Complete Tasks & Punchlists

Hexagon Smart Completions

Quick Reference Guide

July 2026

Contents

JOHN HOLLAND

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

Jump to a topic by clicking the link:

Click from any page to return to the contents page.

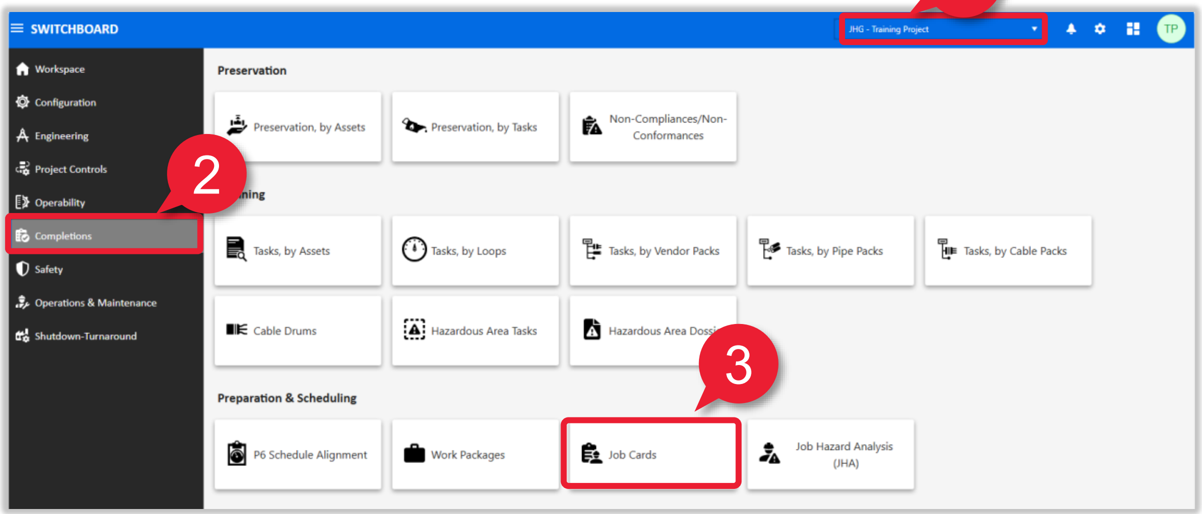
Job Card Module

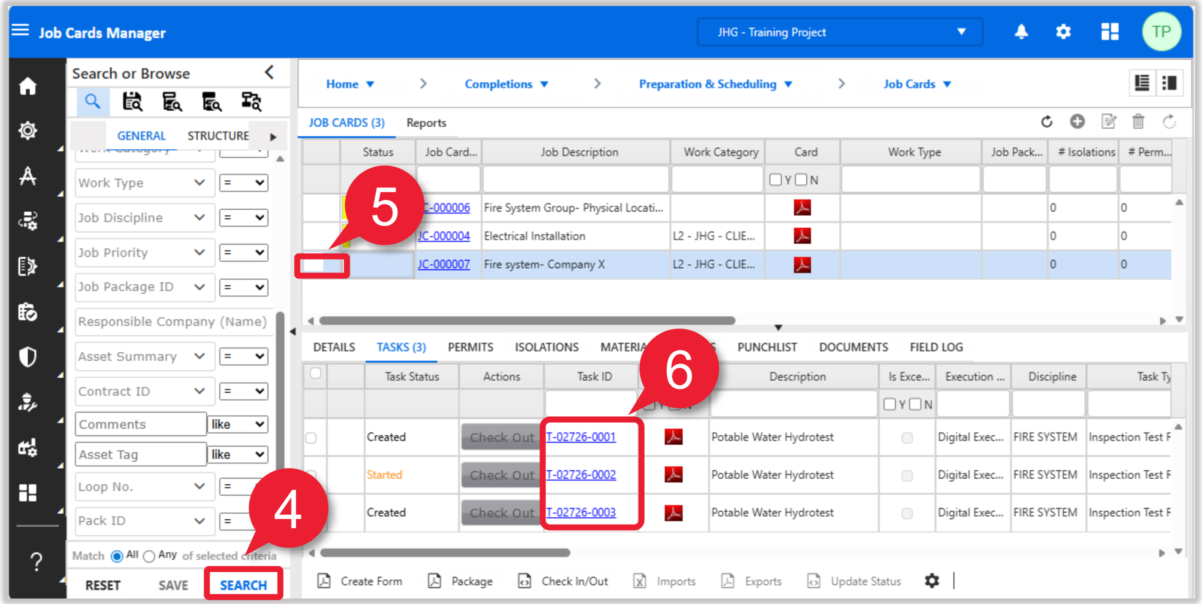
Job Cards are a way for tasks and punchlists to be bundled together for action by specific trades, companies or workers at specific times. Job cards can make accessing your tasks easier. Job cards are optional.

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



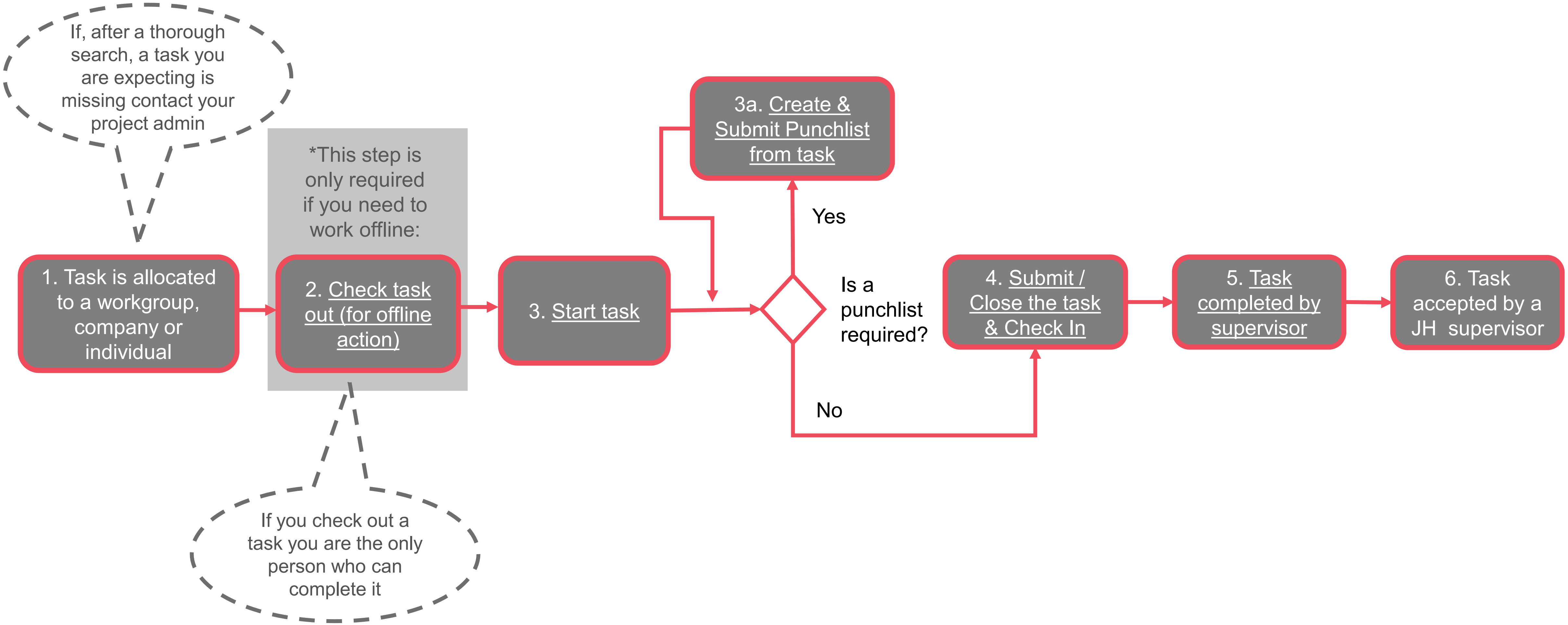


Progress to [Action & Complete a Task](#).

Task (ITR): Action and Complete

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.



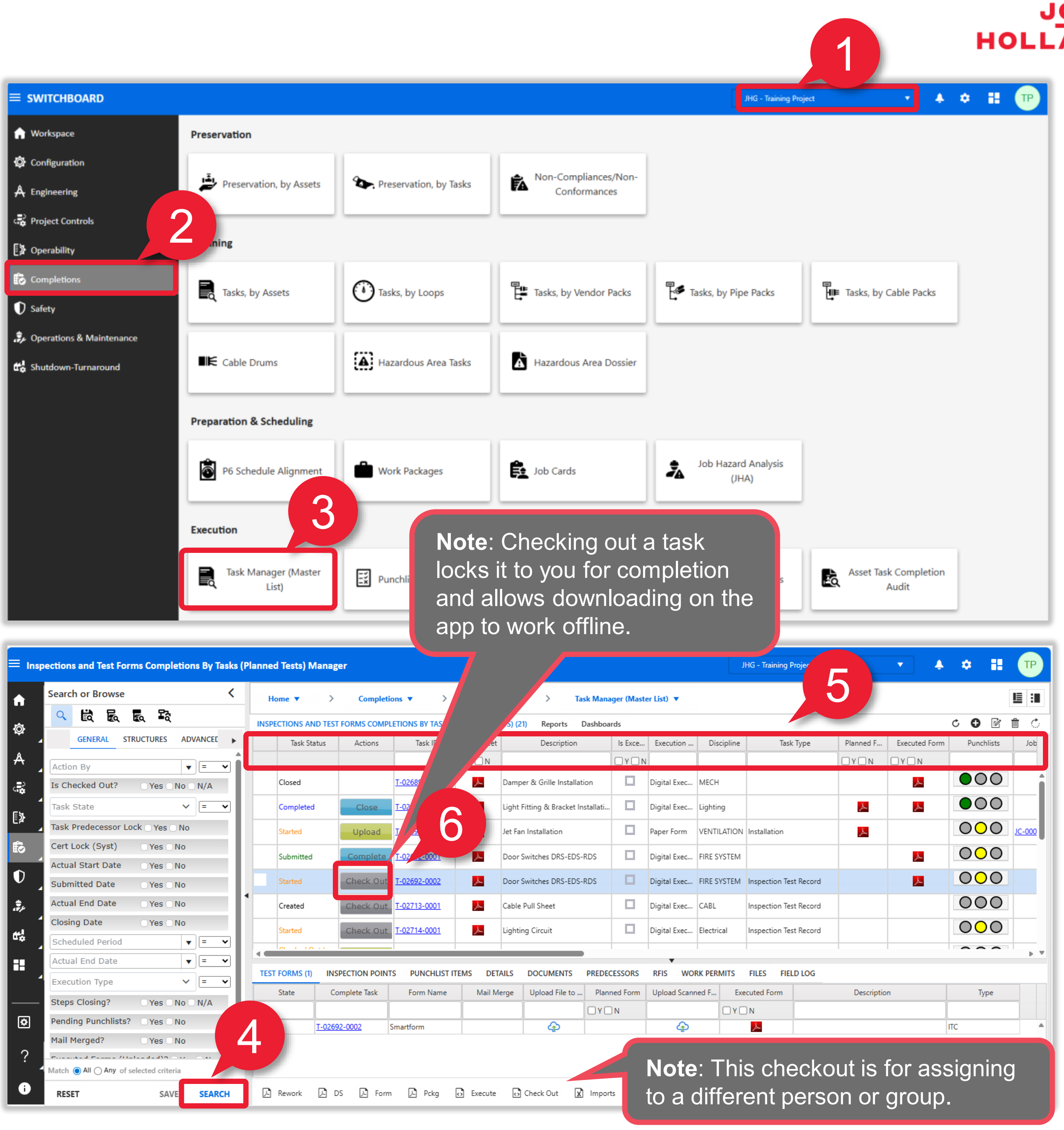
Find & Check Out a Task

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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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

