



STATE OF NEW JERSEY

**SCHOOLS DEVELOPMENT AUTHORITY**

## **Section 25**

# **Punch Lists**

**ORACLE** Primavera

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# I. Punch Lists

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.

## A. Populating the Location Section Dictionaries at the Project Level

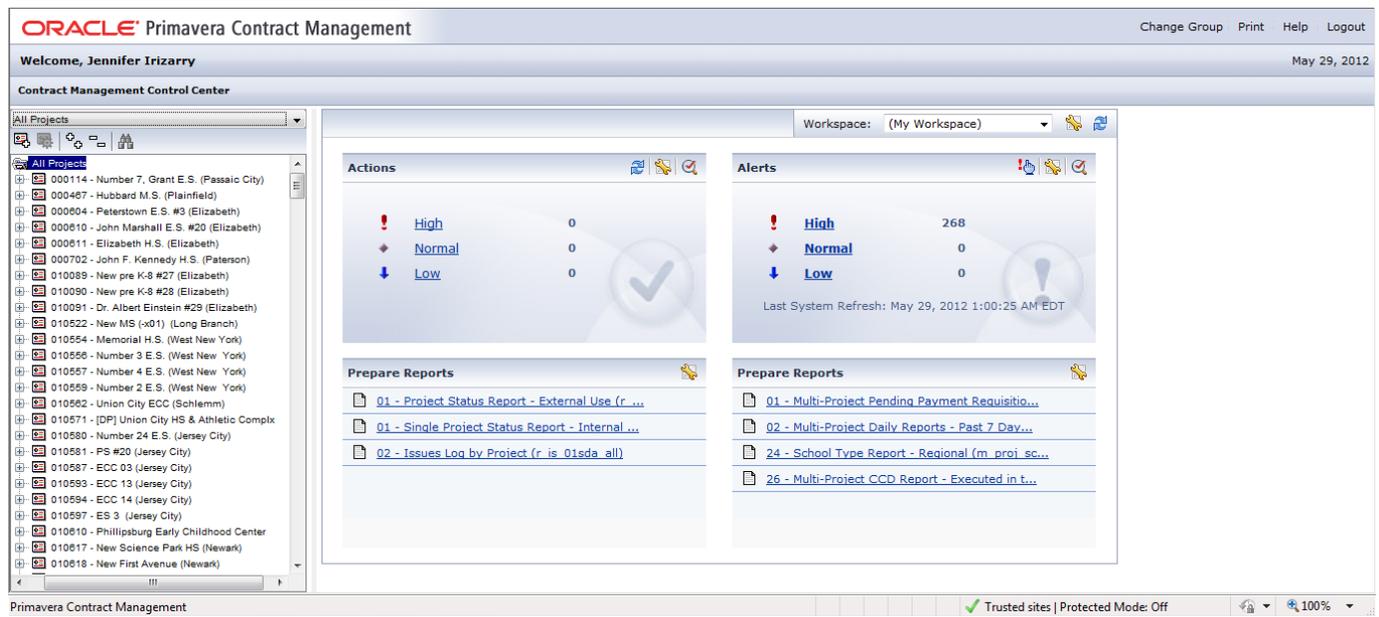
In order for the dictionaries in the Location section of the Punch list detail items to be populated with choices (Drawing Area, Room and Elevation), these dictionaries must be entered at the project level prior to the creation of punch lists.

When you add dictionary definitions to fields in Contract Management, the entries appear under the field columns in drop-down lists. Users can then select the definition from the drop-down list to apply to the corresponding document.

### a. Add a Drawing Area

To assist in determining the portion of a project to which a specific drawing applies, you can define specific drawing areas such as Lobby, Foyer, Office, and so on. Once you define drawing areas for a project, they are specific to that project only.

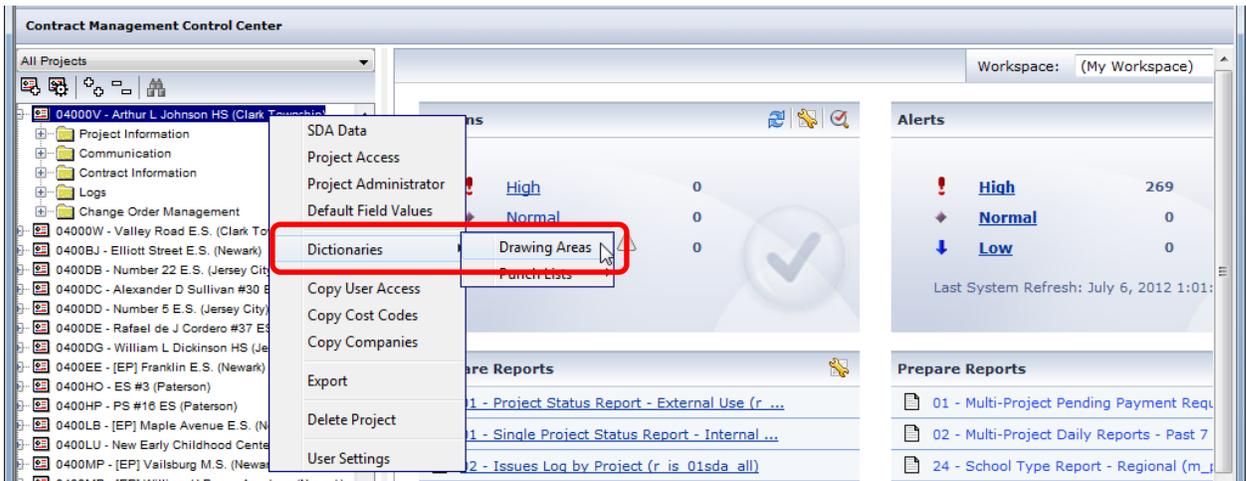
1. Once logged into Primavera, the Contract Management Control Screen displays (as shown).



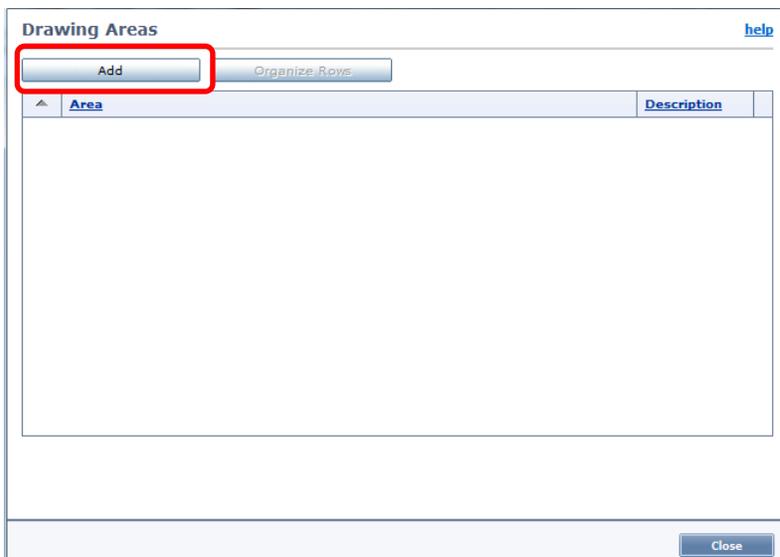
2. Select your desired project.



3. Right click the project name, choose **Dictionaries**, then choose **Drawing Areas**.



4. The **Drawing Areas** screen displays. Click the **Add** button.



5. Enter a name for the **Area** (required field) and enter a **Description**. In the **Move Below** drop down box, click to choose where to insert the new definition in the drop-down list. Click **Save and Add Another** to add additional areas, or choose **Save and Close** to continue.

**Drawing Areas Detail** [help](#)

Area \*

Description

Move Below

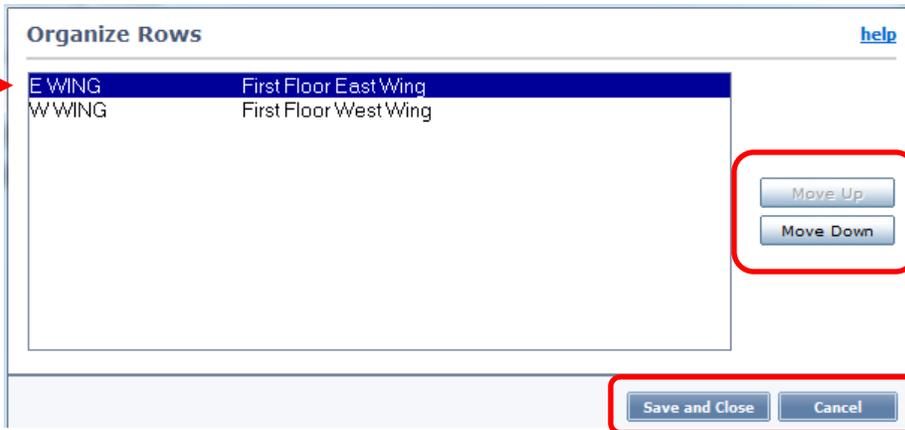
\* Required

6. If multiple rows are entered, when you return to the Drawing Areas box, the **Organize Rows** button will be activated (as seen in the example below). Click this button to open the **Organize Rows** dialog box, in which you can set the order in which the categories appear in drawing area drop-down list.

