitted** status and go to the next person in the workflow for completion. Note: Task status may be different if there is an outstanding punchlist item.

The screenshot shows a web form titled 'Completed' with the text 'The items above have been inspected and are in accordance with drawing and specifications'. The form is divided into three columns: 'Completed By (Contractor)', 'Reviewed By (Contractor Supervisor/QA)', and 'Approved by JHG'. Each column has fields for Name, Title, Company, and Date. At the bottom of the form, there are three buttons: 'Submit' (green), 'Complete' (blue), and 'Close' (grey). The 'Submit' button is highlighted with a red box and a red circle containing the number 16. Below the form, there is a dark grey bar with four buttons: 'Save' (with a floppy disk icon), 'Exit' (with a red X icon), 'Check In', and 'Reset Task'.

The screenshot shows an 'Alert' dialog box with the text 'You must answer all required steps before completing the task.' At the bottom right of the dialog box, there is a blue button with the text 'OK'. A red circle containing the number 16a is positioned next to the 'OK' button.

The screenshot shows a web browser window titled 'Edit Task Completion (T-02692-0002) - Work - Microsoft Edge'. The address bar shows the URL 'https://jhg-sc.intergraphsmarcloud.com/ISC/Tools/EditForm.aspx?ID=702329&v=vTasks_TestsCompletion'. The browser window has a tab labeled 'Task Summary' and a 'Completion' tab. The form is titled 'Completed' and has the text 'I hereby confirm the work has been completed in accordance with contract specified drawings, specifications & standards.' The form is divided into three columns: 'Performed By Contractor', 'Review By Supervisor / Lead Engineer', and 'Accepted By'. Each column has fields for Name, Title, Company, and Date. At the bottom of the form, there are three buttons: 'Edit' (green), 'Complete' (blue), and 'Close' (grey). The 'Edit' button is highlighted with a red box and a red circle containing the number 17. At the bottom of the browser window, there is a dark grey bar with four buttons: 'Save' (with a floppy disk icon), 'Exit' (with a red X icon), 'Reset Task', and a 'Close' button (with a red X icon). The 'Exit' button is highlighted with a red box and a red circle containing the number 18.



Action a Rejected Task

If a task was rejected by the supervisor, (e.g when more info is required) there are a few different steps to get started.

The task status will display as **Rejected**:

1. Click the rejected **Task ID**
2. Comments made by the supervisor when rejecting will automatically pull into the **Comments and Observations** section at the bottom of the Completions tab

All previously input information will remain, make changes or add additional information as required, for detailed steps [Action & Complete a Task](#) or [Add Files to a Task](#)

3. When ready click **Submit** to resubmit task full steps on [Submit a Task](#)
4. Click **Exit** or close the window

If the task was **Checked Out**, it will be automatically checked in when you click Submit.

The task will have a **Submitted** status and go to the next person in the workflow for completion.

Inspections and Test Forms Completions By Tasks (Planned Tests) Manager

JHG - Training Project

Home > Completions > Execution > Task Manager (Master List)

INSPECTIONS AND TEST FORMS BY TASKS (PLANNED TESTS) (23)

Task Status	Action	Task ID	Datasheet	Description	Is Executed	Execution Date	Discipline	Task Type
Rejected	Check Out	R1-02690-0001		(Rework) Light Fitting & Bracke...	☐ Y ☐ N		Lighting	Cable Testing
Closed		T-02689-0001		Damper & Grille Installation	☐ Y ☐ N		MECH	

Task Summary | **Completion** | Files | Task Documents

+ Add Step

Comments and Observations

MO (reset): Rejected, please attach a photo

Completed

The items above have been inspected and are in accordance with drawing and specifications

Completed By (Contractor)		Reviewed By (Contractor Supervisor/QA)		Approved by JHG	
Name:		Name:		Name:	
Title:		Title:		Title:	
Company:		Company:		Company:	
Date:		Date:		Date:	

