Using Octave OnSite Completions on a Tablet

Octave OnSite Completions

November 2026

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Contents

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Jump to a topic by clicking the link:

- Tablet Navigation
  - Home Screen
  - View Modules
  - Sync Manager
- Find a Task or Punchlist
  - Browse by Location or Systemisation
- Work Offline
- Task (ITR): Action & Complete
  - Add a file or photo
  - Take a photo
  - Action a Rejected Task
- Punchlist: Create
  - From a Task
  - From Punchlist Module
- Punchlist: Action & Submit
  - Add a file or photo
  - Take and attach photo
  - Add a GPS Location
- Complete or Reject Task (Supervisors Only)
- Troubleshooting Tips

Click from any page to return to the contents page.

Tablet Navigation – Octave OnSite Completions

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Octave OnSite Completions – Home Screen

Documents Module: Retrieve detailed Document information and view the document/s (e.g. P&IDs, Datasheets)

Tasks Module: Enter and complete assigned **Tasks** when out in the field. See View Modules on next page for more

Project Selector: ensure this shows your current project

Toggle between online and offline modes

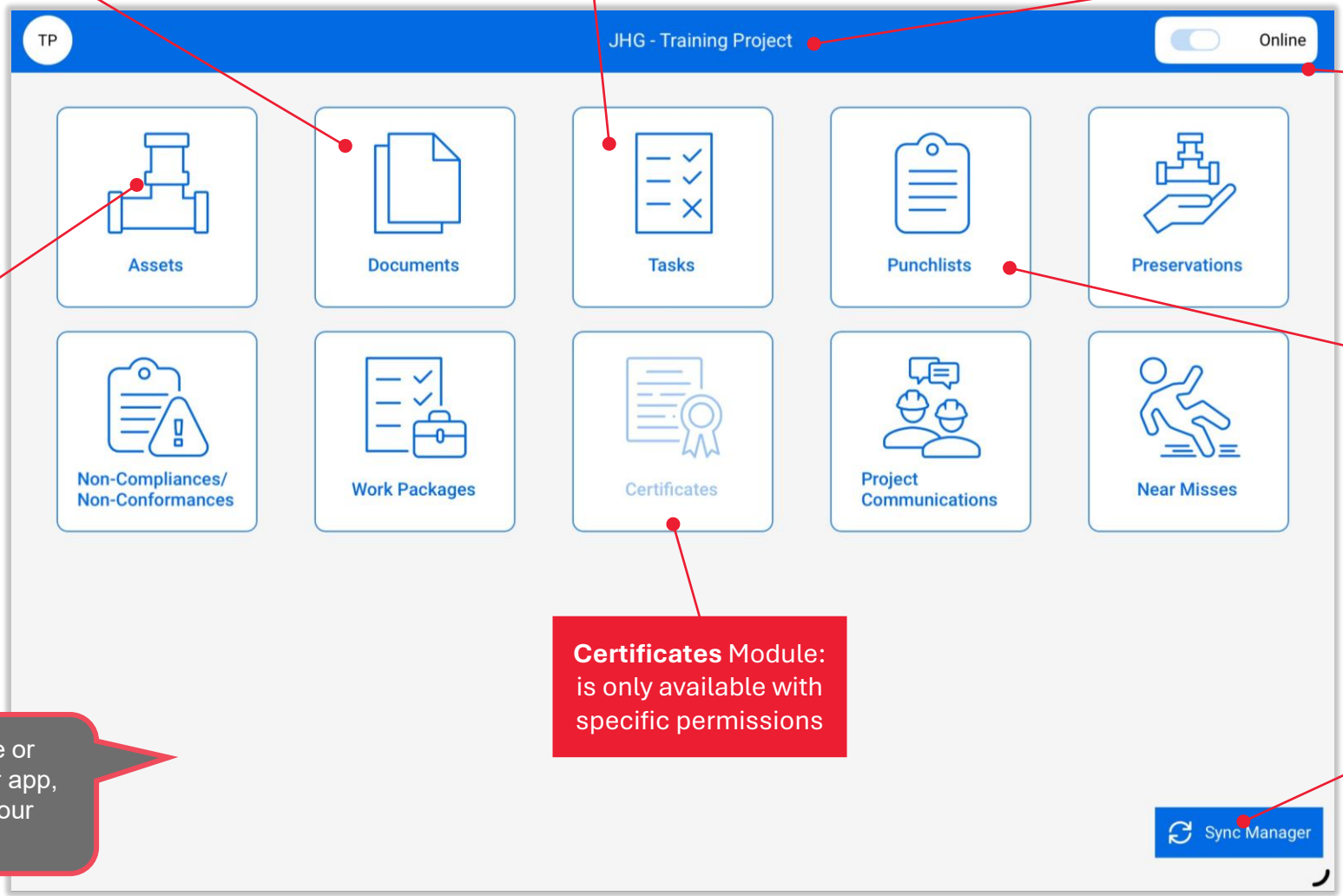
Assets Module: Retrieve and view detailed equipment (Asset) information

Punchlists Module: Input and complete Punchlist items when out in the field

Certificates Module: is only available with specific permissions

Sync Manager allows downloading and uploading data for working offline See Sync Manager

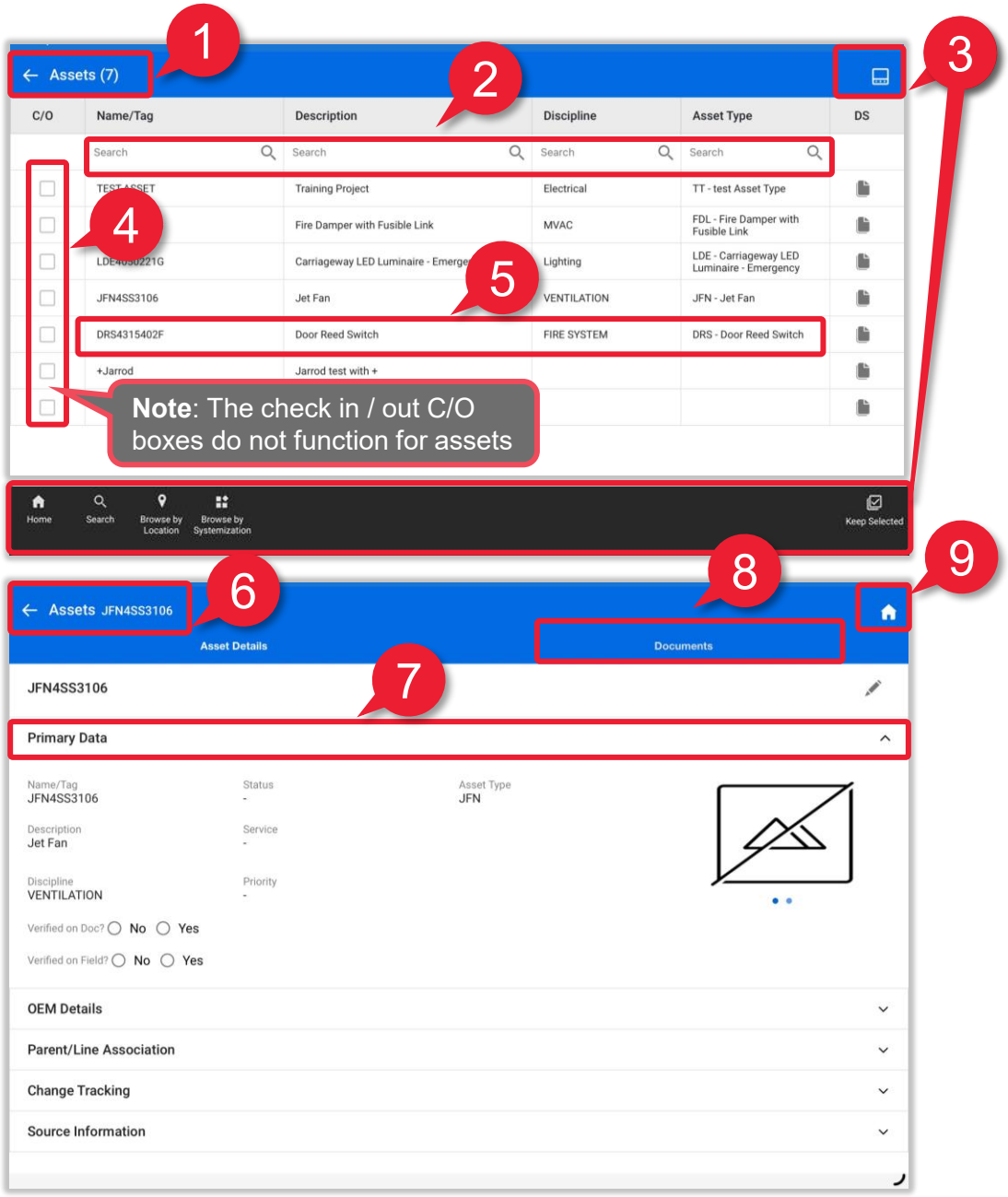
Note: You may see more or less module tiles on your app, this is dependent upon your permissions



View Modules

To view assets, documents, tasks or punchlist items, tap the relevant tile on the home screen. It will automatically search for records within that module. In this example, we are looking at the Asset Module:

1. Tap the **arrow** to return to the home screen
2. Filter displayed items by tapping into and typing in any of the **column heading** search fields
3. Tap the **menu icon** (top right) to display the menu bar at the bottom of the screen. This menu will allow you to easily search, browse or return to the home screen
4. Check items in the **C/O** column to check-out and begin the work offline process
5. Tap anywhere on a **line item** to open the asset, task or punchlist item
6. Once viewing an asset, task or punchlist, tap the **arrow** to return to the module list
7. Tap on any **heading** to open and close details
8. Tap other **tabs** to open different detail views
9. The **house** icon will take you to the home screen



Navigate Octave OnSite Completions – Sync Manager

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This page will display when you tap **Sync Manager** on the home screen. Sync Manager will automatically search for all items checked out to you, your company, or any workgroups you are part of. Items checked out to you are locked to you, only you can edit them until they are checked in.

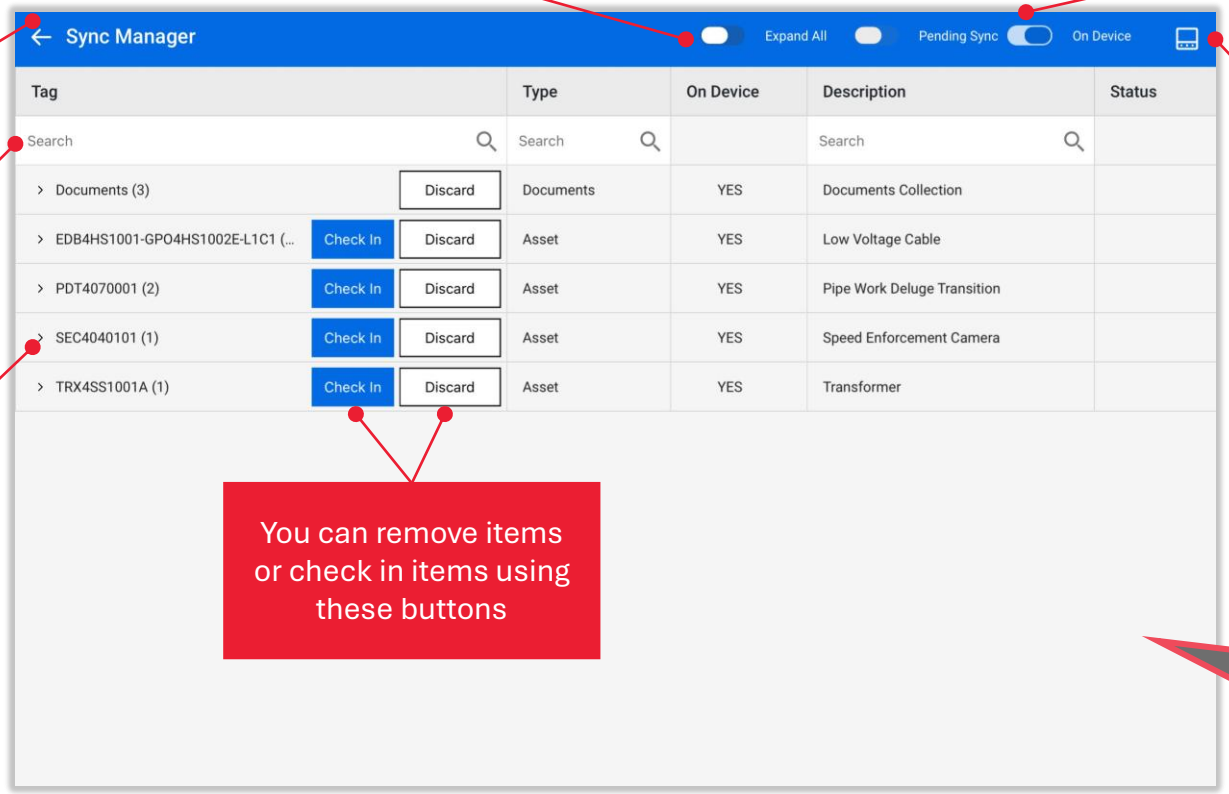
Expand all results to show more detail

By default, Sync Manager will show all items **pending sync**, Toggle to show items already downloaded

Arrow back to home screen

Refine displayed results using the column search

Items you have checked out or downloaded are listed. Tap a line item to show more details, like related tasks



Tap here to open the bottom menu, tap again to close that menu

You can remove items or check in items using these buttons

Note: If you have not checked out any items, Sync Manager will not show any items.

Find a Task or Punchlist

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Find a Task or Punchlist

To find a task or punchlist, from the homescreen

1. Tap the **Tasks** or **Punchlists** module

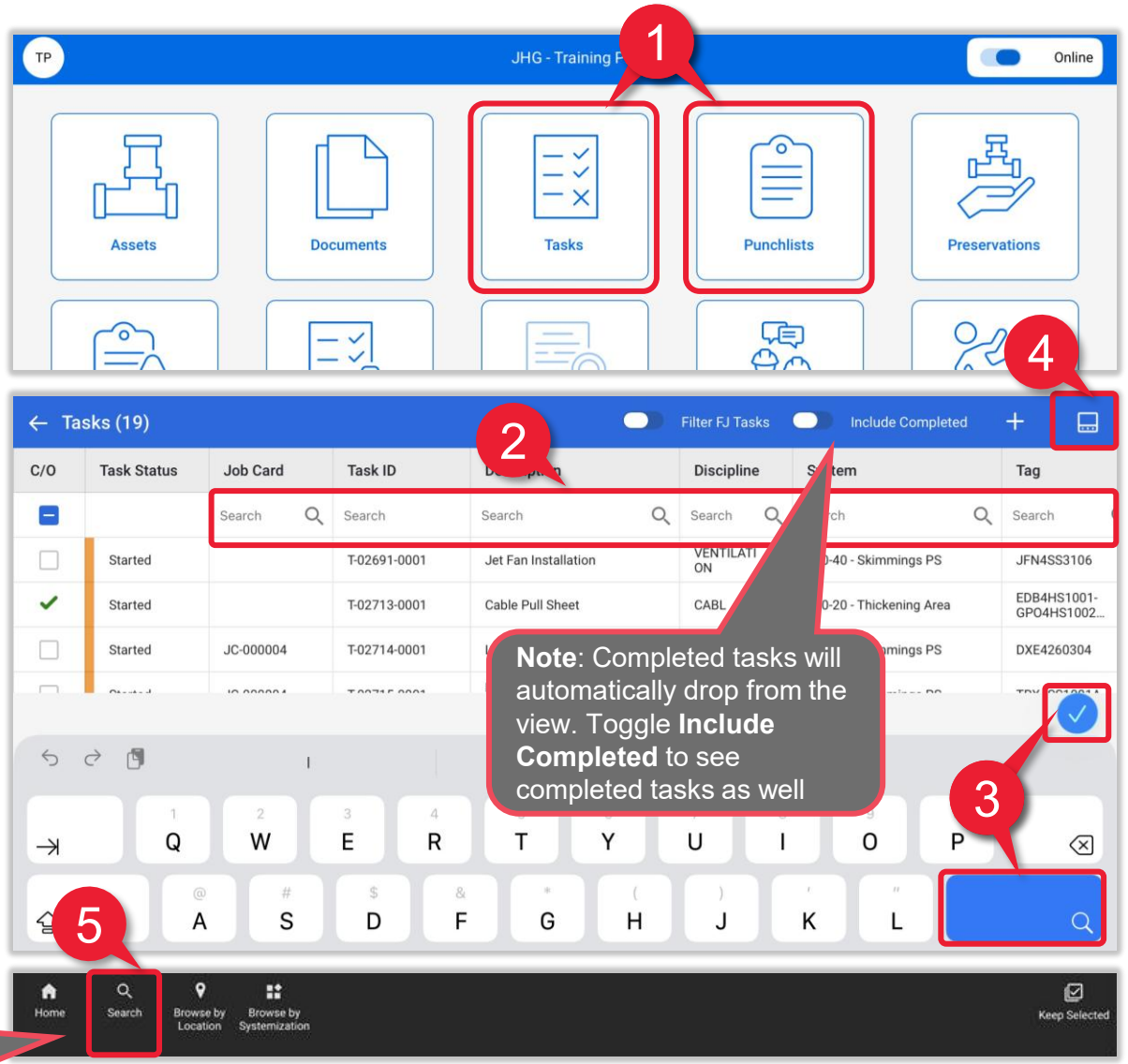
You can filter results immediately by following the steps below, or skip to **step 4** for a detailed search.

2. Tap the **search icon** below the relevant column heading you want to search by. E.g. if you have a Tag number (Asset Tag), tap into the search below **Tag**
3. Start typing and tap the **tick** or **magnifying glass** when ready to filter

To do a search:

4. Tap the **Menu icon** to display the menu bar at the bottom
5. Tap **Search**

Continued on next page…



Note: Searching and filtering works the same way in offline mode, however you are only able to search or filter within items checked out and downloaded to your device.

Find a Task or Punchlist (continued)

6. A search panel will open, tap into desired fields such as **Asset Tag** (you can select multiple) - fields are either free text or a popup menu, both are explained below

   For free text fields (like **Asset Tag**):

   a. Open the keyboard, tap the **tick** when ready

7. Fields with a popup icon, such as **Discipline**, will open a popup

   a. Search or scroll within the pop up

   b. Select as many options as desired

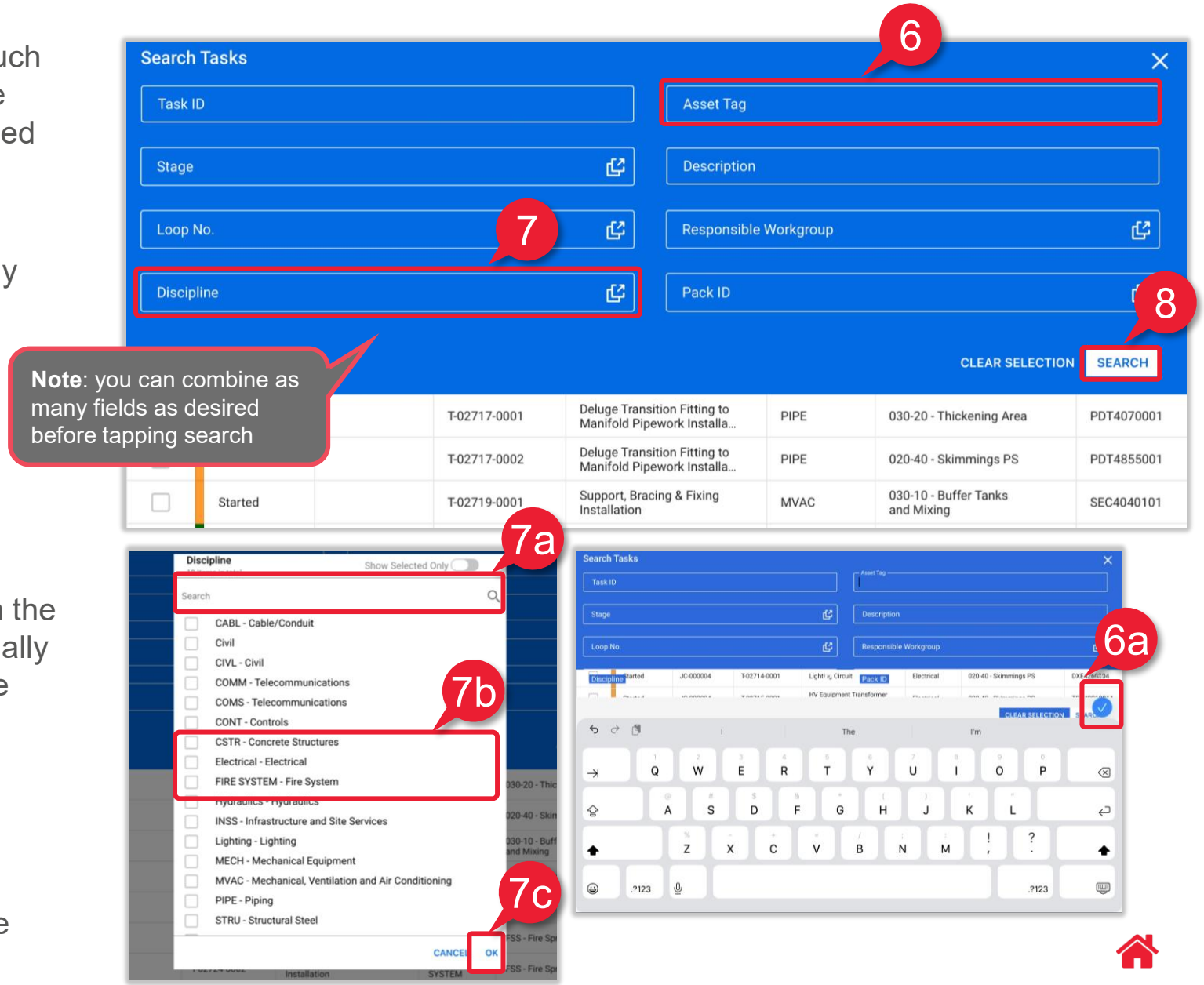
   c. Tap **OK**

8. Tap **Search** when ready

Results will display in the module, viewing a task from the list keeps search results. Clear results by either manually clearing the search column heading or returning to the home screen.