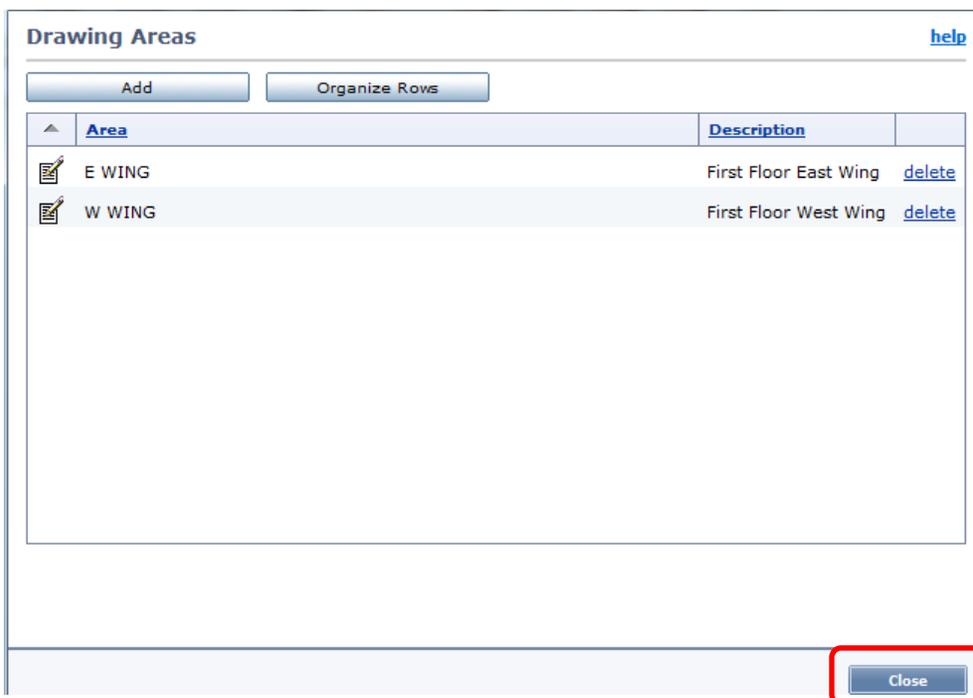
**Drawing Areas** [help](#)

Area	Description	
E WING	First Floor East Wing	<a href="#">delete</a>
W WING	First Floor West Wing	<a href="#">delete</a>

7. Select the options in the list and choose the **Move Up** or **Move Down** buttons to sort the list as desired. The order you set here applies to drop-down lists associated with the Drawing Area dictionary throughout Contract Management. Choose the **Save and Close** button when completed.



8. When you return to the Drawing Areas box, choose the **Close** button at the bottom of the screen to finish.



## b. Add an Elevation

To assist in determining the portion of a project to which a specific elevation definitions apply, you can define specific elevation definitions. Once you define elevations for a project, they are specific to that project only.

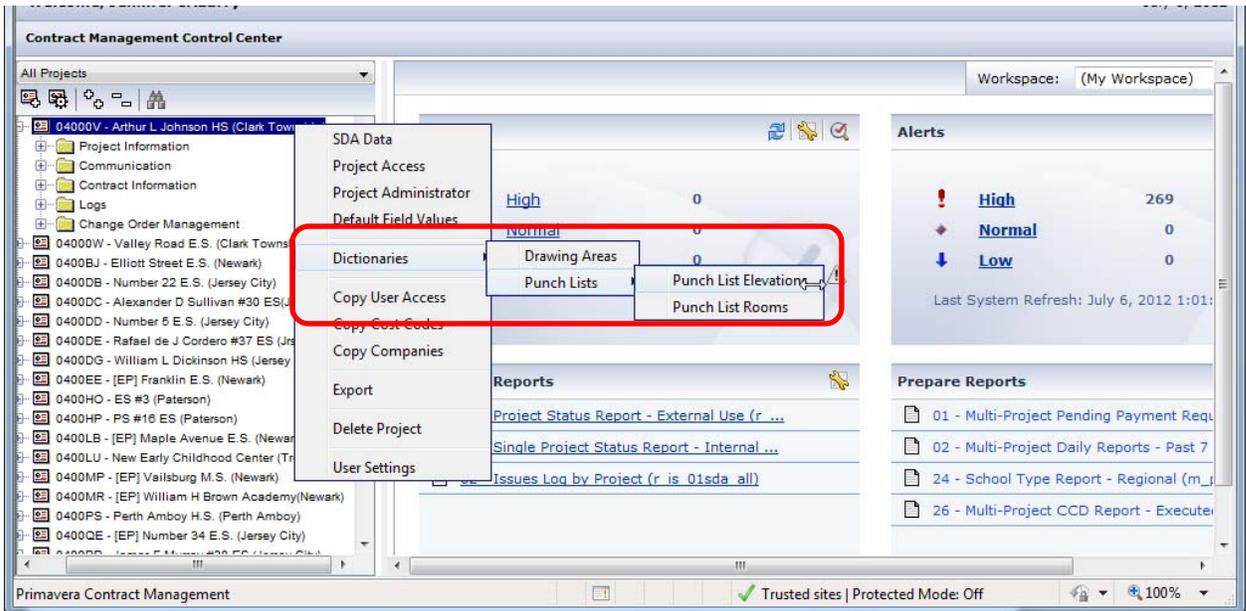
1. Once logged into Primavera, the Contract Management Control Screen displays (as shown).



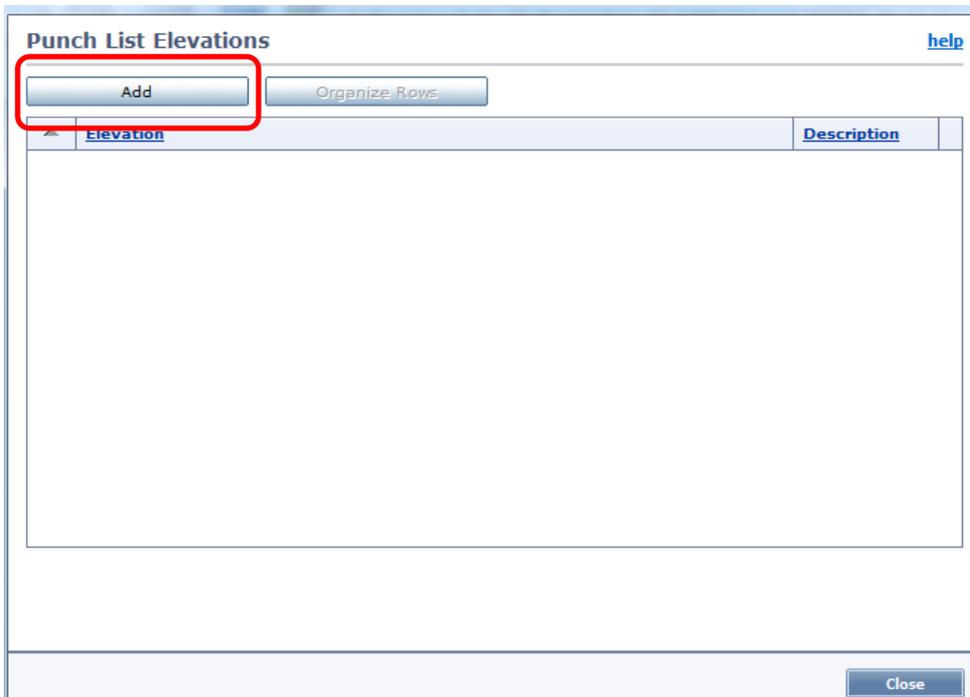
2. Select your desired project.



3. Right click on the project name, choose **Dictionaries**, choose **Punch Lists**, then choose **Punch List Elevations**.



4. The **Punch List Elevations** screen displays. Click the **Add** button to add a Punch List Elevation.



5. Enter a name for the **Elevation** (required field - 8 character limit) and enter a **Description** (23 character limit). In the **Move Below** drop down box, click to choose where to insert the new definition in the drop-down list. Click **Save and Add Another** to add additional information, or choose **Save and Close** to continue.