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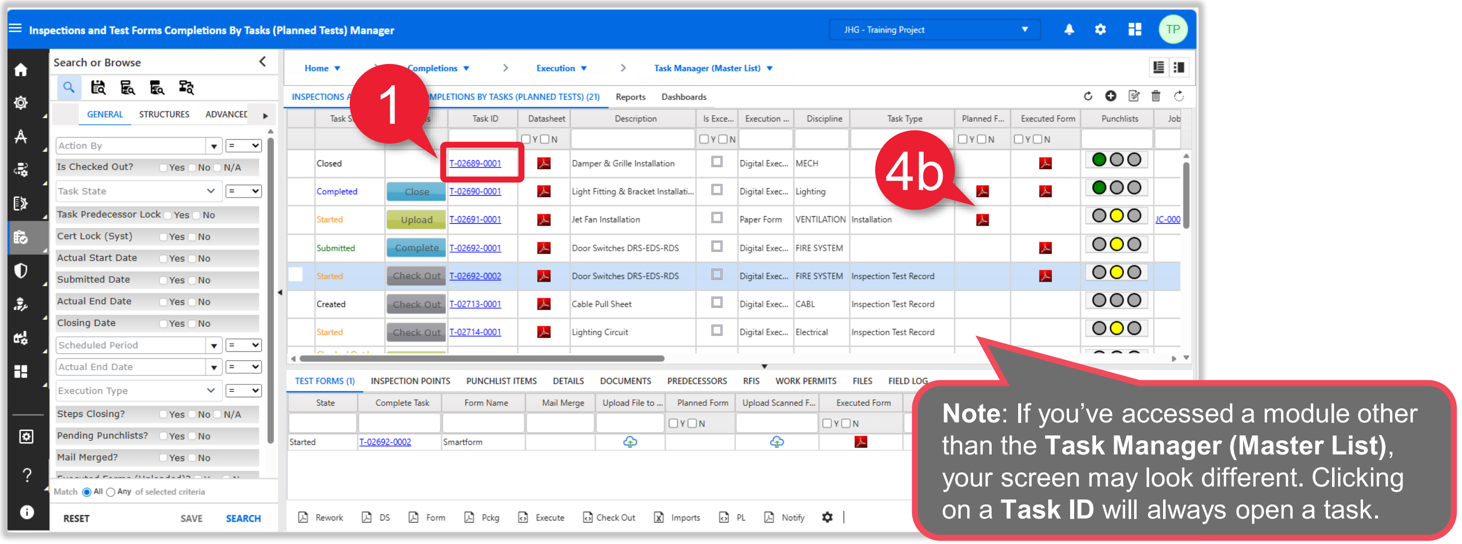
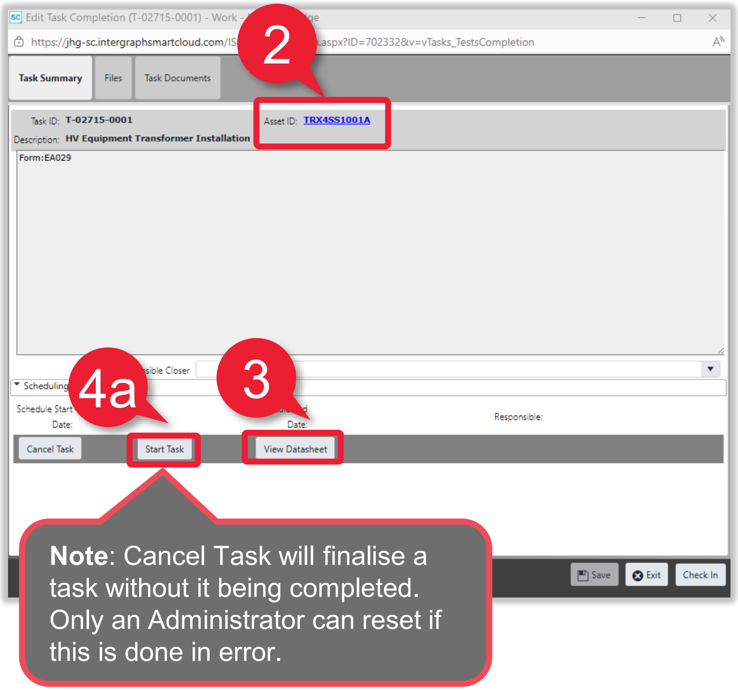
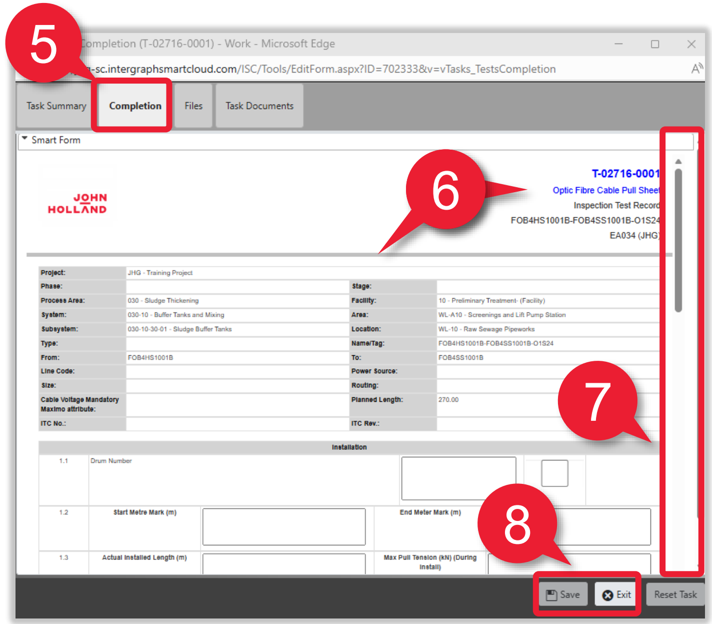
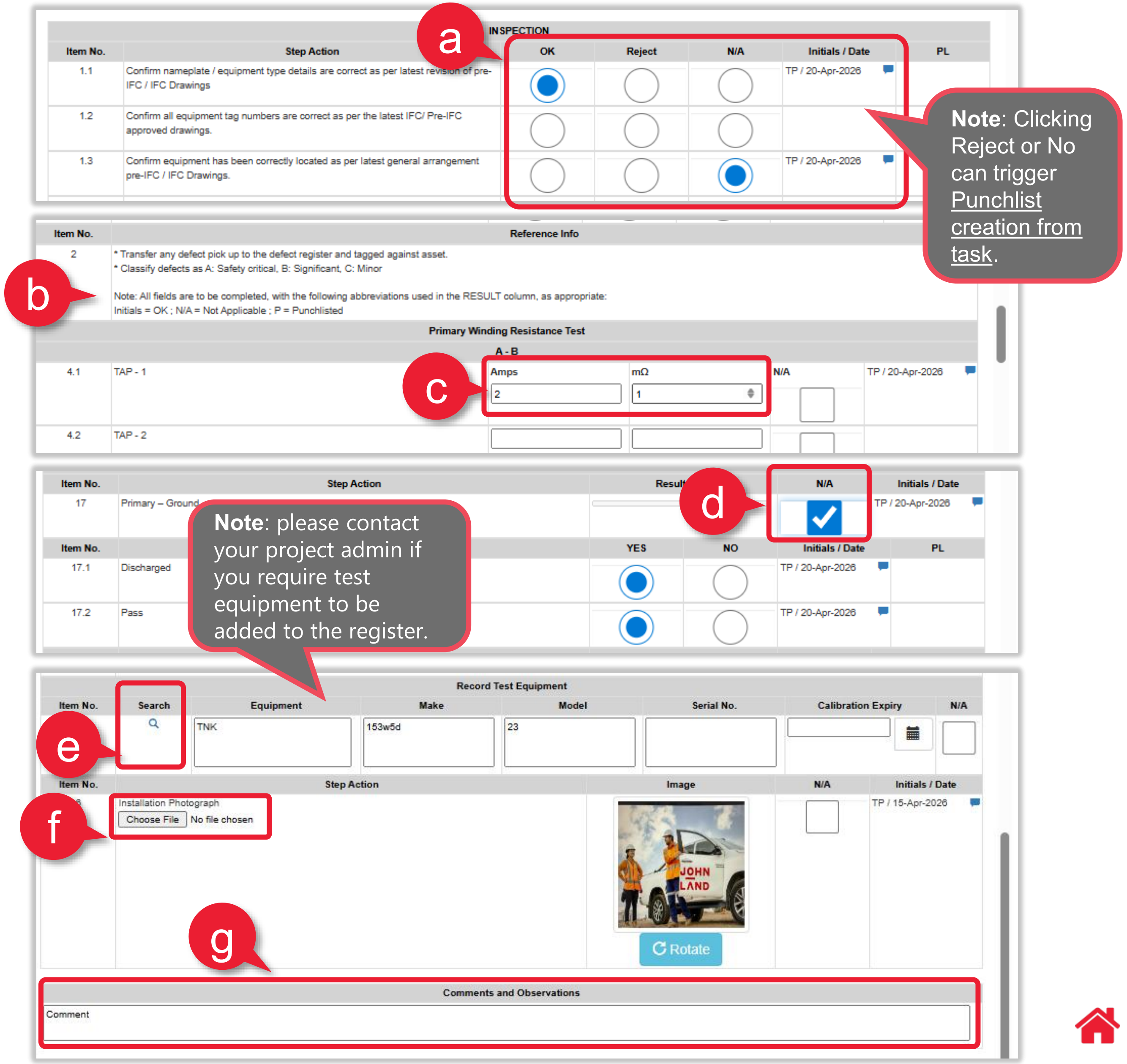






