



Intergraph Smart[®] Completions User Guide

Field Technician

Version 2
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Preface

The user guide is intended for a “Field Technician” who would be responsible for task execution in the field.

A Field Technician should have the following know-how:

- Access the iOS App Store and download applications.
- Configure the Smart Completions Mobile App.
- Use the mobile app to view data, execute tasks, punchlist and sync.
- Access SC site to verify that mobile app data was uploaded correctly.

The user guide will cover the following topics and will enable the end user to import all project information, perform specific project database configurations, and create and administer work packages to the project workforce.

The training material INCLUDES:

- Download the SC CCMS Mobile Application from the iOS App Store
- Configure Application Settings (Server Selection)
- SC Mobile Application Login
- Sync Mobile Application with SC database
- Common Navigation Features (Navigation Ribbon)
- Seeking (Quick Search) Feature
- Task Checkout
- Sync Tasks to the Mobile Device
- Offline Task Execution
- Sync Completed Task

SECTION 1

Smart Completions Mobile Application

1.1 - Mobile Application Overview

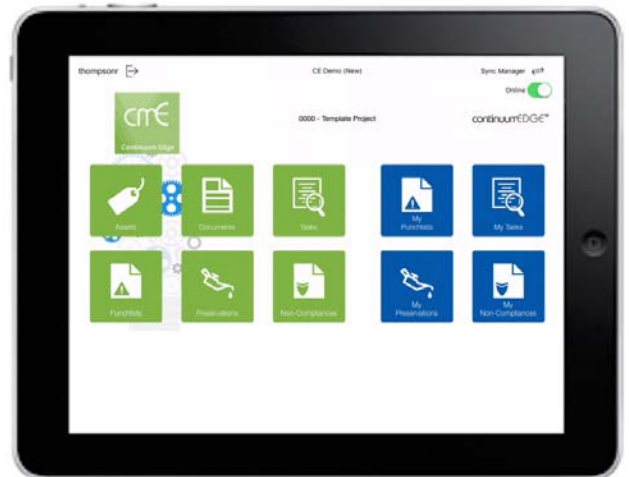
The SC Mobile Application is designed to simplify daily tasks and planning for field personnel.

When used in conjunction with SC's Completions & Commissioning System (CCMS), the SC Mobile Application can be used to simplify punch listing, collection of equipment information, and execution of paperless tasks from the field - with or without Wi-Fi connections readily available all from your mobile device.

The mobile application provides field personnel; access to content located in a database located on your company intranet or through a Hosted internet solution.

The mobile application is used to:

- Retrieve and Edit (e.g. Primary & OEM Data) detailed equipment (asset) information.
- Retrieve detailed document information and view the document itself (e.g. P&IDs, Datasheets).
- View and Execute tasks (e.g. FICs - Field Installation Checks) electronically.
- Enter and complete Punchlist items in the field (with as-found & as-left images).
- View and Execute Preservation tasks electronically.
- Enter and complete Non-Compliance items in the field (w/ as-found / as-left images).



1.2 – Mobile Application Configuration (Apple IOS)

In order to use the SC Mobile Application it must be downloaded from the iOS App Store and then configured.

The process for downloading and configuring the SC Mobile Application is outlined below:



Download the SC CCMS Mobile Application from the iOS App Store.

Configure Application Settings (Server Selection)



Select the Application from your iPad 'Home' screen to open



Setup your SC site on the mobile application by selecting the **Notepad** icon on the Login page. The Server Selection window will open.

The image shows the 'Server Selection' screen of the mobile application. It has a green background. At the top, the title 'Server Selection' is in white. Below it is a text input field containing 'default'. Underneath is the label 'Server Name:' followed by a text input field containing 'IBS Demo'. Below that is the label 'API URL:' followed by a text input field containing 'https://demo.ibs-cloud.com'. At the bottom, there are three buttons: 'Add Server', 'Delete Server', and 'Save Changes'. Red numbers 1, 2, and 3 are placed to the left of the 'IBS Demo', 'https://demo.ibs-cloud.com', and 'Add Server' button respectively.

Server Selection:

1. Enter Server Name – 'default' is displayed but the name can be changed.
2. Enter API URL – e.g. <http://demo.ibs-cloud.com/>

Note:

In order to configure the SC Mobile Application you must know the URL of your SC site.

Your SC site may be 'http' or 'https' this will need to be entered correctly. If you are unsure, please contact your SC Administrator.

3. Select **Add Server** button.

1.3 – Mobile Application Login



The site dropdown list will be populated with your SC site(s).

Note:

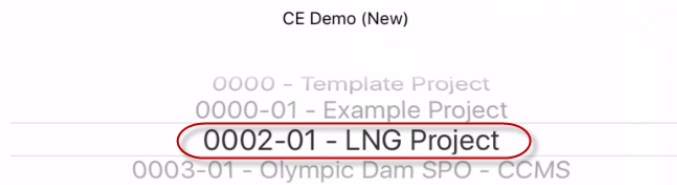
If you have multiple sites (e.g. production & test), expand the dropdown to show all available sites. Select the site you wish to login to.



Enter Username and Password.
Select **Login** button.



The SC Mobile Application Homepage is loaded.