**Punch List Elevations Detail** [help](#)

Elevation \*

Description

Move Below

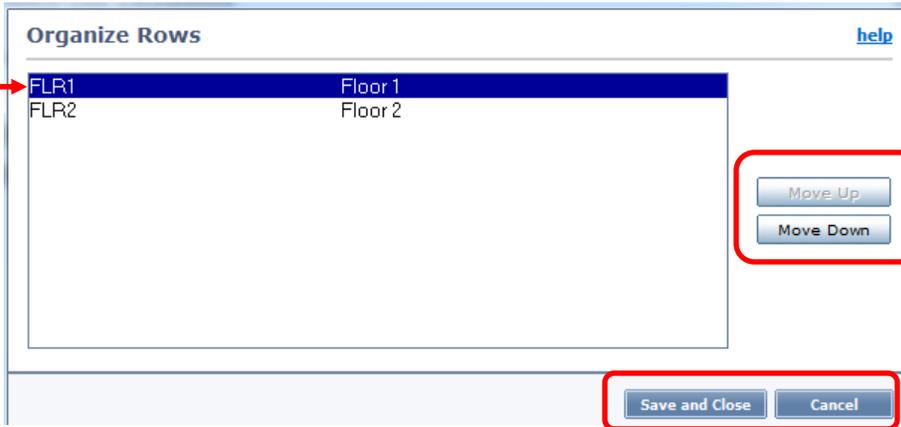
\* Required

6. If multiple rows are entered, when you return to the Punch List Elevations box, the **Organize Rows** button will be activated (as seen in the example below). Click this button to open the **Organize Rows** dialog box, in which you can set the order in which the categories appear in punch list elevation drop-down lists.

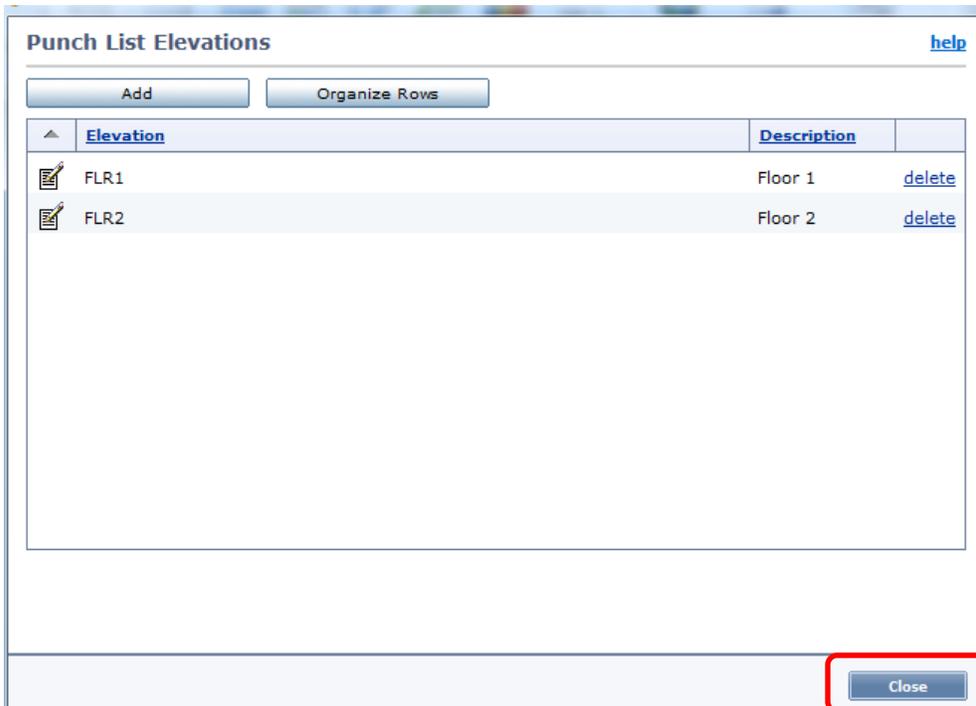
**Punch List Elevations** [help](#)

	<u>Elevation</u>	<u>Description</u>	
	FLR1	Floor 1	<a href="#">delete</a>
	FLR2	Floor 2	<a href="#">delete</a>

7. Select the options in the list and choose the **Move Up** or **Move Down** buttons to sort the list as desired. The order you set here applies to drop-down list associated with the dictionaries throughout Contract Management. Choose the **Save and Close** button when completed.



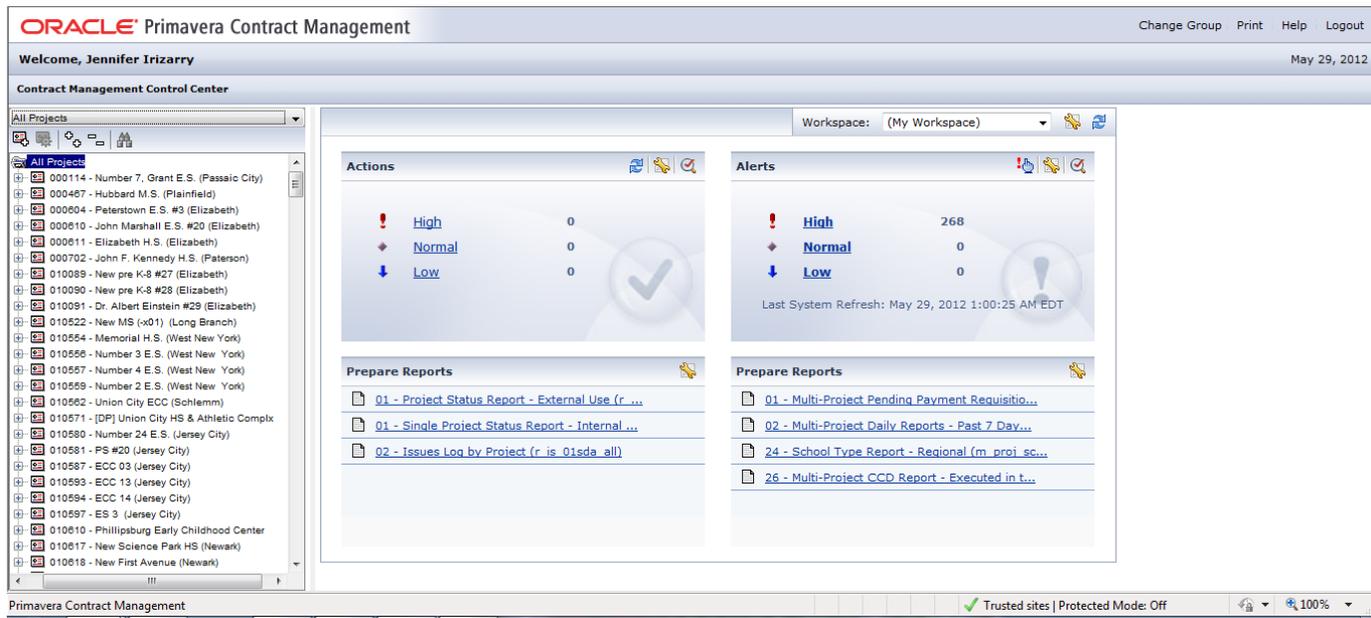
8. When you return to the Punch List Elevations box, choose the **Close** button at the bottom of the screen to finish.



## c. Add a Room

To assist in determining the portion of a project to which a specific room requirement applies, you can define specific room requirements. Once you define rooms for a project, they are specific to that project only.

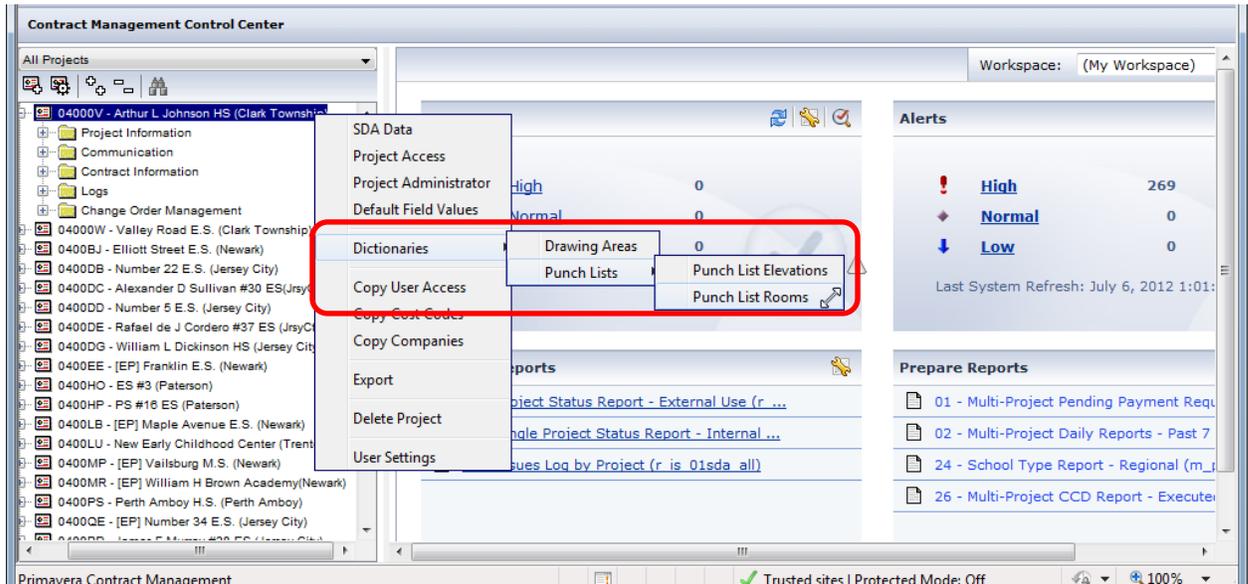
1. Once logged into Primavera, the Contract Management Control Screen displays (as shown).