Submit Complete Close

Save Exit Reset Task



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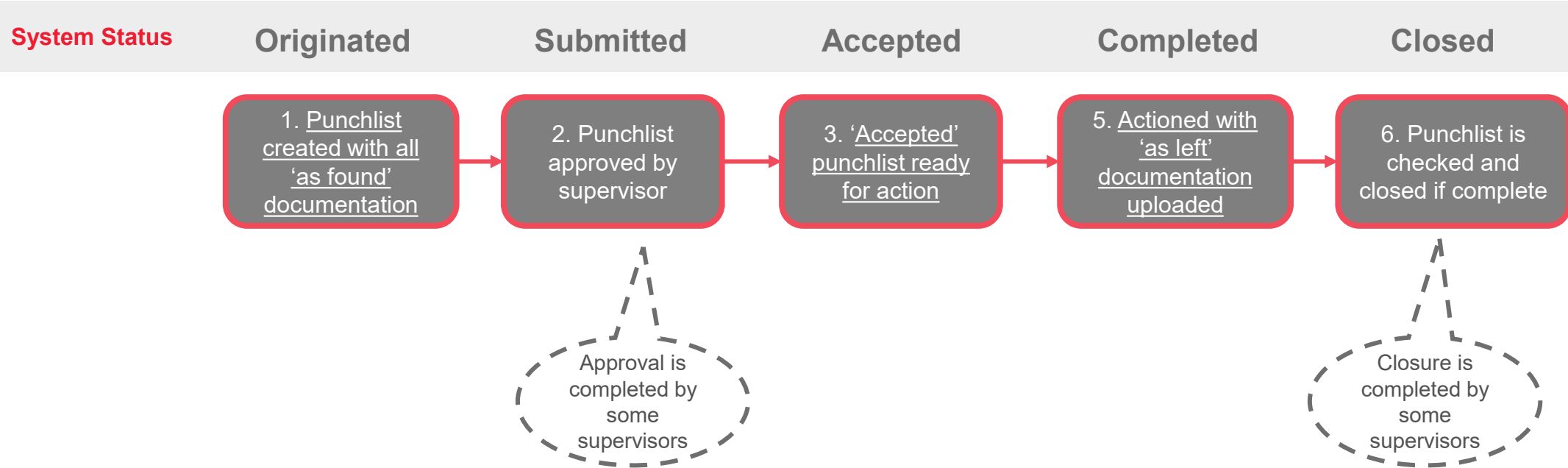
Punchlist: Create

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Process Flow Punchlist

The diagram below shows a high-level overview of the steps and statuses involved in punchlists, from creation to closure. Step by Step instructions are contained in the pages that follow. Note that not all Supervisors can approve Punchlists, if you do not have access the buttons will be greyed out.



Note this is the current process and status and may change in future.



Create a Punchlist

Punchlists are created for keeping track of any outstanding work onsite or raising defects and are generally categorised as the following:

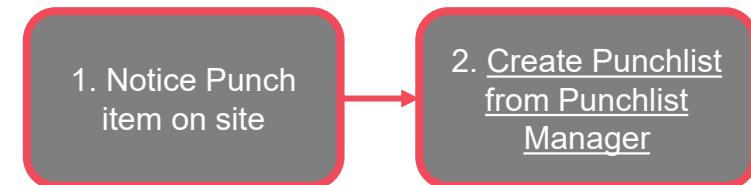
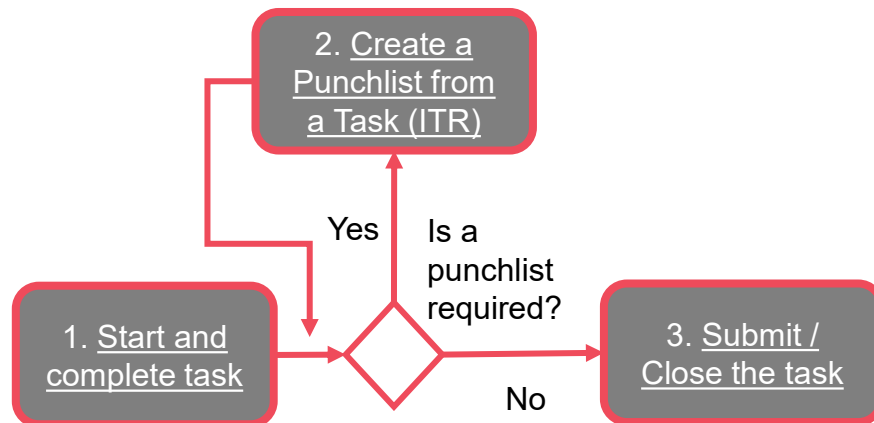
Category A: Cannot Energise