Action & Complete a Task (continued)

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



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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

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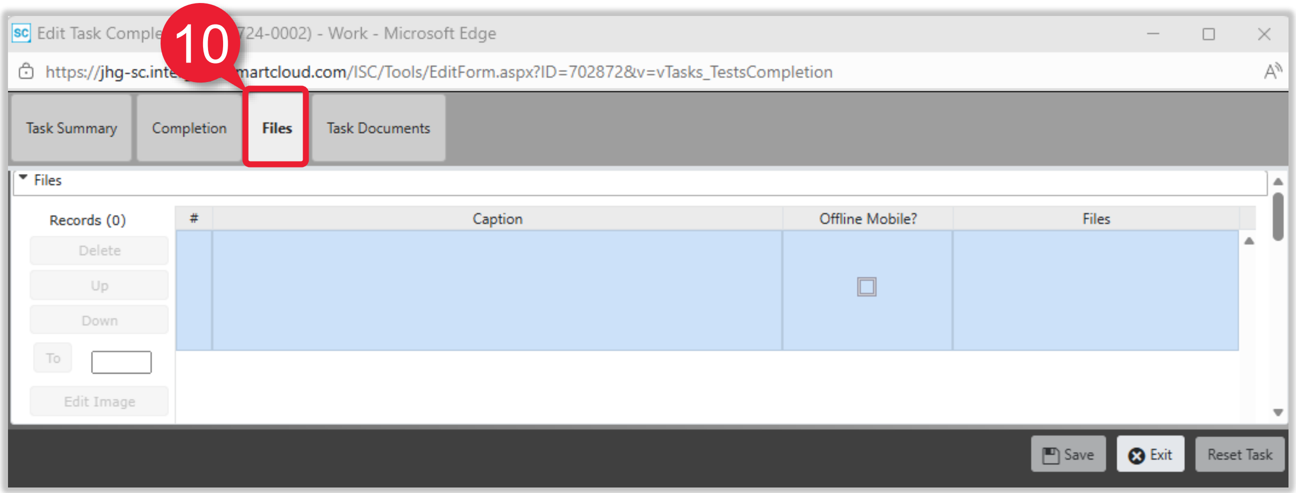
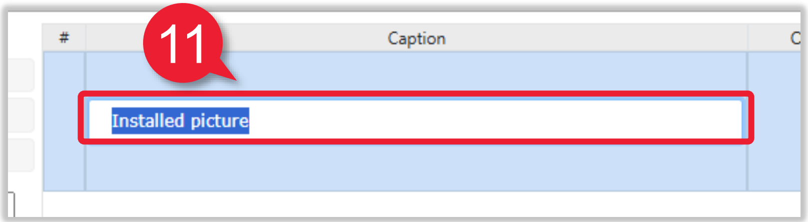
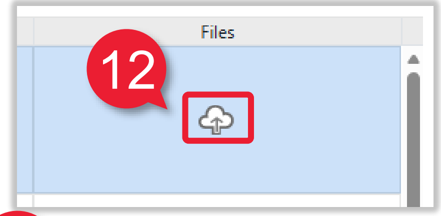
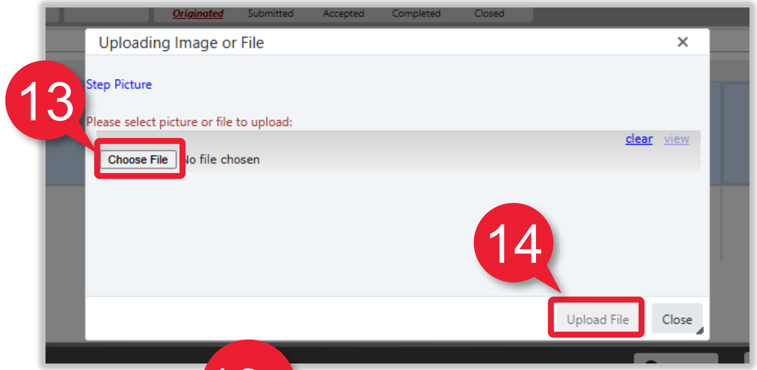
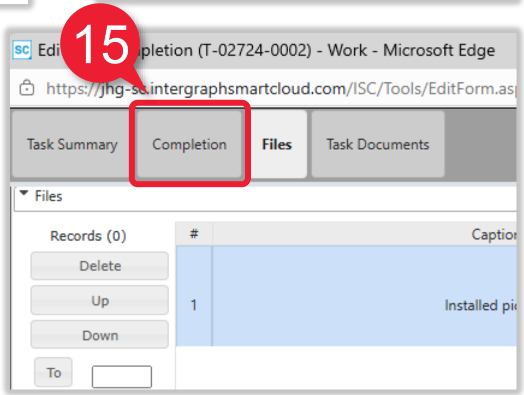
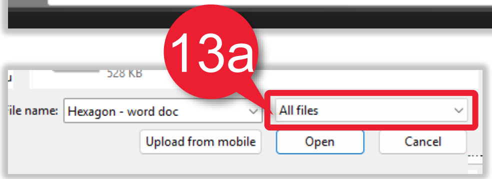












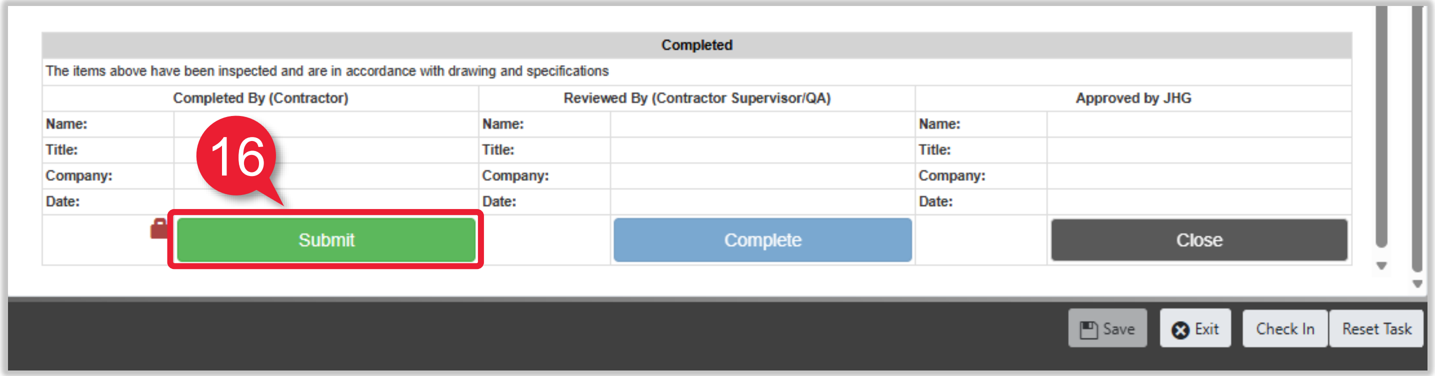
Submit a Task

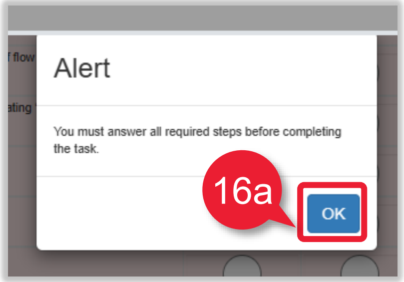
Once all fields on an ITR Task are completed and you are ready to finalise the task.

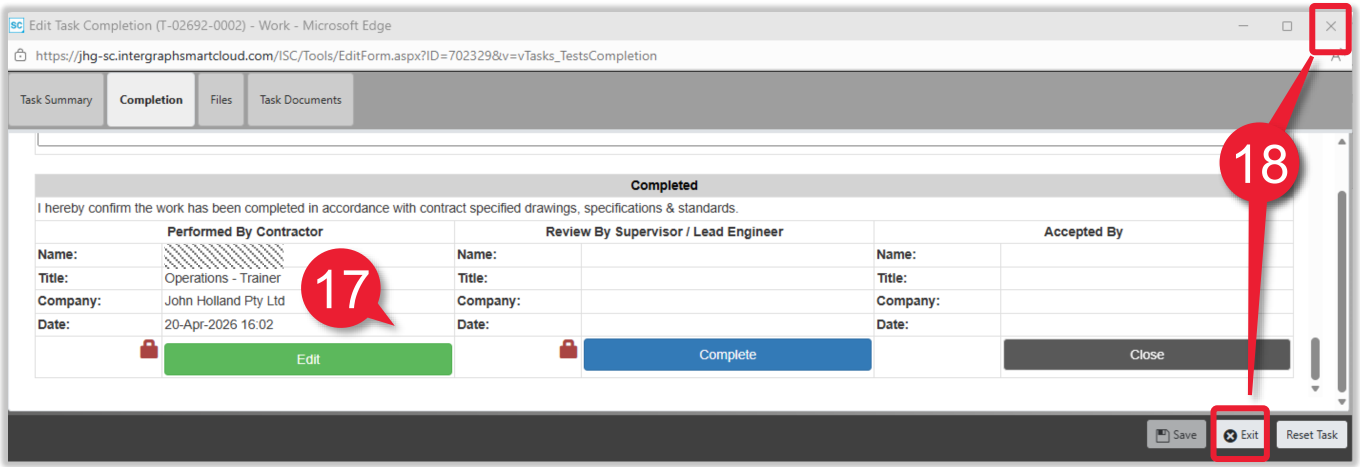
16. Click **Submit** at the bottom of the form
    a) If anything is incomplete, an alert will appear, click **OK -** all outstanding items will display in red for you to complete
17. After clicking Submit it may take a few seconds to process. Once it has processed, **Submit** will change to **Edit**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







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**:

