

# PUNCH LIST

A **Punch List** is a list of items that must be completed before a project can finish. Items can include repairing damages that occurred during construction, or reporting missing equipment. Each punch list document can represent either a single item or a collection of punch list items.

To navigate to the Punch List, click **Project Forms**, then **Punch Lists** from the left hand menu. This displays the overall **Manager View** for the module and shows all records for all projects.

To search for an existing document, use the columns to filter for the data you need. For example, use the Record# column to search for a document. You can also narrow your search by school name by selecting it from the **Projects** drop down menu.

To add a new document, click the **Add** button.



The screenshot displays the software's navigation menu on the left and a data table on the right. The menu includes sections like PLANNING, PROJECT FORMS, COST MANAGEMENT, SCHEDULING, ASSET MANAGEMEN..., WORKFLOW, PORTFOLIO, and TOOLBOX. The 'Punch Lists' option is highlighted under the 'TOOLBOX' section. The data table has columns for PROJECT NAME, SDA NUMBER, RECORD #, DESCRIPTION, WORKFLOW STATUS, TO CONTACT, FROM CONTACT, and REFERENCE. A toolbar above the table contains a refresh icon, a search dropdown, a 'Projects' dropdown, and a red box highlighting the '+' button. Below the table, there is a pagination bar showing '1' of 1 records to display and a 'PAGE SIZE' of 20.

The document screen displays. Enter the following information:

- Project (**required**)
- Punch List # (**required**)
- Description
- Revision
- Date
- From
- To
- Status
- Punch List Type
- Contract

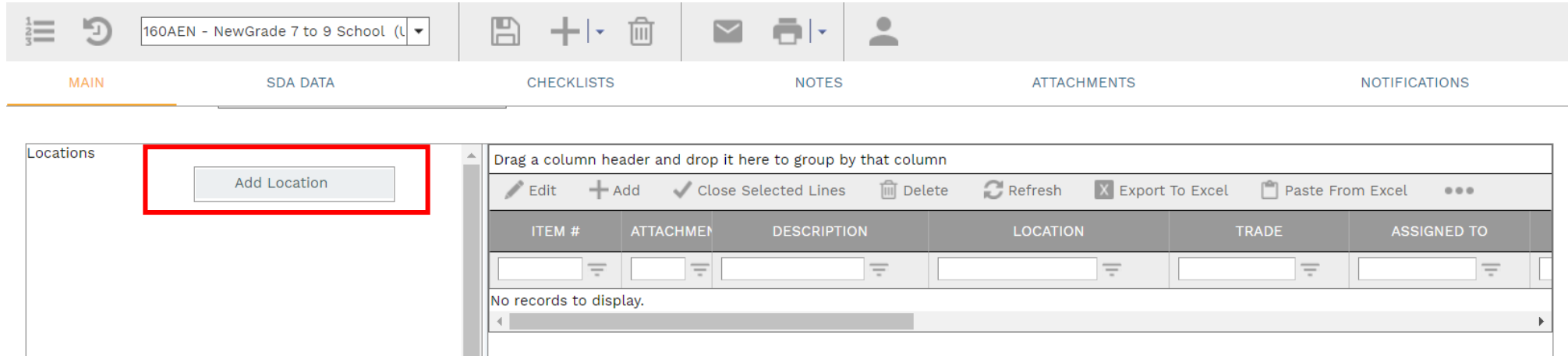
Once completed, click the **Save** button to continue.