Category B: Can energise, but requires de-energisation / isolation to rectify

Category C: Rectification prior to final handover

Creating a Punchlist can be done in two main ways, creation during a task is the preferred method. Click the relevant link below to jump to the steps:

- [During a task \(ITR\)](#): if you find further work, incomplete things, faults, etc, you can trigger a punchlist related to a specific part of the task. When creating a punchlist in this way, lots of information is pulled from the task to create the punchlist.
- [Punchlist Manger](#): can be used if you are onsite and notice something that should be raised, when creating a punchlist in this way, no information will be pre-filled for you.



Create a Punchlist from a Task (ITR)

The steps covered below (and continued on the next page) show creating a punchlist from within a task if you reject an item.

You can also create a punchlist from Punchlist Manager, skip to steps [Create from Punchlist manager](#).

When configured, during completing a task (steps on [Action & Complete a Task](#)), some answers, such as reject or no, the system will prompt you to create a punchlist.

In these cases, a punchlist **must** be raised:

1. Click **Reject** (or No) on the line item during task completion
2. When prompted, click **Yes**, this will open a new window

Continued on next page...

CONSTRUCTION						
A. Fixing(s) Installation						
Item No.	Step Action	OK	Reject	N/A	Initials / Date	PL
2.1	Confirm fixings are suitable for the mounting surface.	☒	☐	☐	TP / 20-Apr-2026	
2.2	Confirm each cast-in element is usable, free of concrete and damage.	☒	☐	☐	TP / 20-Apr-2026	
2.3	Confirm correct type and size of fixings are used for the mounting of the support(s) and are free of damage.	☐	☒	☐	TP / 04-May-2026	PL-000051
2.4	Confirm curing time (where required) for each fixing has been reached (as per manufacturer's instructions).	☐	☐	☐		
2.5	Confirm proof loading has been conducted and recorded as per Proof Load Testing Procedure (RIC-JHC-PRC-00-MD-000-001).	☐	☐	☐		

B. Support(s) & Seismic Bracing(s) Installation						
Item No.	Step Action	OK	Reject	N/A	Initials / Date	PL

Buttons: Save, Exit, Reset Task

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Task Summary Completion Files Task Documents

PL/NC Alert

Do you want to create a punchlist?

Yes Cancel

FA022 - Fire Detection Loop Installation
Inspection Test Record
FA022 (JHG)

Installation Checks

Phase: Construction
Project: Training Project
Plant: JHG - Training
System Ref: FSS
Sub-System Ref: SD

System:
Sub-System:

Note: Cancel will allow you to go back and choose another option against that line item in the task



Create a Punchlist from a Task (ITR) (continued)

3. The task line item will pull into the **Description** (mandatory field), confirm or alter this as required
 4. Select **Punchlist Category** & **Punchlist Type**
 5. Input **Action Required** (mandatory)
 6. Check all other information, ensure you give enough details for a future team to complete the punchlist - **Asset**, **Task** and **Responsible Company** are desirable fields
 7. To add an attachment or image, click on the **Files** tab - for detailed steps see [Add Images or Attachments](#)
 8. To notify others you can **Email Punchlist** to one or more recipients
- Note: you'll be able to email others as part of the submit process later.
9. Click **Submit** once you have completed all relevant information

Continue to **step 10** on [Submit & Send](#).



Create a Punchlist from Punchlist Manager

To create a punchlist outside of completing a task, you must use the **Punchlist Manager**. Creating a punchlist from Punchlist Manager will start with a completely blank form.

If you are creating a punchlist from within a task, see steps on [Create a Punchlist from a Task \(ITR\)](#).