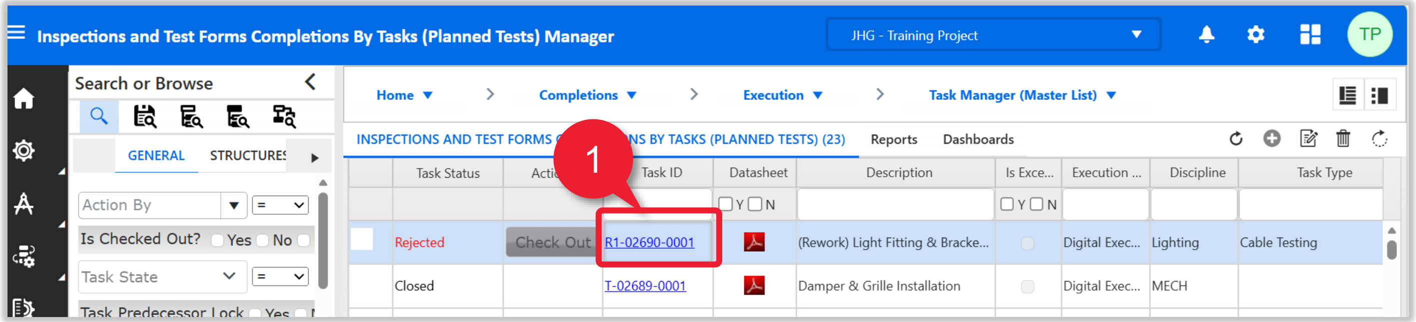
1. Click the rejected **Task ID**
2. Comments made by the supervisor when rejecting will automatically pull into the **Comments and Observations** section at the bottom of the Completions tab

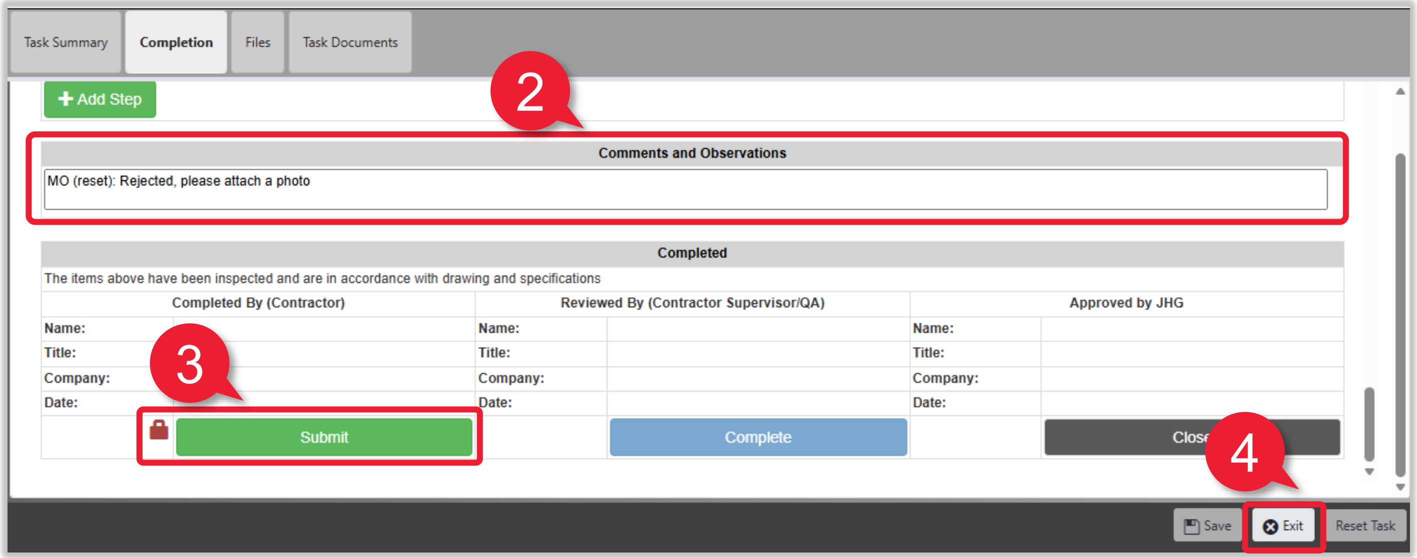
All previously input information will remain, make changes or add additional information as required, for detailed steps Action & Complete a Task or Add Files to a Task

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.



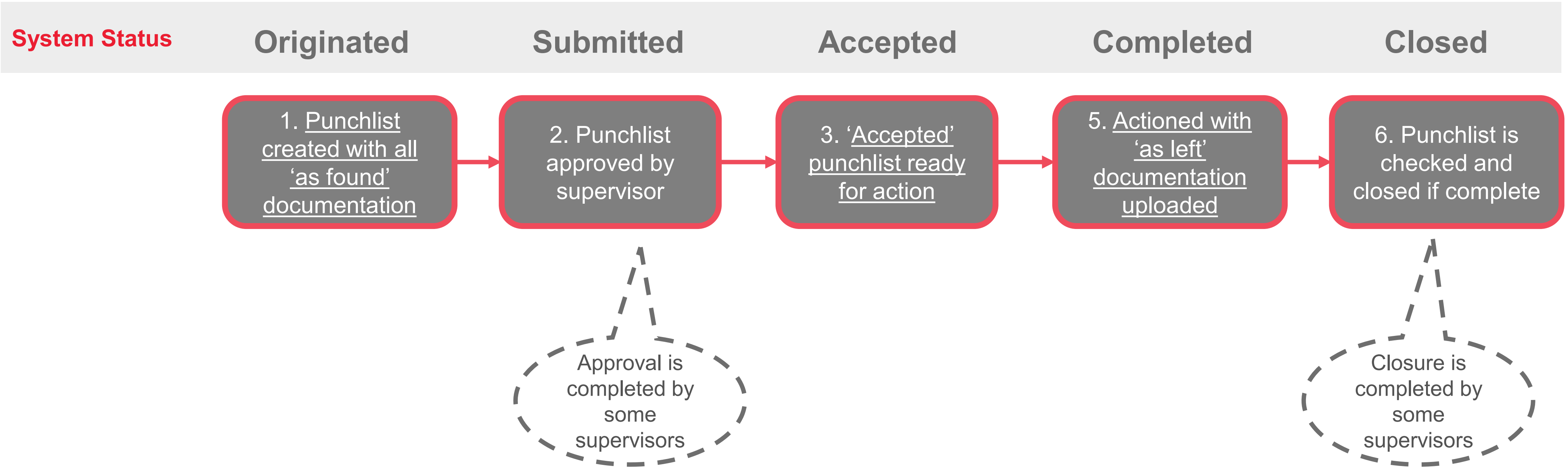


Punchlist: Create

Process Flow Punchlist

JOHN HOLLAND

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.

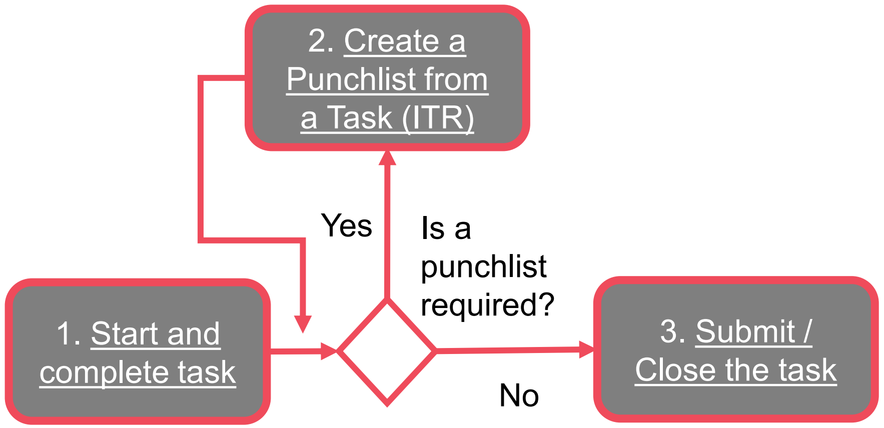
Create a Punchlist

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

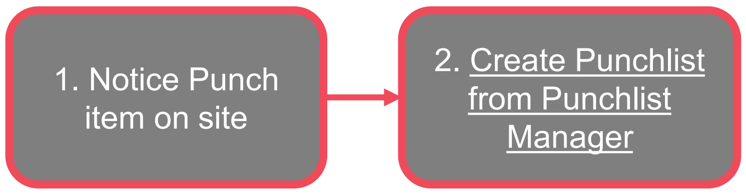
Category A: Cannot Energise
Category B: Can energise, but requires de-energisation / isolation to rectify
Category C: Rectification prior to final handover

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)

JOHN HOLLAND

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

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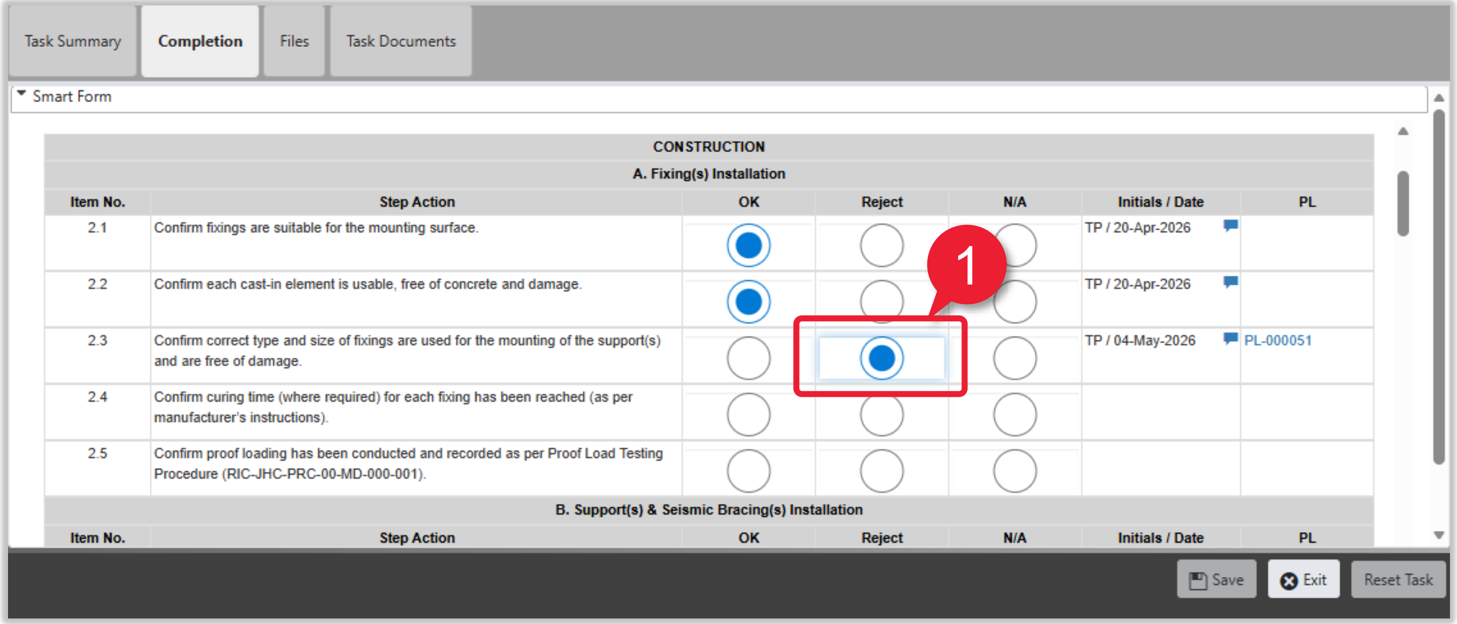
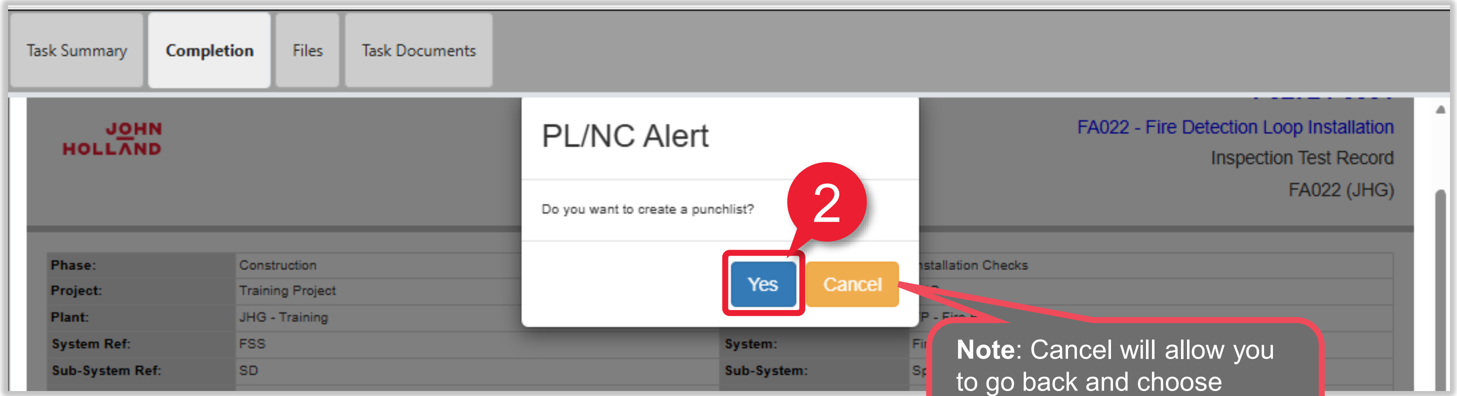