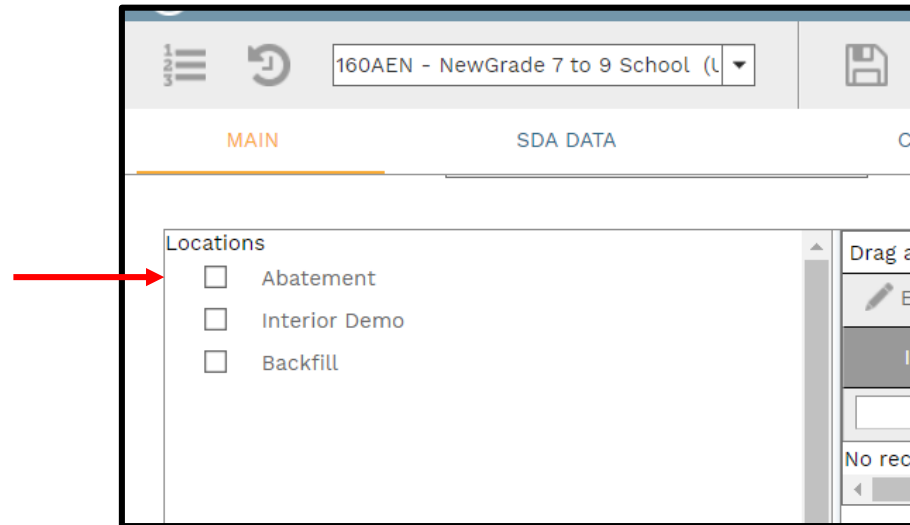
Project*	<input type="text"/>	USER DEFINED FIELDS	<input type="text"/>
Punch List #*	<input type="text"/>	Status	<input type="text"/>
Description	<input type="text"/>		
Status / Revision	<input type="text" value="Draft"/>		
Date	<input type="text"/>		
From	<input type="text"/>		
To	<input type="text"/>		
Status	<input type="text"/>		
Punch List Type	<input type="text"/>		
Contract	<input type="text"/>		

## Step 1 – Define Locations

Right-click your mouse in the white space under Locations, click the **Add Location** button. Type in the name of the first desired location, then repeat the process for all desired locations.



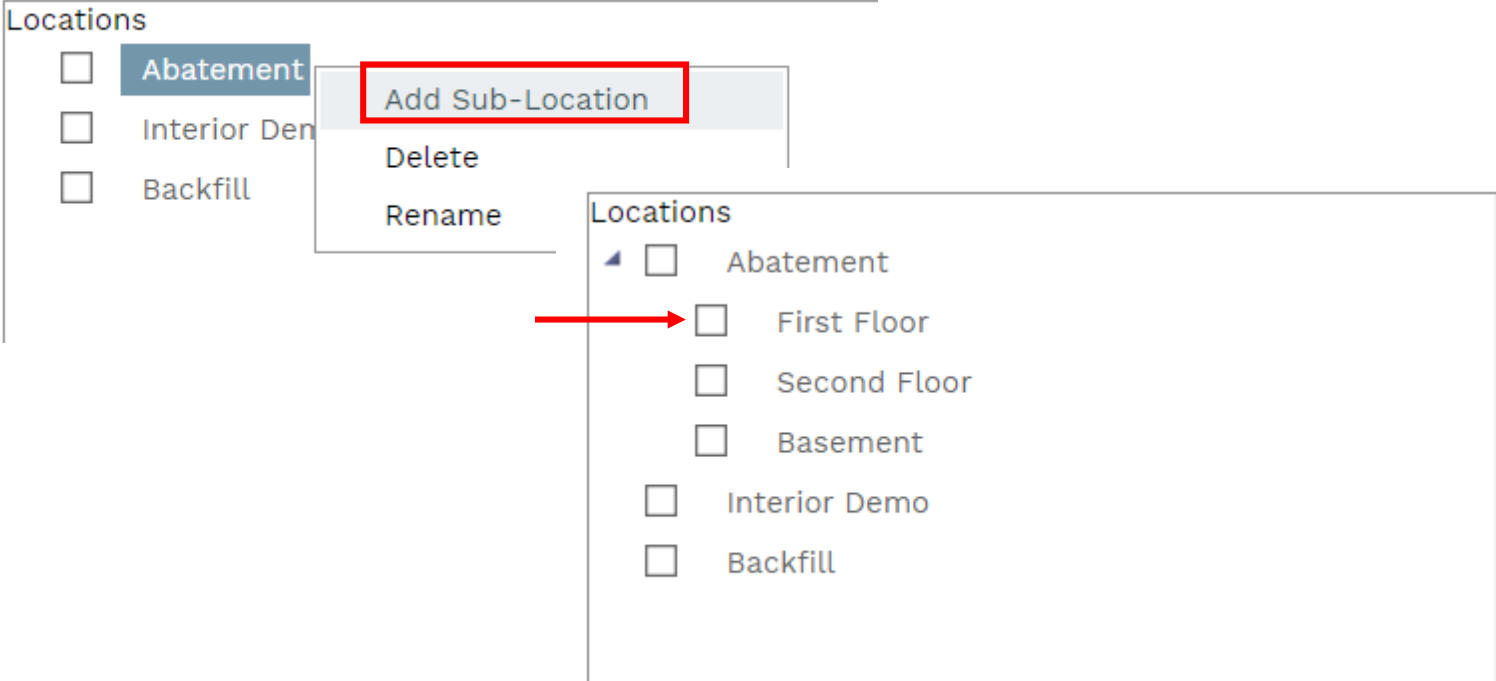
The screenshot shows the top navigation bar with the following tabs: MAIN, SDA DATA, CHECKLISTS, NOTES, ATTACHMENTS, and NOTIFICATIONS. The 'SDA DATA' tab is active. Below the navigation bar, there is a 'Locations' section. A red box highlights the 'Add Location' button. To the right of the button is a table with the following columns: ITEM #, ATTACHMEN, DESCRIPTION, LOCATION, TRADE, and ASSIGNED TO. The table is currently empty, and the text 'No records to display.' is visible below it.