Click the below links to jump to the relevant steps:

- Task: Action & Complete
- Punchlist: Action & Submit
- Work offline (when working offline you will only see tasks and punchlists checked out to you)

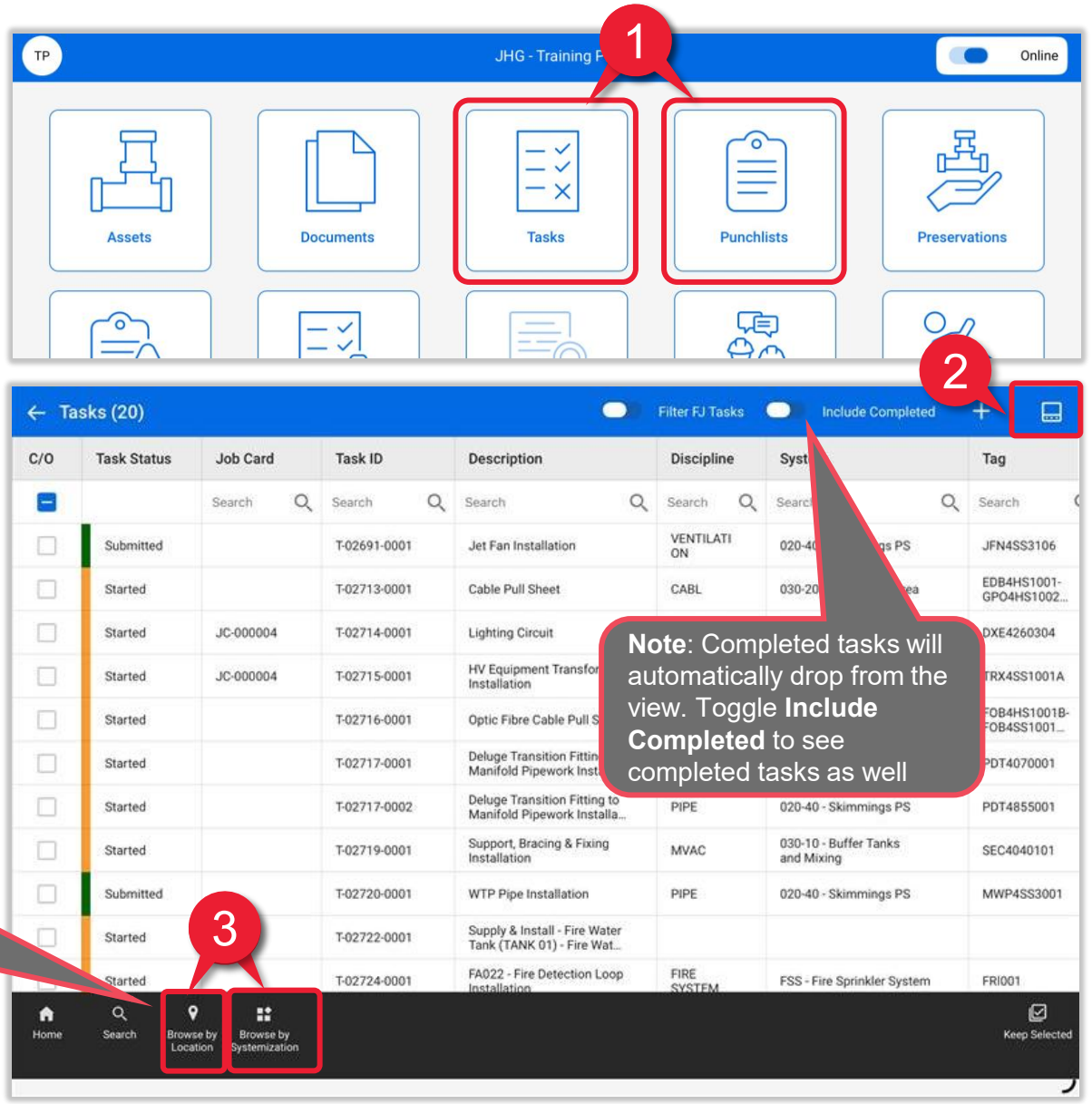


Browse by Location or Systemisation

Browsing is available in many modules, this example covers tasks and punchlists. To Browse for a task or punchlist, from the homescreen

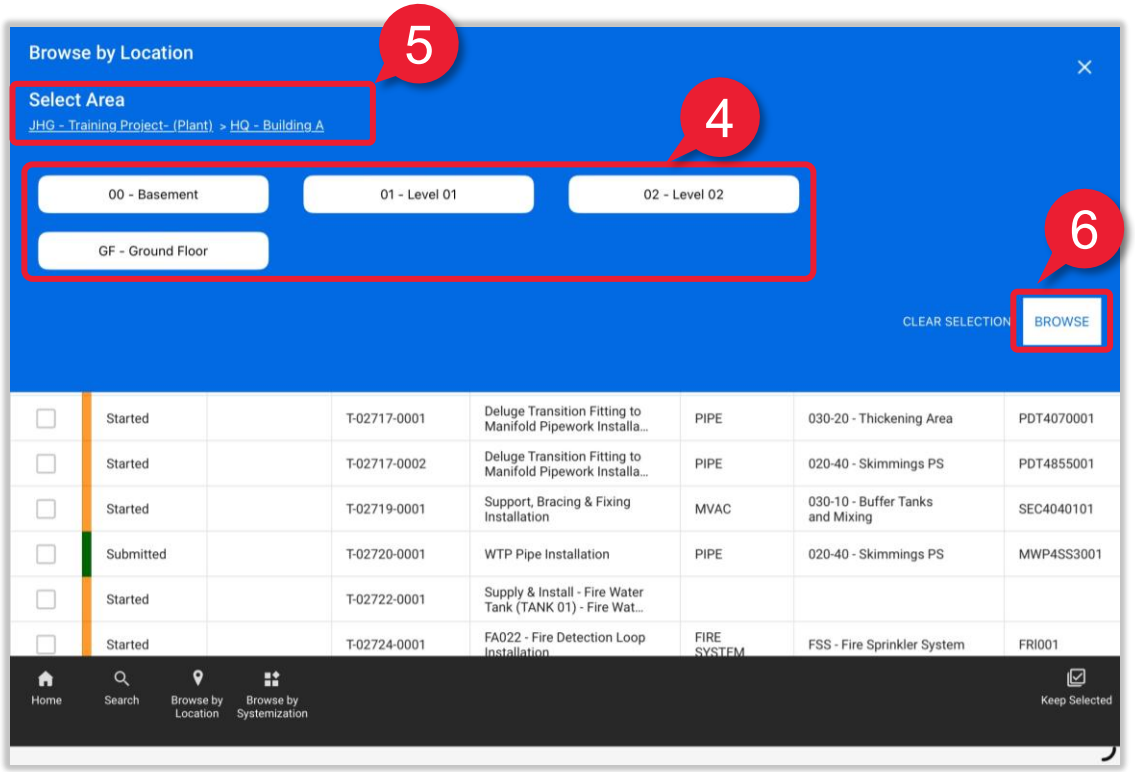
1. Tap the **Tasks** or **Punchlists** module
2. Tap the **Menu icon** to display the menu bar at the bottom
3. Tap either **Browse by Location** or **Browse by Systemisation** - a browse panel will open

Continued on next page…



Browse by Location or Systemisation (continued)

4. Tap the **location** or **systemisation** option desired (you can select multiple) - options will drill down levels as you make selections
5. Selected options are shown in the breadcrumb menu above
6. Tap **Browse** at any time



Results will display in the module, viewing a task from the list keeps search results. Clear results by either manually clearing the browse or returning to the home screen.

Click the below links to jump to the relevant steps:

- Task: Action & Complete
- Punchlist: Action & Submit
- Work offline (when working offline you will only see tasks and punchlists checked out to you)

Work Offline

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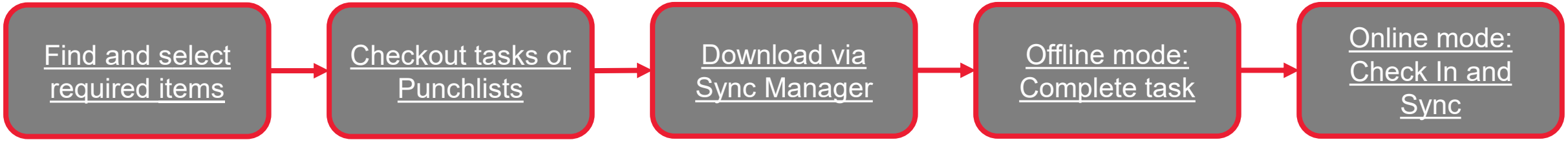
Working Offline process overview

Below is an overview of the process for working offline.

Working online is recommended, working offline is only for when no internet connection is possible.

From selecting tasks and downloading them, to uploading them once complete.

Steps for working offline are on the following pages.

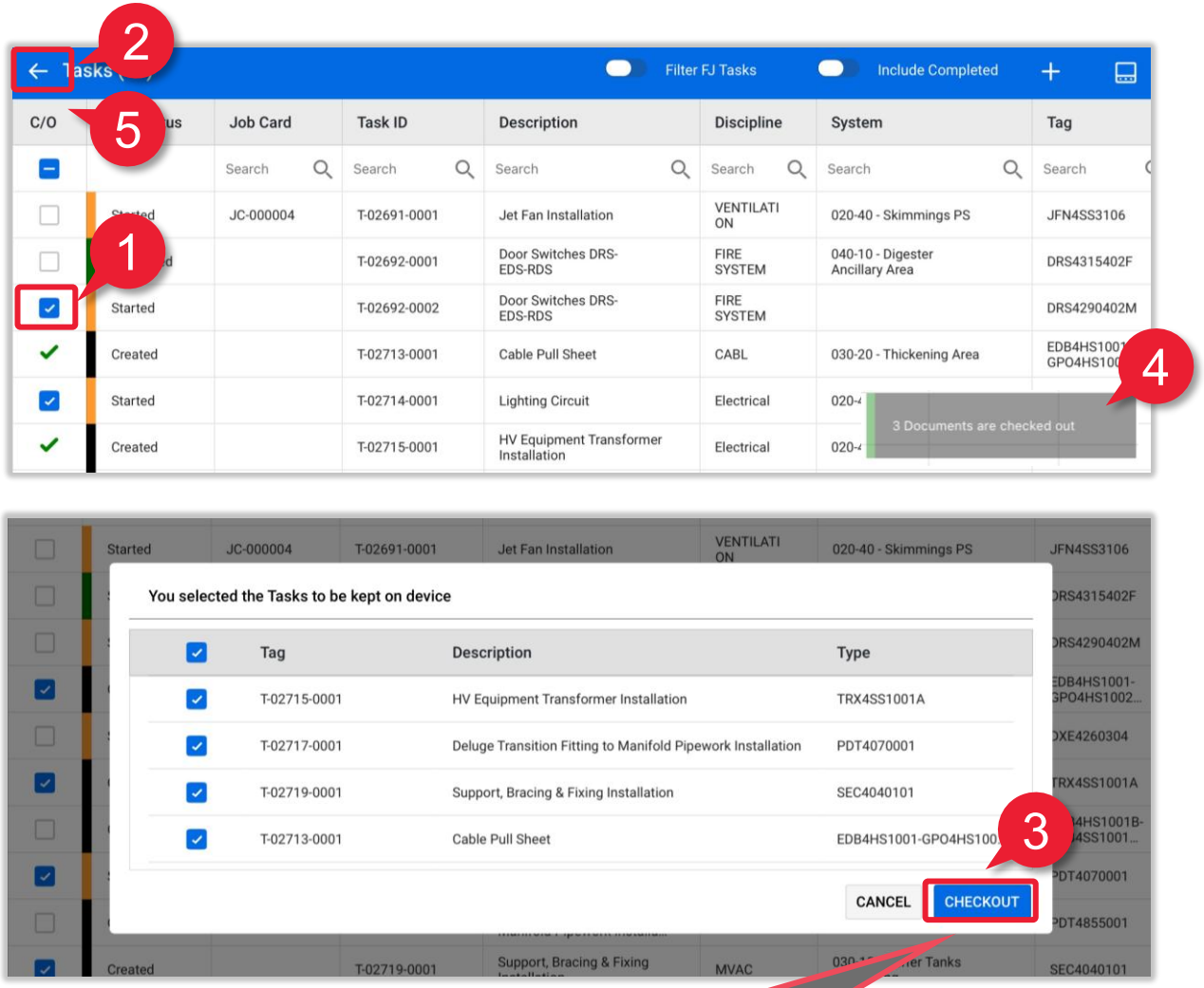


Work Offline – Checkout Tasks / Punchlists

Tasks or punchlists can be checked out from a desktop ready to sync for offline use, if checked out on desktop skip to step 6.

App instructions below. From the homepage, tap the tile for the tasks or punchlist, find the task or punchlist item using the search functions. Then:

1. Tap the **C\O** checkbox for the task or punchlist you need to complete offline, you can select multiple at once.
2. Tap the **arrow** to exit the module
3. A pop up will appear, confirm selection and tap **Checkout**
4. A small confirmation will appear. The selected items are now checked out for your use only, once synced can be available offline.
5. Tap the back **arrow** again to return to the Homepage



Note: Checking out a task or punchlist locks the item to you for action. No one else can edit a checked out item.

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Work Offline – Download via Sync Manager

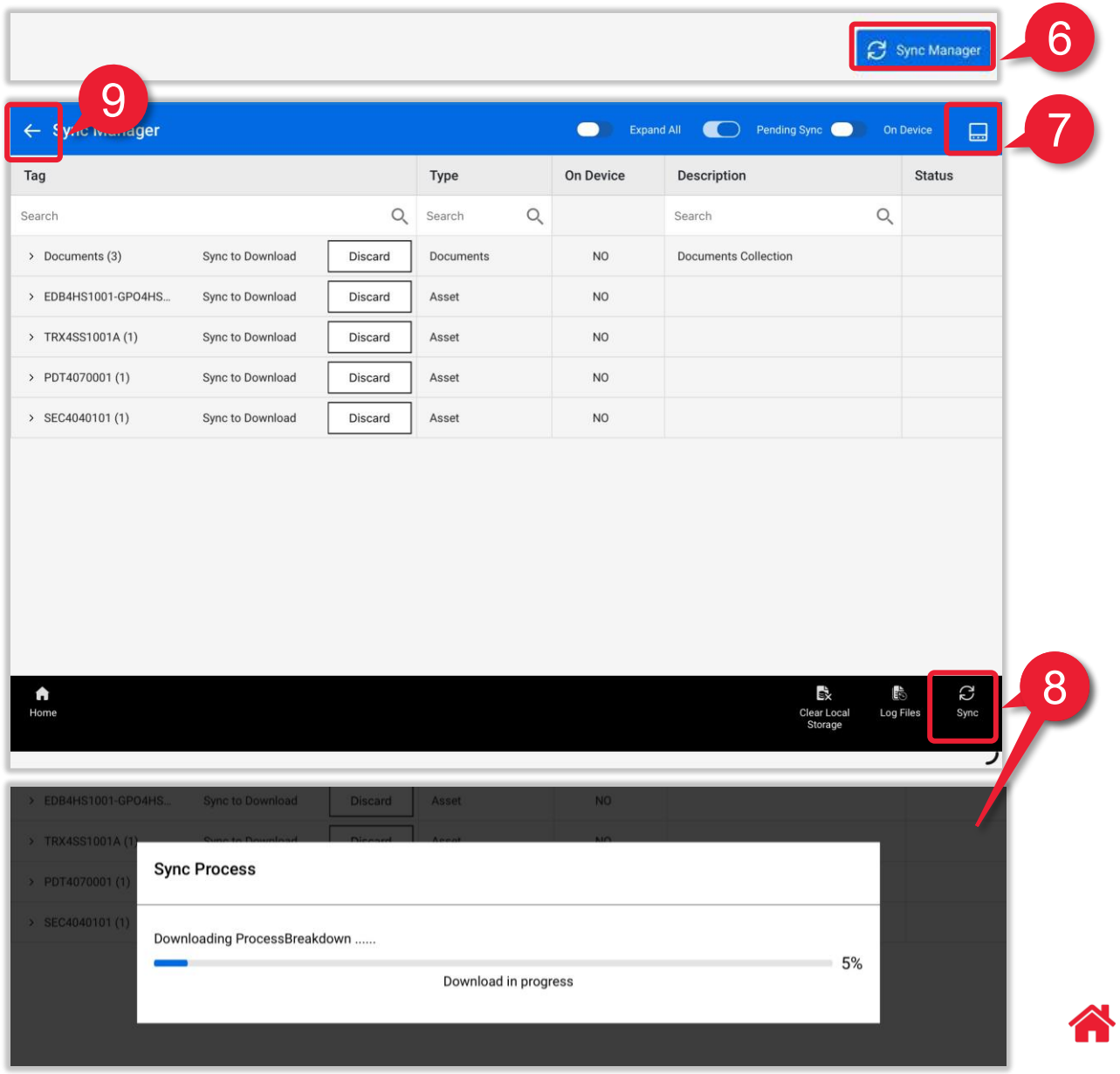
Sync Manager will display all items you've checked out (from previous page). You now need to download them to work on them offline:

6. From the Homepage, navigate to **Sync Manager**
7. Tap the **menu button** to show the menu bar at the bottom
8. Tap **Sync** to begin download of all checked out items – download progress will display
9. Once complete tap the back **arrow** to return to the homepage

You can now work offline to complete tasks or punchlists on site where online mode is not possible.

Activate offline mode by clicking **Offline** on the homepage, or it will automatically move to offline mode when you don't have an internet connection.