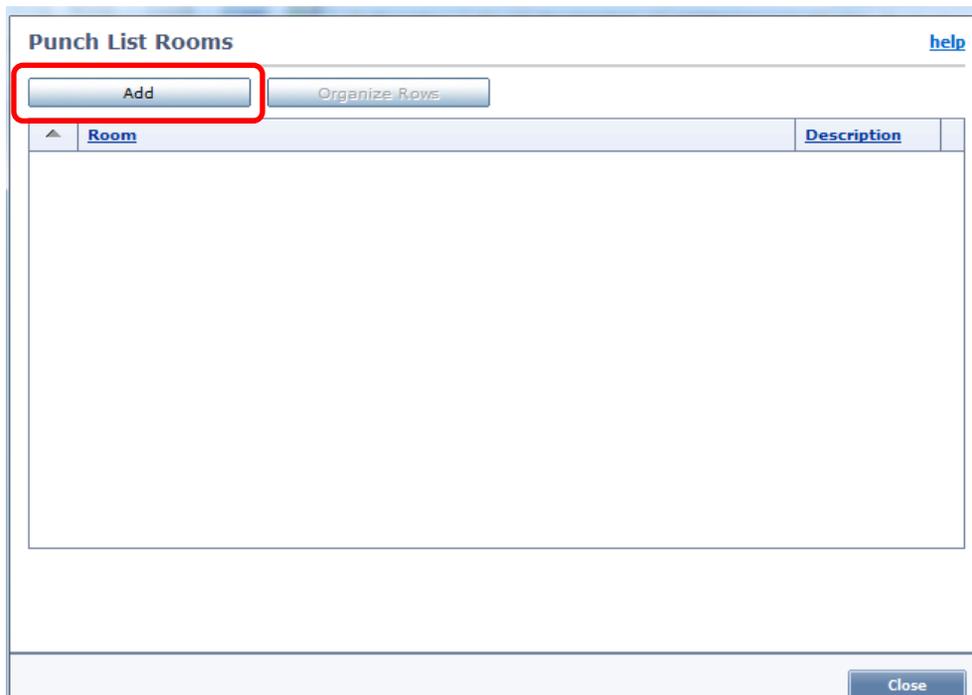
2. Select your desired project.



- From the Contract Management Control Panel screen, select the project name you are working with. Right click on the project name, choose **Dictionaries**, choose **Punch Lists**, then choose **Punch List Rooms**.



- The **Punch List Rooms** screen displays. Click the **Add** button to add a Punch List Room.



5. Enter a name for the **Room** (required field) and enter a **Description**. In the **Move Below** drop down box, click to choose where to insert the new definition in the drop-down list. Click **Save and Add Another** to add additional information, or choose **Save and Close** to continue.

**Punch List Rooms Detail** [help](#)

Room \* 101

Description Room 101

Move Below Move To Top

\* Required

Save and Close Save and Add Another Cancel

6. If multiple rows are entered, when you return to the Punch List Rooms box, the **Organize Rows** button will be activated (as seen in the example below). Click this button to open the **Organize Rows** dialog box, in which you can set the order in which the categories appear in punch list rooms drop-down list.

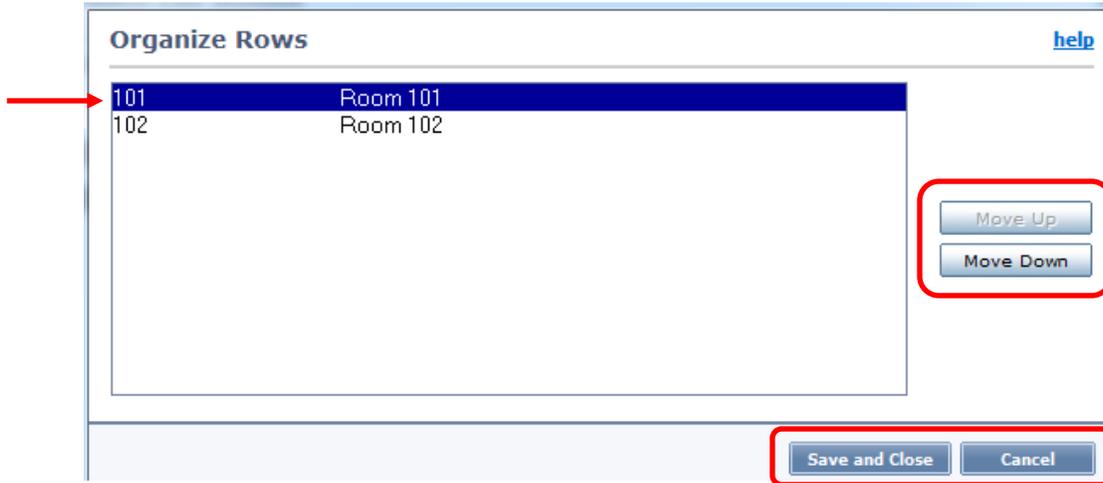
**Punch List Rooms** [help](#)

Add Organize Rows

Room	Description	
101	Room 101	<a href="#">delete</a>
102	Room 102	<a href="#">delete</a>

Close

7. Select the options in the list and choose the **Move Up** or **Move Down** buttons to sort the list as desired. The order you set here applies to drop-down lists associated with the dictionaries throughout Contract Management. Choose the **Save and Close** button when completed.

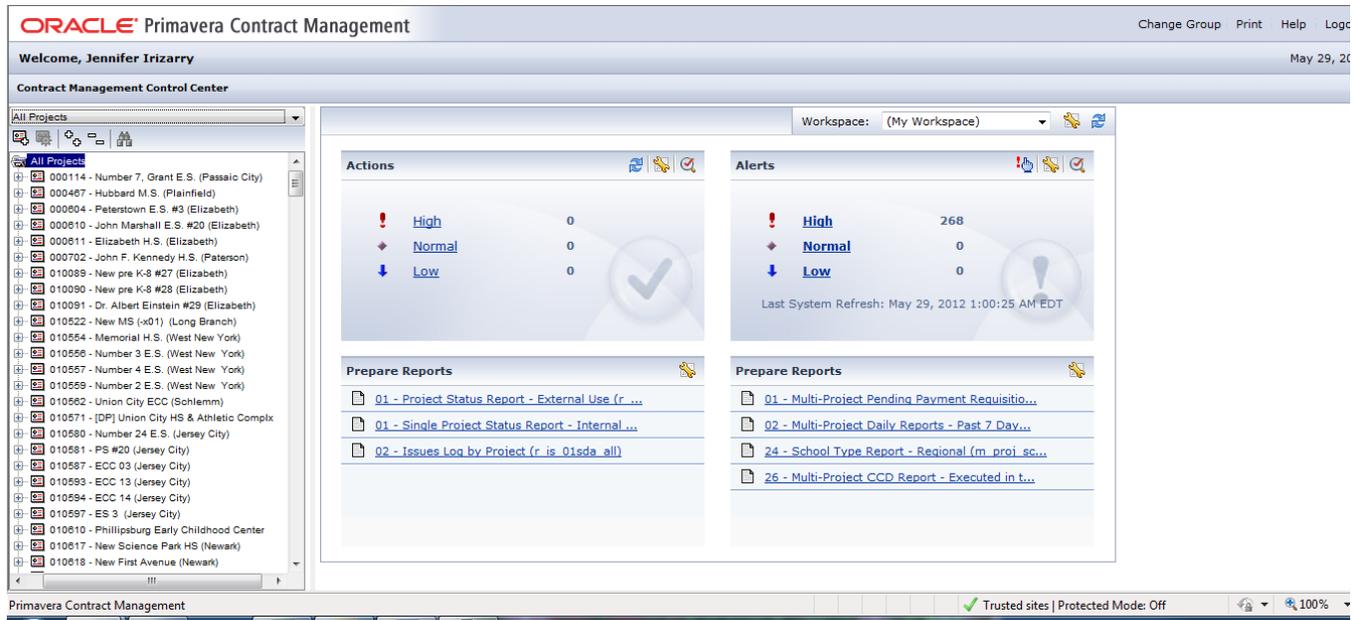


8. When you return to the Punch List Rooms box, choose the **Close** button at the bottom of the screen to finish.



## II. Create a New Punch List

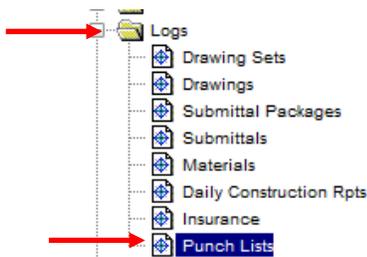
1. Once logged into Primavera, the Contract Management Control Screen displays (as shown).