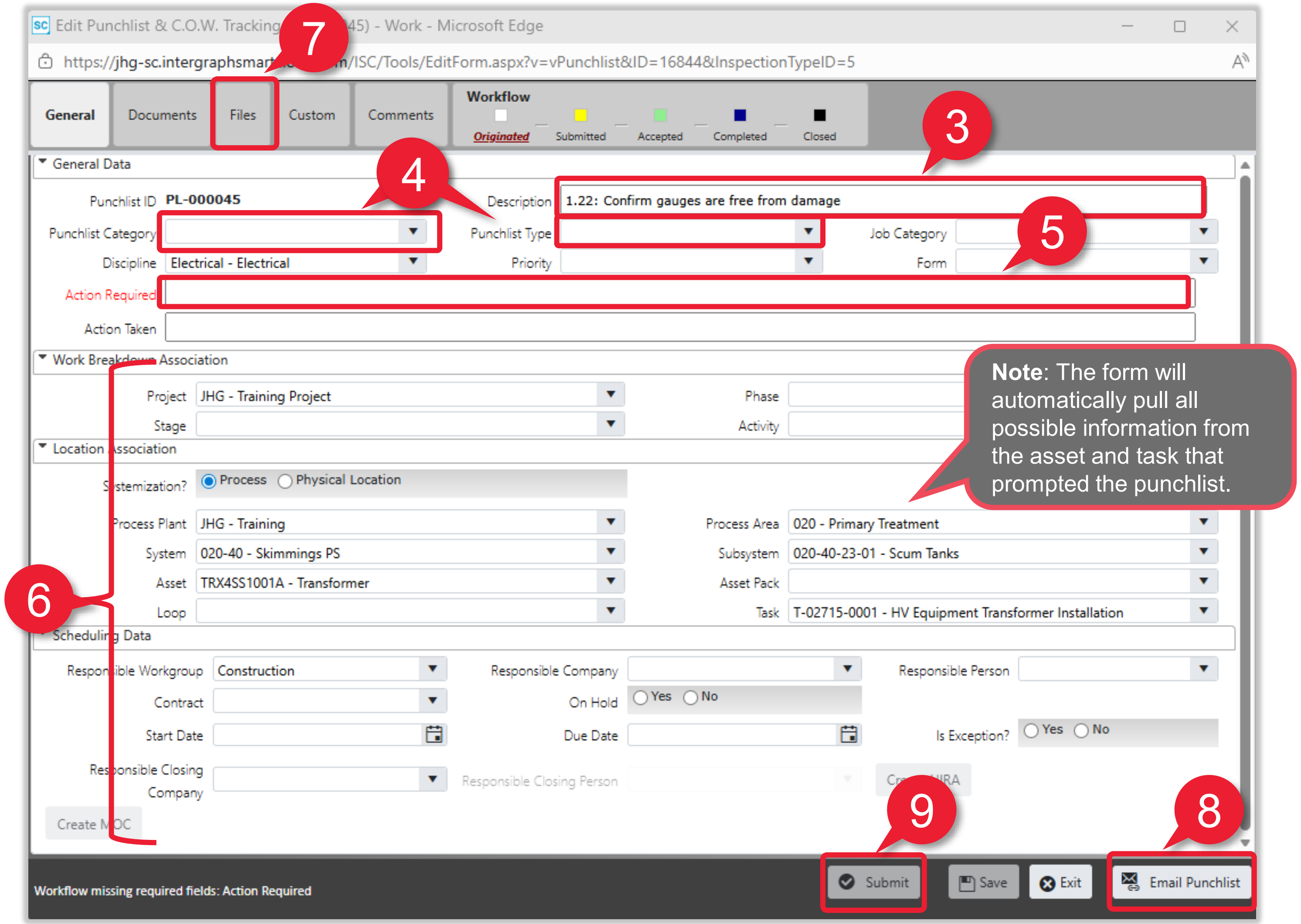
Note: Cancel will allow you to go back and choose another option against that line item in the task

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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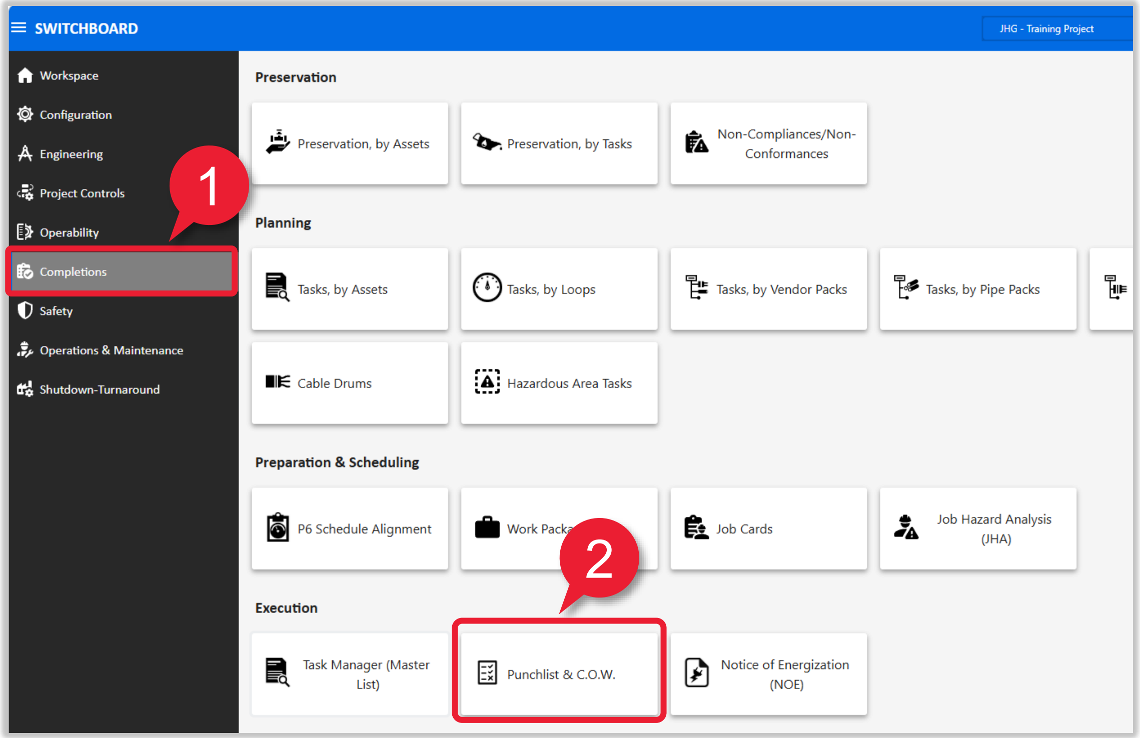
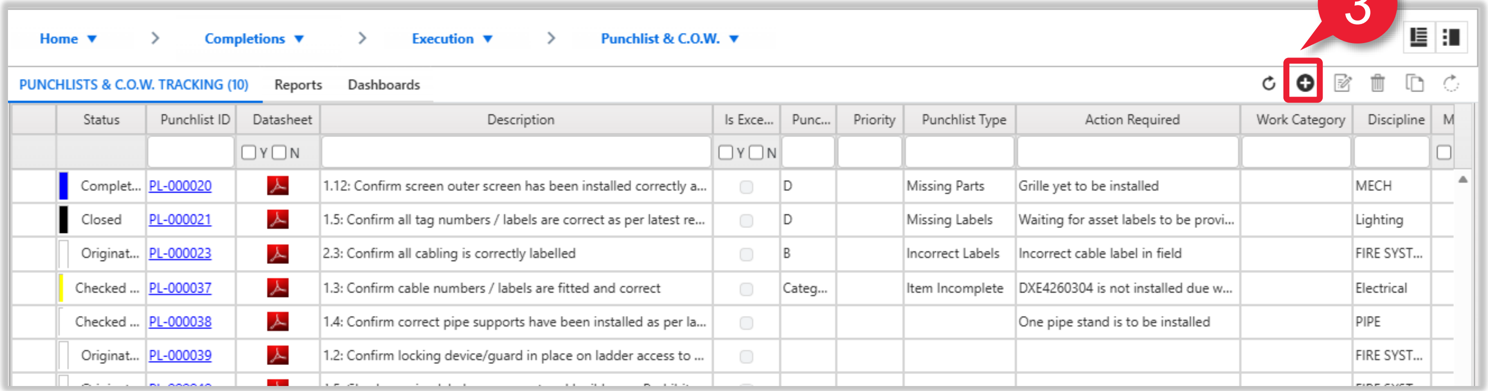