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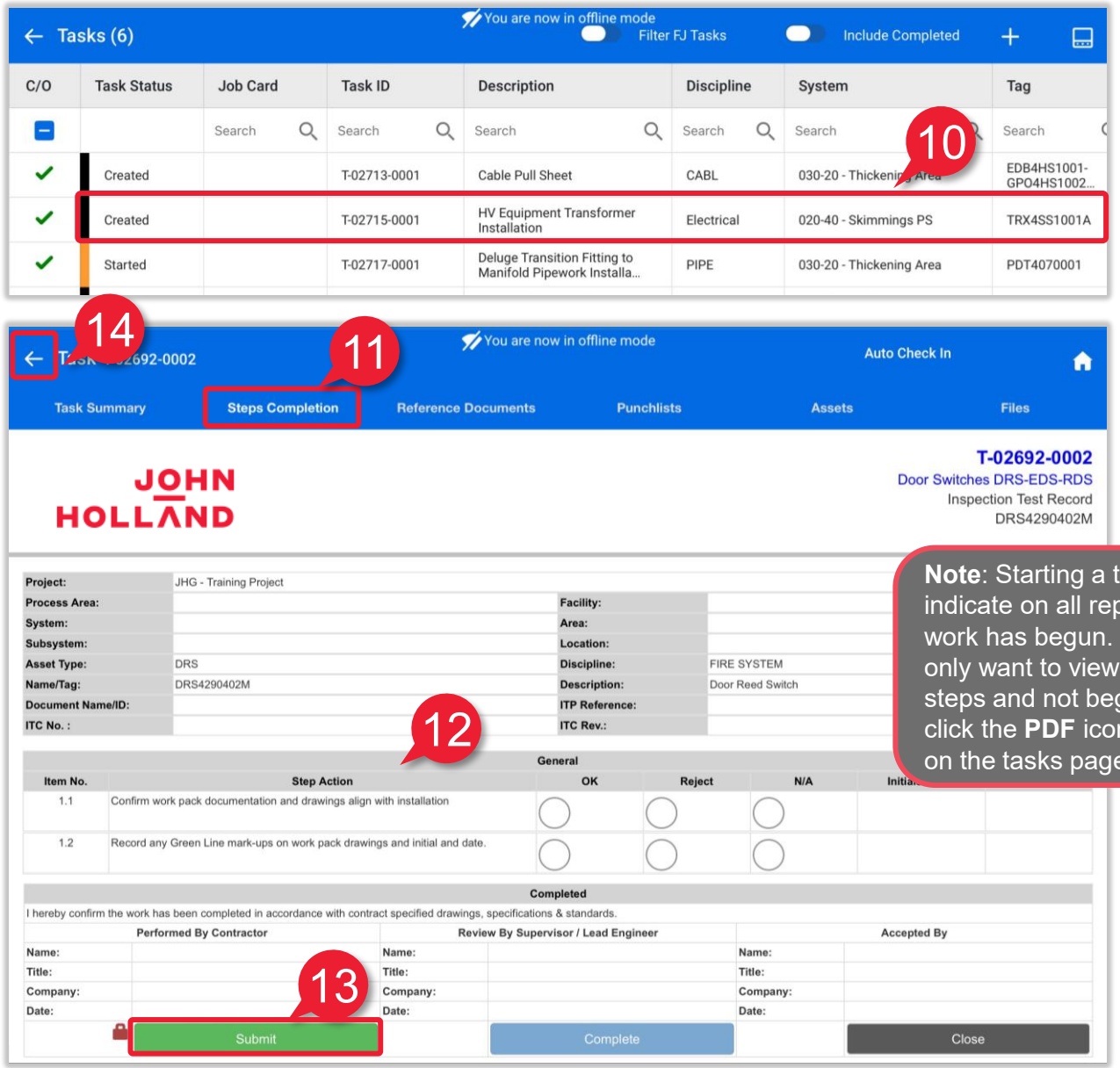
Work Offline – Complete task or punchlist

Items that have been downloaded can be accessed as usual while you are offline, via the module tiles from the homepage.

Upon tapping into the desired module, the results shown will be all downloaded items.

10. Tap a line item to begin a task or punchlist, detailed Punchlist steps here
    a) Tap **Start Task** (will only appear if Task hasn't been started before)
11. Navigate to **Steps Completion**
12. Complete the task, for full steps see Complete a Task
13. Tab **Submit** when ready. This will only upload when you are back online and activate a sync (steps on next page)
14. Tap the back **arrow** to return to the homepage

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Note: Starting a task will indicate on all reports that work has begun. If you only want to view the steps and not begin work, click the **PDF** icon back on the tasks page

Work Offline – Check in & Sync

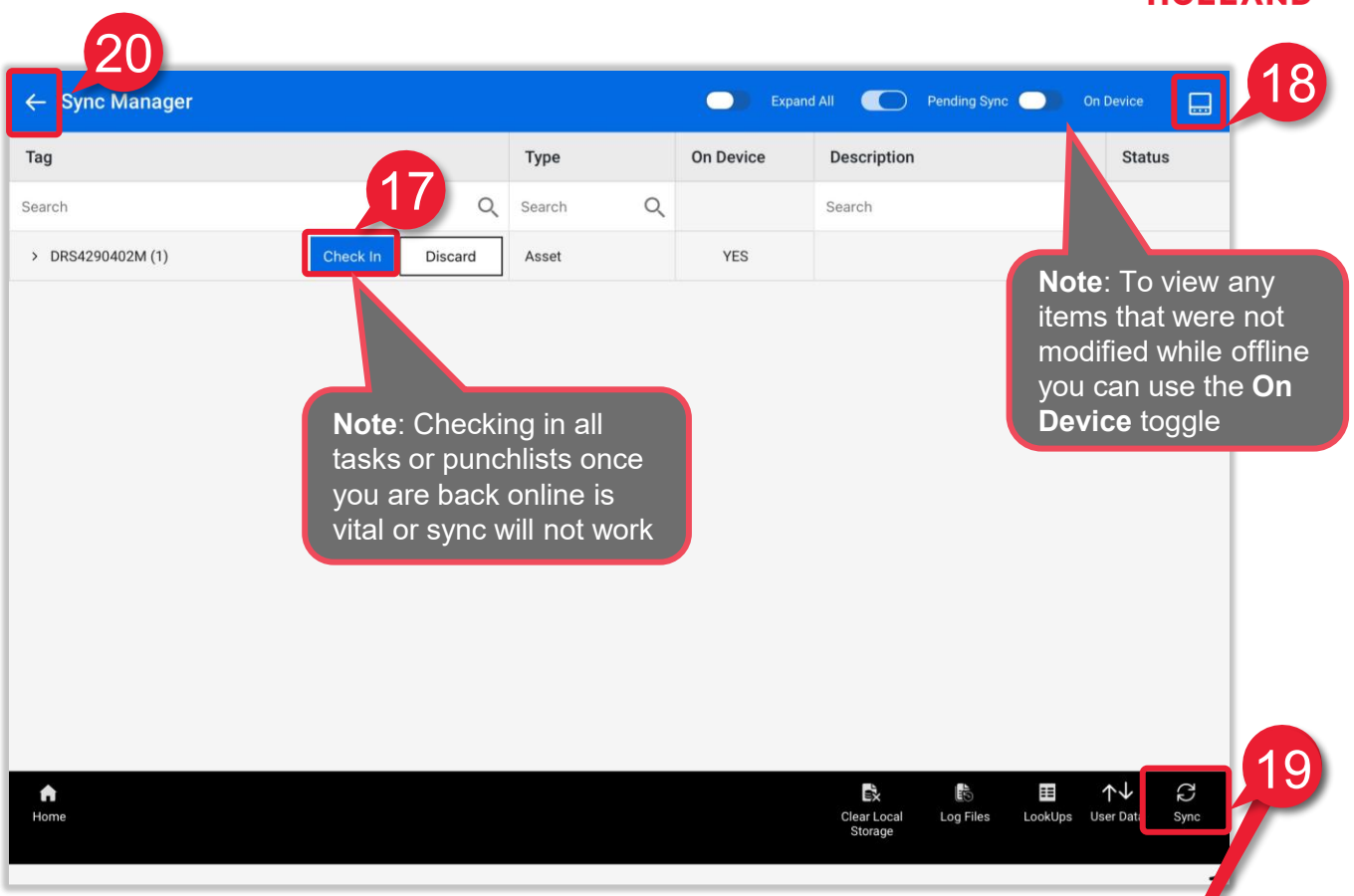
You'll need to check in anything you no longer need to action, as items checked out will not be synced and cannot be edited by anyone else.

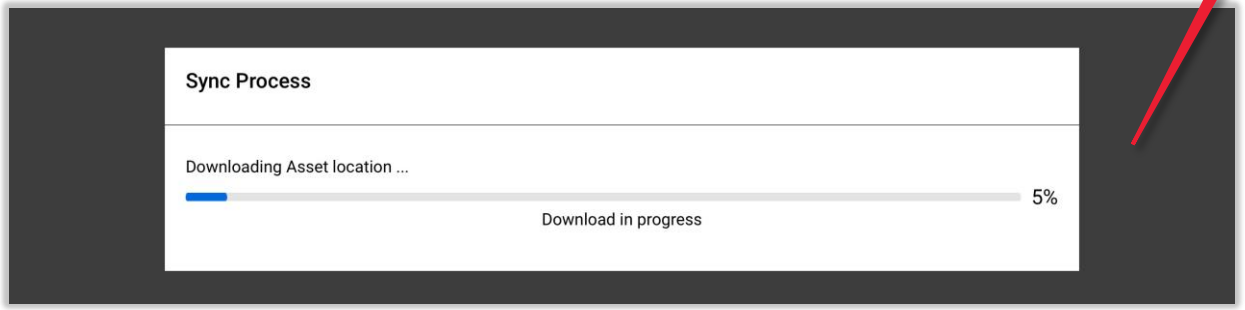
When you have an internet connection, from the Homepage:

15. Tap the **Online** toggle
16. Tap **Sync Manager**, all tasks or items that have been modified while offline will appear in the list
17. Tap **Check In**
18. Tap the **menu icon** to show the menu bar at the bottom
19. Tap **Sync**, upload progress will display
20. Once complete you can return to the homepage, tap the **arrow**

All updated information is now synced and available online.







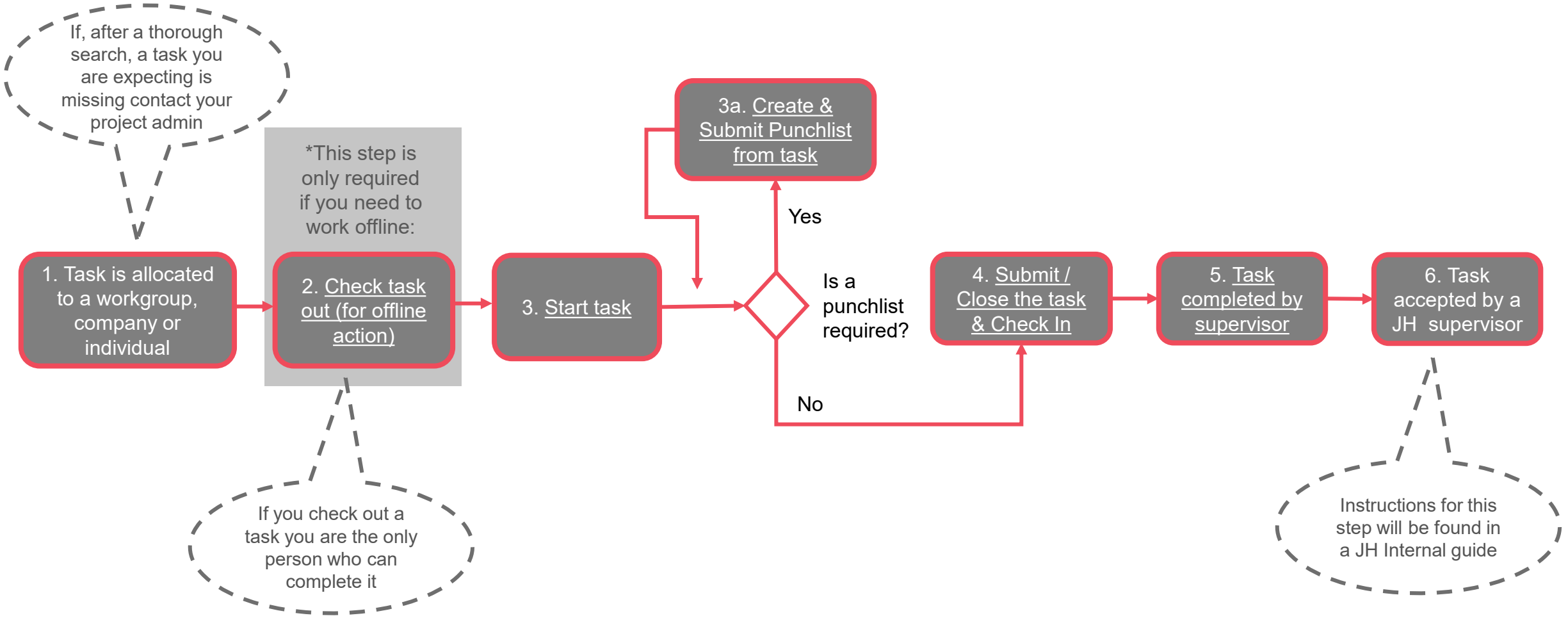
Task: Action & Complete

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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.



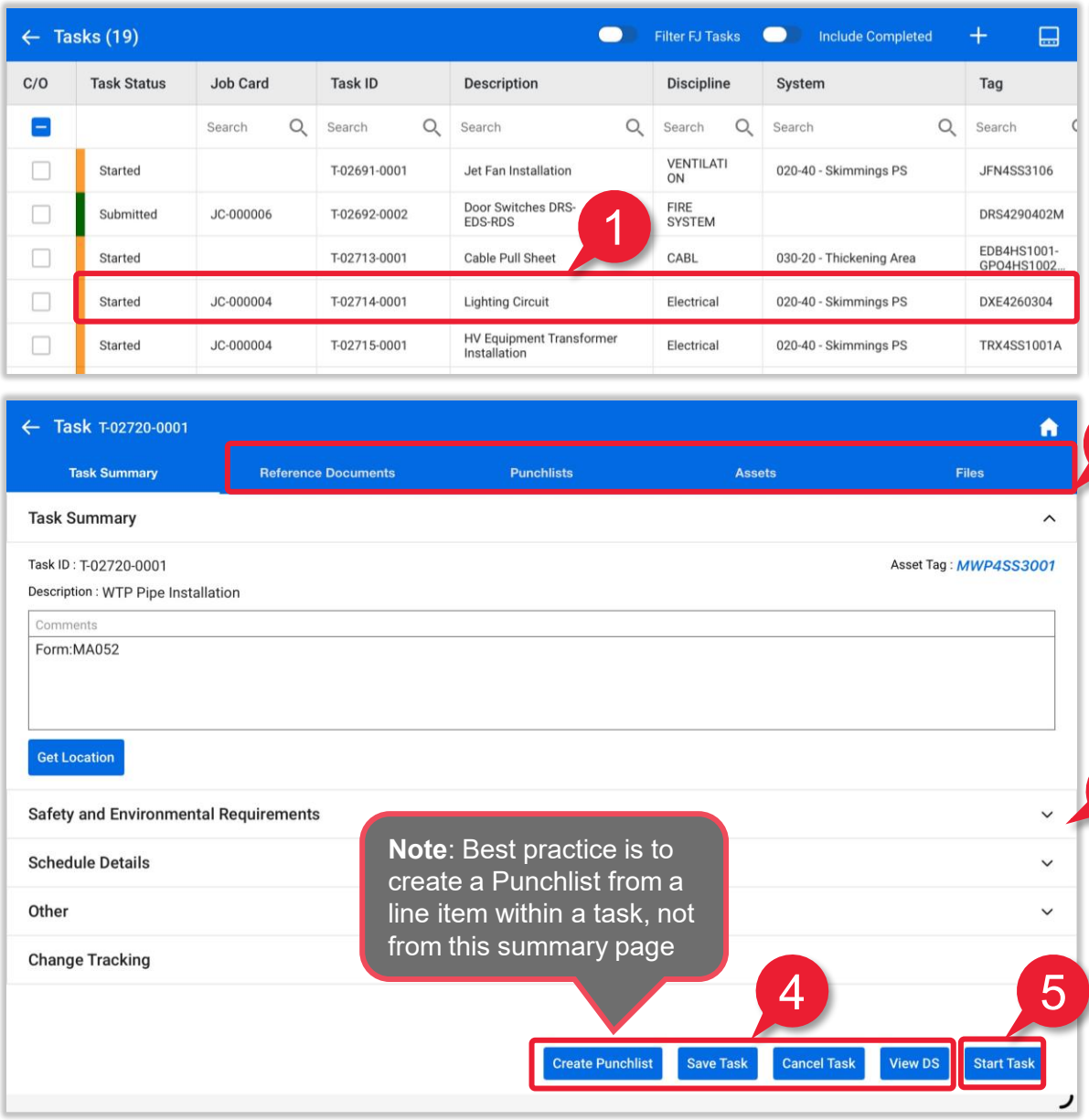
Task - Action & Complete

Once you are ready to work on a task, follow the steps below.

If you need to Work Offline make sure you have checked out and downloaded (synced) the tasks first (see steps here: Work Offline)

1. Tap the **Task** to open it (if you need help finding the task, see steps linked here: Find a Task)
2. The task will open. In the **Tabs** across the top, you can access details such as linked punchlists, linked asset and photos or attachments in files
3. On the **Task Summary** tab you can access additional details by tapping on the drop-down options
4. The buttons at the bottom will change depending on the current status of a task
5. The first time you open a task tap **Start Task**
   a) Starting a task will indicate on all reports that work has begun. If you only want to view the steps and not begin work, click the **PDF** icon back on the tasks page

Continued on next page…



Task - Action & Complete (continued)

6. Once a task is started, a **Steps Completion** tab will open, this tab contains the form and checks that need to be completed, scroll down to view everything
7. Task and asset information is displayed in the header and the top right of the inspection test record (ITR)

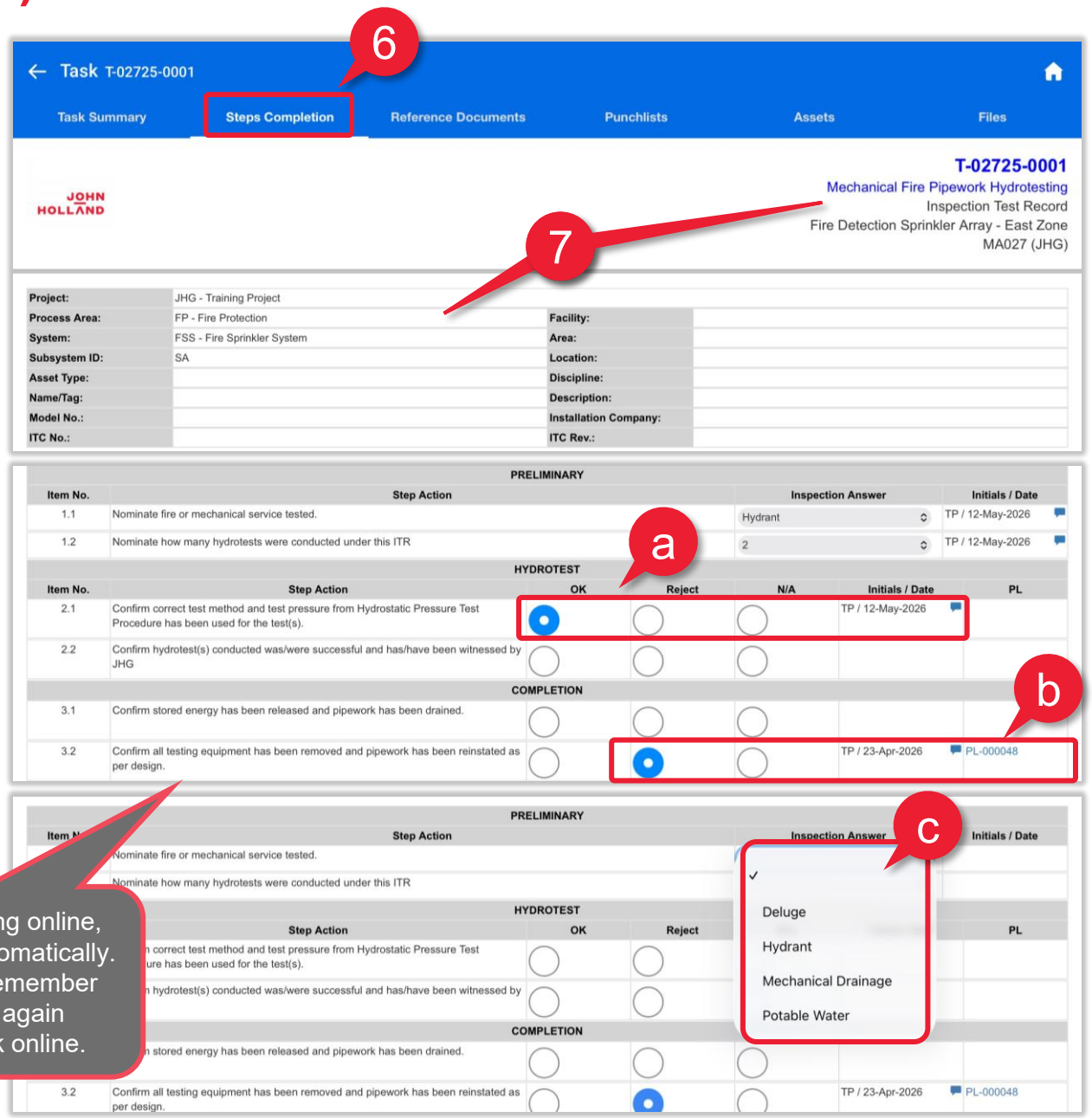
Complete the required information. Every Inspection Test Record (ITR task) may look different as every asset type and test requires different information to be recorded. The below shows steps to complete some of the fields you might see:

a) Tap **OK** or **N/A** against a line item and the system will automatically record the date, time and user stamp on the right.