From the Hexagon Smart Completions homepage:

1. Click **Completions**
2. Click **Punchlist & C.O.W**, this will load the punchlist manager module
3. Click the **Plus icon**, this will open the punchlist window

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The screenshot displays the Hexagon Smart Completions interface. The left sidebar shows the 'Completions' menu item highlighted with a red box and a red circle with the number 1. The main area shows the 'Punchlist & C.O.W.' option highlighted with a red box and a red circle with the number 2. Below this, the 'PUNCHLISTS & C.O.W. TRACKING (10)' table is visible, showing a list of punchlists with columns for Status, Punchlist ID, Description, Is Exce..., Punc..., Priority, Punchlist Type, Action Required, Work Category, Discipline, and M. A red circle with the number 3 highlights the 'Plus icon' in the top right corner of the table.

Status	Punchlist ID	Datasheet	Description	Is Exce...	Punc...	Priority	Punchlist Type	Action Required	Work Category	Discipline	M
Comple...	PL-000020		1.12: Confirm screen outer screen has been installed correctly a...	☐	D		Missing Parts	Grille yet to be installed		MECH	
Closed	PL-000021		1.5: Confirm all tag numbers / labels are correct as per latest re...	☐	D		Missing Labels	Waiting for asset labels to be provi...		Lighting	
Originat...	PL-000023		2.3: Confirm all cabling is correctly labelled	☐	B		Incorrect Labels	Incorrect cable label in field		FIRE SYST...	
Checked ...	PL-000037		1.3: Confirm cable numbers / labels are fitted and correct	☐	Categ...		Item Incomplete	DXE4260304 is not installed due w...		Electrical	
Checked ...	PL-000038		1.4: Confirm correct pipe supports have been installed as per la...	☐				One pipe stand is to be installed		PIPE	
Originat...	PL-000039		1.2: Confirm locking device/guard in place on ladder access to ...	☐						FIRE SYST...	



Create a Punchlist from Punchlist Manager (continued)

4. Complete all required fields

Ensure you give enough details for a future team to complete the punchlist. **Action Required** and **Description** are mandatory. **Punchlist Category**, **Punchlist Type**, **Asset**, **Task** and **Responsible Company** are all desirable fields. The Work Breakdown Association is vital for reporting.

5. Select the **Asset** to automatically fill process and Location Association fields

6. Click between **Process** and **Physical Location** to alter and check the Location Association fields

7. To add an attachment or image, click on the **Files** tab - for detailed steps see [Add Images or Attachments](#)

8. To notify others you can **Email Punchlist** to one or more recipients

Note: you'll be able to email others as part of the submit process later.

9. Click **Submit** once you have completed all relevant information

Continue to **step 10** on next page [Submit & Send](#).

The screenshot shows a web browser window titled "Edit Punchlist & C.O.W. Tracking (Record) - Work - Microsoft Edge". The URL is "https://jhg-sc.intergraphsm...om/ISC/tools/EditForm.aspx?v=vPunchlist". The form has several tabs: "General", "Documents", "Files" (highlighted with a red box and callout 7), "Custom", "Comments", and "Workflow". The "Workflow" tab shows a status bar with "Originated", "Submitted", "Accepted", "Completed", and "Closed".

The form is divided into sections:

- General Data:** Includes fields for "Punchlist ID", "Description", "Punchlist Category", "Punchlist Type", "Job Category", "Discipline", "Priority", and "Form".
- Work Breakdown Association:** Includes "Project" (JHG - Training Project), "Phase", "Stage", "Activity", "Systemization?" (with radio buttons for "Process" and "Physical Location", where "Process" is selected and highlighted with callout 6), "Process Plant", "System", "Asset" (highlighted with callout 5), "Process Area", "Subsystem", "Asset Pack", and "Task".
- Scheduling Data:** Includes "Responsible Workgroup", "Responsible Company", "Responsible Person", "Contract", "On Hold" (Yes/No), "Start Date", "Due Date", "Is Exception?" (Yes/No), "Responsible Closing Company", and "Responsible Closing Person".

At the bottom, there are buttons for "Create MOC", "Submit" (highlighted with callout 9), "Save", "Exit", and "Email Punchlist" (highlighted with callout 8). A red line with callout 4 connects the "Files" tab to the "Email Punchlist" button. A note bubble points to the form with the text: "Note: The punchlist will have no information pre-filled, complete as much information as possible."

