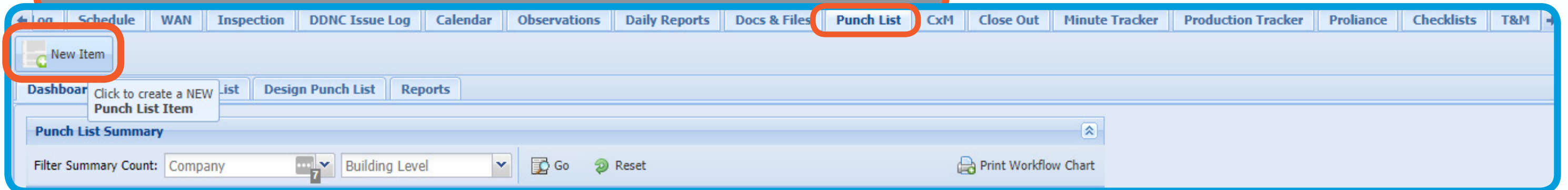# Quick Guide: Punch List Items
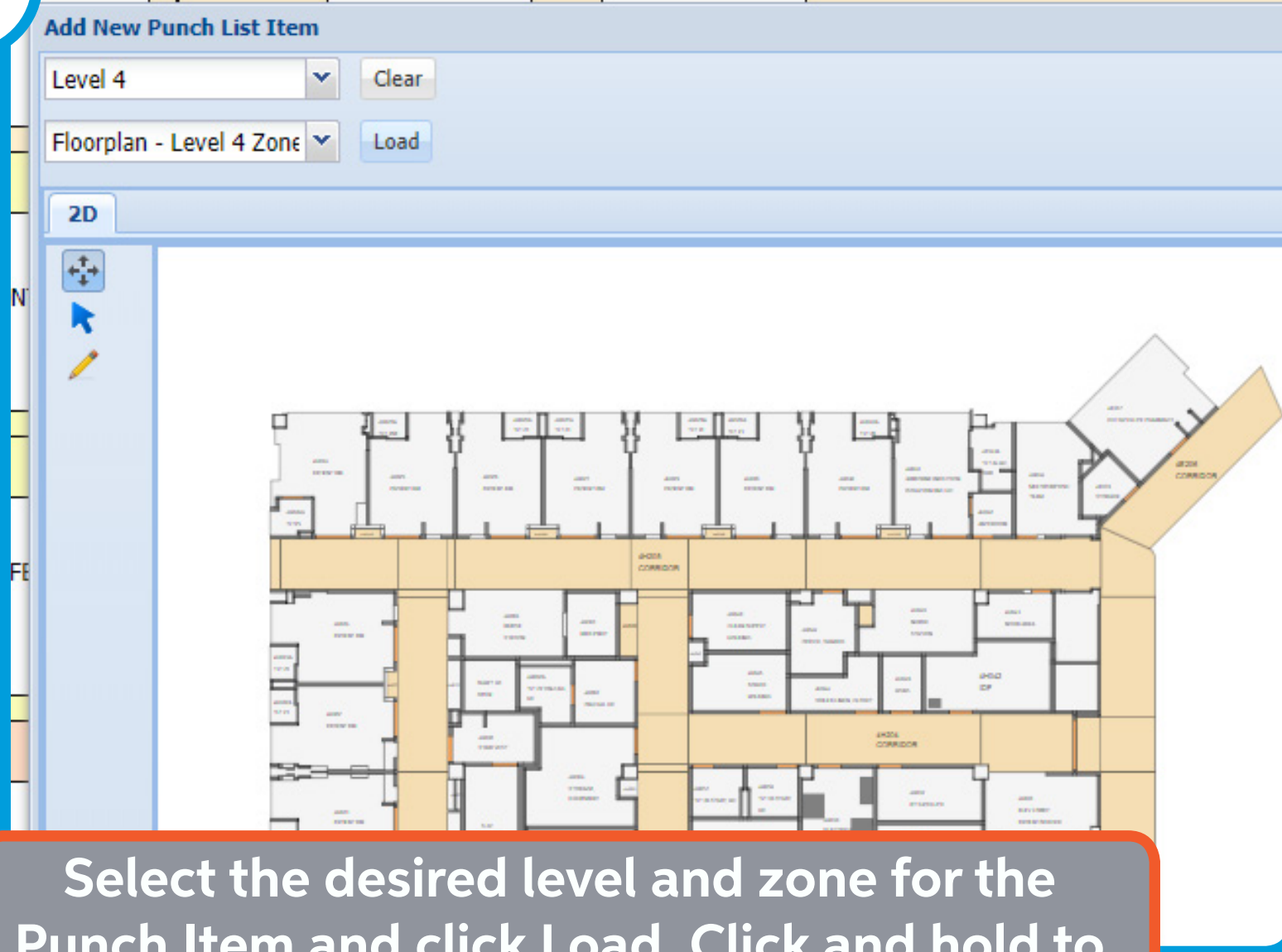
## How to create a Punch List Item and follow simple workflow

