

Punchlists

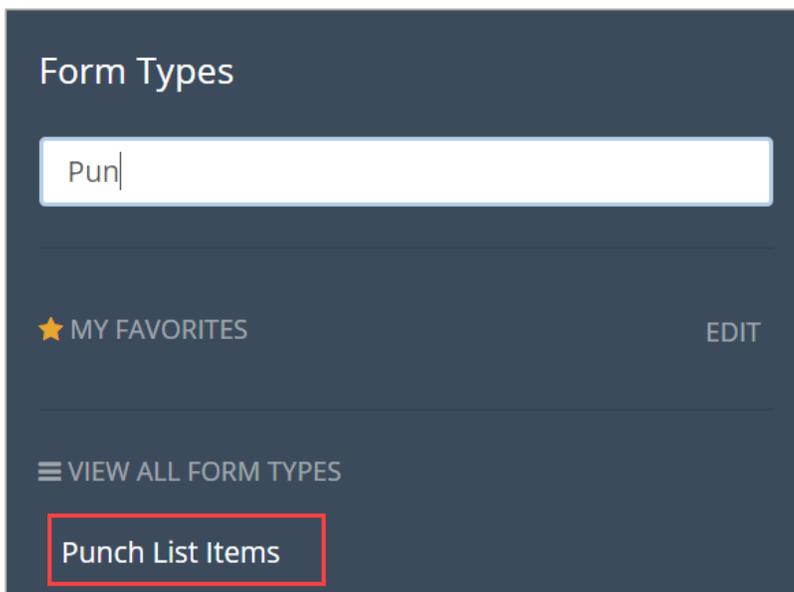
Generally created by the Architect/Engineer or General Contractor depending on project delivery method or contract requirements. Responsible party should use this form in ProjectTeam to record individual punchlist items.

Creating a Punchlist

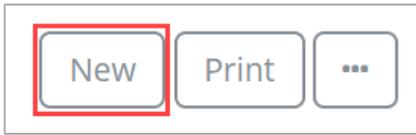
1. Within the project, click the **Forms** icon on the left navigation pane.



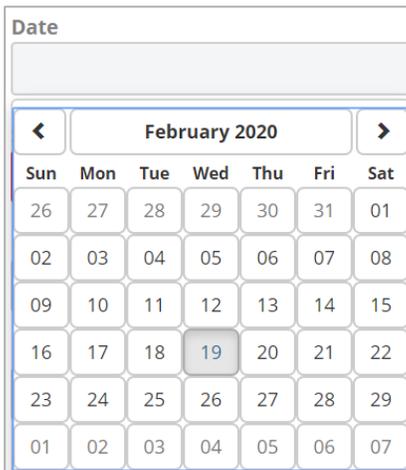
2. In the search field, begin typing **Pun** and the form will appear in the forms list. Click the **form name** to open the log.



- 3. To create a Permit form, click the **New** button.



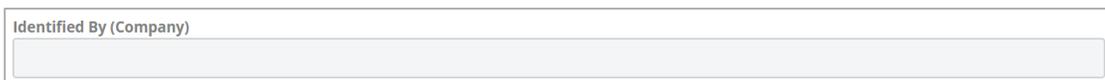
- 4. Click inside the **Date** field and select a date for the Punch List item.



- 5. Enter the title of the Punch List in the **Subject** field.



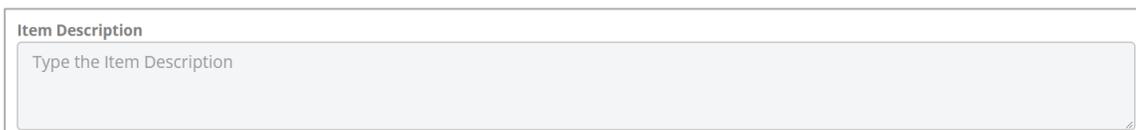
- 6. Click inside the **Identified By (Company)** to select a company name.



- 7. Enter the date the punch list item was found in the **Date Identified** field.



- 8. Enter the **Item Description**.



- 9. Enter the **Building/Area**.

Building/Area
Type the Building/Area

- 10. Enter the **Floor**.

Floor
Type the Floor

- 11. Enter the **Room #/Name**.

Room #/Name
Type the Room #/Name

- 12. Enter the **Surface** type.