Status	Punchlist ID	Datasheet	Description	Is Exce...	Punc...	Priority	Punchlist Type	Action Required	Work Category	Discipline
Complet...	PL-000020		1.12: Confirm screen outer screen has been installed correctly a...		D		Missing Parts	Grille yet to be installed		MECH
Closed	PL-000021		1.5: Confirm all 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

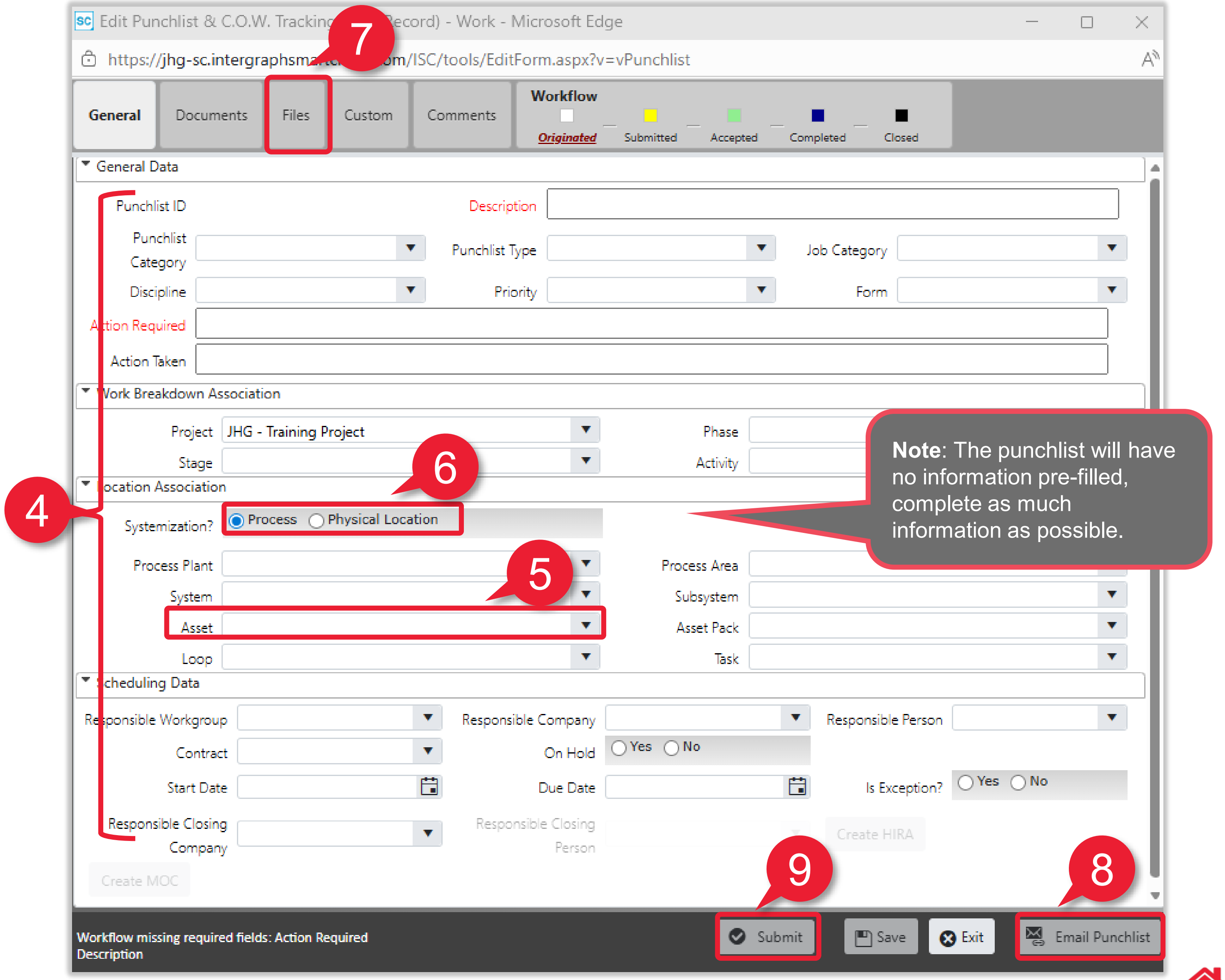
Ensure you give enough details for a future team to complete the punchlist. **Action Required** and **Description** are mandatory. **Punchlist Category**, **Punchlist Type**, **Asset**, **Task** and **Responsible Company** are all desirable fields. The Work Breakdown Association is vital for reporting.

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.



Submit & Send a punchlist

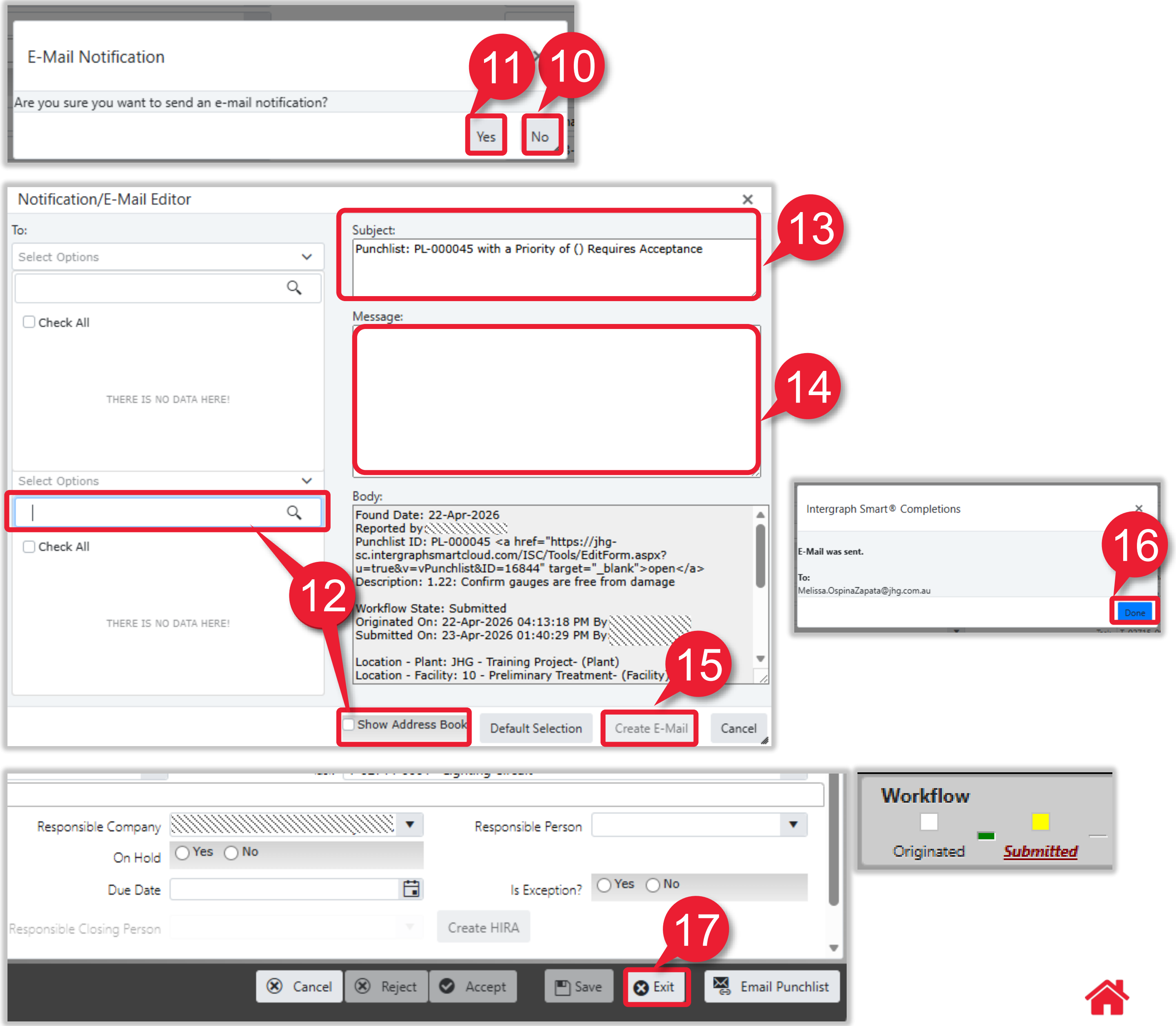
Once you click **Submit**, you have an option to email others.

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](#).