Select project from the Project Selection spinner (if applicable).

Note:

If the user is assigned to more than one project they will need to ensure to select the project they want before syncing the mobile device.

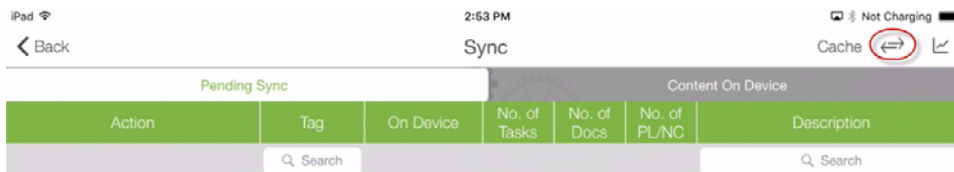
1.4 – Sync Mobile Application with SC Database

Once the Project has been selected the User needs to sync the Mobile device to pull down all relevant data from the SC database (e.g. <http://demo.ibs-cloud.com/>).

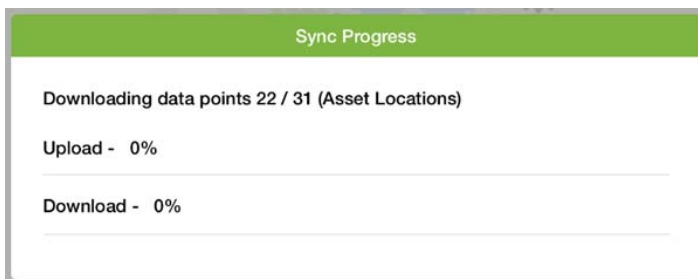
The process for Syncing the SC Mobile Application to the SC database is outlined below:



Select the **Sync Manager** icon from the Homepage.



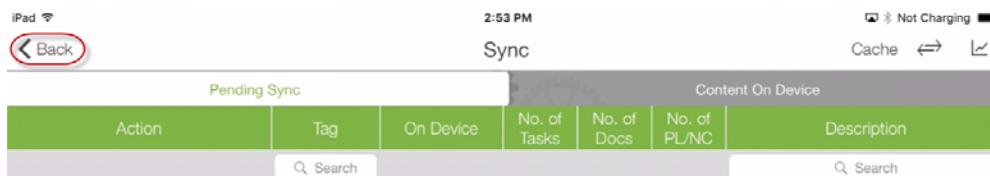
Select the **Sync** icon from the Sync Manager.



The Mobile Application will sync with your SC database.

Note:

Once the sync is complete the 'Sync Progress' window will close



Select the **Back** button to return to the Homepage.

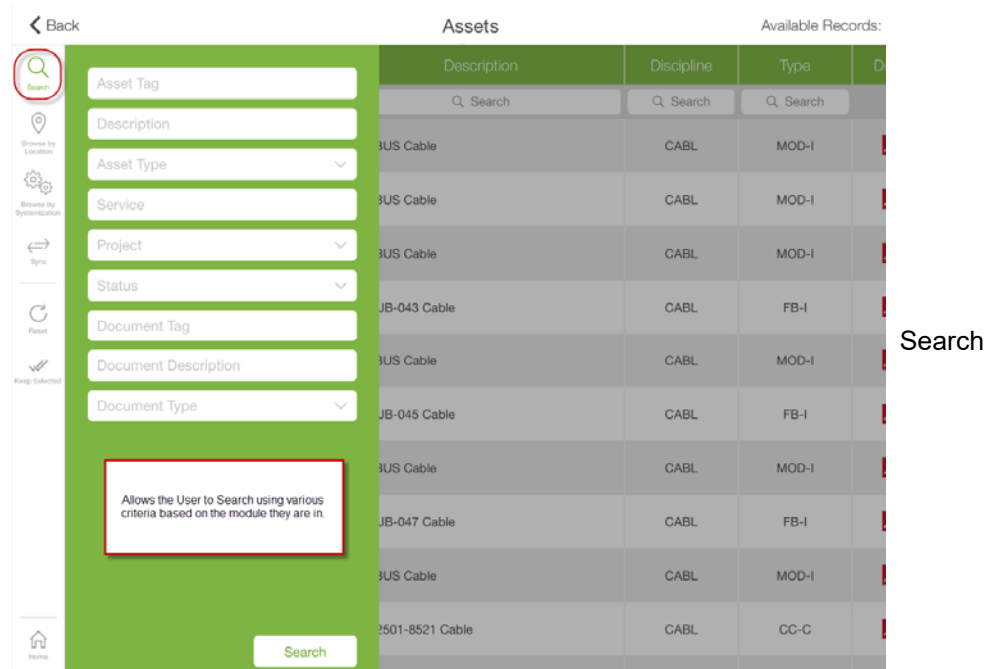
SECTION 2

Smart Completions Mobile Application Use

2.1 – Mobile Application Navigation Ribbon

Now that the Mobile Application has been synced with the SC database the User can now navigate the application to locate CCMS data (Assets, Document, Tasks, etc.) The Mobile Application has a set of common features that can be used to find data. This is done by using the Navigation Ribbon.