The screenshot shows the 'Locations' section of the software interface. A red arrow points to the 'Add Location' button. The 'Locations' list is visible, containing the following items:

- Abatement
- Interior Demo
- Backfill

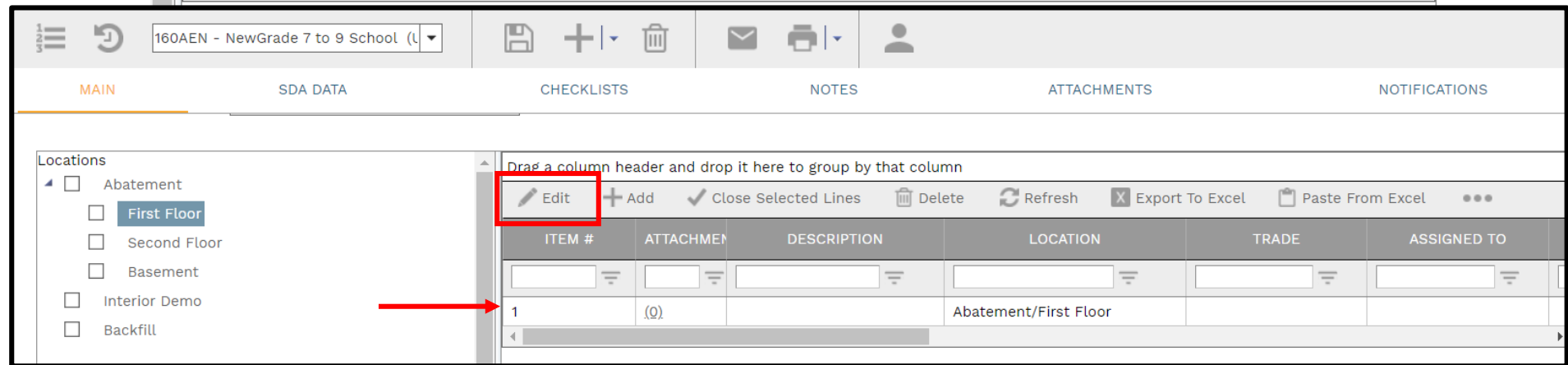
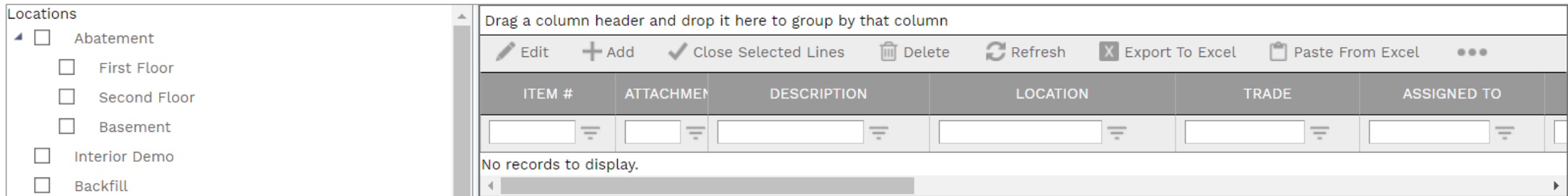
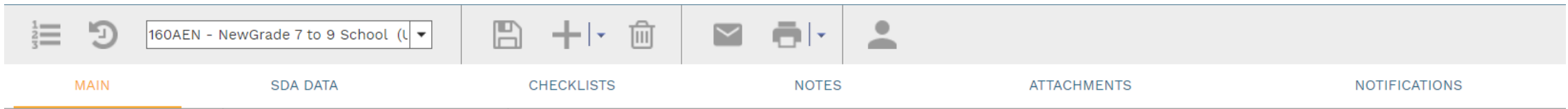
To add a sub-location to any level, right-click your mouse on a Location and click **Add Sub-Location**. Type in the name of the first desired sub-location, the repeat the process for all desired sub-locations. Repeat the process for all Locations in your list. Sub-locations can be deleted or renamed as well.