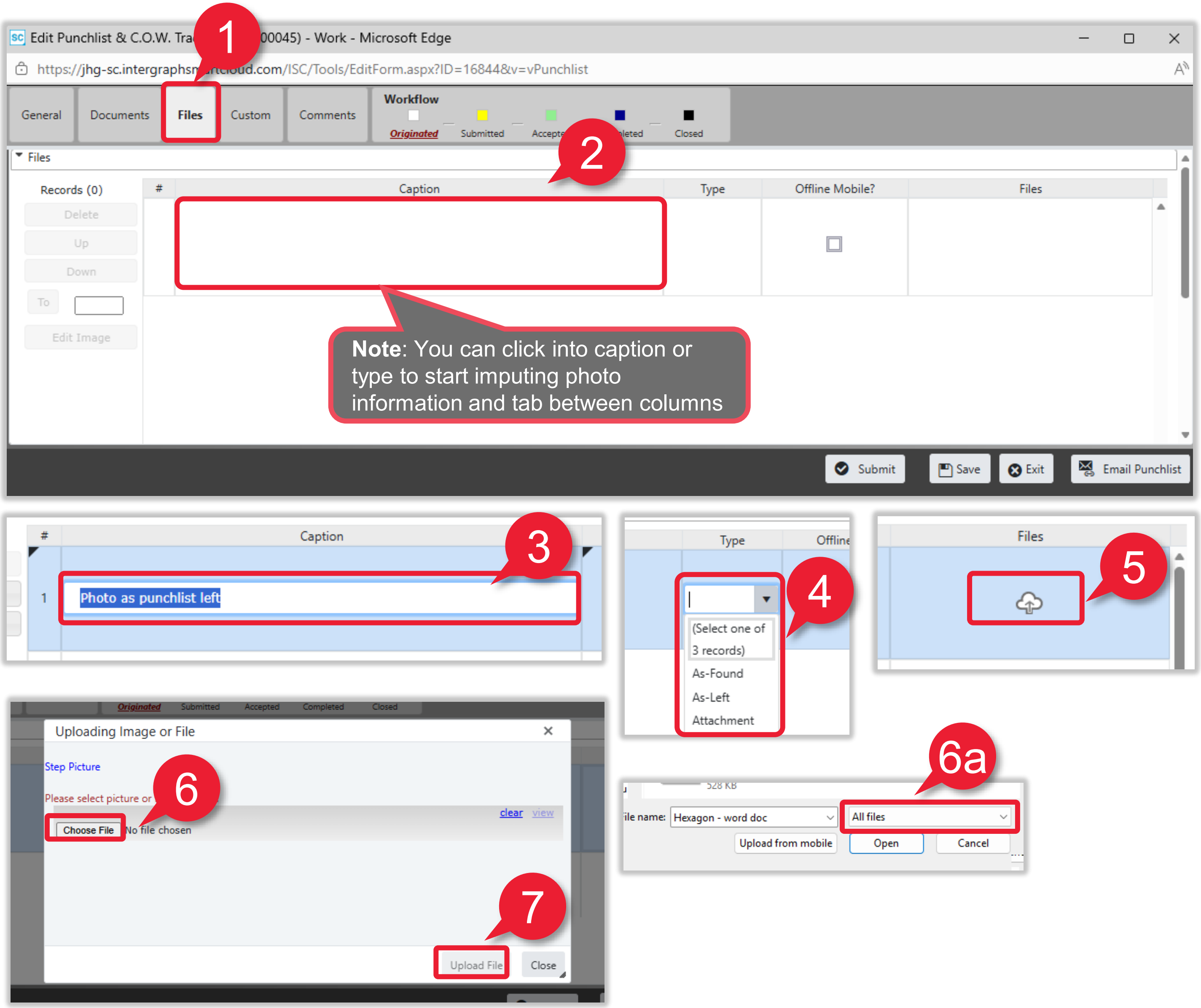
Upload Files to a Punchlist

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.



Punchlists: Action & Complete

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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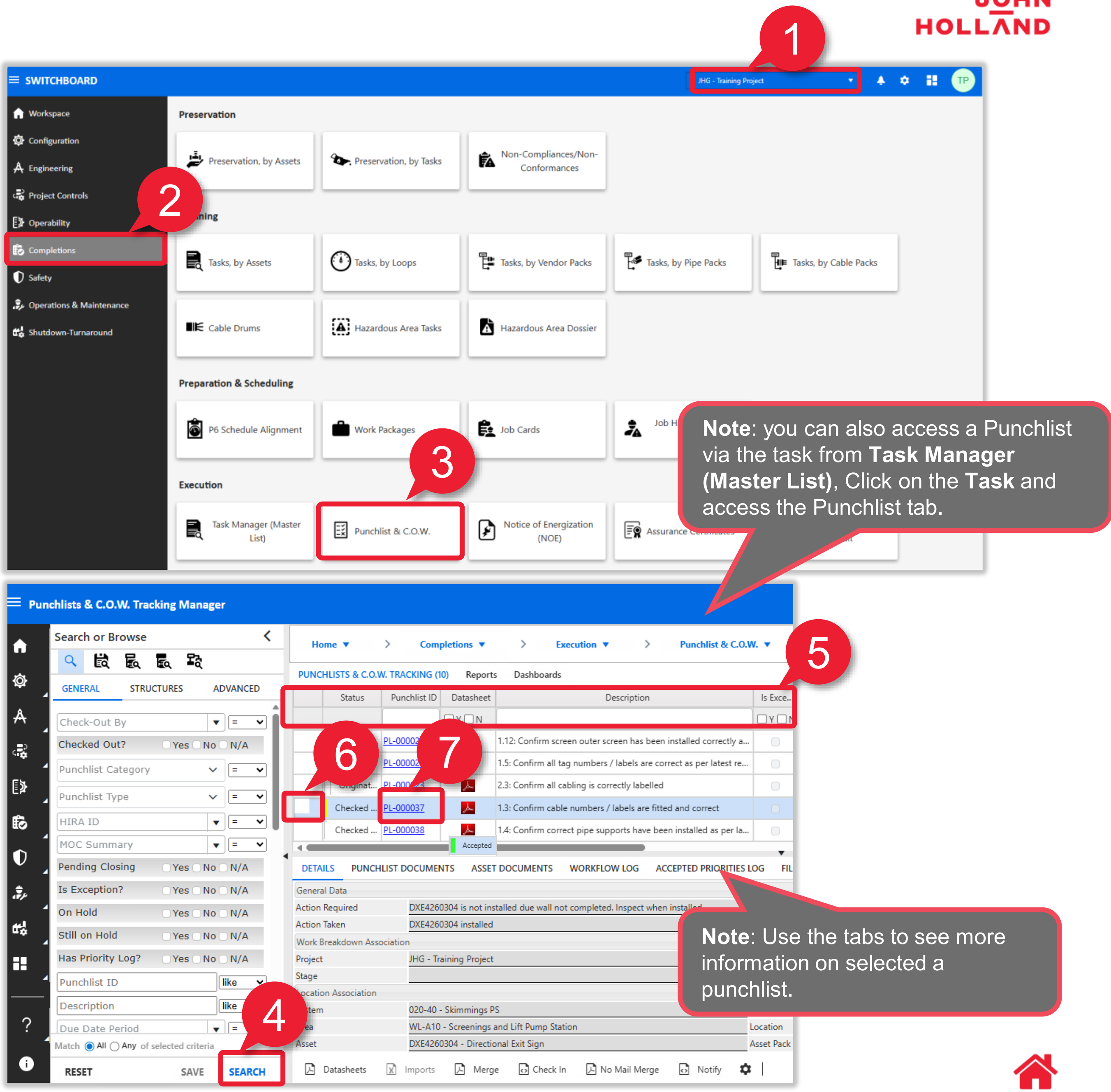


Punchlists: Action & Complete (continued)

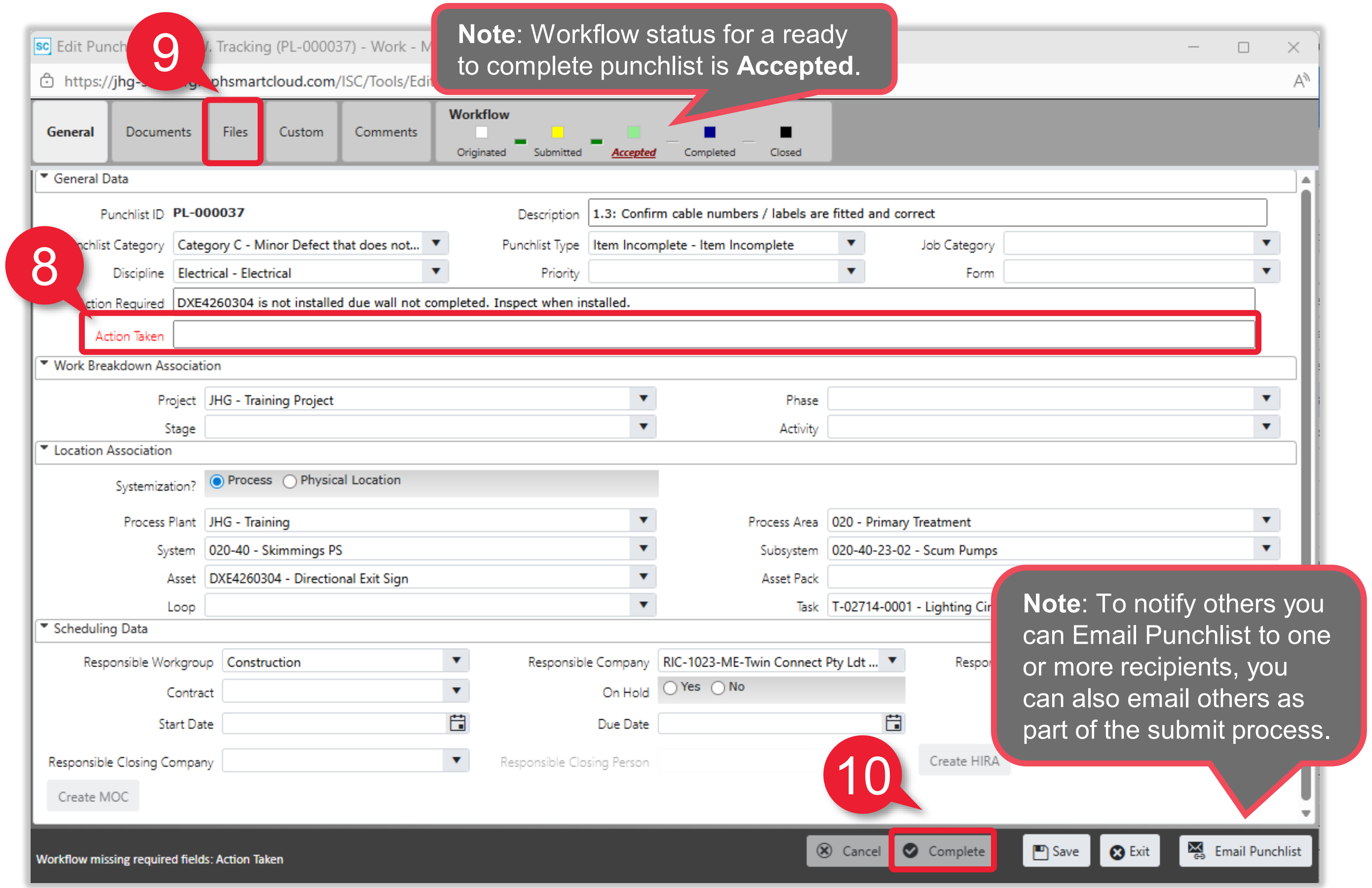
JOHN HOLLAND

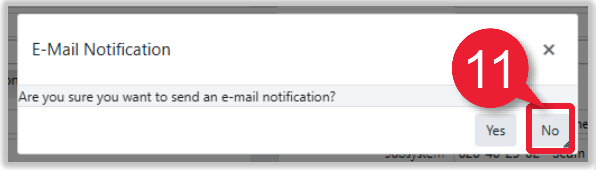
8. Input the **Action Taken** to complete or fix the punchlist item, this is a mandatory field
9. Upload images or attachments to show completed or fixed punchlist via the Files tab – for detailed steps see Add Images or Attachments
10. When all information is filled out and uploaded, click **Complete**
11. A pop up will appear, if you don't want to send an email notification click **No**

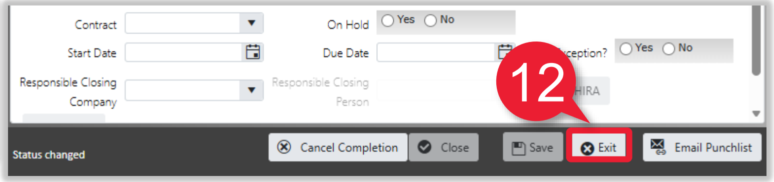
Note: If you want to send an email click **Yes** and see steps on Submit & Send a Punchlist.