The common features of the Navigation Ribbon are explained below:



← Back Tasks Available Records: 82

Search

Browse by Location

4130 - MONREAGH >

4131 - 127 - Fairy Meadow road irrigation... >

4500 - Collection Facility Central >

4530 - Collection Facility South >

4560 - Collection Facility North >

5000 - Modular Yard >

PDF	Description	Discipline	Type	Tag
1	Q Search	Q Search	Q Search	Q Search
02	Fire and Gas Device - Installation (Fab)	INST	Field Installation Check	CTP-00001
56	Piping Insulation (Piping Insulation) (Fabrication)	PIPE	Field Installation Check	PTP-TCP-4035-018
57	Piping Insulation (Piping Insulation) (Fabrication)	PIPE	Field Installation Check	PTP-TCP-4035-024
59	Piping Insulation (Piping Insulation) (Fabrication)	PIPE	Field Installation Check	PTP-TCP-4035-042
41	Piping Surface Protection (Pipe Testpack)	PIPE	Field Installation Check	PTP-4532-00066
82	General Piping Equipment Installation	PIPE	Field Installation Check	PTP-4231-00160
87	General Piping Equipment Installation	PIPE	Field Installation Check	PTP-4232-00180
01	Instrument Loop Test	INST	Loop Testing	L-1801-1691
33	Piping Pre Installation - Fabrication	PIPE	Field Installation Check	PTP-4502-00026
26	Hazardous Area Inspection - Electrical	ELEC	Hazardous Tasks	YA-4035-8051
	Hazardous Area			

Home

Browse by Location

← Back Tasks Available Records: 82

Search

Browse by Systemization

1000 - Wellhead Asset Holding Pen >

1800 - Pipelines >

4000 - Elmo Metering Station >

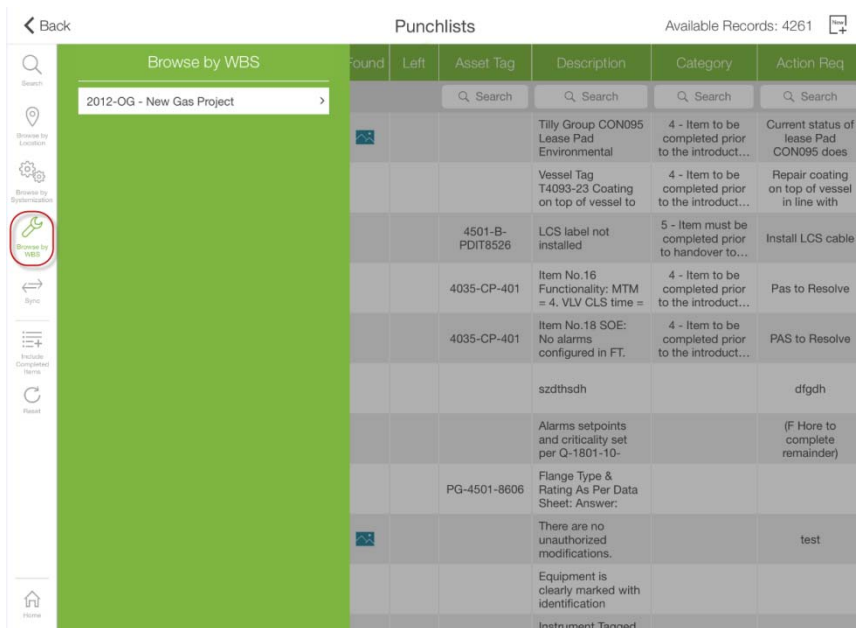
4130 - Pump Station >

4500 - Collection Facility Central >

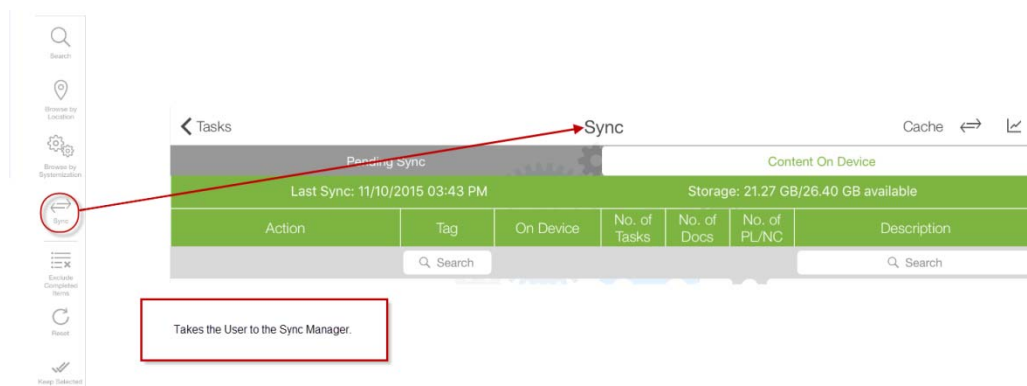
PDF	Description	Discipline	Type	Tag
1	Q Search	Q Search	Q Search	Q Search
02	Fire and Gas Device - Installation (Fab)	INST	Field Installation Check	CTP-00001
56	Piping Insulation (Piping Insulation) (Fabrication)	PIPE	Field Installation Check	PTP-TCP-4035-018
57	Piping Insulation (Piping Insulation) (Fabrication)	PIPE	Field Installation Check	PTP-TCP-4035-024
59	Piping Insulation (Piping Insulation) (Fabrication)	PIPE	Field Installation Check	PTP-TCP-4035-042
41	Piping Surface Protection (Pipe Testpack)	PIPE	Field Installation Check	PTP-4532-00066
82	General Piping Equipment Installation	PIPE	Field Installation Check	PTP-4231-00160
87	General Piping Equipment Installation	PIPE	Field Installation Check	PTP-4232-00180
01	Instrument Loop Test	INST	Loop Testing	L-1801-1691
33	Piping Pre Installation - Fabrication	PIPE	Field Installation Check	PTP-4502-00026
26	Hazardous Area Inspection - Electrical	ELEC	Hazardous Tasks	YA-4035-8051
	Hazardous Area			