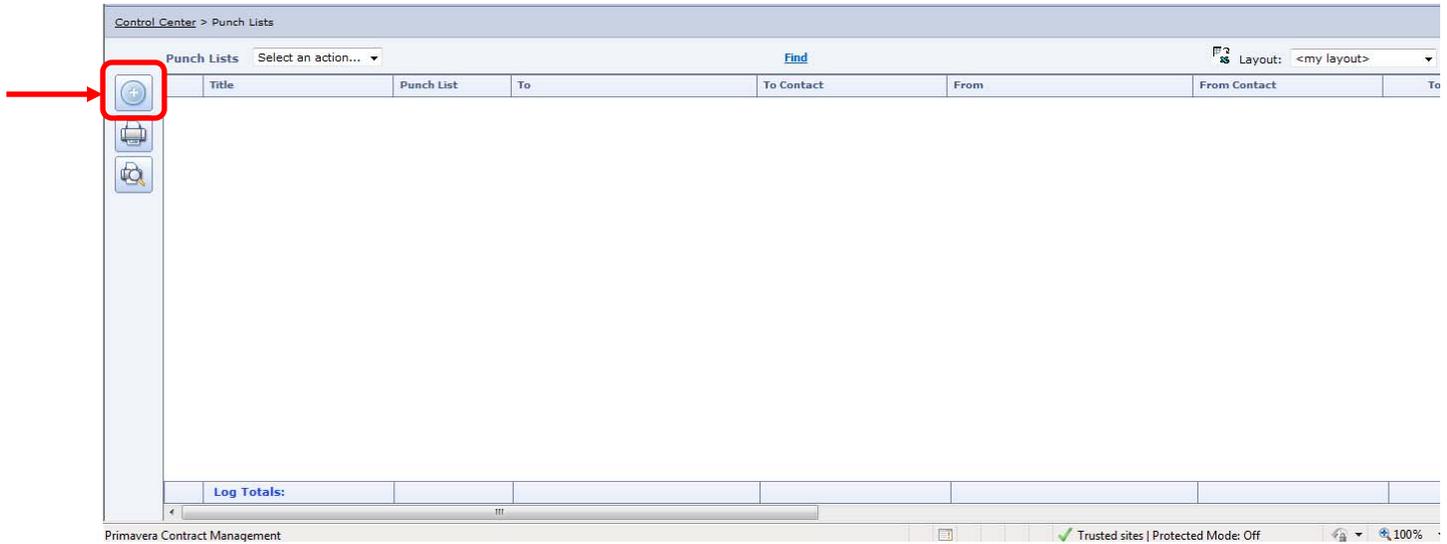
2. Select your desired project.



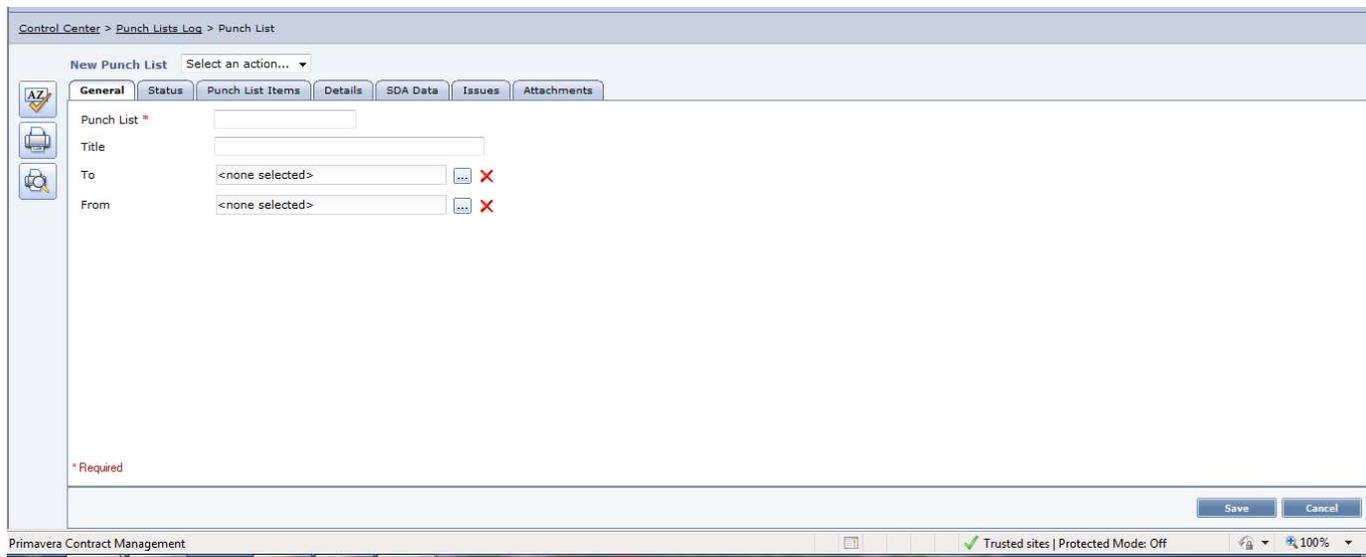
3. Open the **Logs** folder (a list of modules will display) and select the **Punch List** folder.



- The **Punch Lists log view** displays. Click the **Add Document** button to create a new punch list.



- A new **Punch List** document displays. It is divided into several sections:



## A. General Tab

Control Center > Punch Lists Log > Punch List

New Punch List Select an action...

General Status Punch List Items Details SDA Data Issues Attachments

Punch List \*

Title

To <none selected>

From <none selected>

\* Required

Save Cancel

- **Punch List** – This is a numeric identifier for the punch list and is a required field (8 character limit). This value must be unique for each punch list and is a required field. It is recommended that a numbering convention be established by the project teams. Examples of numbering conventions are described below.
  - If the punch list is added by the CM, the value should be “CM<number>” (ie- CM001, CM002, etc.).
  - If the punch list is added by the PM, the value should be “PM<number>” (ie-PM001, PM002, etc.).
  - If this is a school district punch list, the value should be “SD<number>” (ie.-SD001, SD002, etc.).
- **Title** – Enter a descriptive title to the punch list (22 character limit).
- **To** – Click the **select** button to select the name of the GC.
- **From** – Click the **select** button to select the name of the user who is entering the punch list.

An example of a completed section is shown:

Control Center > Punch Lists Log > Punch List

New Punch List Select an action...

General Status Punch List Items Details SDA Data Issues Attachments

Punch List \* CM001

Title Final Punch List

To Epic Management, Inc. William Costello

From New Jersey Schools Development Auth Aaron Goss

## B. Status Tab

The screenshot shows the 'New Punch List' dialog box with the 'Status' tab selected. The 'Ball in Court' field contains 'Epic Management, Inc. William Costello' and the 'Priority' dropdown is set to 'Normal'. The 'Save' and 'Cancel' buttons are visible at the bottom right.

- **Ball in Court** – Will automatically default to the name selected in the To field.
- **Priority** – Default is **Normal**, click the pull down menu to choose High or Low if needed.

## C. Punch List Items Tab

The screenshot shows the 'New Punch List' dialog box with the 'Punch List Items' tab selected. An 'Add' button is highlighted with a red box. Below the 'Add' button is a table with the following columns: Item No., Status, Ball in Court, BIC Contact, Opened, Closed, Required, Description, Area, Room, Elevation, Location, Responsible, Value, and Activity ID. The 'Total Value of Open Items' is \$0.00. The 'Save' and 'Cancel' buttons are visible at the bottom right.

Click the **Add** button to enter punch list items. The **Punch List Items** dialog box displays. Enter the items as described in each section. Please note that after the initial items have been entered, new items can be added to this punch list at any time following the same procedures.

## Punch List Item

**Punch List Item** [help](#)

Spelling

**Punch List Item**

Item No. \* 00001

Opened Jul 10, 2012

Required Jul 17, 2012

Closed

- **Item No.** – The default number will automatically populate in this field. Do not change this number as this is a required field.
- **Opened** – Enter the date the punch list item was opened. The default is the date that the punch list is created. Change as necessary by clicking the **calendar icon**.
- **Required** – Enter the date action is required on the item. The default is seven days later than the date the punch list was created. Change as necessary by clicking the **calendar icon**.
- **Closed** – When this item is completed, enter the date the punch list item is closed by clicking the **calendar icon**.

## Status Section

▼ **Status** - ◆ <BIC - <No BIC Selected>>

Ball in Court <none selected> ...