Surface
Type the Surface

- 13. Enter the **Column Lines**.

Column Lines
Type the Column Lines

- 14. Click inside the **Division** field and select the division from the picklist.

Subcontractor

- 15. Click inside the **Subcontractor** field and select the company from the picklist.

Subcontractor

- 16. Enter the **Schedule Completion** date.

Scheduled Completion

February 2020						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	01
02	03	04	05	06	07	08
09	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
01	02	03	04	05	06	07

17. Enter any applicable **Notes**.

Notes/Comments

Type the Notes/Comments

18. Click inside the **Status** field and select the status from the picklist.

Status

Completed

In-progress

No Action

Rejected

19. Enter the **Date Completed**.

Date Completed

February 2020						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	01
02	03	04	05	06	07	08
09	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
01	02	03	04	05	06	07

20. If the Punch List item has been signed off, click the box for the **Sign Off** field. Entered by the party responsible for verification of completion of the punchlist items.

Sign Off

21. Enter the **Sign Off Date**. Entered by the party responsible for verification of completion of the punchlist items.

Sign Off Date

February 2020						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	01
02	03	04	05	06	07	08
09	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
01	02	03	04	05	06	07

22. Click inside the **Sign Off By** field and select the name of the person from the picklist. Entered by the party responsible for verification of completion of the punchlist items.

Sign Off By

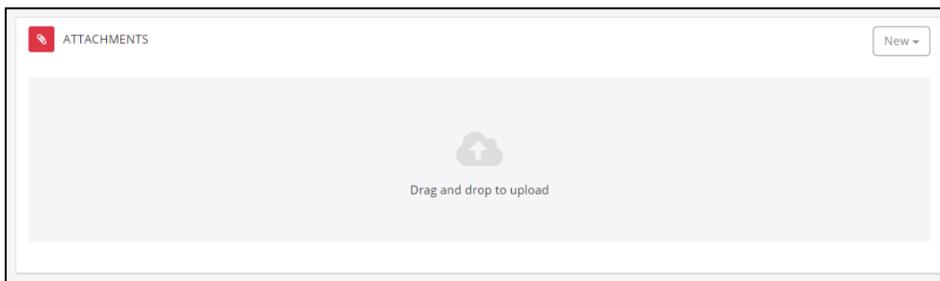
23. Press the **Save & Share** button located in the top right corner.



24. When you have completed adding the Punchlist, click **Save & Share** to save the Punchlist and share it with the appropriate Share Group(s) or click the **Save** to save the item as a draft.

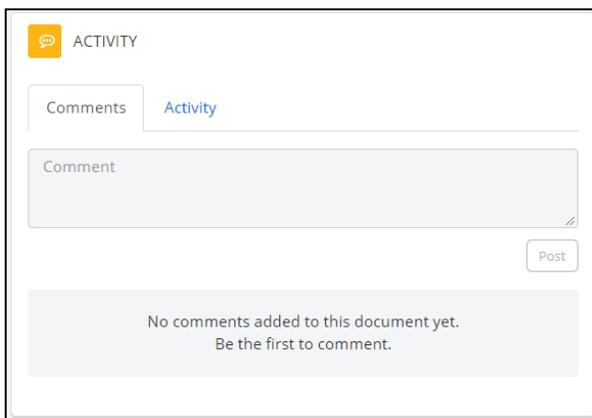
Attach Supporting Documentation

1. Drag and drop any supporting files, not attributable to a specific Punch List fields, to the **Attachments** section of the record.



Comments

1. To ask questions or add commentary regarding the Punch List record, use the **Comments** section.



Editing a Punch List Record

1. Open the **Punch List** log and click the **title of the Punch List** you wish to edit.

Punch List Items shared with me			New	Print	...
<input type="checkbox"/>	Subject ↕	Created On ▾	Shared		
<input type="checkbox"/>	Punch List Record ←	2/19/20 5:14 PM	1	Edit	

- 2. Click the **Edit** button in the Details section of the form.

 DETAILS Edit

Date

Subject
Punch List Record

Identified By (Company)

Date Identified

Item Description

Building/Area

- 3. Make the appropriate changes to the form and press the drop down arrow beside **Save & Share** to share the document or **Save** without sharing.

Cancel Save & Share ▾