



Punch List Training Document

Presented by: OnIndus



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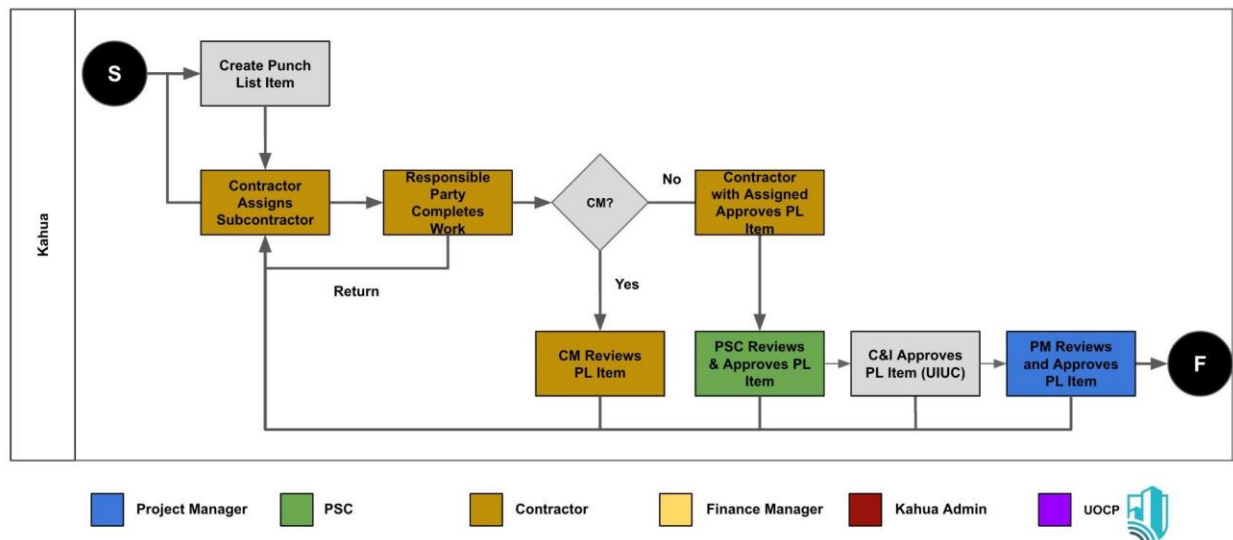
Overview

The Punch List application allows the user to create defect items for subcontractors or vendors by using a library of defect items commonly found on your projects.

This app allows the user to separate the completion list from the punch list, allows outstanding tasks to be documented with clear responsibility, outlines a formal process to close out each item, and enables mobile entry and response to defect items.



Punch List Workflow Design



Workflow Participants

1. Author/Contractor - The person who creates the punch list item.
2. Responsible Party - The person who is responsible for correcting the defect item, usually a subcontractor or vendor.
3. Approvers - The people responsible for verifying that the punch list item has been completed after the responsible party notifies the Author.

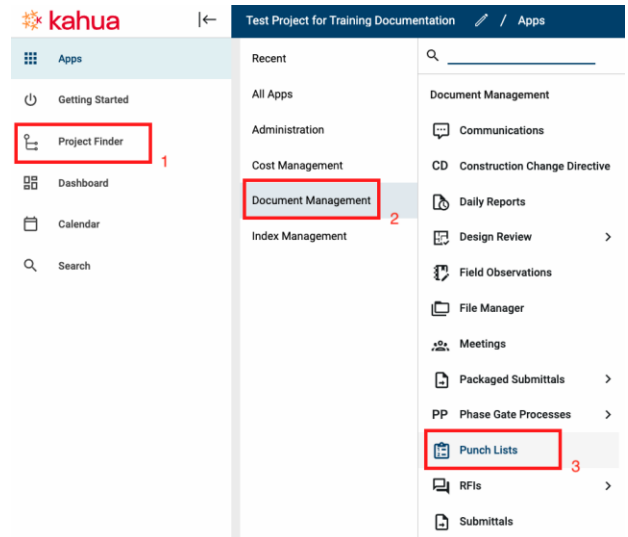
Note: You can have up to four approvers. The approval process moves sequentially from the first to the second to the third to the fourth approver before returning to the Author.



Create and Send a Punch List

1. As the Author of the Punch List, please navigate to the appropriate project using the Project Finder located in the left side menu (1)

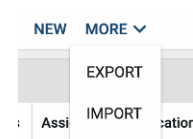
2. Access the Punch Lists app from the App Launcher under the Document Management section by clicking on Punch Lists (2)(3)



3. Once in the Punch Lists application, click New located at the top to create a new Punch List
4. Fill out the Punch List form noting the following:

- a. Required fields are marked with red text
- b. The Responsible Party should be the Representative who completes the work
- c. Provide any other information that will be helpful for the Responsible Party to complete the work.