**1** Click the Punch List module and New Item
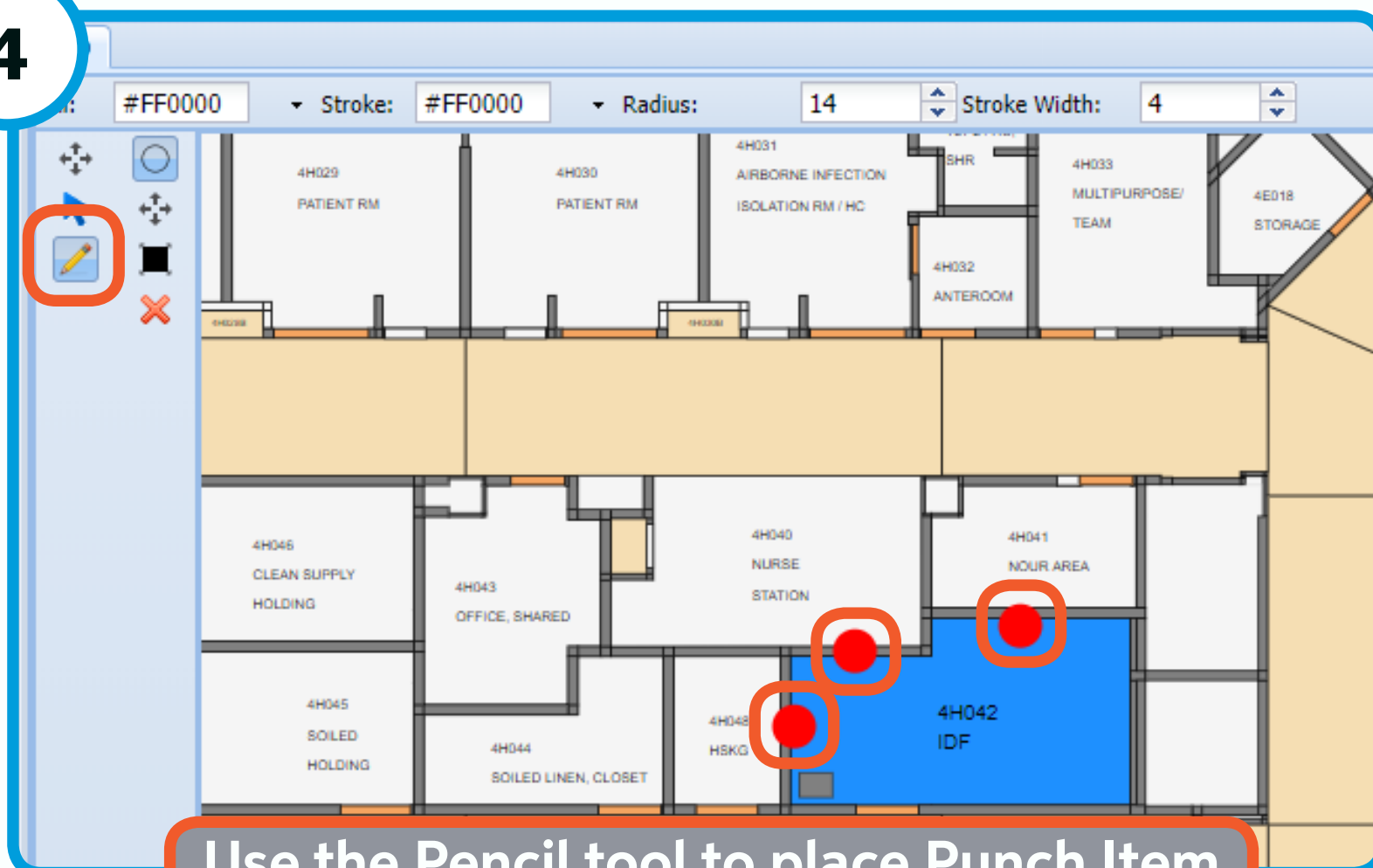


**2**



Select the desired level and zone for the Punch Item and click Load. Click and