Workflow missing required fields: Action Required
Description



Submit & Send a punchlist

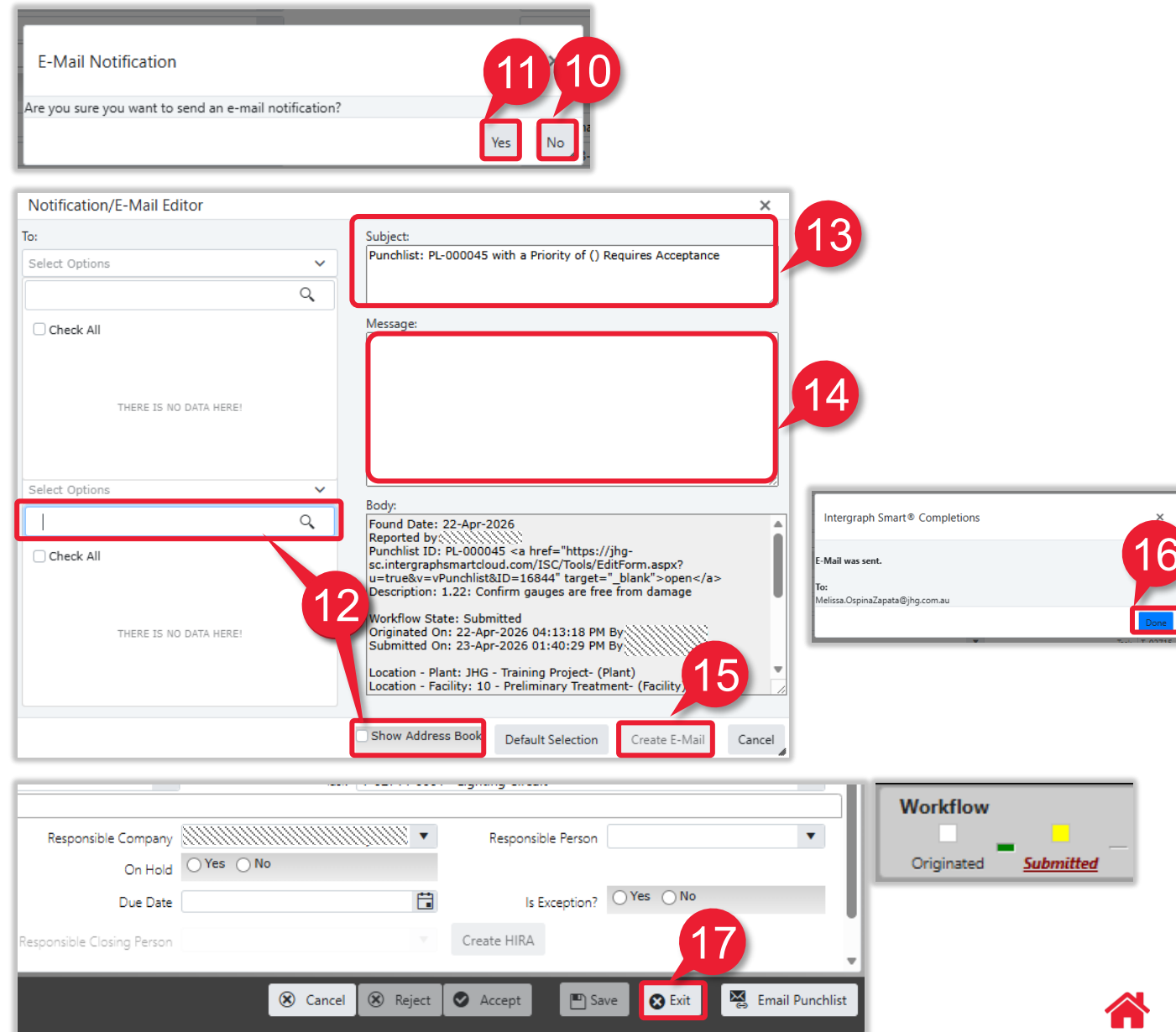
Once you click **Submit**, you have an option to email others.

Anytime you click **Email Punchlist** or if you choose Yes to notify during submission you will follow the below email steps.