b) Tapping **Reject** or **No** can trigger a punchlist creation (see steps linked here: Create a punchlist from a task)

c) Some fields may open a list to select from when tapped

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Task - Action & Complete (continued)

(steps continued from prior page)

d) Reference info may be included

e) Tap into blank fields to input free text

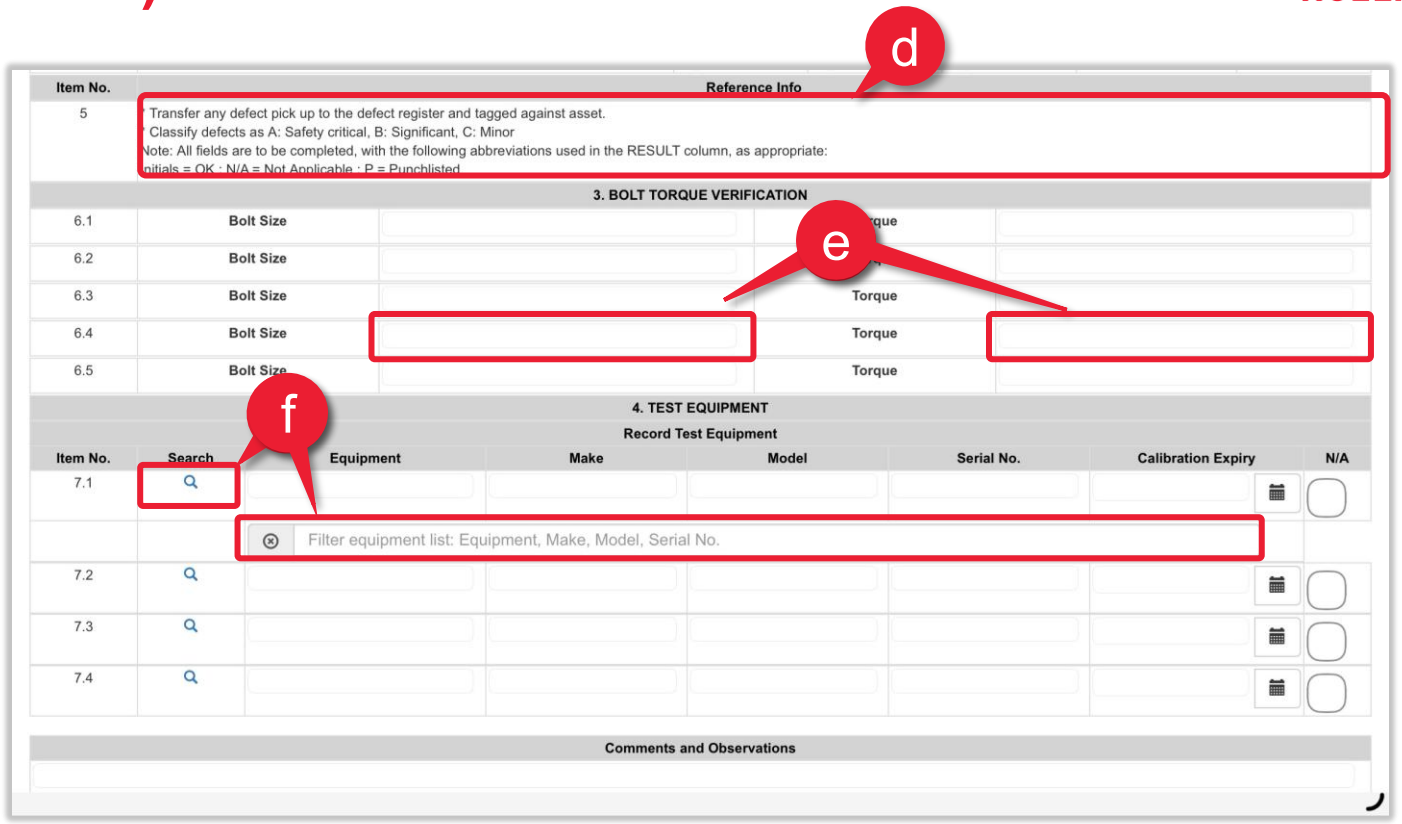
f) Tap the magnifying glass to activate search & type into the search field that opens

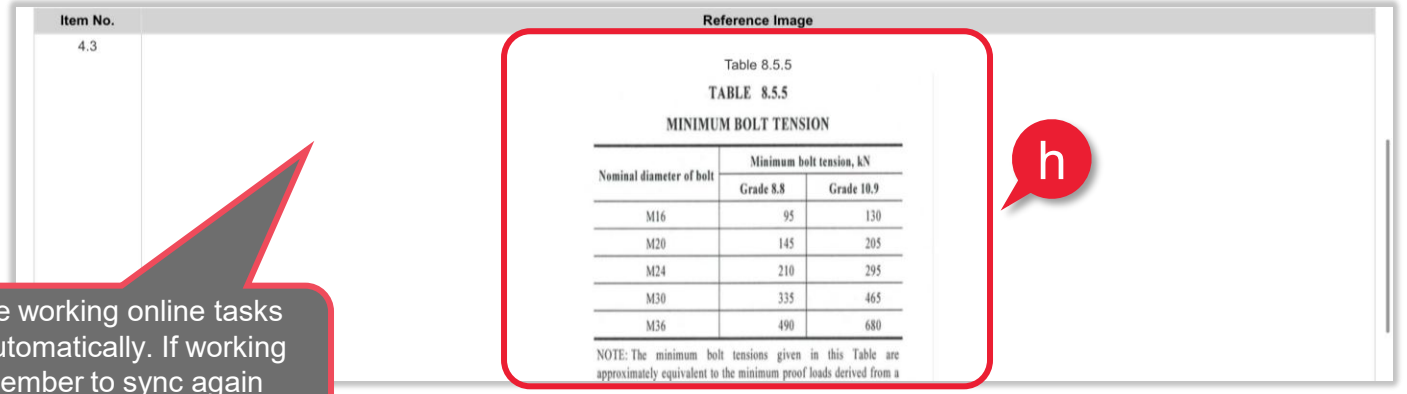
g) Reference images can be included as well

Continue to complete all fields on the task, if you need to add information follow the below steps to:

- Take a Photo if required
- Add a File if required
- Raise a Punchlist if required

Continue to steps to Submit when task is ready





Note: While working online tasks will save automatically. If working offline, remember to sync again when you are back online.

Submit a Task (ITR)

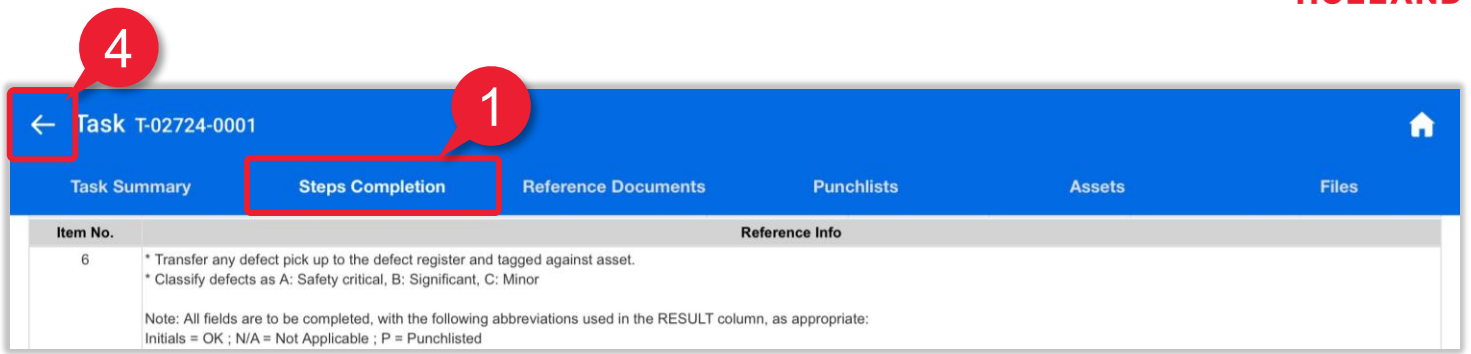
Once all fields on an ITR Task are completed (including attaching all supporting evidence or raising punchlists if required), from within the task, follow the below steps to finalise the task:

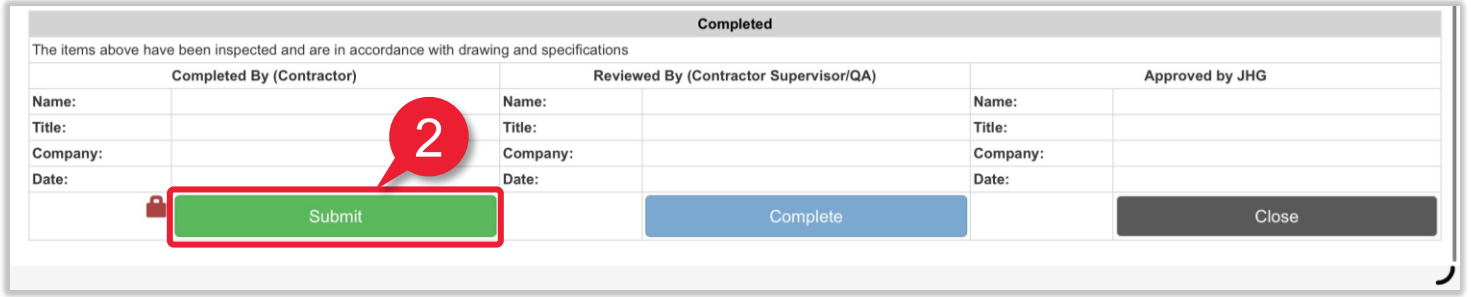
1. Scroll to the bottom of the **Steps Completion** tab
2. Tap **Submit**
3. Your name and details will populate and the submit button will display as **Edit**
4. Tap the **arrow** at the top to return to the task list
5. Confirm the task status is displaying as **Submitted**

The task will go to the next person in the workflow for completion.

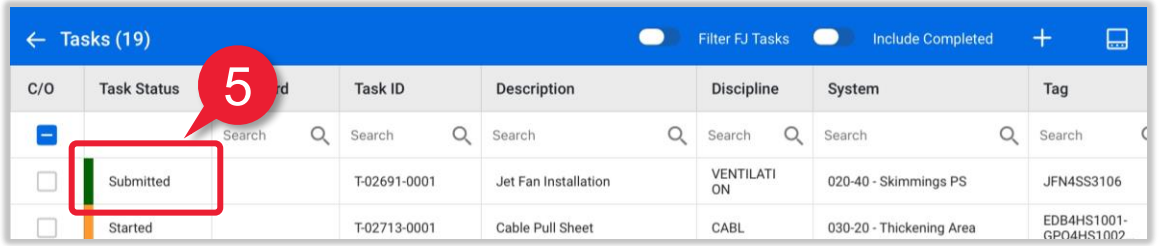
Note: Task status may be different if there is an outstanding punchlist item.

If you were working offline, remember to check in and sync once back online.









Task – Add a file

Before you submit a task, you can add additional files or include pictures additional to what is required in the form, by following the steps below. If you don't need to add additional files, skip to Submit a Task.

1. Tap the **Files** tab
2. Tap the **Plus** icon
3. Tap the image or paper icon depending upon what your uploading:

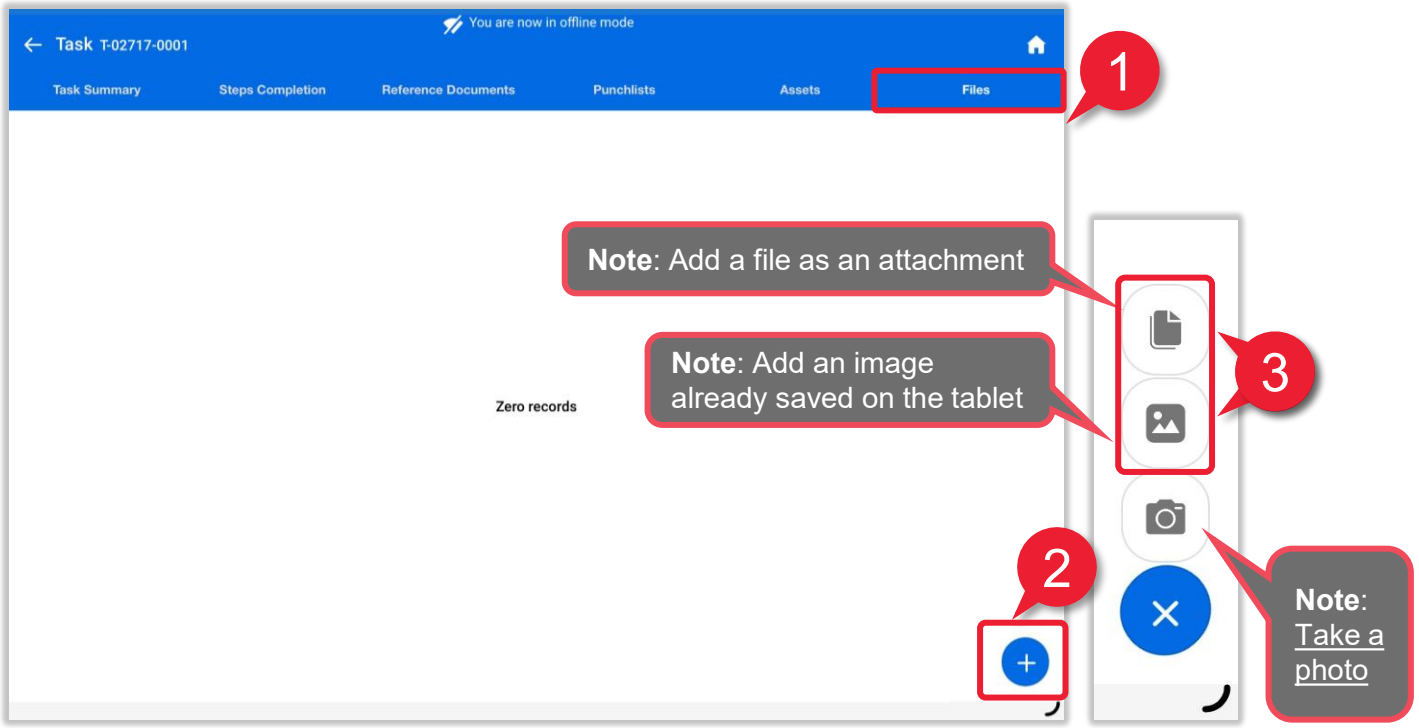
   Image: Images saved on device

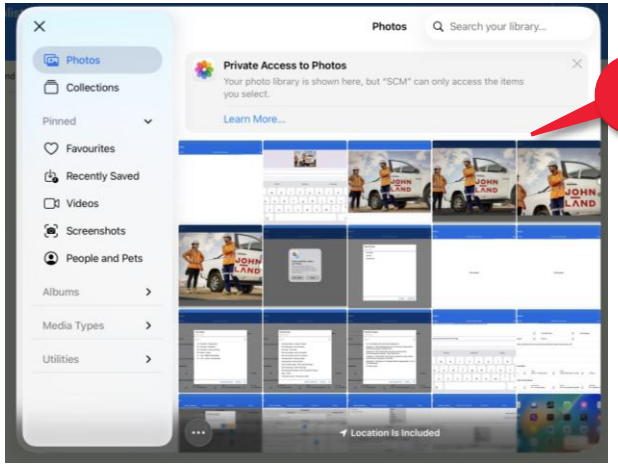
   Paper icon: PDFs
4. A popup will open to allow selection of either files or photos, tap the desired file

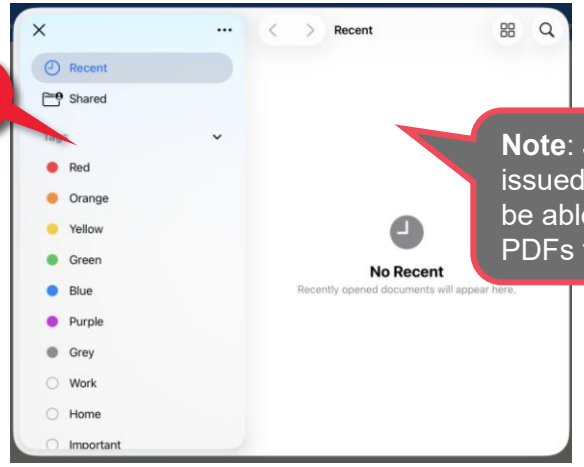
Repeat steps to add multiple files. Continue to complete all fields on the task, if you need to add information follow the below steps to:

- Take a Photo if required
- Raise a Punchlist if required

Continue to steps to Submit when task is ready







Task – Take a photo

Before you submit a task, you can add additional files or include additional pictures than what is required in the form, by following the steps below. If you don't need to add additional files, skip to Submit a Task.

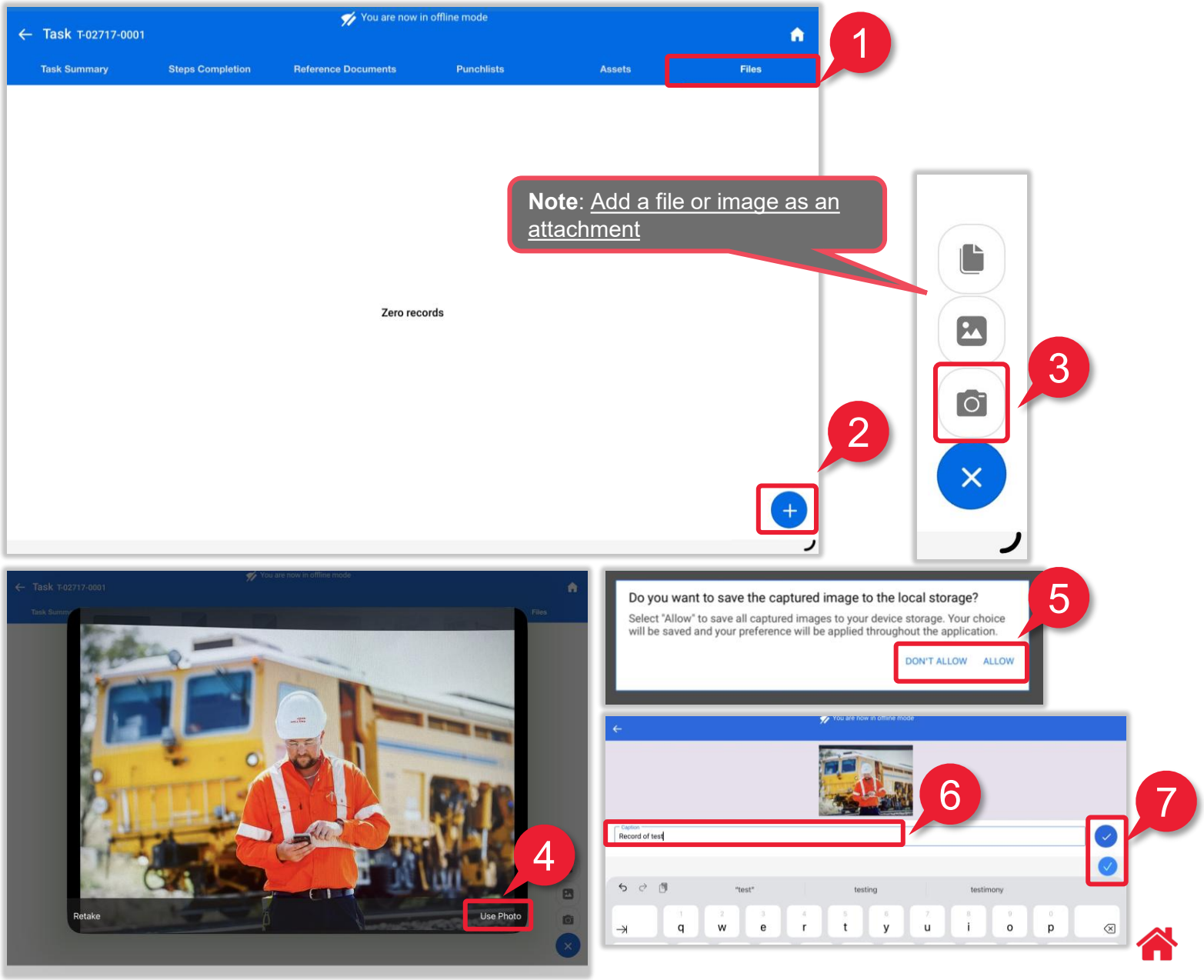
1. Tap the **Files** tab
2. Tap the **plus** icon
3. Tap the **camera** icon, the device camera will activate, take the photo
4. Tap **Use Photo**
5. The first time a device is used you will be asked if you'd like to save images locally, this is entirely individual preference tap **allow** or **don't allow**
6. Type a caption to explain the image
7. Tap either of the **ticks**

The image will now be saved in the files tab of the task.