Priority Normal ▼

Status New Item ▼

- **Ball in Court** – If the entire punch list is the responsibility of one party (such as the GC), it may not be necessary to set the ball in court at the Punch List Item level. Instead, Ball in Court can be set on the main Punch List document.
- **Priority** – Default is Normal, may be changed to High or Low as necessary by clicking the drop down list.
- **Status** – Default is New Item. New Punch List Items should be left at the New Item status until they are closed.

## Location Section



▼ **Location**

Area

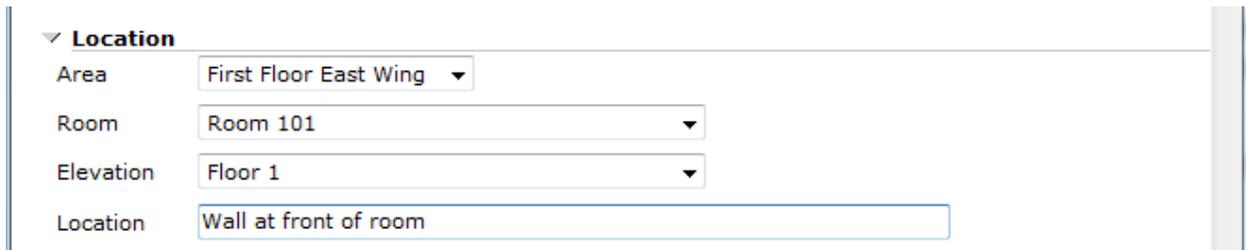
Room

Elevation

Location

- **Area** – Choose the desired option from the pull down menu. Note: this is the dictionary that was populated at the project level. If there are no options in the list, please refer to Section I of this document.
- **Room**– Choose the desired option from the pull down menu. Note: this is the dictionary that was populated at the project level. If there are no options in the list, please refer to Section I of this document.
- **Elevation**– Choose the desired option from the pull down menu. Note: this is the dictionary that was populated at the project level. If there are no options in the list, please refer to Section I of this document.
- **Location** – Enter a location (35 character field).

An example of a completed section is shown:



▼ **Location**

Area

Room

Elevation

Location

## Description Section



▼ **Description**

- **Description** – Enter a description of the punch list item (4000 character field).

## Schedule Section

▼ **Schedule**

Activity ID

Start

Finish

- **Activity ID** – if a project schedule has been linked to this project, click the **select** button to choose the Activity ID. If no project schedule has been linked to this project, enter the applicable Activity ID.
- **Start / Finish** – if a project schedule has been linked to this project, the Start and Finish dates will be automatically entered based on the selected Activity ID. If no project schedule has been linked to this project, enter the Start and Finish dates for the Activity ID using the **calendar** icons.

An example of a completed section is shown.

▼ **Schedule**

Activity ID

Start

Finish

## Details Section

▼ **Details**

Responsible Item

Value (\$)

- **Responsible Item** - This field will be used to cross-reference or link one punch list item to another. Once two punch list items are linked, they can be viewed as having a parent/child relationship. A “parent” punch list item can have one or many “children” punch list items linked to it. The drop down box for this field is populated automatically as multiple punch list items are entered in the system. The drop down box will be **blank** for the first punch list item you enter, but will become populated with each additional punch list item you enter.
- **Value (\$)** – If desired, enter a value for the punch list item.

## SDA Data Section

SDA Data [top of page](#)

CSI  ... X

Source  ... X

Type  ... X

- **CSI** – If desired, click the select button to choose the applicable Construction Specification Index reference from the list provided.
- **Source** – If desired, click the select button to choose the applicable source from the list provided.
- **Type** – If desired, click the select button to choose the applicable type from the list provided.

An example of a completed section is shown below.

SDA Data [top of page](#)

CSI  ... X

Source  ... X

Type  ... X

## Issues Section

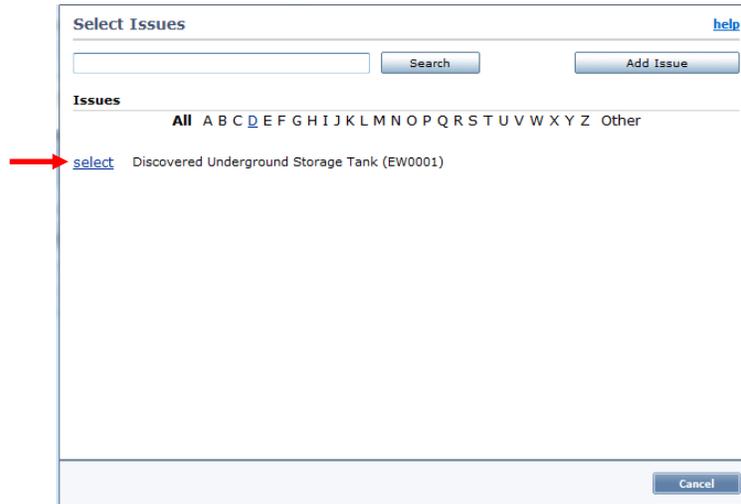
Issues [top of page](#)

**Link**

Issue Title and Code

- If these punch list items are all related to the same Issue, it may not be necessary to link an Issue at the punch list item level. Instead, they can be linked at the document level. Otherwise, click the **Link** button to choose an Issue to link to this punch list item.

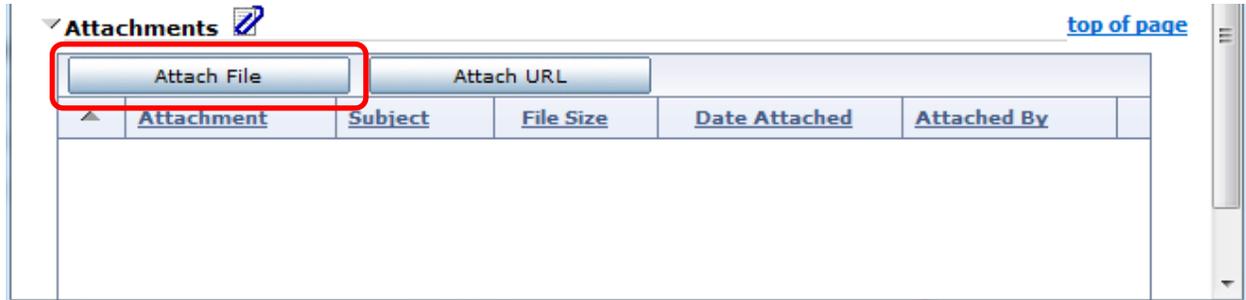
- The **Select Issues dialog box** displays. Locate your desired issue and click the **select** link to the left of the issue title to link it to the Punch List. Once you click the select link, you will return to the previous screen.



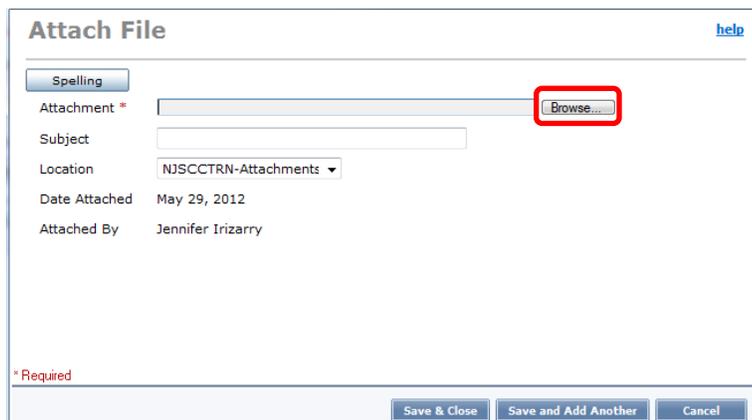
An example of a completed section is shown:



## Attachments Section



- If these punch list items are all related to the same Attachment, it may not be necessary to link the Attachment to the punch list item level. Instead, it can be linked at the document level. Otherwise to attach supporting documentation, click the **Attach File** button.
- Click the **Browse** button to navigate to the document you wish to attach.



- The **Choose File to Upload** window displays. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.

https://dev2pe.njsda.gov/ - Attach File - Windows Internet Explorer

**Attach File** [help](#)

Spelling

Attachment \* C:\Users\jirizarry\Desktop\report.pdf [Browse...](#)

**Subject** Report

Location NJSCTRN-Attachments

Date Attached Jun 19, 2012

Attached By Jennifer Irizarry

\* Required

Save & Close Save and Add Another Cancel

- The attached file displays in the **Attachments** section.

**Attachments** [top of page](#)

Attach File Attach URL

Attachment	Subject	Location	File Size	Date Attached
<a href="#">report.pdf</a>	<a href="#">Report for punch list</a>	0850-005-04-000V	33 KB	Jul 11, 2012

Scroll to the bottom of the Punch List Item screen and click the **Save & Close** button to return to the Punch List screen or click the **Save & Add Another** button to add additional items. Click Cancel to cancel the entry.

Save and Close Save and Add Another Cancel

The punch list item you added is now listed in the **Punch List Items** section. Repeat this process for each additional required punch list item. There is no limit to the number of items you can add to your punch list.