Home

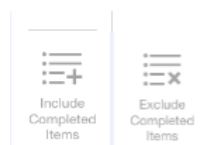
Browse by Systemization



Browse by WBS (Work Breakdown Structure)



Sync



Include/Exclude Completed Items

Allows User to expand/reduce results based on Completion Status.

Assets Available Records: 352

Search

Asset Tag

Description

Asset Type

Service

Project

Status

Document Tag

Document Description

Document Type

Search

Clears all data in entered in Search/Browse Fields.

Reset

Tasks Available Records: 82

C/O Status Job Card Task ID PDF Description Discipline Type Tag

Search

Q Search Q Search Q Search Q Search Q Search Q Search

Early Flare Commissioning MULTI System Commissioning 4502-1000

4501-050

4520-001-001 - Talinga Transfer Pumps

4501

4501-049

4501

0135-NET-0015

T-01861-0270 ITR PAS LOOP TEST INST Inspection Test Record H-4030-030-201

T-01861-0271 ITR PAS LOOP TEST INST Inspection Test Record P-4030-030-200

T-01861-0272 ITR PAS LOOP TEST INST Inspection Test Record T-4030-020-203

You have Tasks that have been selected to be Checked Out :

Task ID	Description	Tag	Type
T-01469-0004	FIC System Completion	4520-001-001 - Field Installation Talinga Transf...	Field Installation Check

Checkout Selected Discard all

Keep Selected



2.2 Mobile Application Navigation - Search

The Seeking feature allows a User to filter data based on data inputted in the 'Search Box' in a manager.

The functionality of the Seeking feature is outlined below:

Available Records: 82

C/O	Status	Job Card	Task ID	PDF	Description	Discipline	Type	Tag
	Started		T-00698-0002		Fire and Gas Device - Installation (Fab)	INST	Field Installation Check	CTP-00001
			T-00722-0156		Piping Insulation (Piping Insulation) (Fabrication)	PIPE	Field Installation Check	PTP-TCP-4035-018
	Started		T-00722-0157		Piping Insulation (Piping Insulation) (Fabrication)	PIPE	Field Installation Check	PTP-TCP-4035-024
			T-00722-0159		Piping Insulation (Piping Insulation) (Fabrication)	PIPE	Field Installation Check	PTP-TCP-4035-042
	Partial		T-00724-0141		Piping Surface Protection (Pipe Testpack)	PIPE	Field Installation Check	PTP-4532-00066
			T-00794-0182		General Piping Equipment Installation	PIPE	Field Installation Check	PTP-4231-00160
			T-00794-0187		General Piping Equipment Installation	PIPE	Field Installation Check	PTP-4232-00180
			T-00810-0001		Instrument Loop Test	INST	Loop Testing	L-1801-1691
			T-00819-0233		Piping Pre Installation - Fabrication	PIPE	Field Installation Check	PTP-4502-00026
	Started		T-00832-1126		Hazardous Area Inspection - Electrical	ELEC	Hazardous Tasks	YA-4035-8051
					Hazardous Area			

No data inputted.

Tasks

Available Records: 9

C/O	Status	Job Card	Task ID	PDF	Description	Discipline	Type	Tag
	Started		T-00698-0002		Fire and Gas Device - Installation (Fab)	INST	Field Installation Check	CTP-00001
			T-00810-0001		Instrument Loop Test	INST	Loop Testing	L-1801-1691
			T-01861-0270		ITR PAS LOOP TEST	INST	Inspection Test Record	H-4030-030-201
			T-01861-0271		ITR PAS LOOP TEST	INST	Inspection Test Record	P-4030-030-200
			T-01861-0272		ITR PAS LOOP TEST	INST	Inspection Test Record	T-4030-020-203
			T-01861-0273		ITR PAS LOOP TEST	INST	Inspection Test Record	X-4030-030-202
			T-01861-0274		ITR PAS LOOP TEST	INST	Inspection Test Record	Z-4030-030-202
	Partial	JC-078377	T-00692-32112		Pre Installation Instrument Inspection (Fab)	INST	Field Installation Check	PG-4501-8650
	Partial	JC-078377	T-00692-32113		Pre Installation Instrument Inspection (Fab)	INST	Field Installation Check	PG-4501-8601

Data inputted (filtered by Discipline).