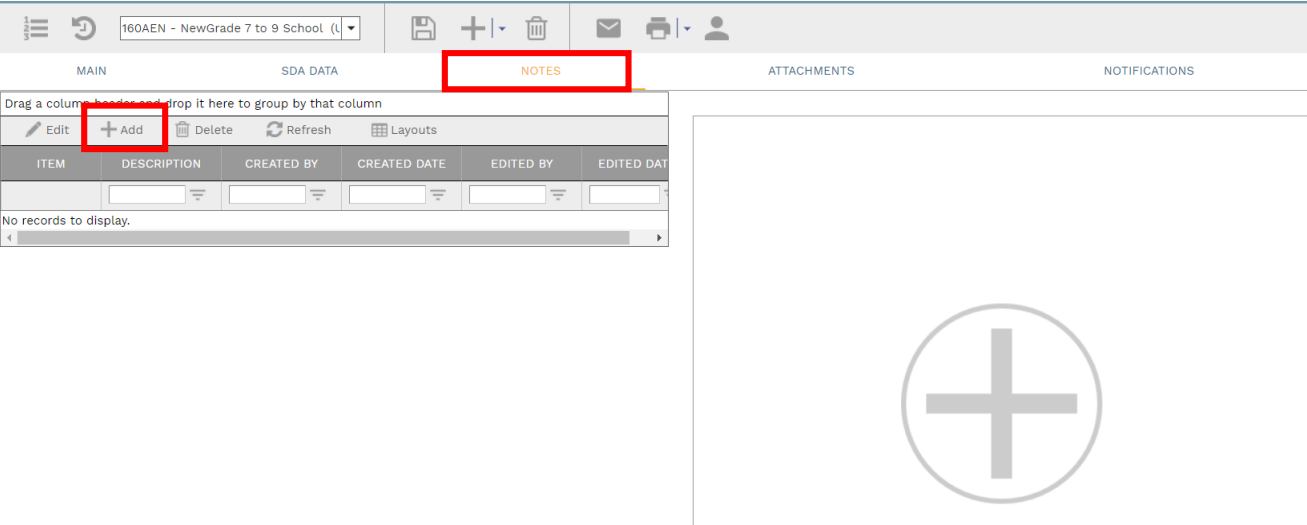
## Step 2 – Add Details for each Location

Click and drag a Location/Sub-Location to the details grid. Click the entry on the grid and click the **Edit** button to add other details to the line item. Click the **Save** button when done. Repeat the process until all details for the Locations/Sub-Locations have been entered.

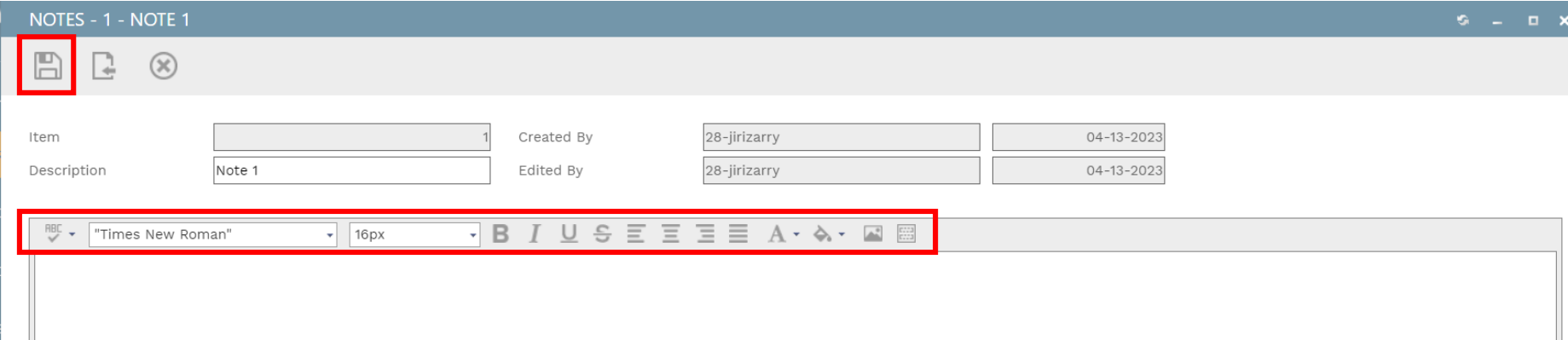
If you use the copy command (drop down of Add button) to create subsequent Punch List documents, the structure of the Locations/Sub-Locations will be copied into the new document.