5. To Import/Export the Punch Lists please click More and then on the Export/Import Button



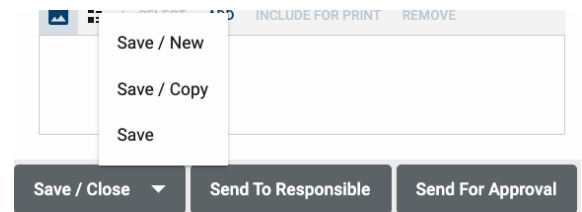
- a. The Export Button will provide the Template that can be used to fill out and import the Punch Lists

6. The Author defaults to the person creating the item i.e. the Author.
7. The Locations field allows the Author of the items to enter specific reference to the location in which the item was identified
 - a. The drop-down list is populated from the Locations app under the Index Management section.



8. Click the Library Type drop-down list and select a Library Item.
9. Select a Defect from the list.
 - a. The selected Defect populates the Subject field
 - b. Edit the Subject text as needed
10. Input a Due Date, the Responsible Party, and a least one Approver
 - a. Approver 1 – Contractor with Assigned or Construction Manager
 - b. Approver 2 – Professional Services Consultant
 - c. Approver 3 - C&I Lead Inspector (UIUC, UIC if applicable)
 - d. Approver 4 – University Project Manager
11. Attach images and reference documents at the bottom of the form, if applicable
12. Use the options on the Save menu at any time during editing by choosing:

- a. Save - saves the Punch List that you are editing while allowing you to continue editing
- b. Save/New - saves and closes the Punch List you are editing and opens a new Punch List form
- c. Save/Close - saves the Punch List you are editing and closes the Punch List Edit window



13. After entering all relevant information, the Author can put the item into workflow depending on whether the item has been complete upon entry or still requires attention by the Responsible Party:

- a. If it needs attention from the Responsible Party, click the Send to Responsible button



- i. This saves the Punch List and sends it to the person selected as the Responsible Party
- ii. The Status will change automatically



- b. If the Item is complete, click Send for Approval to initiate the approval process.
 - i. The system requests approval from each approver listed in the Approvers section.
14. At this point the Author can only Recall the Punch List to make edits or if it needs to be deleted
15. The Punch List is sent to the Responsible Person with all the details from the Author

Respond to a Punch List

Kahua allows the Responsible Party to respond to unresolved items with comments as well as references to indicate that the item is ready to be routed through the approval process.

1. The user listed in the Responsible Party field receives a task, noting an item requires response.
 - a. Click the link in the email and auto-navigate to Kahua
 - b. Sign into Kahua and click on your task icon located at the top right then select the Punch List task
2. The Responsible Party reviews the item details and can either:



- a. Enter comments into the Notes field and **click Return**
- b. Enter comments in the notes field and references detailing the corrective actions taken to fix the item and **click Mark Complete** to initiate the approval process.

Punch List Item - Action Required Task

[View Source Record >](#)

CSI Code	
Status	Assigned
Contract	
Estimated value of corrective work to be performed	
Approver	Data Migration
Approver 2	
Approver 3	

> SECTIONS

- DETAILS
- OUTCOME
- MEDIA
- REFERENCES

▼ OUTCOME

Due	2/6/2024
Completed	
Comments	
Notes	<hr/>

▼ MEDIA

SELECT ADD INCLUDE EOD PRINT REMOVE

Save Return Mark Complete



Approve a Punch List

The individual listed in the Approver field receives a task notification noting that a Punch List Item requires approval.

1. The Approver reviews the comments and references (if any) sent by the Author and/or Responsible Party and chooses to Approve or Reject the Item
2. If the first Approver approves the item, the item is then routed to Approver 2 and so on till the final Approver who is Approver 4
3. If any of the Approvers reject the Item, the Approver's comment is returned to the Responsible Party for revision and resubmission.
4. Approval by the final approver updates the Status of the Item to Closed
5. A copy of all items specific to the project are maintained in the Log View under the Items sub app upon opening the Punch List app.

Punch List Item - Action Required Task [Icons]

[View Source Record >](#)

Type	
Status	Ready For Appr
Contract	
Estimated value of corrective work to be performed	
Responsible Party	Data Migration
Assigned To	Data Migration
Due	2/6/2024
Completed	2/5/2024

> SECTIONS

- DETAILS
- APPROVAL
- MEDIA
- REFERENCES

APPROVAL

Approver Data Migration - Onindus

Approver 2

Approver 3

Approver 4

Comments

Notes

Save Approve Reject