10. If you don't need to email others, click **No** to and skip to step 18
11. If you need to email others, click **Yes**, this will open a new email window
12. Start typing or click **Show Address Book** to fill email addresses
13. Edit Subject if required
14. Type a Message in the email body if required
15. Click **Create E-Mail**
16. Click **Done** on the confirmation message
17. Click **Exit**

After submitting, at the bottom of the punchlist you will see options to Cancel, Reject or Accept, this indicates you have submitted. The workflow status will move to Submitted.

If you created the Punchlist from a task return to [Action & Complete a Task](#).



Upload Files to a Punchlist

To add an image or attachment during the creation of a Punchlist, follow steps from [Create a Punchlist](#), then:

1. In the Punchlist navigate to the **Files Tab**
2. Click into the **Caption** field
3. Type a caption for the image / attachment
4. Select a file **Type**, anything other than an image should use the **Type**: Attachment
5. Click the **cloud logo**, an upload popup will appear
6. Click **Choose File** and select the image or attachment from the file Selector
 - a) You may need to ensure you've selected **all Files** to upload your file
7. Click **Upload File**

You can repeat this process to upload multiple images / attachments.

To finalise the punchlist [Submit & Send](#).

1

2

Note: You can click into caption or type to start inputting photo information and tab between columns

3

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Punchlists: Action & Complete

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Punchlists: Action & Complete

Punchlists can be found via the **Punchlist & C.O.W** module, shown below, or via their linked asset or task (ITR) more details in the [Search & Reporting](#) guide.

The below steps cover how to action a punchlist and submit for closure by some Supervisors (not all have permissions).

From the Hexagon Smart Completions homepage:

1. Ensure you are viewing the correct project, if needed change using the project selector
2. Click **Completions**
3. Click **Punchlist & C.O.W**, this will allow a search of all Punchlists
4. Search or browse as required, click **Search** with no selections to see all punchlist items
5. You can refine search results by clicking and typing into the column header filters if needed
6. Mark the **checkbox** for the punchlist details to show in the secondary panel
7. Click the **Punchlist ID** to open the punchlist in a new window for editing

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The screenshot displays the Hexagon Smart Completions interface. The top navigation bar shows the 'JHG - Training Project' selector (1). The left sidebar has the 'Completions' menu item highlighted (2). The main dashboard shows various task categories, with 'Punchlist & C.O.W.' highlighted in the 'Execution' section (3). A callout box notes: 'Note: you can also access a Punchlist via the task from Task Manager (Master List), Click on the Task and access the Punchlist tab.' The bottom section shows the 'Punchlists & C.O.W. Tracking Manager' window. It features a search bar (4) and a table of punchlists. The table has columns for Status, Punchlist ID, Datasheet, Description, and Is Exception. A checkbox in the first column is selected (6). The selected punchlist ID 'PL-000037' is highlighted (7). A callout box notes: 'Note: Use the tabs to see more information on selected a punchlist.' The bottom of the window shows the 'SEARCH' button (4) and various action buttons like 'RESET', 'SAVE', 'IMPORTS', 'MERGE', 'CHECK IN', 'NO MAIL MERGE', 'NOTIFY', and 'HELP'.

Status	Punchlist ID	Datasheet	Description	Is Exce.
	PL-000037		1.12: Confirm screen outer screen has been installed correctly a...	☐
	PL-000037		1.5: Confirm all tag numbers / labels are correct as per latest re...	☐
	PL-000037		2.3: Confirm all cabling is correctly labelled	☐
Checked	PL-000037		1.3: Confirm cable numbers / labels are fitted and correct	☐
Checked	PL-000038		1.4: Confirm correct pipe supports have been installed as per la...	☐



Punchlists: Action & Complete (continued)

8. Input the **Action Taken** to complete or fix the punchlist item, this is a mandatory field
 9. Upload images or attachments to show completed or fixed punchlist via the Files tab – for detailed steps see [Add Images or Attachments](#)
 10. When all information is filled out and uploaded, click **Complete**
 11. A pop up will appear, if you don't want to send an email notification click **No**
- Note: If you want to send an email click **Yes** and see steps on [Submit & Send a Punchlist](#).
12. On the punchlist screen the status will be updated to **Completed**, click **Exit**

The punchlist will now progress for final checks before closure in the workflow.