Repeat steps to add multiple photos. If you need to add information follow the below steps to:

- Add a File if required
- Raise a Punchlist if required

Continue to Submit when task is ready

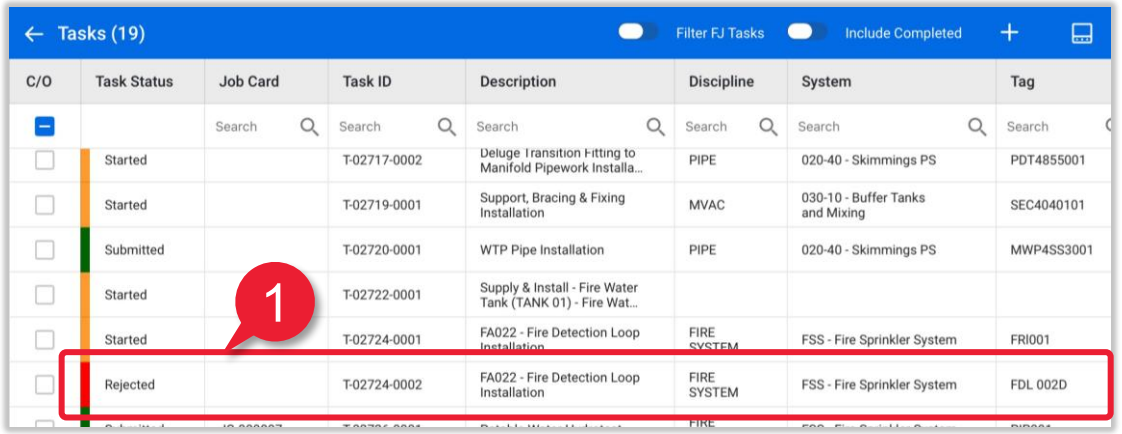


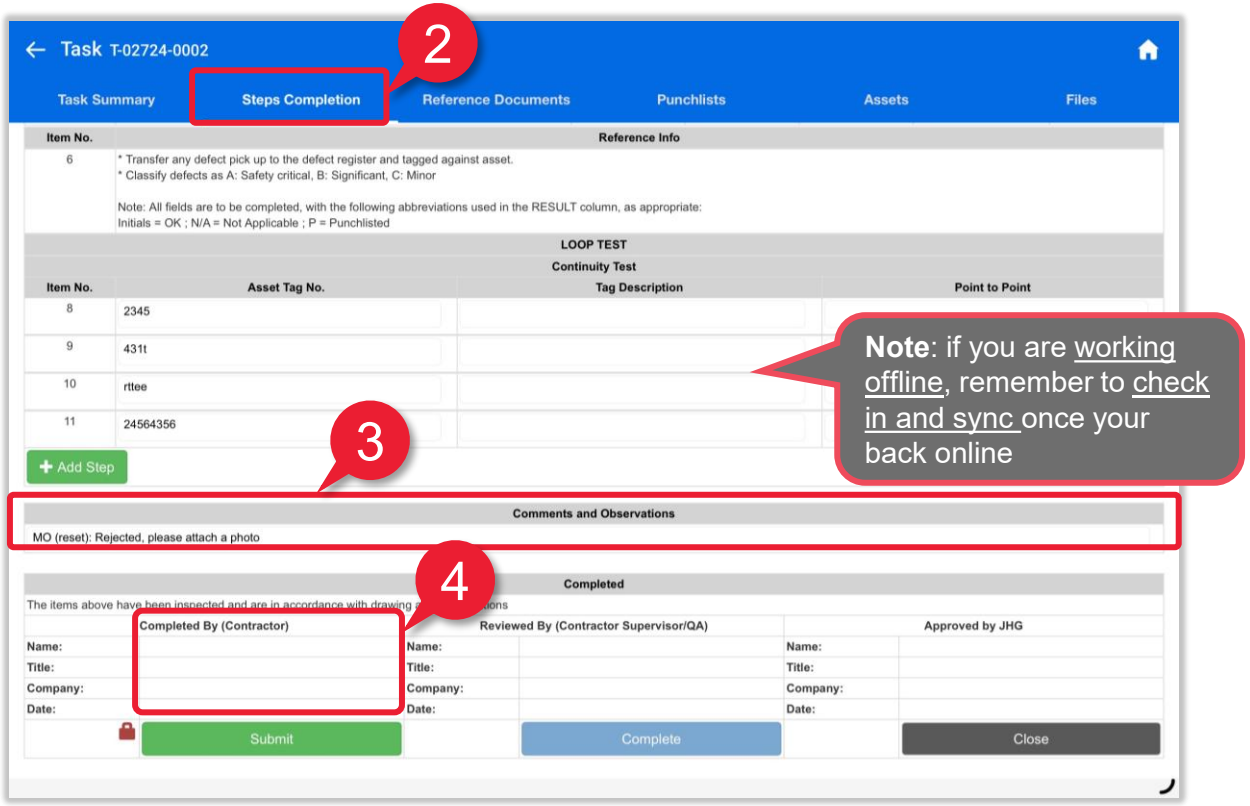
Action a Rejected Task (ITR)

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

From the home screen tab in the Tasks module:

1. Tap on the rejected task you need to action
2. Tap the **Steps Completion** tab and scroll to the bottom
3. Comments made by the supervisor when rejecting will automatically included in **Comments and Observations**
4. All previously input information remains; however, submission information is reset





Continue to complete all fields on the task, if you need to add information follow the below steps to:

- Take a Photo if required
- Add a File if required
- Raise a Punchlist if required

Continue to steps to Submit when task is ready

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

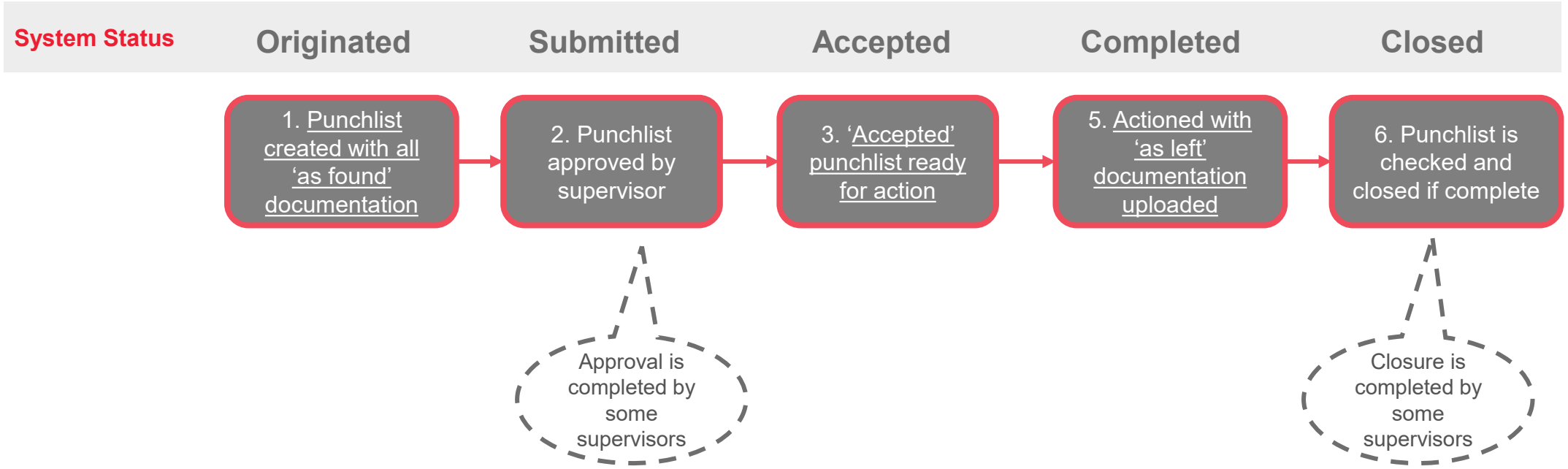
Note: Task status may be different if there is an outstanding punchlist item.

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

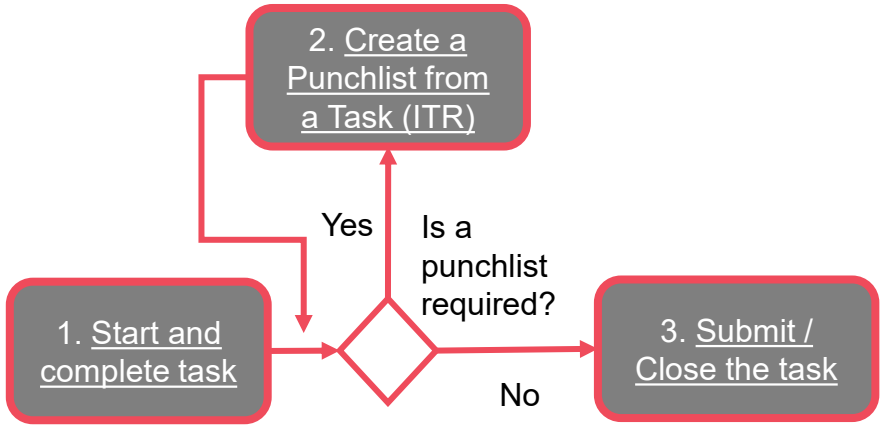
Punchlist: Create

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

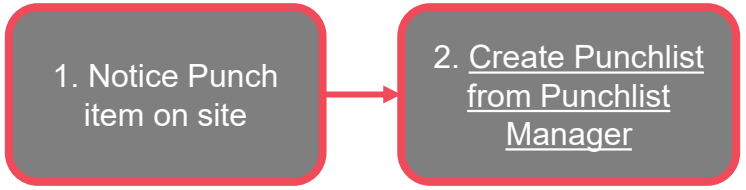
Category A: Cannot Energise
Category B: Can energise, but requires de-energisation / isolation to rectify
Category C: Rectification prior to final handover

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 items, faults, etc, you can trigger a punchlist related to a specific task line item. 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.



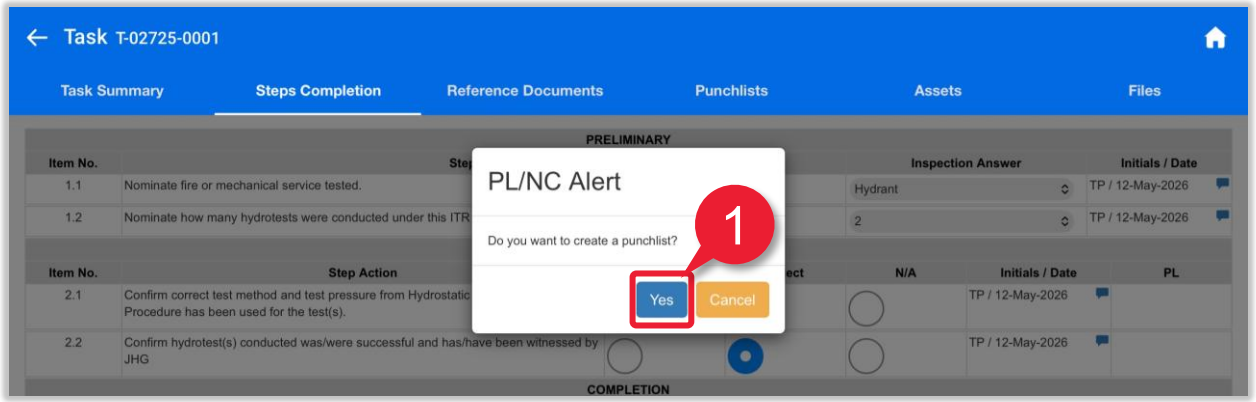
Create a Punchlist from a Task (ITR)

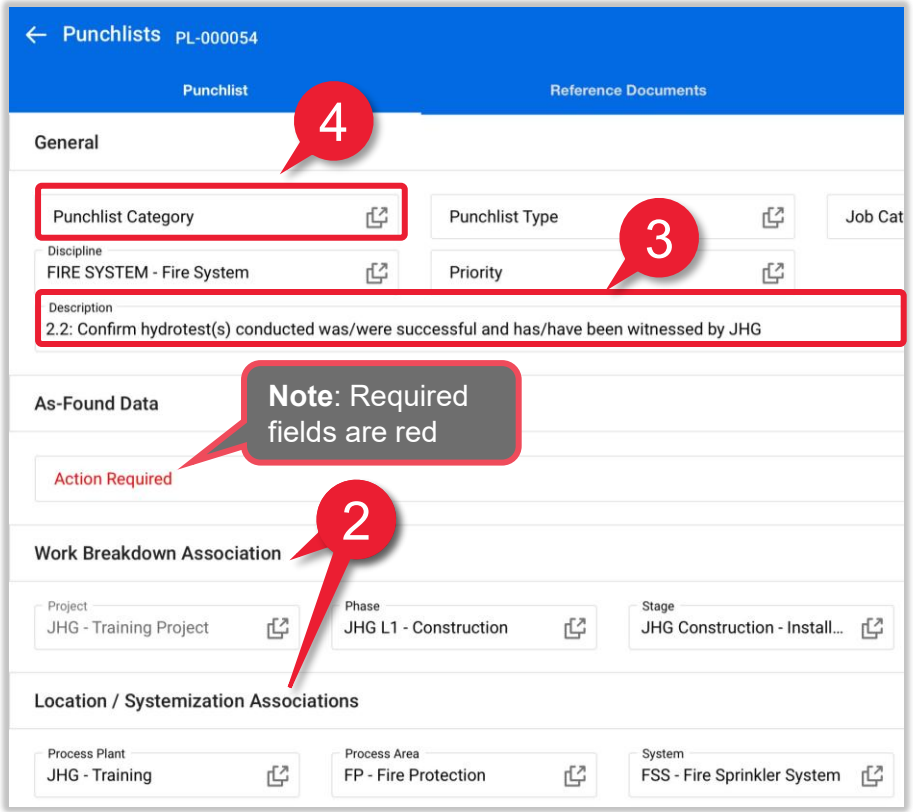
The steps below (and continued on the next page) show creating a punchlist from within a task if you are prompted by the system.

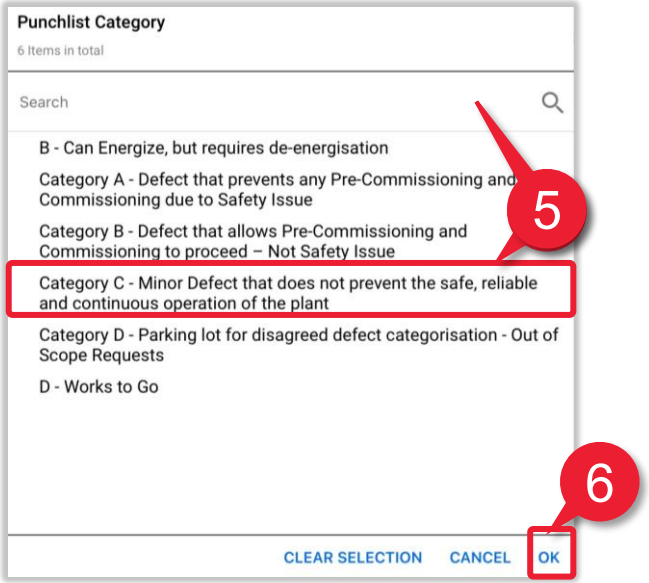
You can also create a punchlist from the Punchlist Manager (see steps to Create from Punchlist manager).

1. When prompted by the system, tap **Yes**
2. Check the information pulled from the task, such as **Work Breakdown Association** and **Location / Systemization Associations**
3. The task line item will pull into the **Description** (mandatory field), confirm or tap into this to alter as required
4. Taping on any field with a popup icon, like **Punchlist Category**, will open a pop up
5. Either tap the desired selection, or tap into **Search** and type to refine available selections
6. Once a selection is made tap **OK**

Continued on next page….







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

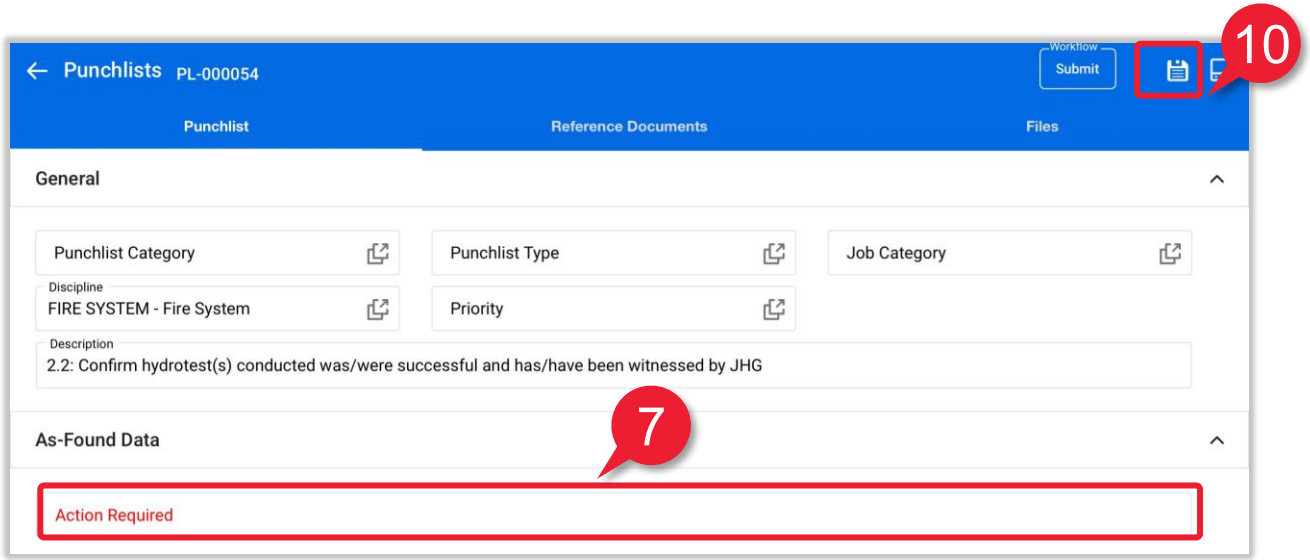
7. Tap into **Action Required**
8. Type the punchlist activity, this is a mandatory field
9. Tap the **tick** when ready
10. Tap the **Save** icon at any time to save without submitting

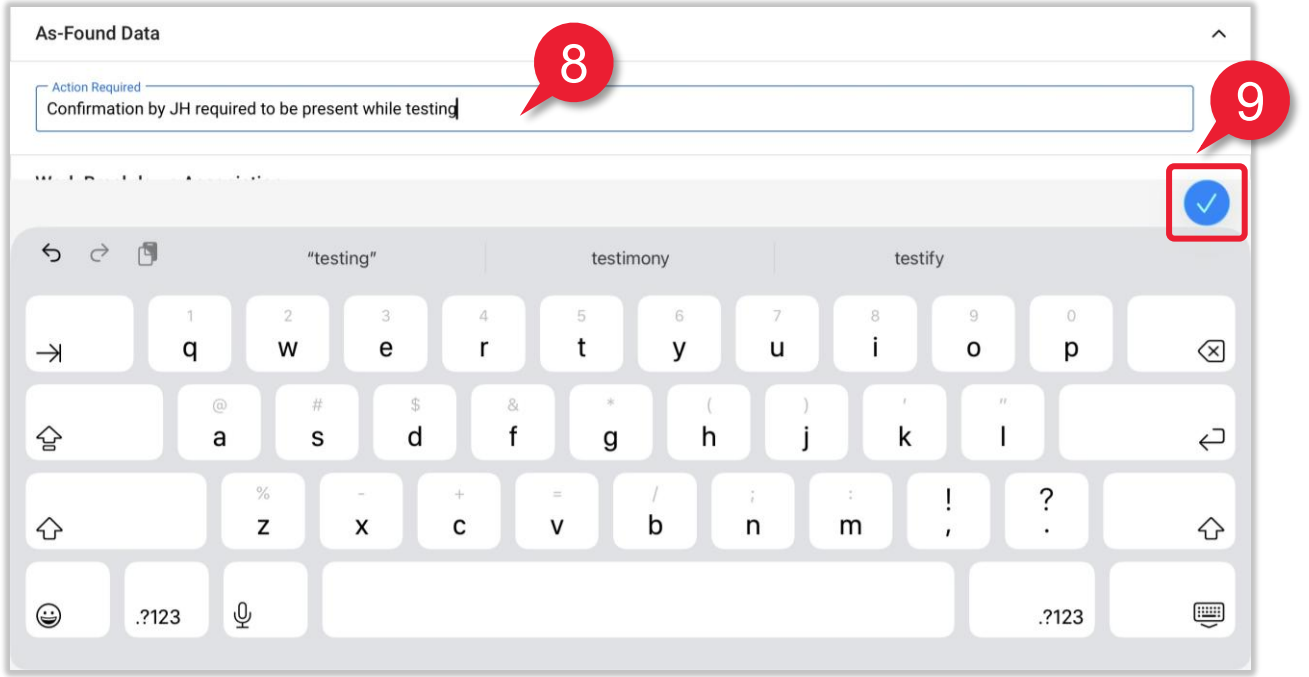
Check all other information, ensure you give enough details for a future team to complete the punchlist – **Asset** and **Task** information will pull from the task. **Responsible Company**, **Punchlist Category** and **Punchlist Type** are desirable fields

if you need to add information follow the below steps to:

- Add a file or image if required
- Add a GPS location if required

Continue to steps for Submit & Send when the Punchlist is ready





Create a Punchlist from Punchlists Module

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

If you are creating a punchlist from within a task (the preferred method), see steps on Create a Punchlist from a Task (ITR).