Control Center > Punch Lists Log > Punch List

Punch List: CM001 | Final Punch List [Select an action...](#)

General Status **Punch List Items** Details SDA Data Issues Attachments

Add Total Value of Open Items \$0.00

Item No.	Status	Ball in Court	BIC Contact	Opened	Closed	Required	Description	Area	Room	Elevation	Location	Respon
00001	New Item			Jul 10, 2012		Jul 17, 2012	Wall need repair for nail holds.	First Floor East Wing	Room 101	Floor 1	Wall at front of room	

## D. Details Tab

The screenshot shows the 'Details' tab of the Punch List interface. The breadcrumb path is 'Control Center > Punch Lists Log > Punch List'. The page title is 'Punch List: CM001 | Final Punch List' with a 'Select an action...' dropdown. The 'Details' tab is selected, and other tabs include 'General', 'Status', 'Punch List Items', 'SDA Data', 'Issues', and 'Attachments'. On the left, there are icons for 'AZ', a printer, and a magnifying glass. The main content area has three fields: 'Description' with the value 'Punch list from first walk through', 'Contract' with the value 'Construction (NT-0032-C02)', and 'Change Management Number' which is blank. A red box highlights the 'Details' tab, and another red box highlights the '...' button next to the 'Contract' field.

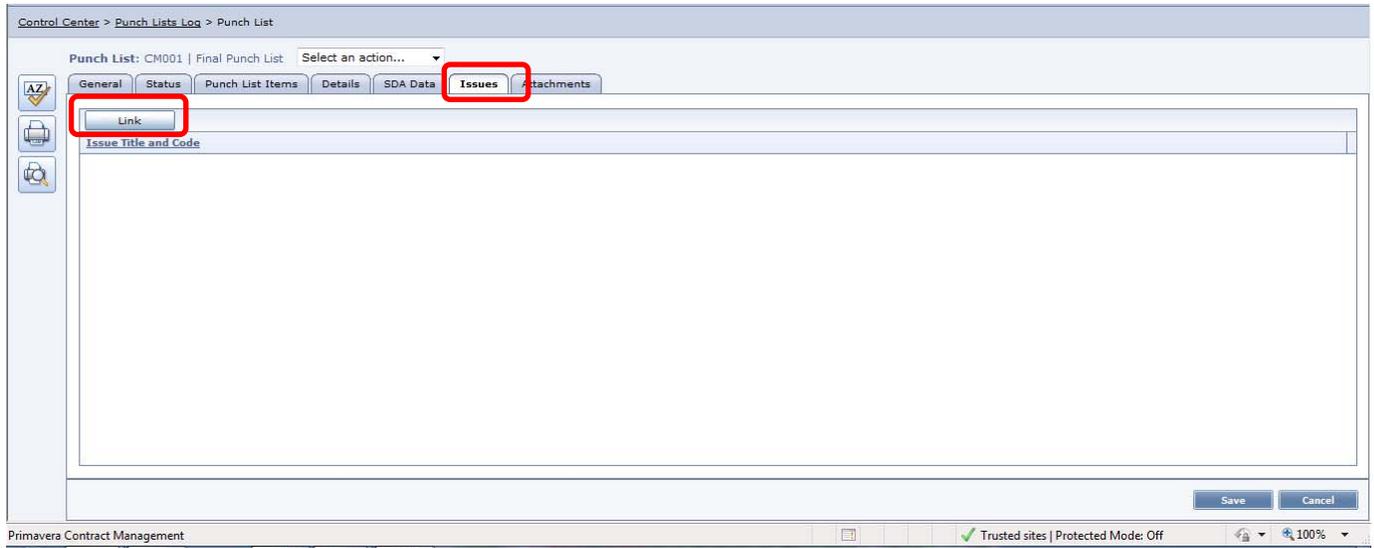
- **Description** – Enter a detailed description of the nature of the Punch List (40 character limit).
- **Contract** – Click the **select** button to choose the applicable contract from the displayed selection list.
- **Change Management** – Will remain blank unless Change Management is initiated from the Punch List.

## E. SDA Data Tab

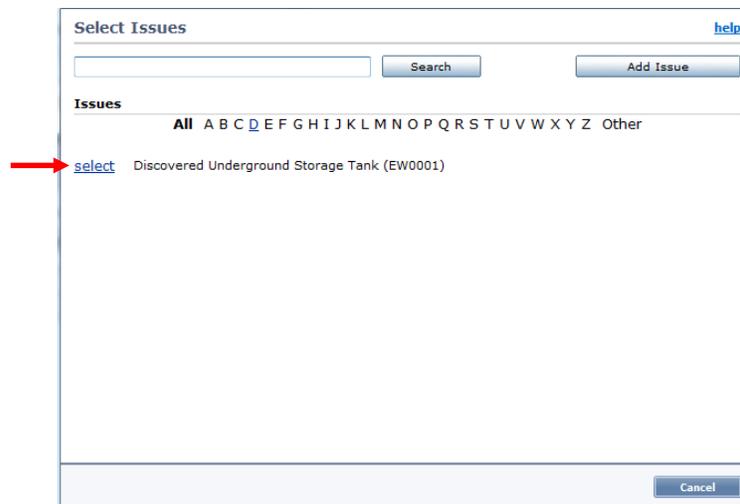
The screenshot shows the 'SDA Data' tab of the Punch List interface. The breadcrumb path is 'Control Center > Punch Lists Log > Punch List'. The page title is 'Punch List: CM001 | Final Punch List' with a 'Select an action...' dropdown. The 'SDA Data' tab is selected, and other tabs include 'General', 'Status', 'Punch List Items', 'Details', 'Issues', and 'Attachments'. On the left, there are icons for 'AZ', a printer, and a magnifying glass. The main content area has one field: 'Punchlist Type' with the value 'Final to GC'. A red box highlights the '...' button next to the 'Punchlist Type' field, and a red 'X' icon is visible to the right of the field.

- **Punchlist Type** – Click the **select** button to choose the type of punchlist.

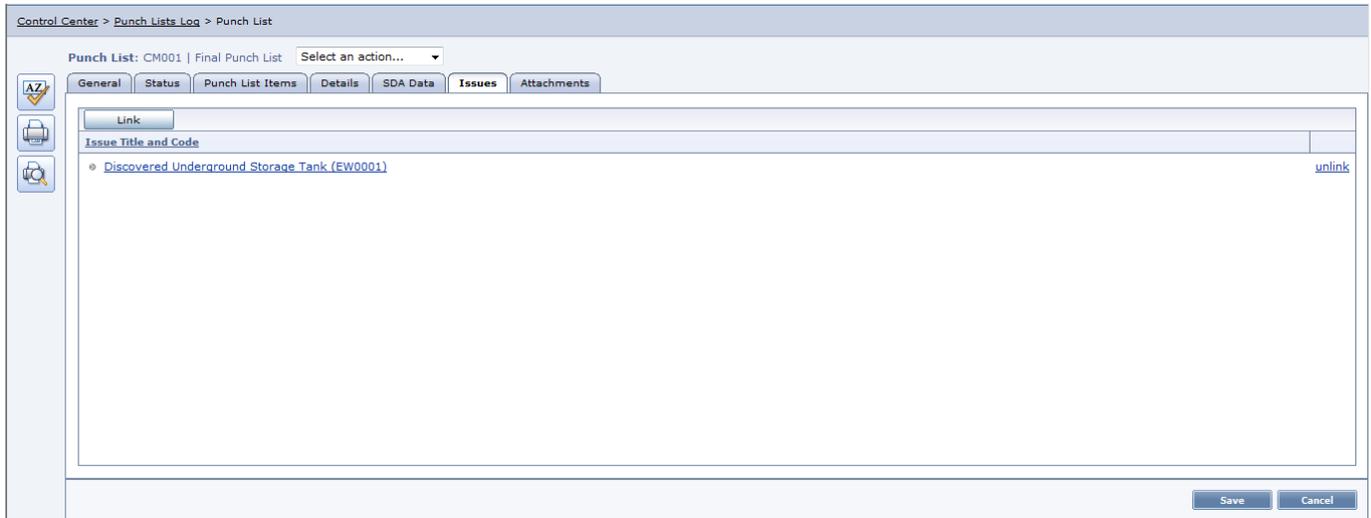
## F. Issues Tab



- If this Punch List relates to an Issue that was previously entered in the Issues log, it can be linked to this document. Click the **Link** button.
- The **Select Issues dialog box** displays. Locate your desired issue and click the **select** link to the left of the issue title to link it to the Punch List. Once you click the select link, you will return to the Punch List document.