The screenshot displays the 'Edit Punchlist' interface for punchlist ID PL-000037. The 'Files' tab is selected, and the 'Action Taken' field is highlighted with a red box and callout 8. A red box and callout 9 highlight the 'Files' tab. A red box and callout 10 highlight the 'Complete' button in the bottom right. A red box and callout 11 highlight the 'No' button in the 'E-Mail Notification' pop-up. A red box and callout 12 highlight the 'Exit' button in the bottom right. A red box and callout 13 highlight the 'Accepted' status in the workflow status bar. A red box and callout 14 highlight the 'Email Punchlist' button in the bottom right.

Note: Workflow status for a ready to complete punchlist is **Accepted**.

Note: To notify others you can Email Punchlist to one or more recipients, you can also email others as part of the submit process.



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Complete or Reject Tasks (Supervisors Only)

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Complete or Reject Tasks – Supervisors Only

If you are a **Field Supervisor**, you have permission to check and finalise your teams' tasks for final review by a John Holland Supervisor. Access the full [Process Flow Task ITR](#) for more detail.

Only some Supervisors have permissions to check and approve Punchlists. Access the full [Process Flow Punchlist](#) for more detail.

To check and finalise your teams' tasks, search and filter for desired tasks. Full search instructions in the [Search & Reporting](#) guide. In this example we've searched **Task Manager (Master List)** for all tasks (a blank search).

1. Click **Search** to show results in the module
2. Tasks that require supervisor approval will have a status of **Submitted**, click **Complete** to open the task window
3. The window will open to the Completions tab by default, showing the list of checks
4. To make a comment against any line item, click the blue **Comments Icon** on that line item
5. If a punchlist has been raised, click the **PL Number** to view for reference
6. On the task you may need to scroll down to see all items on the list and complete the task

Continued on next page...

The screenshot displays the 'Inspections and Test Forms Completions By Tasks (Planned Tests) Manager' interface. The left sidebar contains search filters for 'Action By', 'Is Checked Out?', 'Task State', 'Task Predecessor Lock', 'Cert Lock (Syst)', 'Actual Start Date', 'Submitted Date', 'Actual End Date', 'Closing Date', 'Scheduled Period', 'Actual End Date', and 'Execution Type'. The main content area shows a table of tasks with columns for Task Status, Actions, Task ID, Datasheet, Description, Is Executed, Execution, Discipline, Task Type, Planned Form, and Executed. A task with status 'Submitted' is highlighted, and a red box with a '2' points to the 'Complete' button. Below the table, there are tabs for 'TEST FORMS', 'INSPECTION POINTS', 'PUNCHLIST ITEMS', 'DETAILS', 'DOCUMENTS', 'PREDECESSORS', 'RFIS', 'WORK PERMITS', 'FILES', and 'FIELD LOG'. The 'PUNCHLIST ITEMS' tab is selected, showing a list of items with columns for Item No., Step Action, OK, Reject, N/A, Initials / Date, and PL. A red box with a '3' points to the 'Completion' tab. A red box with a '4' points to a blue 'Comments Icon' on a line item. A red box with a '5' points to a 'PL Number' (PL-000023) in the 'PL' column. A red box with a '6' points to a scroll bar on the right side of the punchlist items table.



Complete or Reject Tasks – Supervisors Only (continued)

On the Completions tab at the bottom you will be able to Complete or Reject a submitted task:

7. To see any photos or other attachments click the **Files** tab
8. To see the full photo click on the **image**
9. When ready to return to the form click the **Completion** tab
10. If you are happy with the task, click **Complete** - your details will be automatically filled
11. Once accepted, click **Exit** to close

Once Completed, the task moves to a completed status awaiting approval by a JH Supervisor.