SECTION 3

Checkout Task and Sync to Mobile

3.1 Task Checkout

Now that the User understand how to navigate the Mobile Application they can search for and checkout Tasks.



From the Homepage select the **Tasks** icon.

Checkout Task and Sync to Mobile

← Back Tasks Available Records: 872

C/O	Status	Job Card	Task ID	PDF	Description	Discipline	Type	Tag
<input type="checkbox"/>	Past Due		T-00002-8767		Instrument Data Record	INST	Inspection Test Record	1000-PI-9061
<input type="checkbox"/>	Past Due		T-00002-8798		Instrument Data Record	INST	Inspection Test Record	1000-PIT-9055
<input type="checkbox"/>	Past Due		T-00002-8824		Instrument Data Record	INST	Inspection Test Record	1000-PSV-9004
<input type="checkbox"/>	Past Due		T-00002-8833		Instrument Data Record	INST	Inspection Test Record	1000-PSV-9055-A
<input type="checkbox"/>	Past Due		T-00002-8834		Instrument Data Record	INST	Inspection Test Record	1000-PSV-9055-B
<input type="checkbox"/>	Past Due		T-00002-8841		Instrument Data Record	INST	Inspection Test Record	1000-PV-9055-A
<input type="checkbox"/>	Past Due		T-00002-8850		Instrument Data Record	INST	Inspection Test Record	1000-PY-9055-B
<input type="checkbox"/>	Past Due		T-00002-9004		Instrument Data Record	INST	Inspection Test Record	1000-XS-9081
<input type="checkbox"/>	Past Due		T-00002-9062		Instrument Data Record	INST	Inspection Test Record	1000-XY-9081
<input type="checkbox"/>	Past Due		T-00002-9063		Instrument Data Record	INST	Inspection Test Record	1000-XY-9081-A

Locate the Tasks you want to check out (using the 'Navigation Ribbon' or 'Seeking' functionality). Select the Tasks by clicking on the Green checkbox in the C/O column.

← Back Tasks Available Records: 872

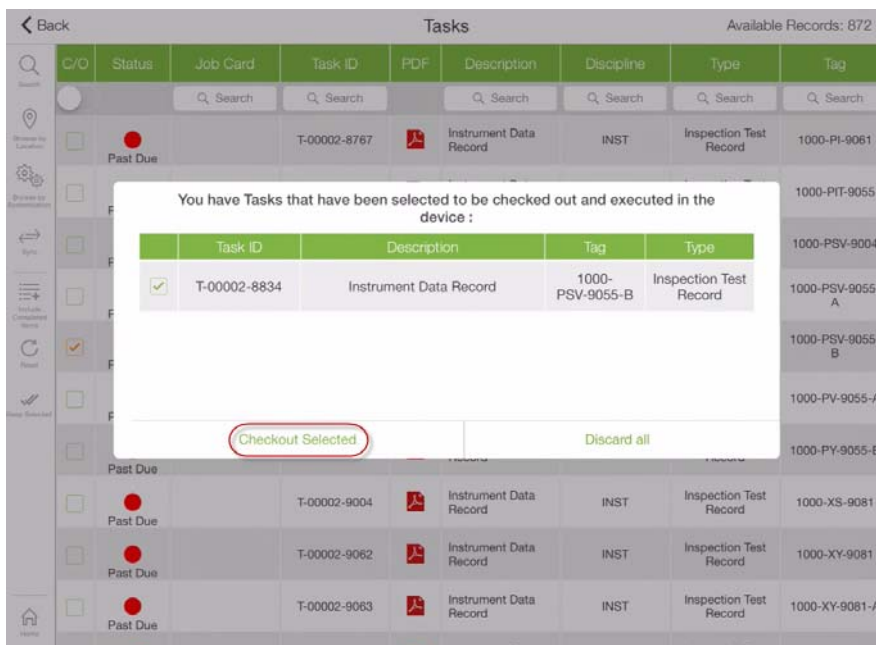
C/O	Status	Job Card	Task ID	PDF	Description	Discipline	Type	Tag
<input type="checkbox"/>	Past Due		T-00002-8767		Instrument Data Record	INST	Inspection Test Record	1000-PI-9061
<input type="checkbox"/>	Past Due		T-00002-8798		Instrument Data Record	INST	Inspection Test Record	1000-PIT-9055
<input type="checkbox"/>	Past Due		T-00002-8824		Instrument Data Record	INST	Inspection Test Record	1000-PSV-9004
<input type="checkbox"/>	Past Due		T-00002-8833		Instrument Data Record	INST	Inspection Test Record	1000-PSV-9055-A
<input checked="" type="checkbox"/>	Past Due		T-00002-8834		Instrument Data Record	INST	Inspection Test Record	1000-PSV-9055-B
<input type="checkbox"/>	Past Due		T-00002-8841		Instrument Data Record	INST	Inspection Test Record	1000-PV-9055-A
<input type="checkbox"/>	Past Due		T-00002-8850		Instrument Data Record	INST	Inspection Test Record	1000-PY-9055-B
<input type="checkbox"/>	Past Due		T-00002-9004		Instrument Data Record	INST	Inspection Test Record	1000-XS-9081
<input type="checkbox"/>	Past Due		T-00002-9062		Instrument Data Record	INST	Inspection Test Record	1000-XY-9081
<input type="checkbox"/>	Past Due		T-00002-9063		Instrument Data Record	INST	Inspection Test Record	1000-XY-9081-A
<input type="checkbox"/>	Past Due		T-00002-9107		Instrument Data Record	INST	Inspection Test Record	1000-XZ-9081-A