hold to move the map, scroll to zoom in and out.

**3** Use the Selection Tool and click on the room where your Punch Item is located
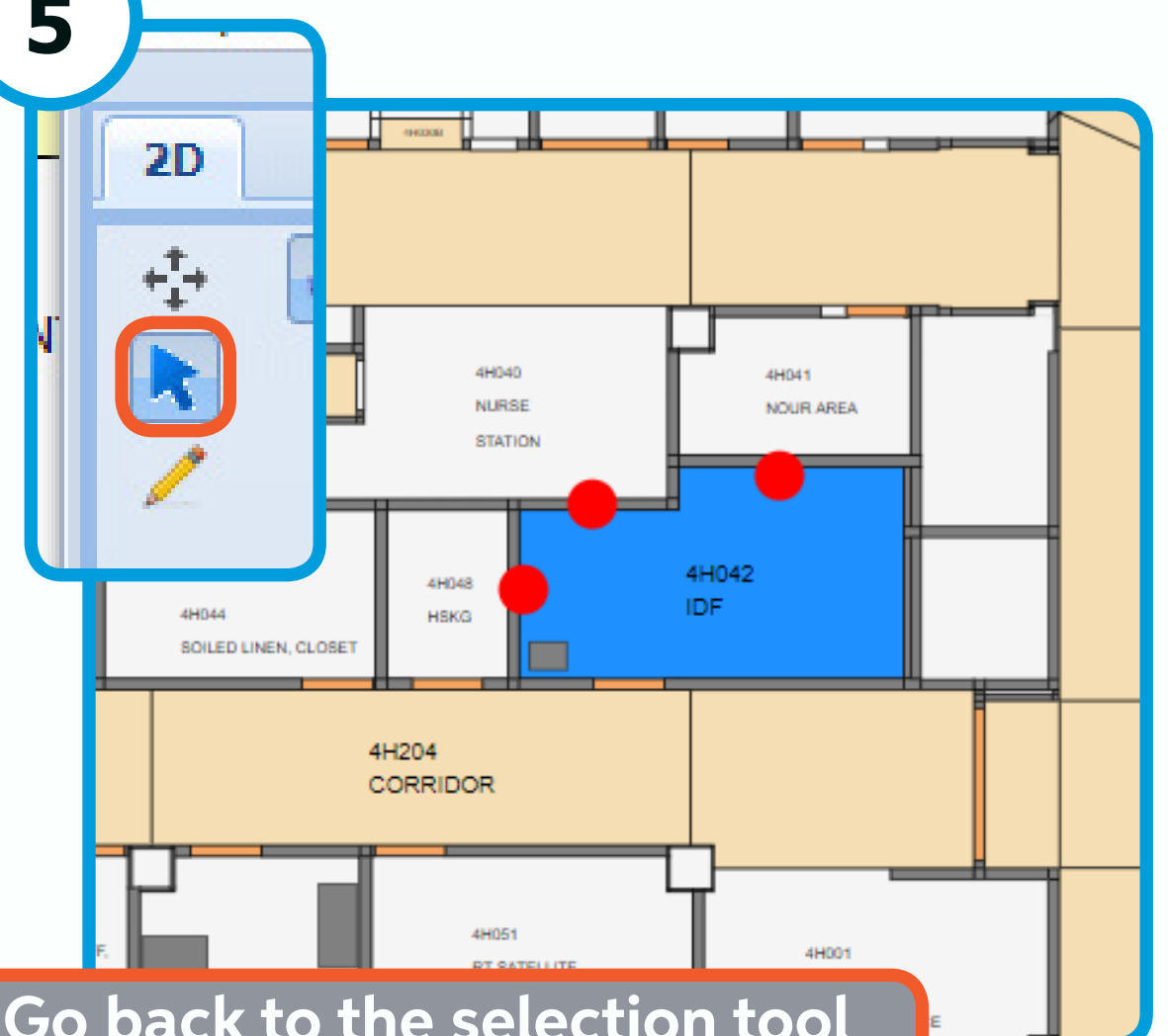