To **Reject** a task:

12. If information is missing, or something else is required, click **Reject**
13. Rejecting a task will open a comment window, type a comment to tell the technician what additional information is required
14. Click **Submit**, then follow next steps to notify

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This screenshot shows the 'Completion' tab of a task form. At the top, there are four tabs: 'Task Summary', 'Completion', 'Files', and 'Task Documents'. The 'Files' tab is highlighted with a red box and a callout '7'. Below the tabs is a grid of input fields. A 'Comments and Observations' section is present. The 'Completed' section contains a confirmation statement and three columns for 'Performed By Contractor', 'Review By Supervisor / Lead Engineer', and 'Accepted By'. Each column has fields for Name, Title, Company, and Date. Below these columns are two buttons: a red 'Reject' button (callout '12') and a blue 'Complete' button (callout '10'). To the right of these buttons is a 'Close' button (callout '11'). At the bottom right, there are 'Save', 'Exit' (with a red box and callout '11'), and 'Reset Task' buttons.

This screenshot shows the 'Files' tab of the task form. It displays a table with columns for 'Records (1)', '#', 'Caption', 'Offline Mobile?', and 'Files'. The first record has a caption 'X2345P0' and a photo thumbnail. A red box highlights the photo thumbnail with a callout '8'. To the left of the table are buttons for 'Delete', 'Up', 'Down', 'To', and 'Edit Image'. Above the table, the 'Completion' tab is highlighted with a red box and a callout '9'. At the bottom right, there are 'Save', 'Exit', and 'Reset Task' buttons.

This screenshot shows a 'Enter Comment' window. It has a text area for 'Please enter a comment for the rejection.' and a label 'TP (reject):'. Below the text area are 'Submit' and 'Cancel' buttons. Callout '13' points to the text area, and callout '14' points to the 'Submit' button.



Complete or Reject Tasks – Supervisors Only (continued)

To notify the technician who submitted the task:

15. Select the rejected task
16. Click **Notify** on the secondary panel, this will open an email pop up
17. Complete the **To** field by typing or searching:
 - a) Click **Show Address Book** if the email isn't found
18. Add a message to the email body if required
19. Click **Create E mail** – the email will be sent
20. The comment you made when rejecting the form at step 13 will be displayed within the form under Comments and Observations

The task can now be actioned by a field technician to add what is required and resubmit. The form will retain all information already recorded.

Inspections and Test Forms Completions By Tasks (Planned Tests) Manager

JHG - Training Project

Home > Completions > Execution > Task Manager (Master List)

INSPECTIONS AND TEST FORMS COMPLETIONS BY TASKS (PLANNED TESTS) (23) Reports Dashboards

Actions	Task ID	Datasheet	Description	Is Exec...	Execution ...	Discipline	Task Type
☒ Rejected	Check Out: R1-02690-0001		(Rework) Light Fitting & Bracke...	☐ Y ☐ N		Digital Exec... Lighting	Cable Testing
☐ Closed	I-02689-0001		Damper & Grille Installation	☐ Y ☐ N		Digital Exec... MECH	
☐ Completed	I-02690-0001		Light Fitting & Bracket Installati...	☐ Y ☐ N		Digital Exec... Lighting	Cable

TEST FORMS (1) INSPECTION POINTS PUNCHLIST ITEMS DETAILS DOCUMENTS PREDECESSORS RFIS WORK PERMITS FILES FIELD LOG

State	Complete Task	Form Name	Mail Merge	Upload File to ...	Planned Form	Upload Scanned F...	Executed Form
Rejected	R1-02690-0001	Smartform			☐ Y ☐ N		☐ Y ☐ N

RESET SAVE SEARCH

Rework DS Form Pkg Execute Check Out Imports PL Notify

Notification/E-Mail Editor

To: Select Options

Subject: Tasks to Complete/Close requested by

Message:

Body: Task T-02724-0002 (FA022 - Fire Detection Loop Installation) has started on subsystem SD - Sprinkler Distribution: open

17a Show Address Book 19 Create E-Mail

Comments and Observations

MO (reset): Rejected, please attach a photo

Completed

The items above have been inspected and are in accordance with drawing and specifications

Completed By (Contractor)		Reviewed By (Contractor Supervisor/QA)		Approved by JHG	
Name:		Name:		Name:	
Title:		Title:		Title:	
Company:		Company:		Company:	
Date:		Date:		Date:	

Submit Complete Close

Save Exit Reset Task