Note:

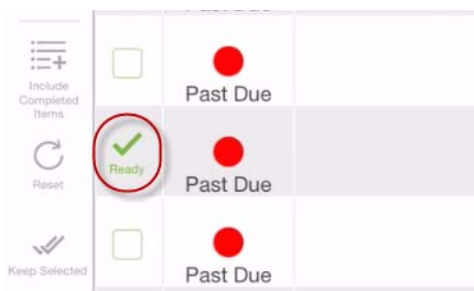
Once you have selected the Tasks; the checkbox will turn Orange and a checkmark will appear and are now flagged for checkout.



To check out the Tasks, select the **Keep Selected** button from the Navigation Ribbon.

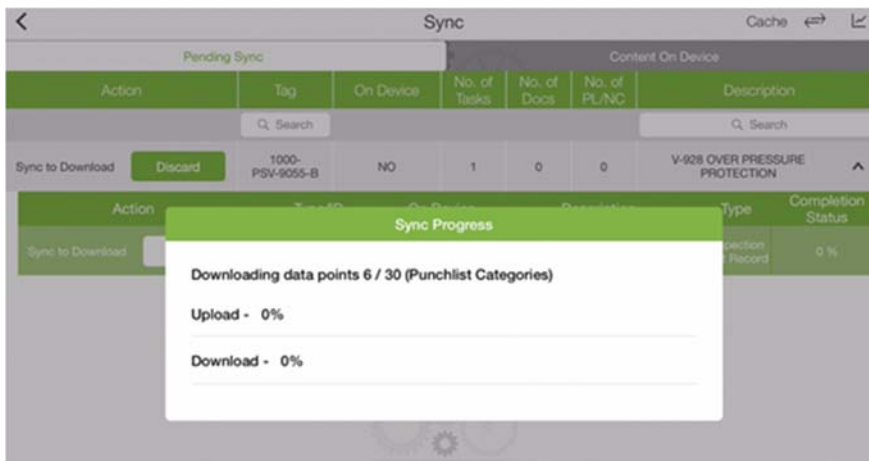


A notification window will appear informing the User that they have a Tasks selected to be checked out. To check out the listed Tasks click the **Checkout Selected** button.



The notification window will close and the Orange checkbox and checkmark will now be Green with "Ready" displayed underneath.

The selected Tasks are now ready to be synced down to the mobile device for offline execution.



A Sync Progress window will open and inform the User of the sync status.



The Tasks and related data are now synced down onto the Mobile Device.

The user can verify by selecting the 'Content on Device' tab.

The Task(s) can now be completed while offline.

SECTION 4

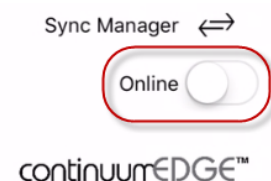
Offline Execution & Syncing of Completed Tasks

4.1 – Offline Task Execution

Now that the Tasks have been synced to the Mobile Device they can be executed in the field while Offline (no internet connection).

Note:

On the Homepage there is an Online/Offline toggle button. When executing Tasks out in the field the toggle needs to be set to Offline (button to the Left). This will ensure that the device doesn't switch between online and offline while completing tasks as this can prevent proper use and data could be lost.



The process for executing a Task offline is outlined below:

The screenshot displays the continuumEDGE mobile application interface. At the top, it shows the user 'thompsonr', the project '001 - Example Project', and the status 'Test CE CCMS'. A toggle switch for 'Online' is set to 'Offline'. The main screen features a grid of icons for 'Assets', 'Documents', 'My Punchlists', 'My Tasks', 'My Preservations', 'My Non-Compliances', 'My Operations Tasks', and 'My Maintenance Tasks'. A red box highlights the 'Assets' and 'Documents' icons. Another red box highlights the 'My Tasks' icon. Below the main grid, there are more icons for 'My Punchlists', 'My Preservations', 'My Operations Tasks', and 'My Maintenance Tasks'. A red box highlights the 'My Tasks' icon. The bottom section shows the 'My Tasks' screen with a table of tasks. The table has columns for C/O, Status, Job Card, Task ID, PDF, Description, Discipline, Type, and Tag. Two tasks are listed, both with a status of 'Past Due' and a 'Connection Lost' indicator. The first task is 'Instrument Data Record' with ID 'T-00002-0681' and tag '1000-HS-9858'. The second task is 'Instrument Data Record' with ID 'T-00002-8834' and tag '1000-PSV-9055-B'. Below the table, there is a 'Task Details' section for task 'T-00002-0681'. It includes sections for 'Safety and Environmental Requirements', 'Scheduling', 'Other', and 'Change Tracking'. The 'Scheduling' section shows a schedule date of '02-Jan-2017, 07-Jan-2017' and a duration of '0.75 hrs'. The 'Change Tracking' section shows the record was created on '13-Oct-2016' by 'Ryan Thompson' and modified on '28-Apr-2017' by 'Ryan Thompson'.