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.







Complete or Reject Tasks (Supervisors Only)

Complete or Reject Tasks – Supervisors Only

JOHN HOLLAND

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

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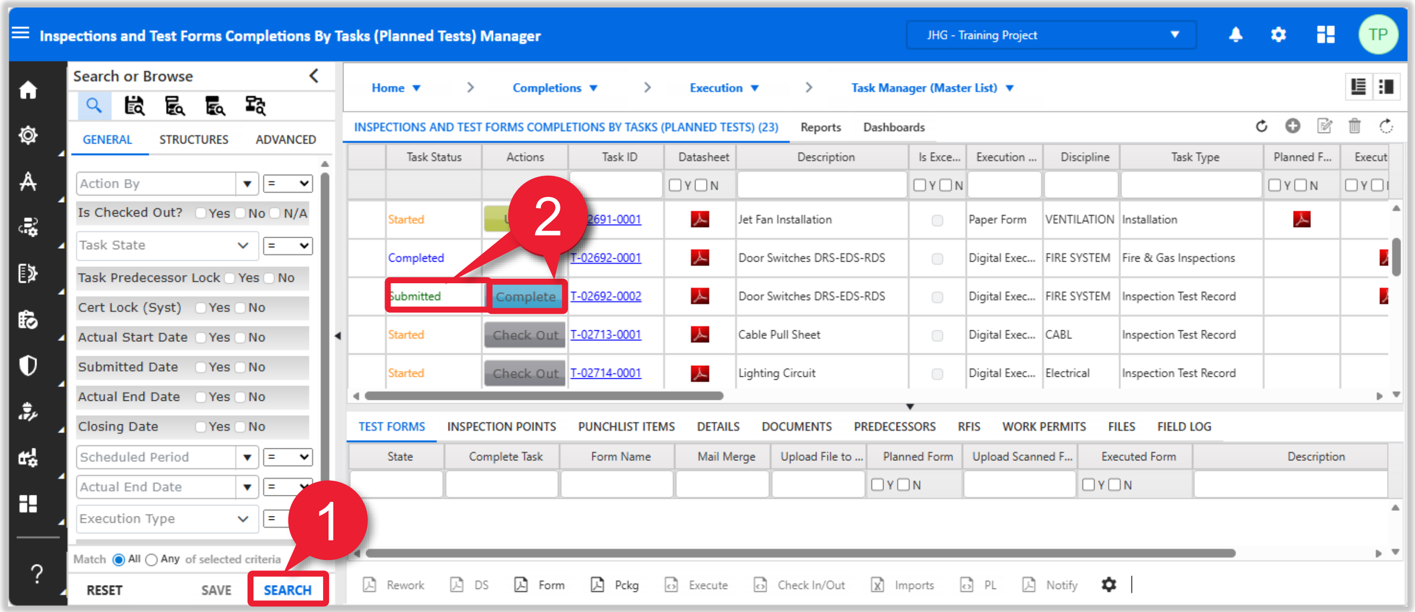

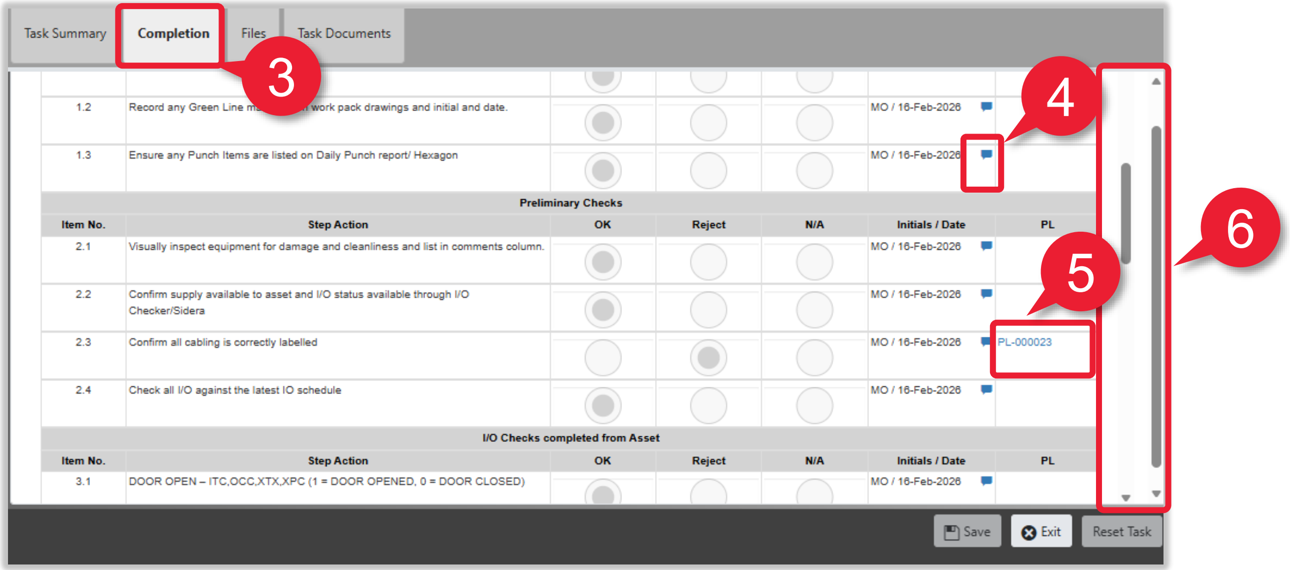

Complete or Reject Tasks – Supervisors Only (continued)

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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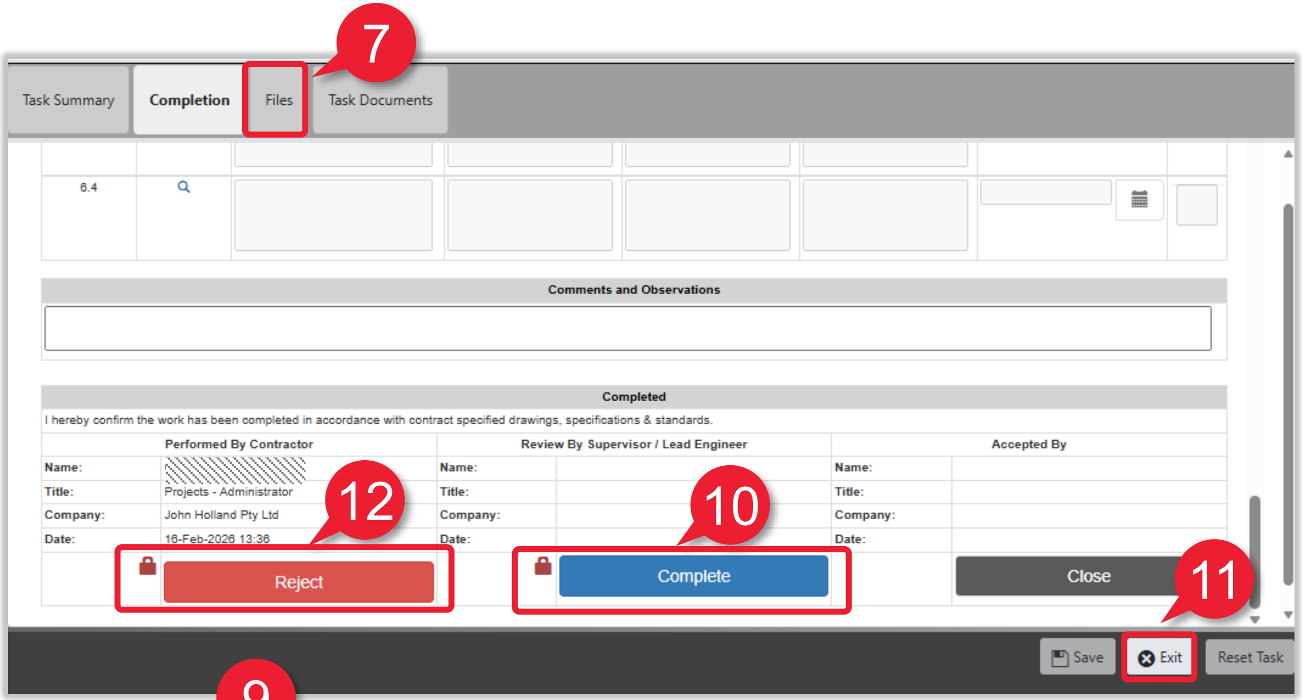

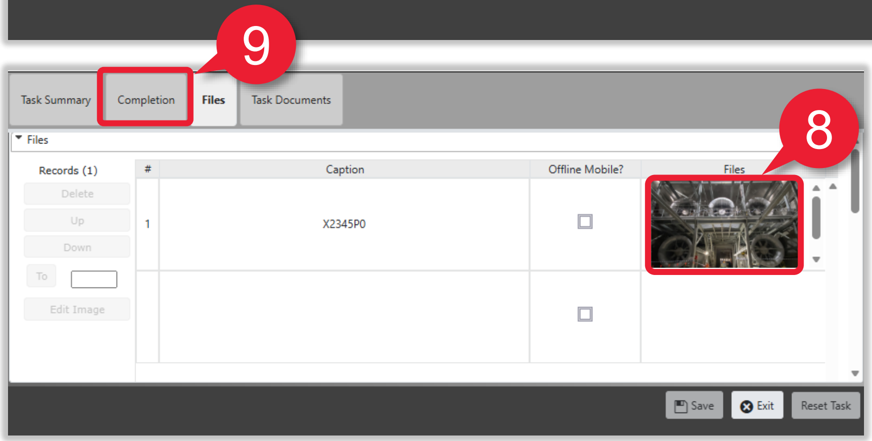

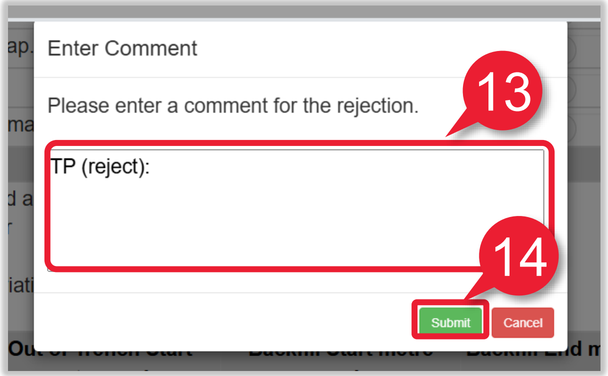

Complete or Reject Tasks – Supervisors Only (continued)

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.