**4**



Use the Pencil tool to place Punch Item Markers in the approximate locations of your punch items in the room

**5**



Go back to the selection tool and click on the Punch Item Markers to add details

# Quick Guide: Punch List Items
## How to create a Punch List Item and follow simple workflow

**6**

Create punchlist

| Type(s) | Item Detail |

Level 1

Add New

| Above Ceiling | Architectural | Civil | Communications | Electrical |
| Equipment | Exterior Skin | Finals - Milestones | Fire Alarm | Fire Sprinkler |
| Landscaping | Life Safety | Mechanical (HVAC) | MISC | Plumbing |
| Signage | Structural | TEST-VOID | | |

Hand Rails ➊ ➋ Damaged ➊

⇒ Next

**Continue to Next**

**Assign a Punch Item type(s) as desired, then click Item Detail.**

**7**

Create punchlist

| Type(s) | Item Detail |

Basic Info

| Title * : | Test Punch Item |
| Comments: | Fill with important details. |

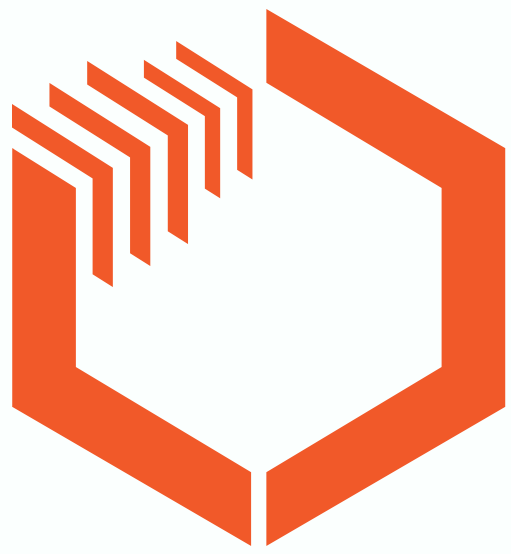| Priority * : | Medium |
| Installing Co * : | Clark-McCarthy |
| Assign To: | |
| Permit * : | INC 4 - Int Architecture, MEP, Kitchen, Fire Alarm, Fire Protection |
| Reason * : | Damage Noted |

Attachment(s)

Show file Uploader

**Add the appropriate Title, comments, and assignee. Add additional information and attach files as desired. Click Save. The Punch Item is Saved and the appropriate users are notified. Repeat steps 5-7 for every marker placed in step 4**

Save

**8**

| Dash | GC Completion List | Design Punch List | Reports | 64414 ✕ |

Batch Actions ▾ | Distribute | Quick Filter ▾ | Group by ▾ | Custom Filters ▾ | Custom Set ▾ | Manage Columns | S

Save Filter

| ID | Status | Assigned Company | Assigned To | Types | Tit |
|---|---|---|---|---|---|
| ID: | | | | | |
| Text: | 64414 | Ready for Owne... | Stanford Hospital & Clinics | Tatiana Pannetta | Architectural | Sk |
| Keyword Search: | 64413 | Ready for Owne... | Stanford Hospital & Clinics | Tatiana Pannetta | Electrical-Light Fixture | Lo |
| | 64412 | Ready for Owne... | Stanford Hospital & Clinics | Tatiana Pannetta | Architectural-Ceiling | Da |
| Author: | 64411 | Open to Sub | Hasson Inc | Tai Harrington | Architectural-Wall-Finish | Wa |
| Author Co: | 64410 | Open to Sub | Hasson Inc | Tai Harrington | Architectural-Wall-Finish | Fir |
| Permit: | 64409 | Open to GC | Clark-McCarthy | Forrest Thomas | Architectural-Wall-Finish-Not Specifi... | W |
| | 64408 | Open to Sub | Stanford Hospital & Clinics | Tatiana Pannetta | Architectural-Ceiling-Hard Lid-Dama... | Art |
| Installing Co: | 64407 | Open to GC | Clark-McCarthy | Forrest Thomas | Architectural-Ceiling-Hard Lid-Dama... | Ce |
| Priority: | 64406 | Open to Sub | Hasson Inc | Tai Harrington | Architectural-Wall-Tile-Damaged | Wa |
| | 64405 | Open to Sub | Performance Contracting ... | Kevin Ullrich | Architectural-Ceiling-Tile-Damaged | Ce |
| | | | | Tatiana Pannetta | Architectural-Flooring | Mis |
| | | | | Tatiana Pannetta | Architectural-Wall Finishes | Lo |
| | | | | Dave Winston | Electrical-Wall-Wall | Co |