When the Mobile Device is in Offline mode only the Assets, Documents and “My” Managers are available to access.

Select the **My Tasks** icon to open the manager to view and complete Tasks.

All Tasks that you have checked out from the Mobile Device or that have been checked out to the User from SC will be shown in the manager.

Select the Task to execute. The ‘Task Details’ window will open to show the User information about the task. To view the ‘Task Summary’ window and then start the Task select the **Steps** icon in the top right of the window.

Offline Execution & Syncing of Completed Tasks

Task Details Edit Task Completion - T-00002-0681 Connection Lost

Description: Instrument Data Record

1 Task Summary 2 Steps Completion 3 Reference Documents

Task Summary

Task ID: T-00002-0681
 Description: Instrument Data Record
 Asset ID: 1000-HS-9858

Scheduling Details

Scheduled Start Date: January 2, 2017
 Schedule End Date: January 7, 2017
 Responsible:

Cancel Task Start Task View Task View Asset

Select the **Start Task** button to execute the Task.

Task Details Edit Task Completion - T-00002-0681 Connection Lost

Description: Instrument Data Record

1 Task Summary 2 Steps Completion 3 Reference Documents

T-00002-0681
 Instrument Data Record
 Inspection Test Record
 CE-FIC-I-001

Phase:	Construction	Stage:	Mechanical Completion
Project:	Example Project	Project No:	001
Area:	50-10-1 - Area 1	Location / Facility:	50-10-1-1 - Location 1
System Ref:	1100-05	System:	HO STARTUP HEATER
Sub-System Ref:		Sub-System:	
Tag No:	1000-HS-9858	Work Scope:	
Tag Type:	HS - Hand Switch	Tech Specs:	
Drawing No:	1000-L-0025, 1000-LC-00008, 1000-PID-0009		
Comments:	INSTR_SYS: NA, INSTR_LOC: FIELD		

Item No.	Step Action	Transmitter Analog	Digital Instrument / Device	Control Valve Analog	Digital Valve	Initials / Date
1.1	Select test option	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Transmitter Analog Test						
2.1	BENCH OR FIELD CAL:		Bench	Field	N/A	
2.2	TRANSMITTER:		Fieldbus	Analog	N/A	
2.3	Range:	Min	Max	Units	N/A	

The User now completes the Task by answering each step question.

Task Details Edit Task Completion - T-00002-0681 Connection Lost

Description: Mechanical Test (by contract)

1 Task Summary 2 Steps Completion 3 Reference Documents

Reference Documents

C/O	Document ID	PDF File	Description	Type
	1000-PID-0009		Example Project - Piping & Instrument Diagram	P&ID

Document - 1000-PID-0009

MODEL DEVELOPMENT

Asset Types: Create Asset Types

Criticality Models: Develop Criticality Models

Failure Mode Effects Analysis Models: Develop FMEA Models

Task Models: Create Maintenance Task Models (Strategies)

Test Forms & Checklist Library: Create Test Forms (Tactics)

NOTES:
 1. Boxes with Names above are specific ODMs Modules
 2. PDF icon icon Modules Module is P&ID

Note:

The User can also access Reference Documents associated with the Task by selecting the 'Reference Documents' tab and a list of available documents are listed.

Select the **PDF** icon for the document the User wants to view. The document will open. To close the document and

Offline Execution & Syncing of Completed Tasks

return to the Task select the **Back** icon and then the 'Steps Completion' tab.

Item No.	Step Action	Yes	No	N/A	Initials / Date	PL
5.5	SPEED CONTROL AVAILABLE?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	RT / 21-Jun-2017	
Item No.	Step Action	Inspection Answer			N/A	Initials / Date
5.6	FAIL ACTION (ON LOSS OF MOTIVE POWER)	<input type="text"/>				

< Task Details Edit Task Completion - T-00002-0681 Connection Lost

If when completing the Task the User enters a value that is out of range or a checkbox that is flagged to create a Punchlist (e.g. Reject, No) a PL/NC Alert window will open. The User selects the **Yes** button to create a Punchlist.

Description: Instrument Data Record

1 Task Summary 2 Steps Completion 3 Reference Documents

Item No.	Input (Rising)	Input (Decreasing)	OUTPUT CONTACT STATUS	PLC/DCS INDICATION	N/A	Initials / Date
4.3	<input type="text"/>	<input type="text"/>				
4.4	<input type="text"/>	<input type="text"/>				
Item No.	Step Action	Inspection Answer			N/A	Initials / Date
4.5	DEAD BAND	<input type="text"/>				

PL/NC Alert
Do you want to create a punchlist?
Yes Cancel

< Edit Punchlist - PL-1 Connection Lost Submit

General

Punchlist Category: CAT 3 - Items generated by th...
Punchlist Type: Other - Other
Work Category: COMM - Commissioning
Discipline: INST - Instrument & Controls
Description: 5.5: SPEED CONTROL AVAILABLE?
Priority: 2: B-Low

As-Found Data

Action Required: Display is not working. Needs to be fixed/replaced.