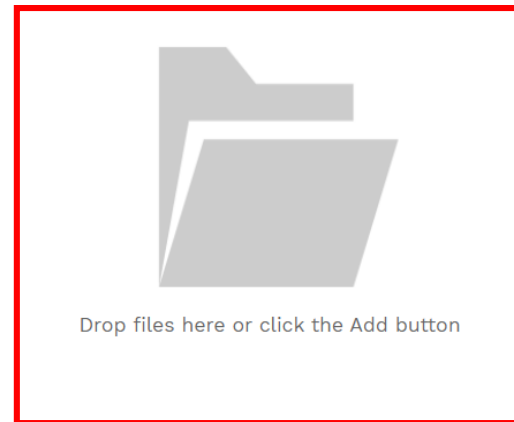
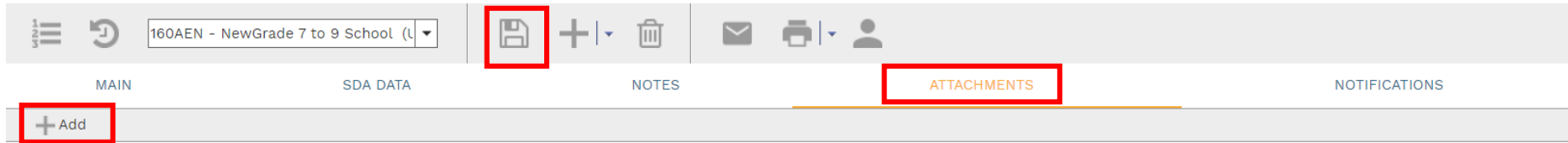
Click **Add** on the **Notes tab** to add additional notes as needed.



Enter your notes in the field provided. The text can be formatted using the toolbar shown. There is no limit to the amount of text you can enter. Click the **Save** button when completed.



On the **Attachments tab**, you can drag-and-drop your desired attachment(s) in the middle section of the screen, or you can choose **Add** to manually navigate to the location of your attachment on your computer, and add it through that window. Repeat the process for all additional attachments. Click the **Save** button when finished.





To print Punch List information, click the **print button** and select **BI Reporting** from the drop down list. Choose an option from the report menu to receive your output (either Adobe or export to Excel) or to cancel the Reports Preview screen.

The screenshot shows the top toolbar of the software. The print icon (a printer) is highlighted with a red box. A dropdown menu is open, showing options: "Go To BI Reporting Center", "BI Reporting", "PMWeb Reporting", and "PMWeb Word". The "BI Reporting" option is also highlighted with a red box. Below the toolbar, the "REPORTS PREVIEW" window is visible, with a red box around the print icon and a red arrow pointing to the "BI Reporting" option in the dropdown menu.

**Note:** Please be patient when waiting for output from a selected report. It may take a few minutes to load the data.

REPORT	RECORD TYPE	DEFAULT
Punch List Details	Punch Lists	✓
Punch List Items Not Completed	Punch Lists	
Punch Lists	Punch Lists	
Punch Lists By Company	Punch Lists	

1

**Punch List Details** **PM**

Project: 160AEN - NewGrade 7 to 9 School (Union City) Project Num

Punch List #: 001  
Description: list 1  
Date: 05-22-2023

To: From:

Item #	Description	Location	Assigned To	Cost	Issued Date	Du
001	AbatementFirst Floor	AbatementFirst Floor		\$0.00		

10/1 Printed on 05-22-2023