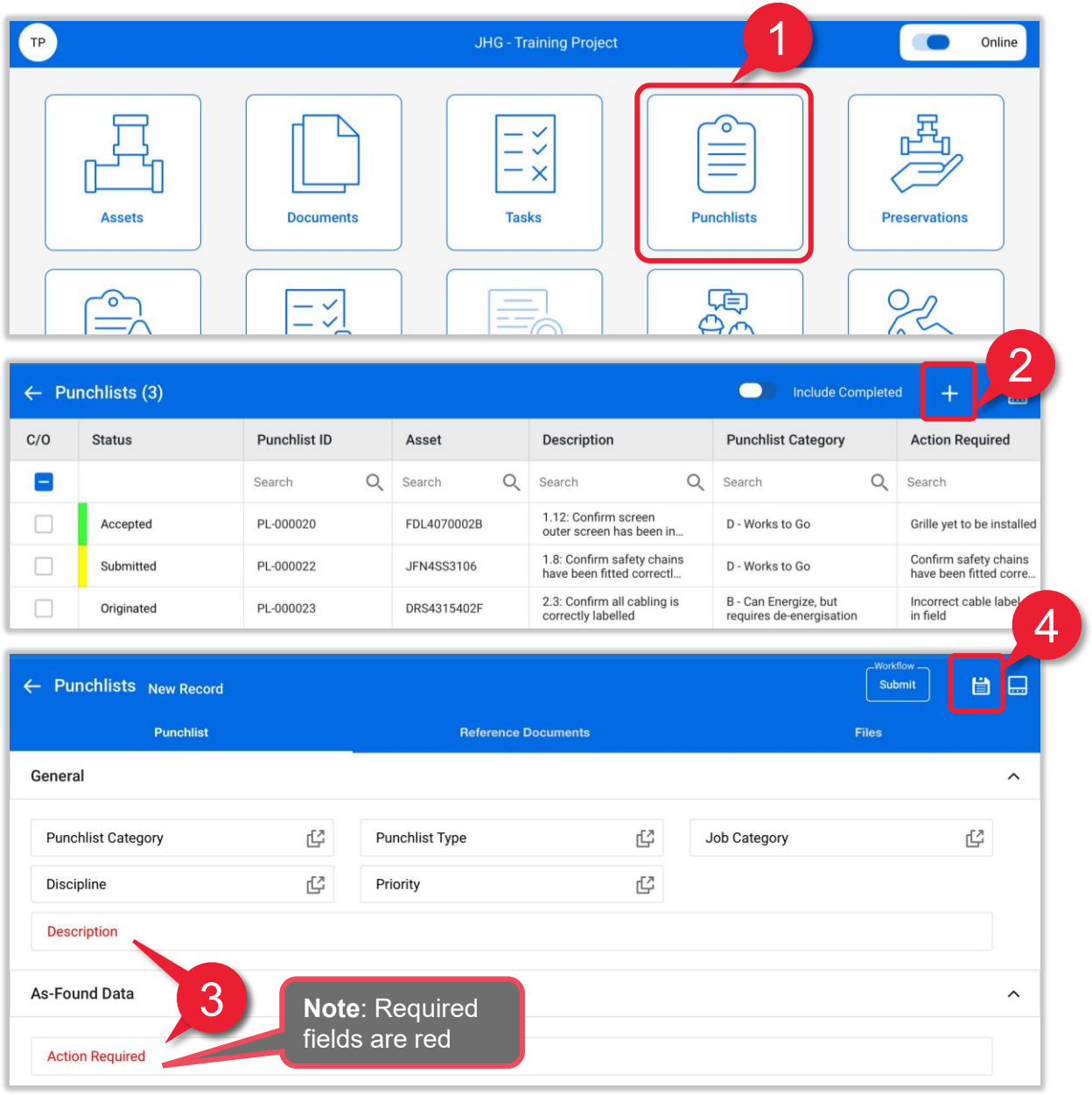
From the Hexagon Smart Completions app homepage:

1. Tap **Punchlists**
2. Tap the **plus** icon
3. A blank punchlist will open, at originated stage, the **Description** and **Action Required** fields are mandatory tap into each and type relevant information
4. Tap the **disk** icon at any point to save

Ensure you give enough details for a future team to complete the punchlist. **Punchlist Category**, **Punchlist Type**, **Asset**, **Task** and **Responsible Company** are all desirable fields.

The Work Breakdown Association, Punchlist Category and Systemisation are vital for reporting and handover.

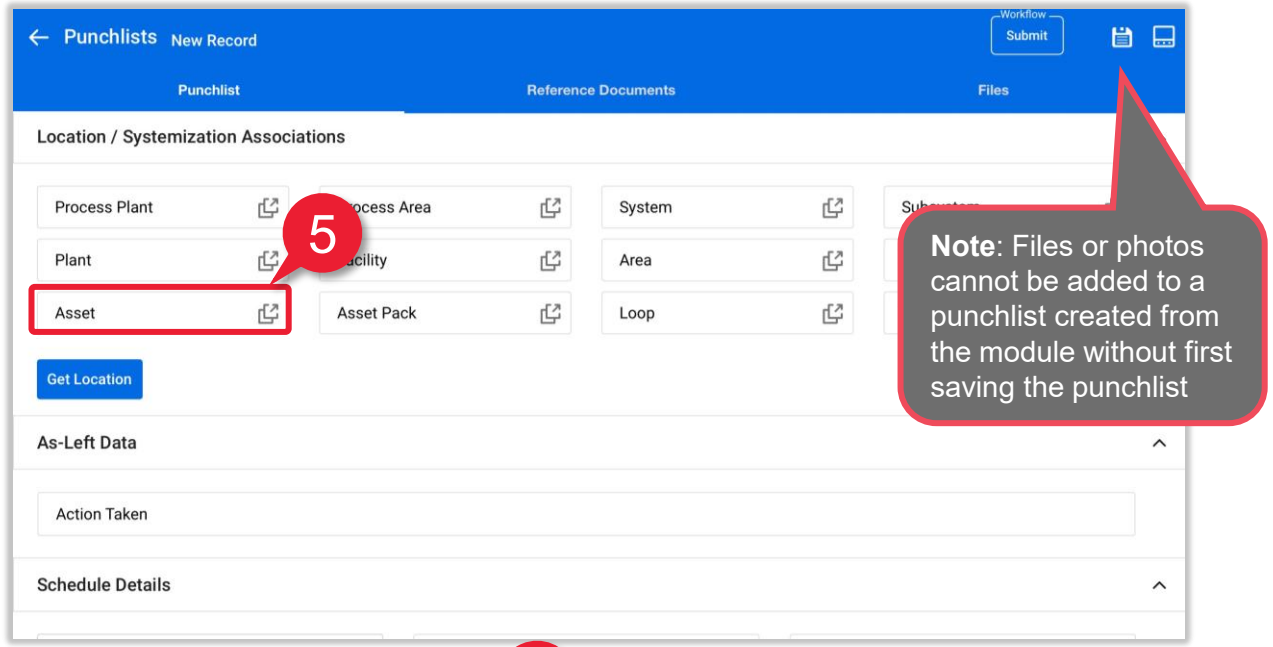
Continued on next page….

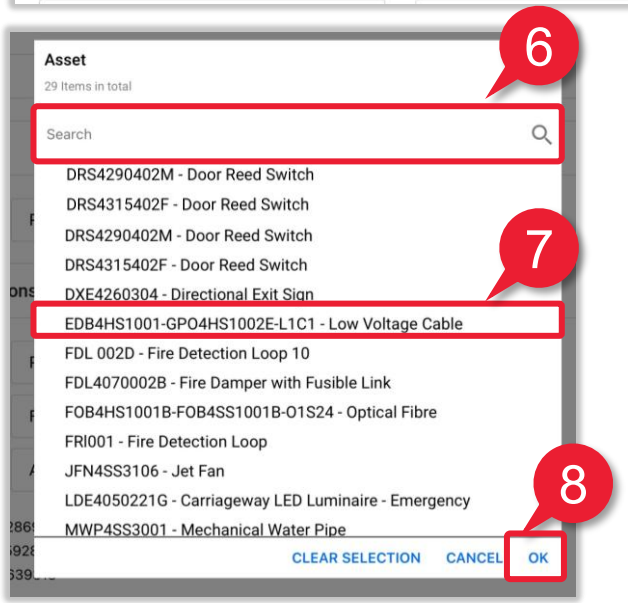


Create a Punchlist from Punchlists Module (continued)

It's helpful to add asset information first, as this will pull information from the asset to fill out the punchlist

5. Scroll down and tap **Asset**
6. A popup will open, scroll through or tap the search to locate the asset, you can search by asset tag or asset name
7. Tap to select an asset
8. Tap **OK** to confirm selection





If you need to add information follow the below steps to:

- Add a photo or file if required
- Add a GPS location if required
- Take and attach a Photo if required

Continue to steps for submit & send when Punchlist is ready

Punchlist: Create – Submit & Send

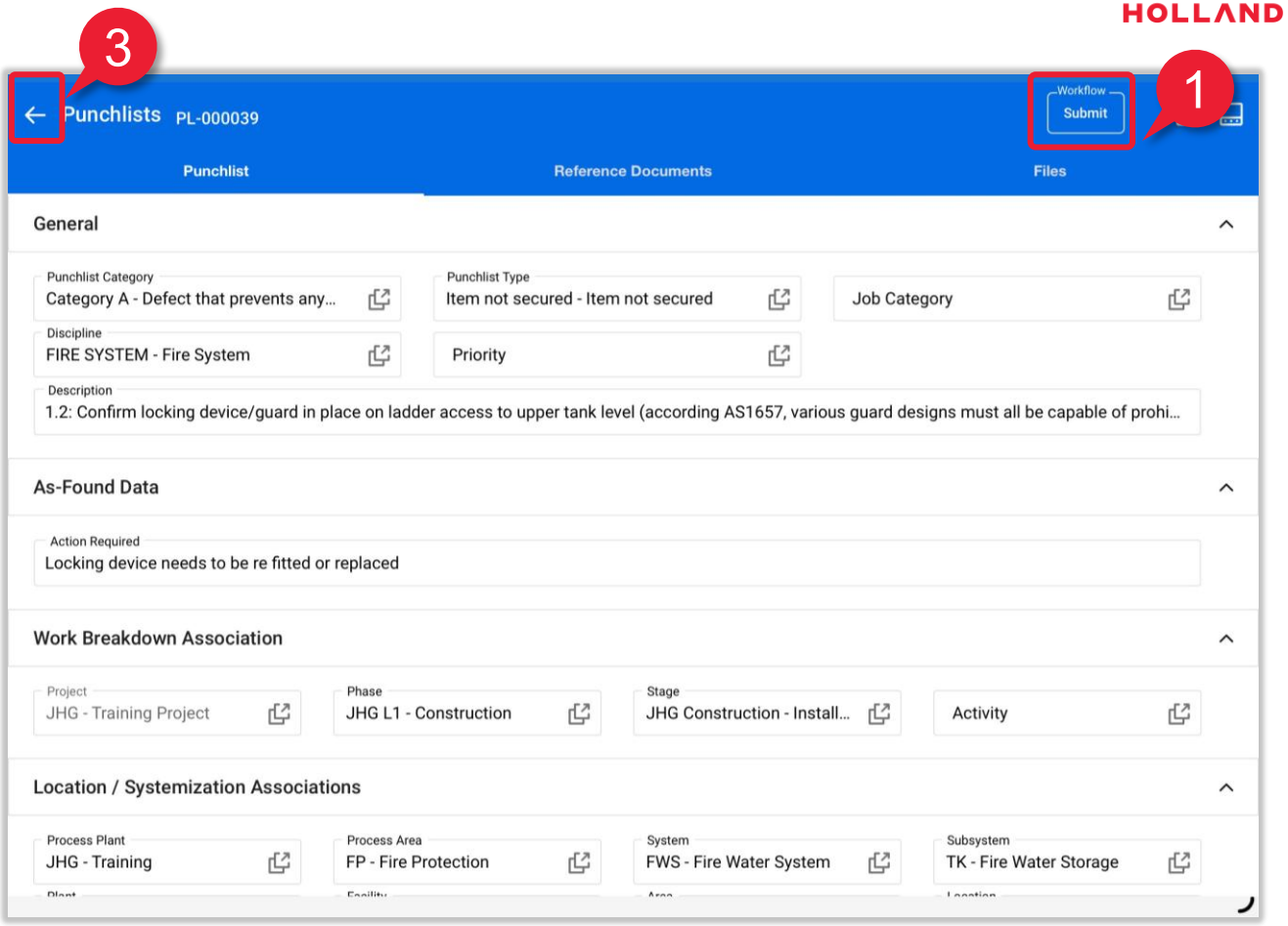
follow steps from Punchlist: Create, then:

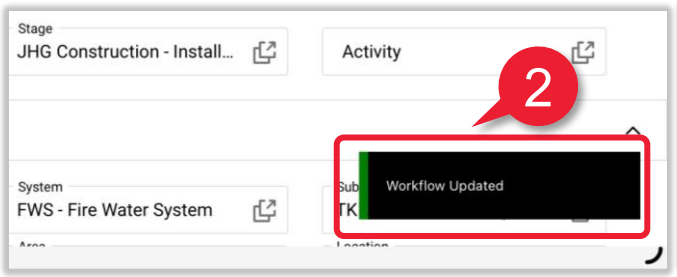
1. When ready tap **Submit**
2. The workflow status will move to Submitted and you'll see this notification in the bottom right corner
3. Tap the back **Arrow** to exit the punch item and return to the previous screen (either a search list or task depending upon where you created the punchlist from)
4. The punchlist status will be updated in the punchlist module list

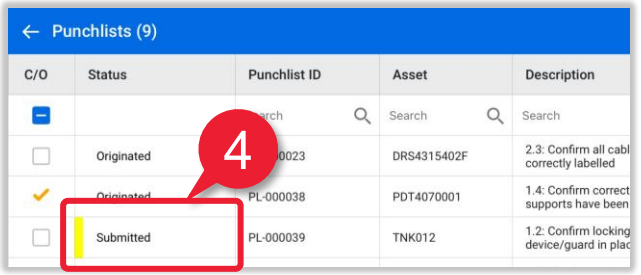
If working offline, remember to check in then sync once back online.

After submitting, the Workflow at the top will show **Cancel**, this indicates you have submitted.

If you created the Punchlist from a task return to Task: Action & Complete.







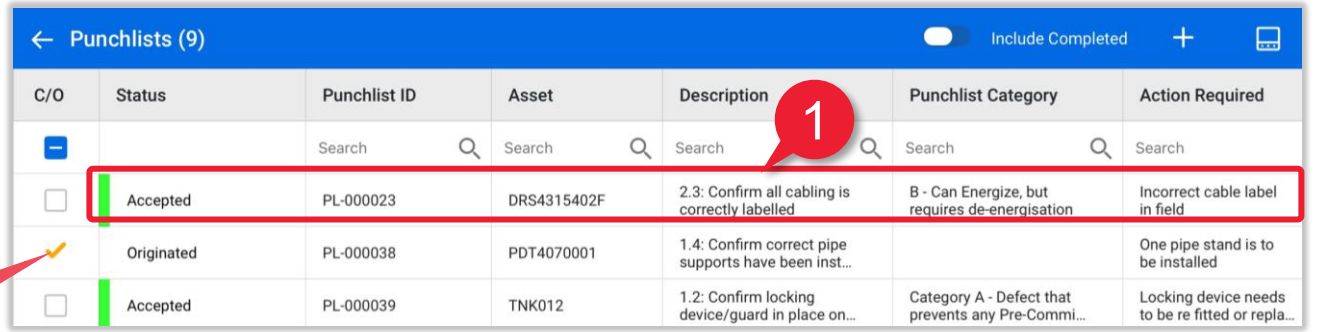
Punchlist: Action & Submit

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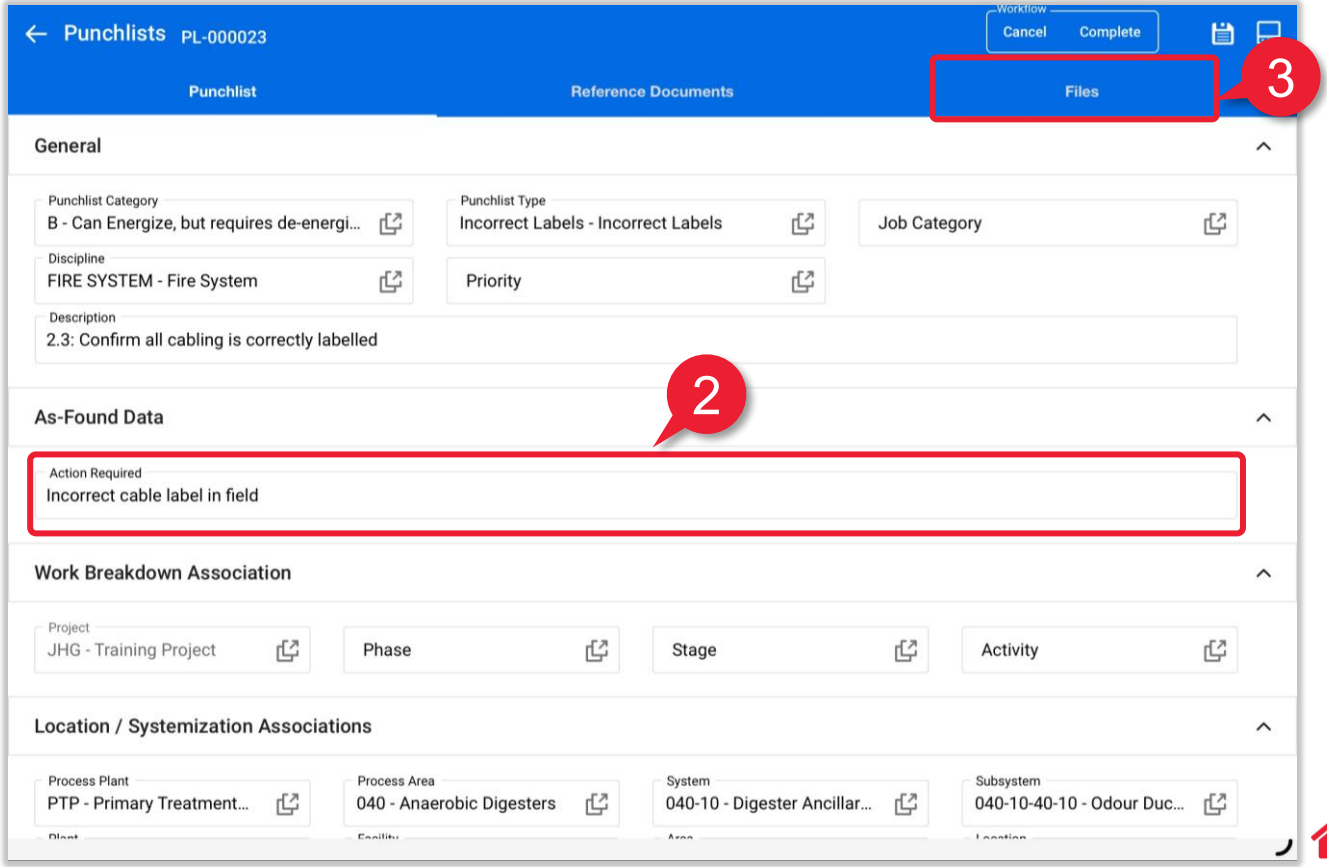
Punchlist – Action & Submit

Punchlists can be found via the **Punchlists** module, shown below, or via the punchlist tab in the linked asset or task (ITR) more details in Find a Task or Punchlist.