As-Found Image:

As-Left Data

Action Taken:

As-Left Image:

Work Breakdown Association

Project: 001 - Example Project
Phase: 1 - Construction
Stage: 3 - Mechanical Completion
Activity:

< Edit Punchlist - PL-1 Connection Lost Submit

A Punchlist Edit Form will open and the User enters all applicable fields (including taking a photo of the PL item) and then saves the Punchlist record.

Note:

The Punchlist can also be assigned a workflow state if desired. This is done by selecting the state.

Item No.	Step Action	Yes	No	N/A	Initials / Date	PL
5.5	SPEED CONTROL AVAILABLE?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	RT / 21-Jun-2017	PL-1
Item No.	Step Action	Inspection Answer			N/A	Initials / Date
5.6	FAIL ACTION (ON LOSS OF MOTIVE POWER)	<input type="text"/>			<input type="checkbox"/>	
5.7	FAIL ACTION (ON LOSS OF CONTROL SIGNAL)	<input type="text"/>			<input type="checkbox"/>	

ROUTING SLIP

I hereby confirm the work has been completed in accordance with contract specified drawings, specifications & standards.

Performed By

Name:

Title:

Date:

Approved By

Name:

Title:

Date:

Complete

Close

ROUTING SLIP

I hereby confirm the work has been completed in accordance with contract specified drawings, specifications & standards.

Performed By

Name:

Title:

Date:

Approved By

Name:

Title:

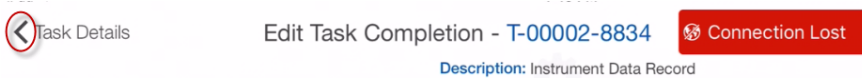
Date:

Reject

Close

Once the Punchlist is saved the User will be returned to the Task and the Punchlist will be referenced in the step. Once the Task has been completed the User will select the **Complete** button at the bottom of the form. This will fill in the 'Performed By' details of the Task.

To return to the Task list the User selects the back icon until they are returned to the 'My Tasks' manager.



4.2 – Sync Completed Tasks

When the user has finished all Tasks (this would include a partially completed Task) they can now sync the Tasks back to SC.

The process for syncing completed Tasks is outlined below:



To sync the completed Tasks and any associated data (e.g. Punchlists) the User selects the Home icon to return to the Homepage. The User then toggles the **Online/Offline** button to "Online".

Note:

The User must be in a location where there is internet access.

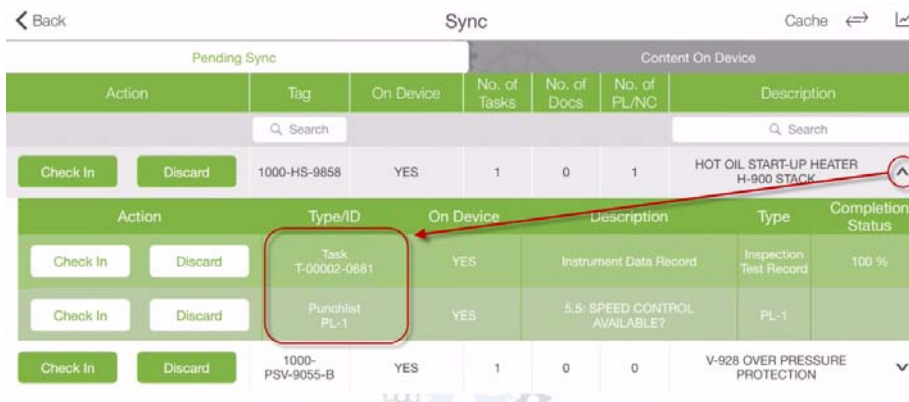
Offline Execution & Syncing of Completed Tasks



The User will then access the Sync Manager by selecting the **Sync Manager** icon.



In the Sync Manager's 'Pending Sync' tab the User will see all data (Tasks, Punchlists, etc.) that requires syncing.



Note:

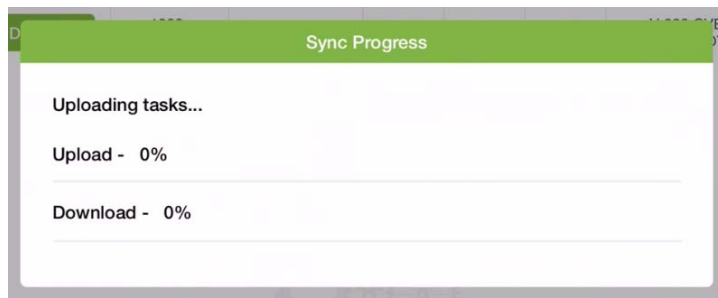
The list is displayed collapsed, listing by Asset Tag. To expand/collapse the list click on the arrow at the far right and all items (e.g. Tasks, Punchlists, etc.) related to that Asset tag are displayed/hidden.



To sync data back to SC the User selects the **Check In** button for all items to be synced. When this button has been selected it will display "Sync to Check In".



The User now selects the **Sync** icon to sync content to SC.



A Sync Progress window will display showing the User the progress of the sync. When syncing is complete the window will close.

The user can now verify in their SC site that the data has been synced.

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