| Reassign: | Select User |
| Installing Company: | Select Installing Company |

Save

| Punch ID | 64414 |
| Status | Ready for Owner Review |
| Created | 2019/10/28 |
| Duration | Days |
| Type | |
| Title | Skewed diffuser grill |
| Desc | Skewed diffuser grill |
| Priority | Medium |
| Location | 1E010 H ATRIUM |
| Title | |

**Locate Punch Items in the GC Completion List or Design Punch List to workflow**

# Quick Guide: Punch List Items

How to create a Punch List Item and follow simple workflow

**9**

| | | | | |
|---|---|---|---|---|
| rd | GC Completion List | Design Punch List | Reports | 0178 |

Edit   Admin Override   GC Review   Add CoAuthor   **Open to Sub**   Dispute   Duplicate   Print Options

**Punch List Details**

Edit

| | | | |
|---|---|---|---|
| Item ID: | 0178 | Duration | Days |
| Status: | Open to GC | Priority: | Medium |
| Author: | Brian Barker | Author Company: | Project Inertia LLC |
| Assigned To: | Test OfficeEngineer | Company Assigned To: | HMC Architects |
| Installing Company: | Big Contractor Co | Permit: | INC 1 |
| Title: | 345 | Reason: | Damage Noted |
| Description: | 345 | | |
| CoAuthor | | CoAuthor Company: | |
| CoAuthor Supporting Description: | | | |

**View document details and attachments**

**Punch List Files**

Edit

| Icon | Name | Type |
|---|---|---|
| | B57D2E1C-6D88-486E-B535-71BB484F68A6_1537468983_800x800.png | image |

**Types**

Edit

Landscaping
Clean Hardscape Surface

**Location(s)**

| ID | Title |
|---|---|
| 96404 | 111 |

**History**

| Date | Username | Action | Comment |
|---|---|---|---|
| 2018-09-20 11:42:41 | Brian Barker | **STATUS : OPEN** | Open Item |

**IG Snapshot(s)**

| Name | Size | User |
|---|---|---|

**Discussion Board**

2018-09-20 11:42:41   **STATUS : OPEN**    by Brian Barker

Open Item

**Leave comments and click "Save"**

Comment:

File:    Add More Files

Save

> Workflow options are located on the top right of the open document. Options vary by project and role, but generally include an option for assigning work, submitting work for review, or closing the Punch Item. Users are notified any time a Punch Item is sent to their Stage.

**10**

> When an Owner or Designer is ready to close a punch item, they select Close

**0185**

Edit   Admin Override   GC Review   Design Rejected   Add CoAuthor   **Close**   Duplicate   Print Options

Edit

| | |
|---|---|
| Duration | Days |
| Priority: | Medium |
| Author Company: | Project Inertia LLC |
| Company Assigned To: | Design Company 1 |
| Permit: | CF-12345 |

**Discussion Board**

2019-10-11 16:06:20   **STATUS : READY FOR DESIGN REVIEW**    by Brian Barker

Test

2019-10-11 16:05:49   **STATUS : READY FOR GC REVIEW**    by Brian Barker

test

2019-10-11 16:05:18   STATUS : READY FOR

**Message** ✕

? Do you really want to close this item?

[ Yes ]   [ No ]

**Success** ✕

Item Status set to "CLOSED"

[ OK ]

**You're Done!**