The below steps cover how to action a punchlist and submit for closure by a Supervisor. A punchlist that's ready to action will be in the **Accepted** stage.



Note: A tick here means the item is checked out to you



1. Tap the **Punchlist**
2. Check the **action required** field for what is required
3. Upload images or attachments to show completed or fixed punchlist via the **Files** tab – for detailed steps see add a photo or file
4. Scroll down on the **Punchlist** tab to complete the punchlist

If you need to add information follow the below steps to:

- Add a photo or file if required
- Add a GPS location if required
- Take and attach a Photo if required

Continued on next page…

Punchlist – Action & Submit (continued)

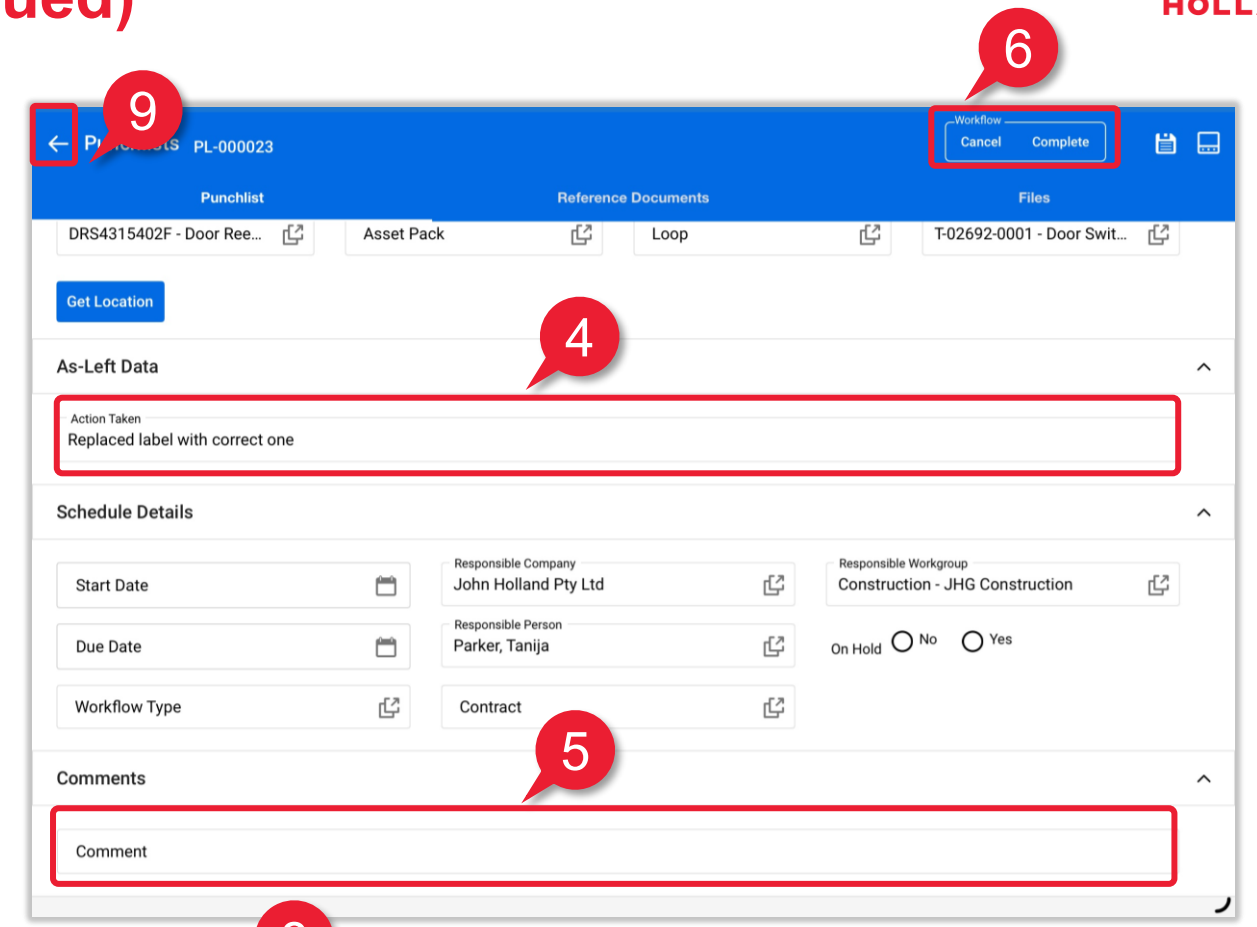
4. Type the **Action Taken** to complete or fix the punchlist item, this is a mandatory field

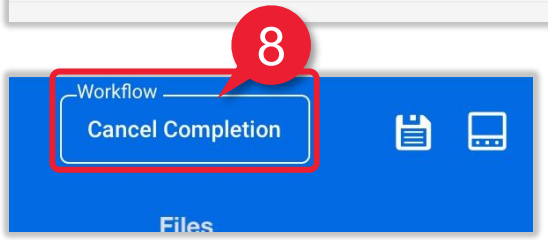
   Mandatory fields are marked in red prior to completion
5. Scroll down and add any **Comments** if required
6. When all information is filled out and uploaded, tap **Complete**

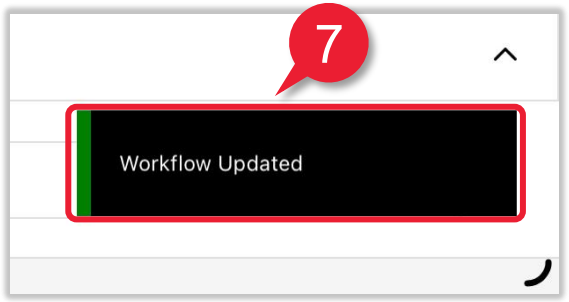
The punchlist will now progress for final checks before closure in the workflow.

7. A **Workflow Updated** notification will appear briefly in the bottom right
8. The workflow options change to **Cancel Completion**
9. Tap **back** to return to the punchlist module

If working offline, remember to check in then sync once back online.







Punchlist – Add a File or Photo

Before you submit a Punchlist, you can add additional files or include pictures additional to what is required in the form. To add an already taken image or attachment during the creation of a Punchlist, follow steps from Create a Punchlist, then:

1. Tap **Files** tab
2. Tap the **plus**
3. Choose the option you need, adding file, existing image or take a photo
4. Select a file type
5. Tap **Continue** and select the file, image or take the photo
6. Type a caption to describe the file or image
7. Tap either tick

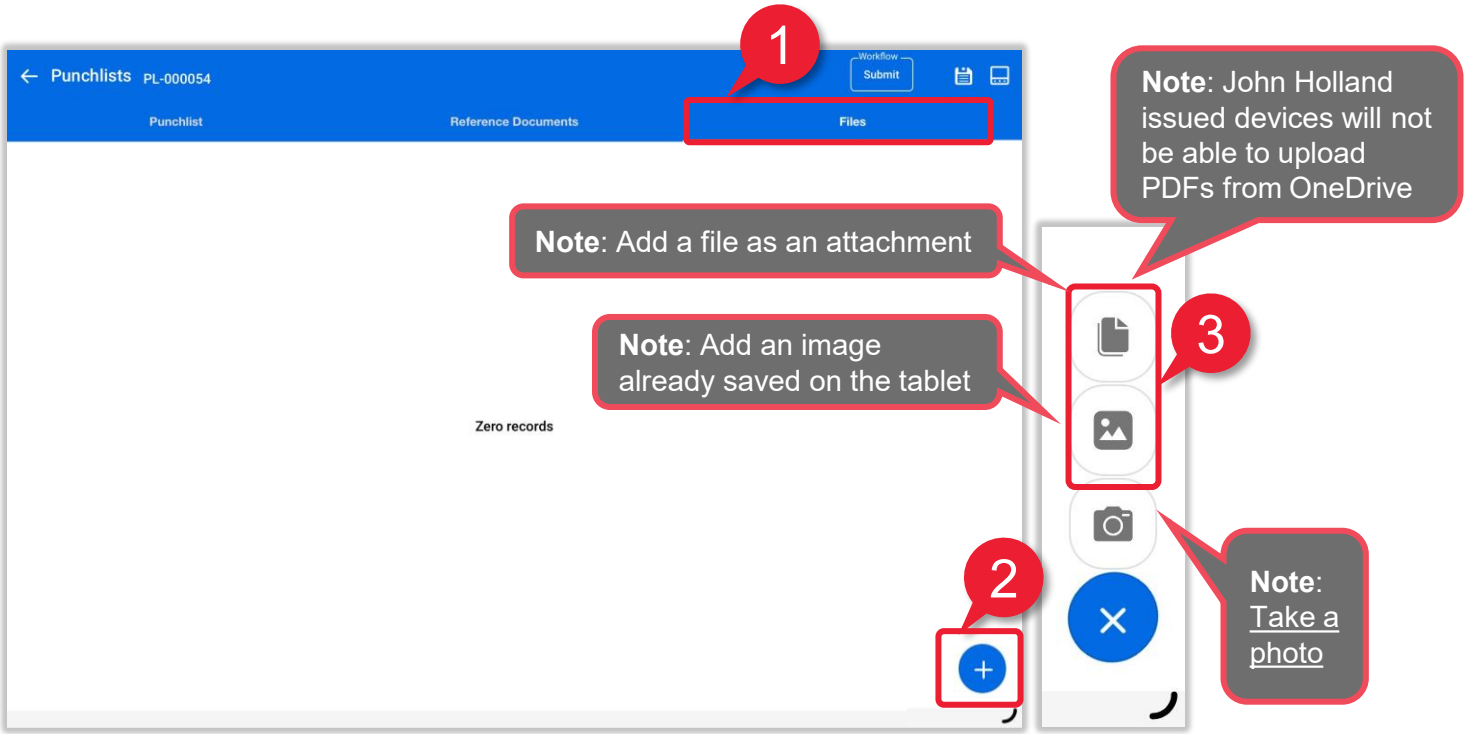
The file or image will be uploaded and appear in the list on the files tab. You can repeat this process to upload multiple images / attachments.

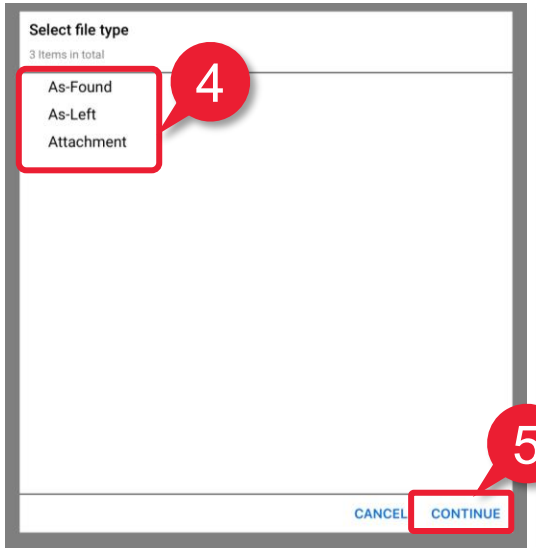
If working offline, remember to check in then sync once back online.

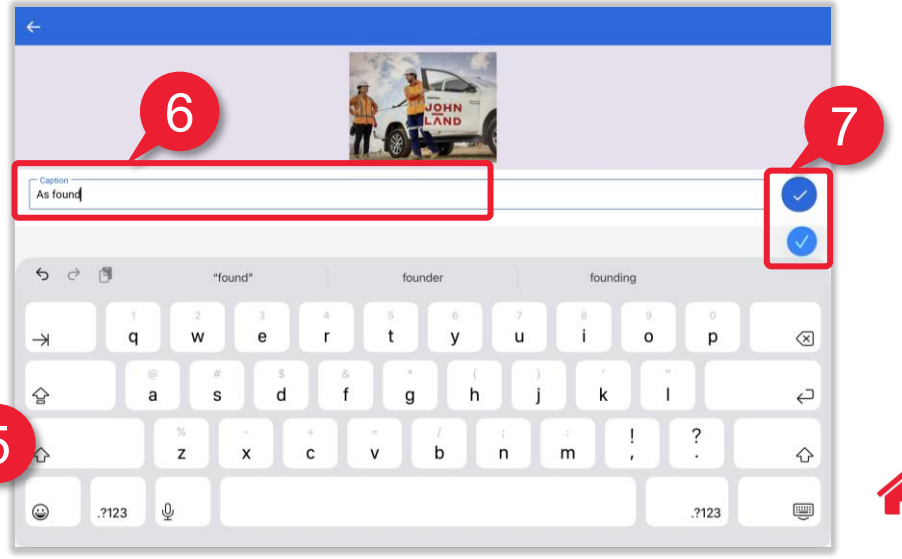
If you were:

Creating a new punchlist: Continue to submit & send

Actioning a punchlist: Continue to action & submit





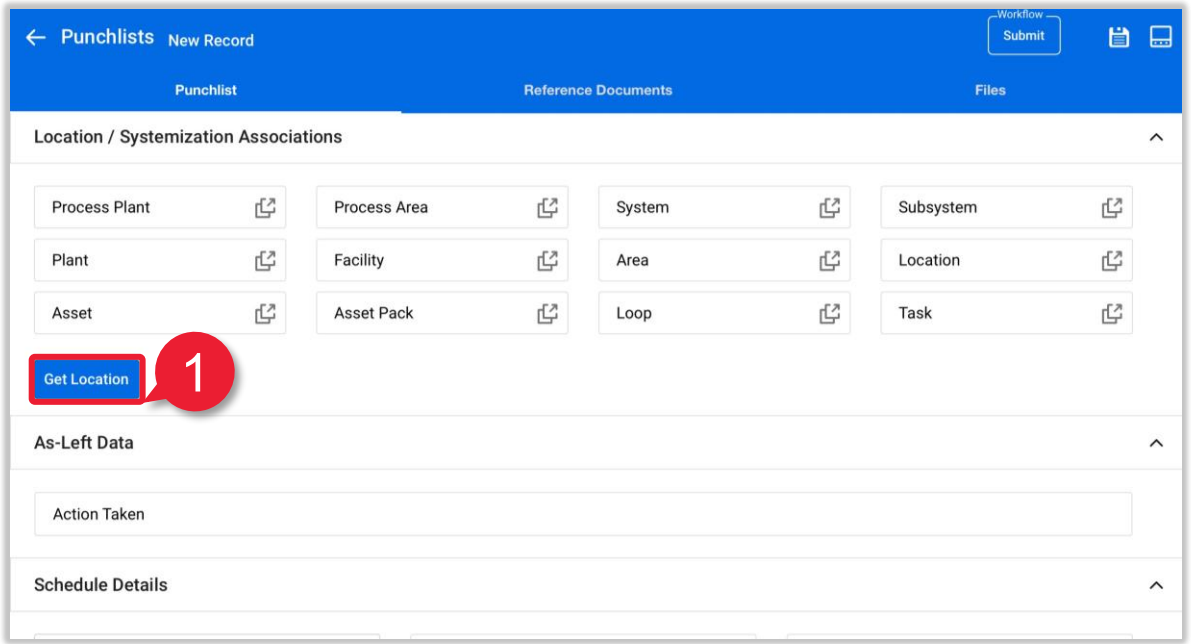


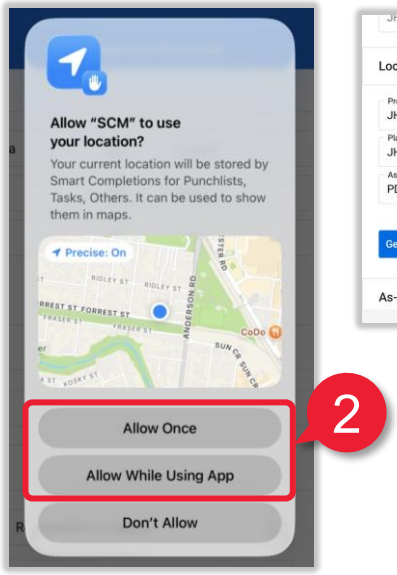
Punchlist - Add GPS location

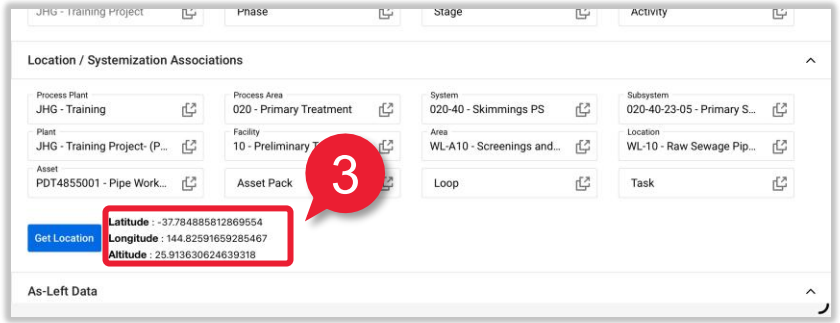
Before you submit a Punchlist, you can add additional files or include pictures additional to what is required in the form. You can also choose to add a precise geographic (GPS) location, follow the steps below.

From within the punchlist:

1. Tap **Get Location**
2. A pop up may appear to request location permissions for the app, tap **allow once** or **allow while using the app**
3. Exact geographic data will display next to the location







If you need to add information follow the below links for steps to:

- Add a photo or file if required
- Take and attach a Photo if required

If you were:

Creating a new punchlist: Continue to submit & send

Actioning a punchlist: Continue to action & submit

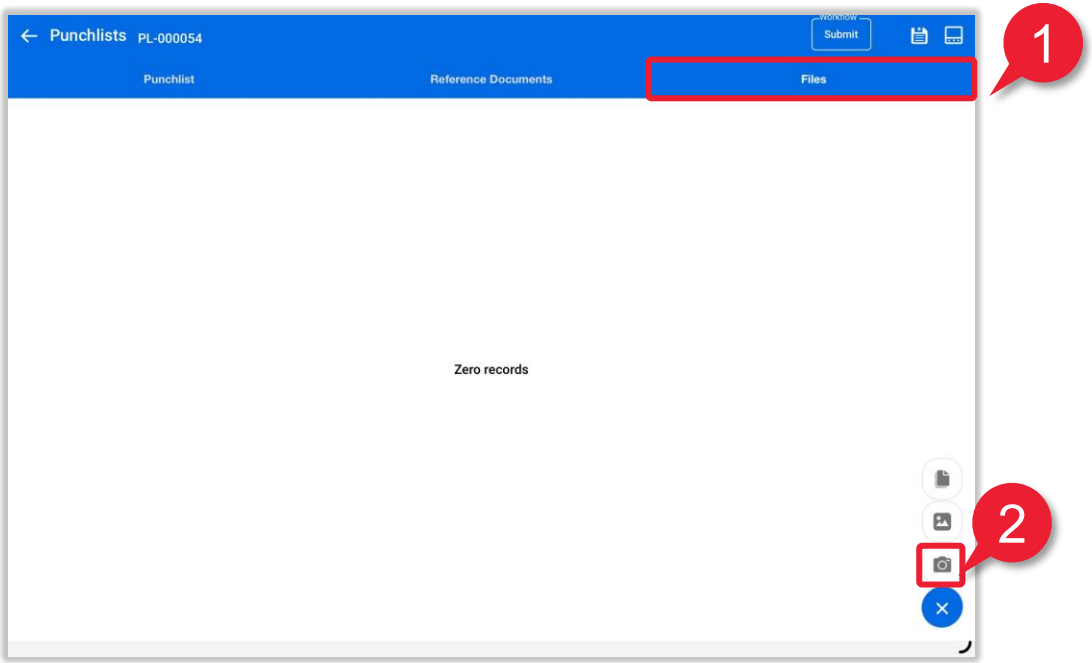
Punchlist – Take and attach a photo

Before you submit a Punchlist, you can add additional files or include additional pictures to what is required in the form.

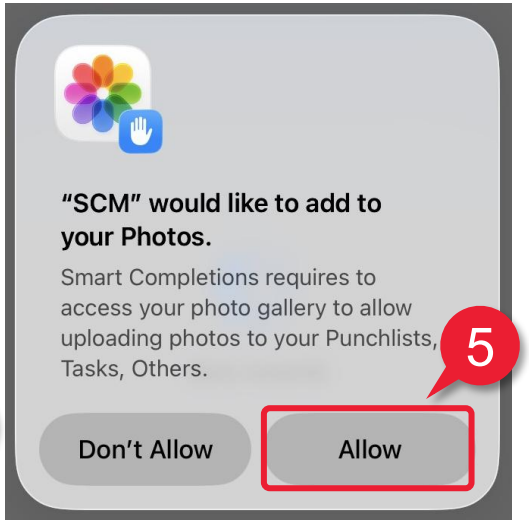
While completing a Punchlist:

1. Tap the **Files** tab
2. Tap the **Camera** icon to take a photo
3. Choose a **file type**
4. Tap **Continue**
5. The first time you my see a popup requesting permission to access photos or camera, tap **Allow**

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Punchlist – Take and attach a photo (continued)

Take the photo using the tablet, then:

6. Tap **Use Photo**
7. Tap into the **Caption** field and type a description of the image
8. Tap either of the **ticks** to complete

The image is now uploaded as a file

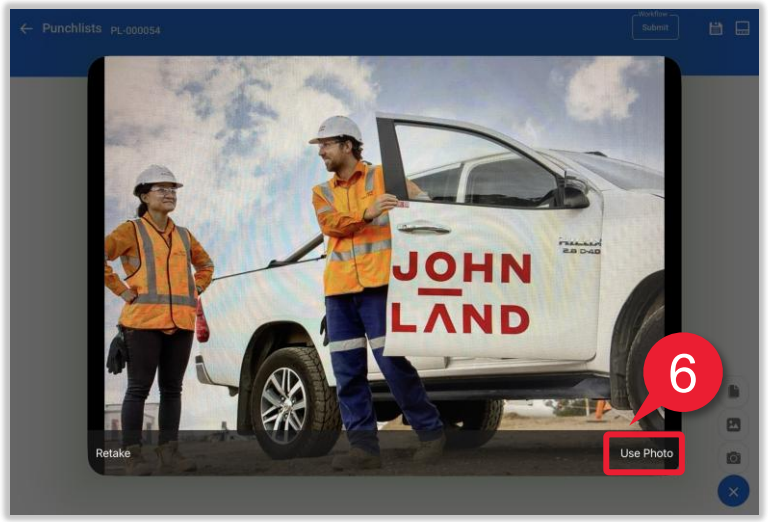
9. Tap the **Punchlist tab** to return to the punchlist or
10. Tap **back** to return to the **Punchlist Module**

If you need to add more information follow the below links for steps to:

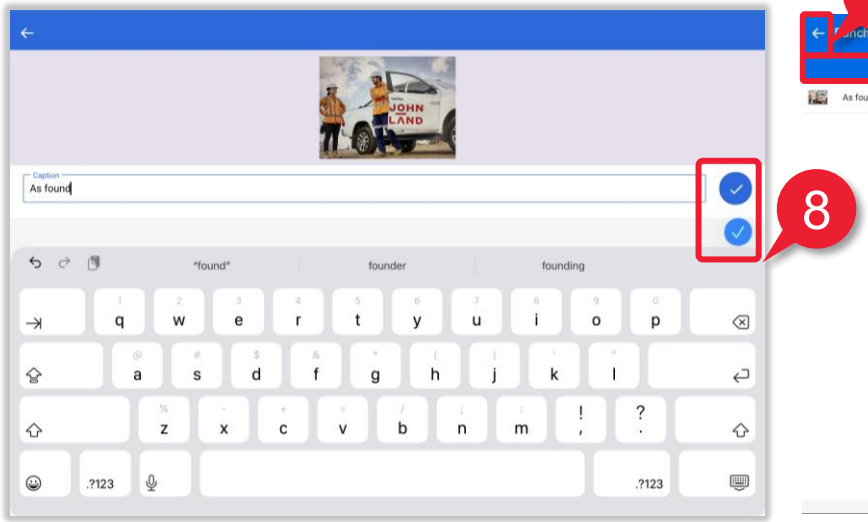
- Add a file or photo if required
- Add GPS location if required

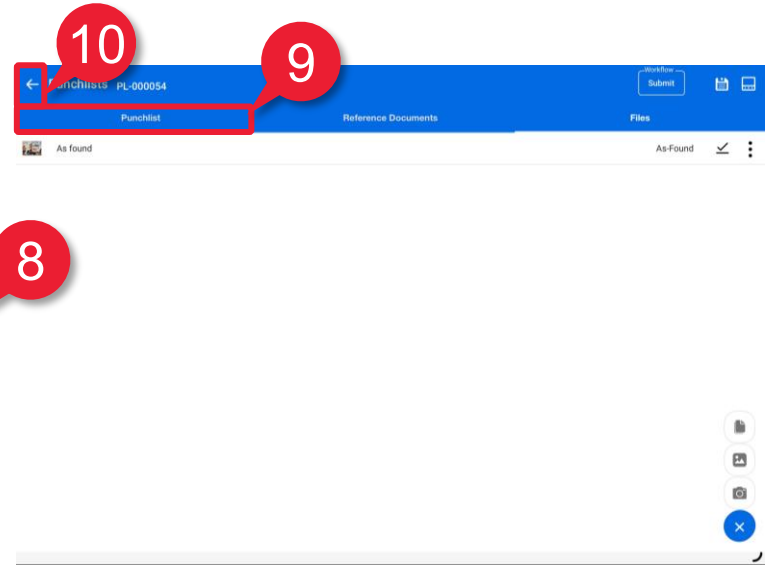
If you were:

- **Creating a new** punchlist: Continue to submit & send
- **Actioning** a punchlist: Continue to action & submit









Complete or Reject Tasks | Supervisors Only

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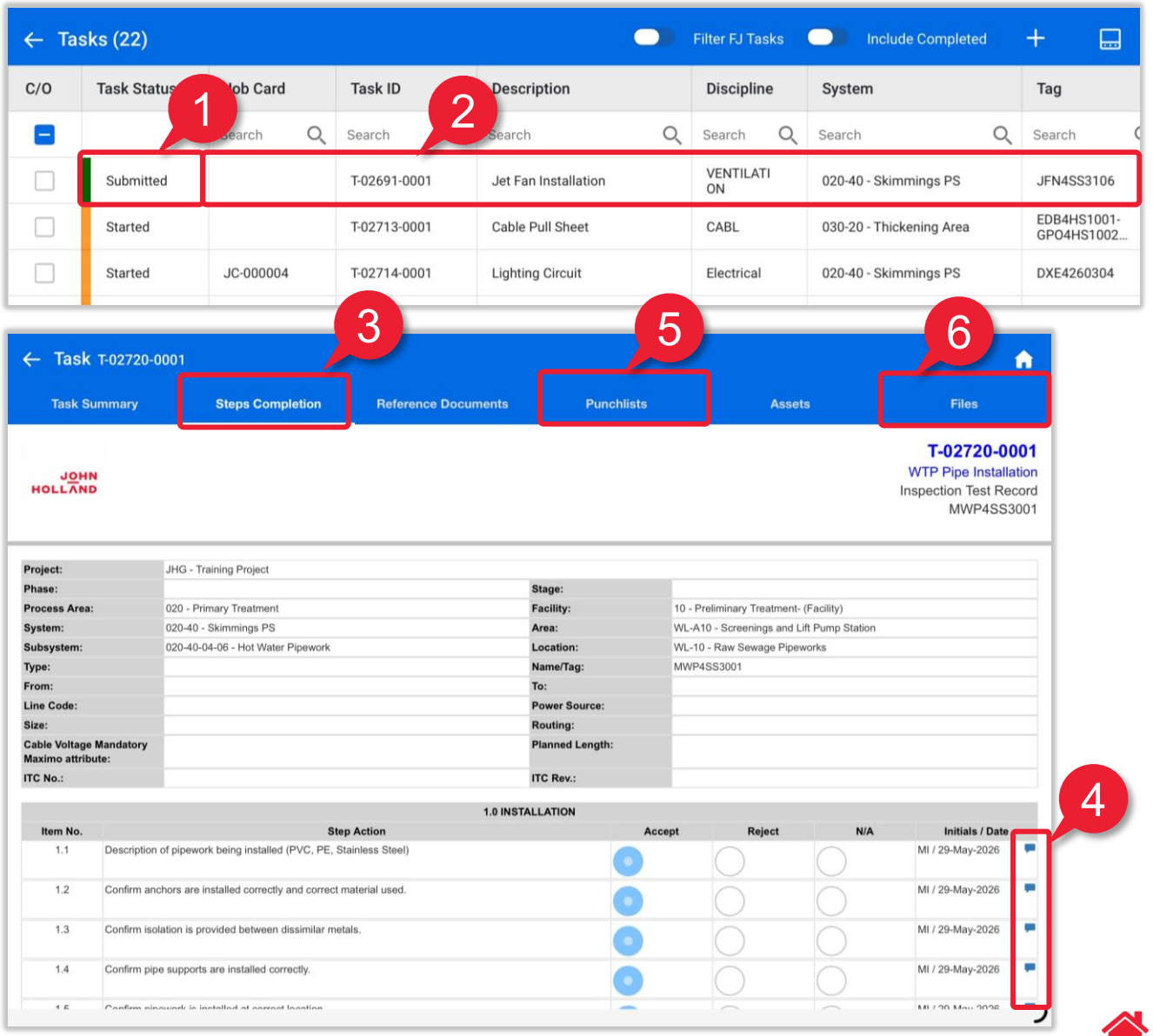
Complete or Reject Tasks – Supervisors Only

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 specific Supervisors can 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 Find a Task section. In this example we've accessed the Task Module.

1. Tasks that require supervisor approval will have a status of **Submitted**
2. Tap into the task
3. The task will open to the **Steps 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. Check any Punchlists raised via the **Punchlist** tab
6. Check any supporting images or attachments via the **Files** tab



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Complete or Reject Tasks – Supervisors Only (continued)

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

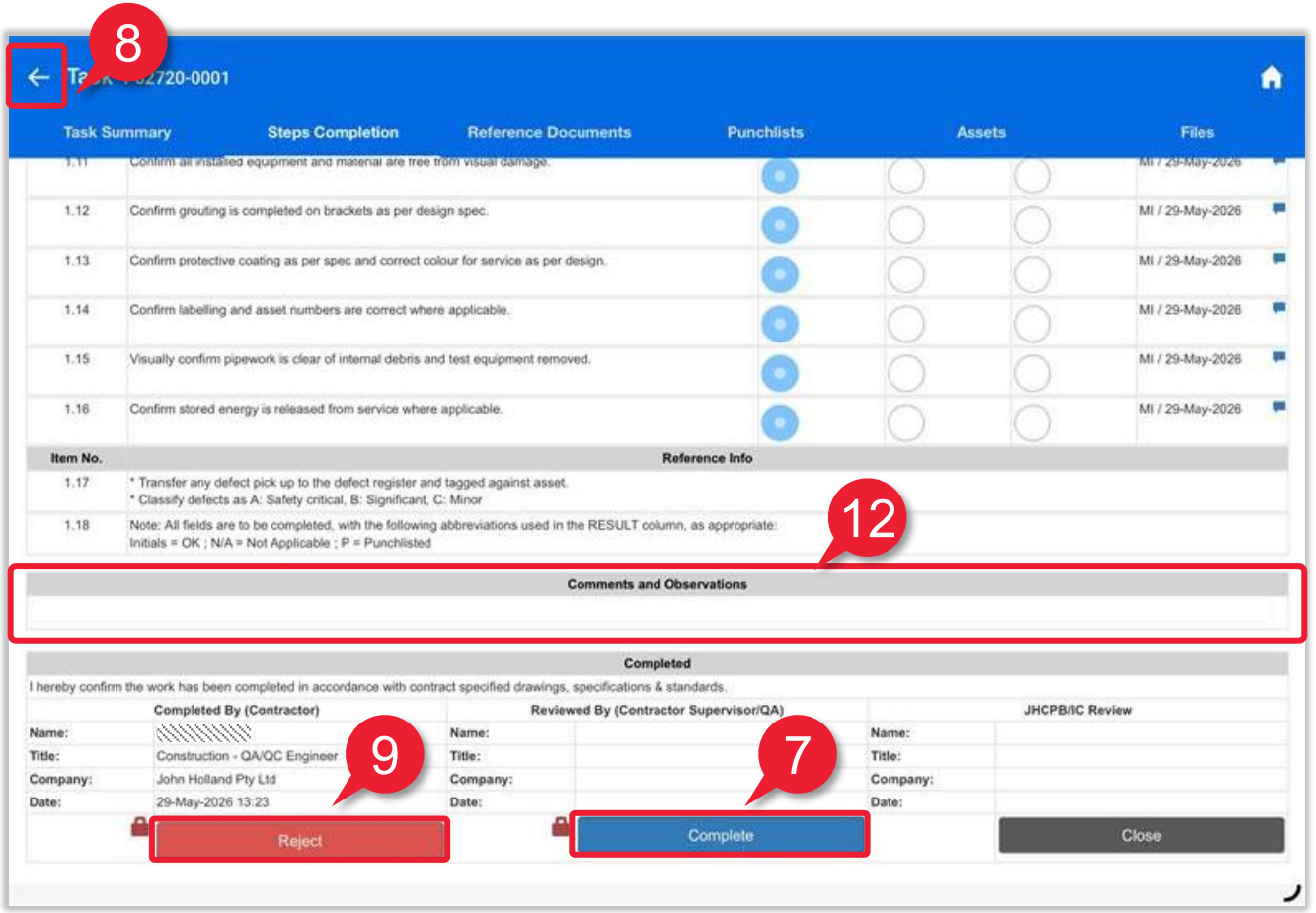
7. If you are happy with the task, tap **Complete** - your details will be automatically filled
8. Once accepted, tap **back arrow** to return to the task list

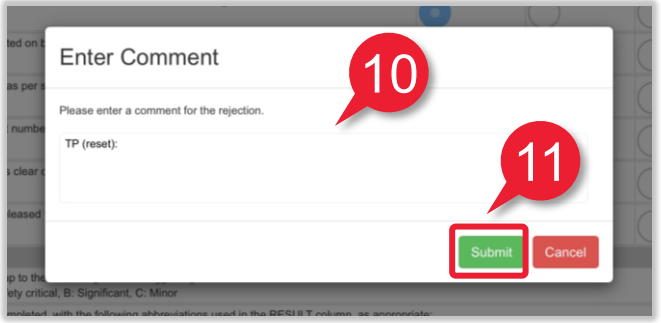
Once Completed, the task moves to a completed status awaiting approval by a JH Supervisor.

To **Reject** a task:

9. If information is missing, or something else is required, click **Reject**
10. Rejecting a task will open a comment window, type a comment to tell the technician what additional information is required
11. Tap **Submit**
12. The comment you made when rejecting the form 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. No automatic notification of rejection is sent.





Tablet App Troubleshooting Tips

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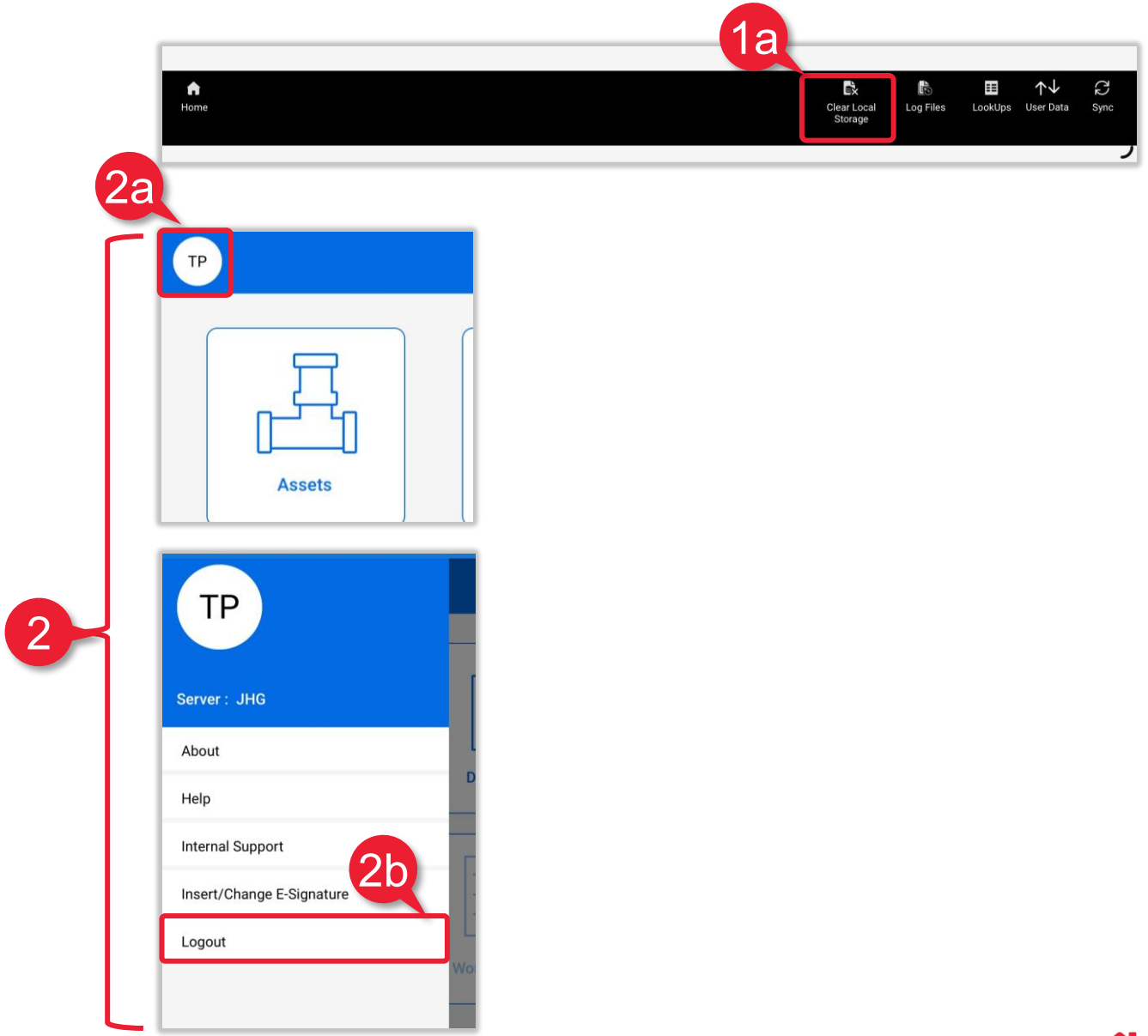
Tablet App Troubleshooting Tips

If you receive any errors or unexpected displays within the app, here are a few things you can try:

1. Ensure you have checked-in & synced everything using Sync Manager. Follow the steps here: Work Offline – Check in & Sync.
    a. Within Sync Manager you can also tap the menu icon and **Clear Local Storage** to help with sync issues
2. Try logging out and back in again, from the homepage:
    a. Tap your initials to open the menu
    b. Tap **Logout**
    c. Follow instructions in the relevant **Activate & Login guide** to install the tablet app and login again (links below)

    If you are using a shared tablet, ensure you logout when finished

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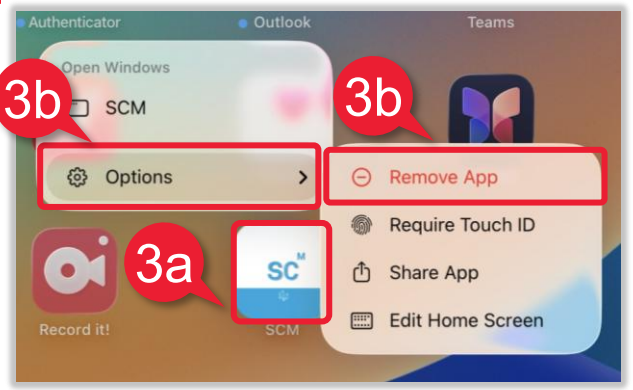


Tablet App Troubleshooting Tips

3. Uninstall and Reinstall the app:
   a. From the tablet homescreen, press and hold the app
   b. On **Apple devices**: Tap **Options**, then Tap **Remove App** or on some iPads tap the **X**
   c. On **Android devices**: Tap **Uninstall**
   d. Follow instructions in the relevant Activate & Login guide (link below) to install the tablet app and login again

- Activate & Login with a non-JH account

Apple devices



3

Android devices