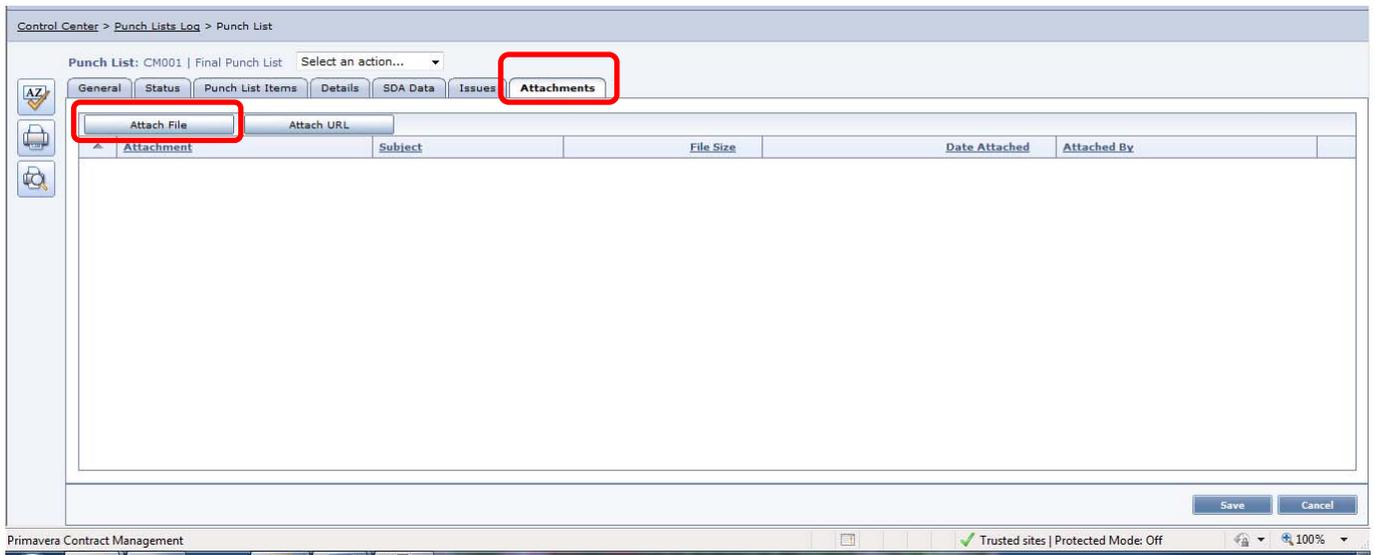


An example of a completed section is shown:

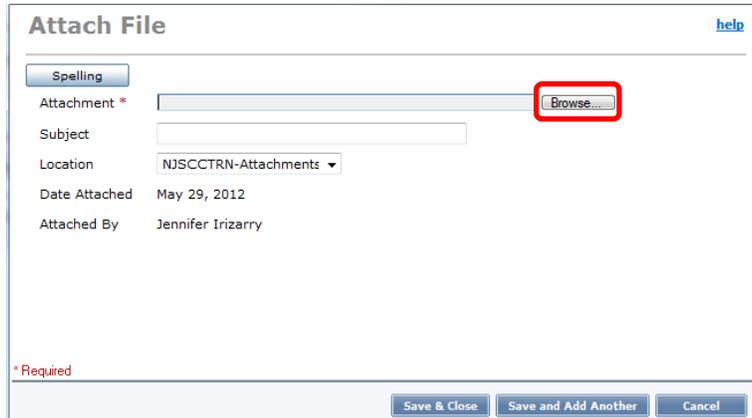


## G. Attachments Tab

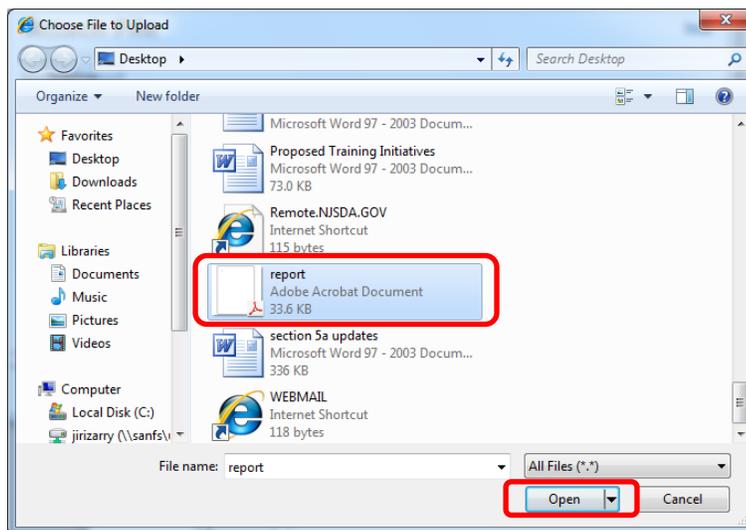
- To attach supporting documentation, click the **Attach File** button.



- Click the **Browse** button to navigate to the document you wish to attach.



- The **Choose File to Upload** window displays. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.

https://dev2pe.njsda.gov/ - Attach File - Windows Internet Explorer

### Attach File [help](#)

Spelling

Attachment \* C:\Users\jirizarry\Desktop\report.pdf [Browse...](#)

Subject Report

Location NJSCCTR-Attachments

Date Attached Jun 19, 2012

Attached By Jennifer Irizarry

\* Required

[Save & Close](#) [Save and Add Another](#) [Cancel](#)

- The attached file displays in the **Attachments** section.

Control Center > Punch Lists Log > Punch List

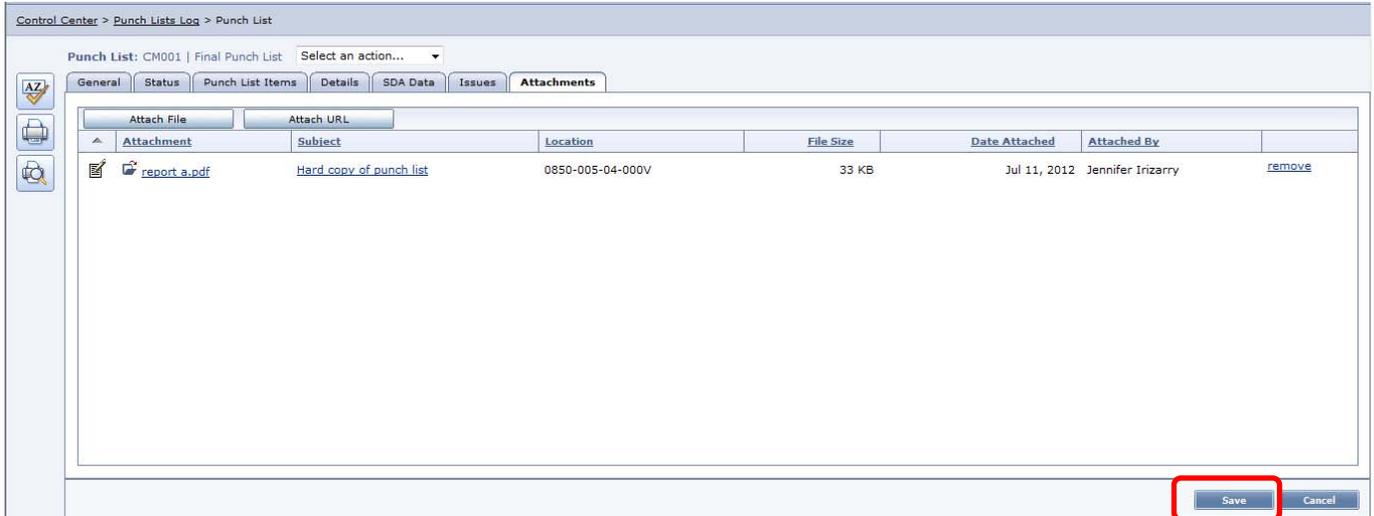
Punch List: CM001 | Final Punch List [Select an action...](#)

General Status Punch List Items Details SDA Data Issues **Attachments**

Attachment	Subject	Location	File Size	Date Attached	Attached By	
report a.pdf	Hard copy of punch list	0850-005-04-000V	33 KB	Jul 11, 2012	Jennifer Irizarry	<a href="#">remove</a>

[Save](#) [Cancel](#)

When all fields are completed, click the **Save** button at the bottom of the document window.



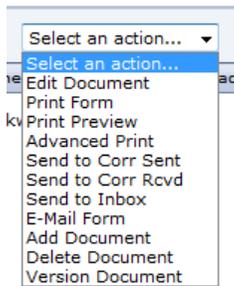
### III. Version Document

Contract Management 13.0 provides a Version Document feature to help you maintain multiple versions of your documents and provide a snapshot of the change history of the documents. Versioning a document means it will maintain versions of both the document and any attachments. The document version will be stored as an html file. The attachment version will show information on the location, path and the file size of an attachment, as well as the user who attached the file to the document and the date of attachment.

The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

#### A. Create a Document Version

1. To create a version of the current document, click the Select an Action menu from the top of the screen and choose Version Document from the drop-down list.



2. Contract Management will prompt you to confirm the Version Document function. Click the Yes button to continue or No to cancel.



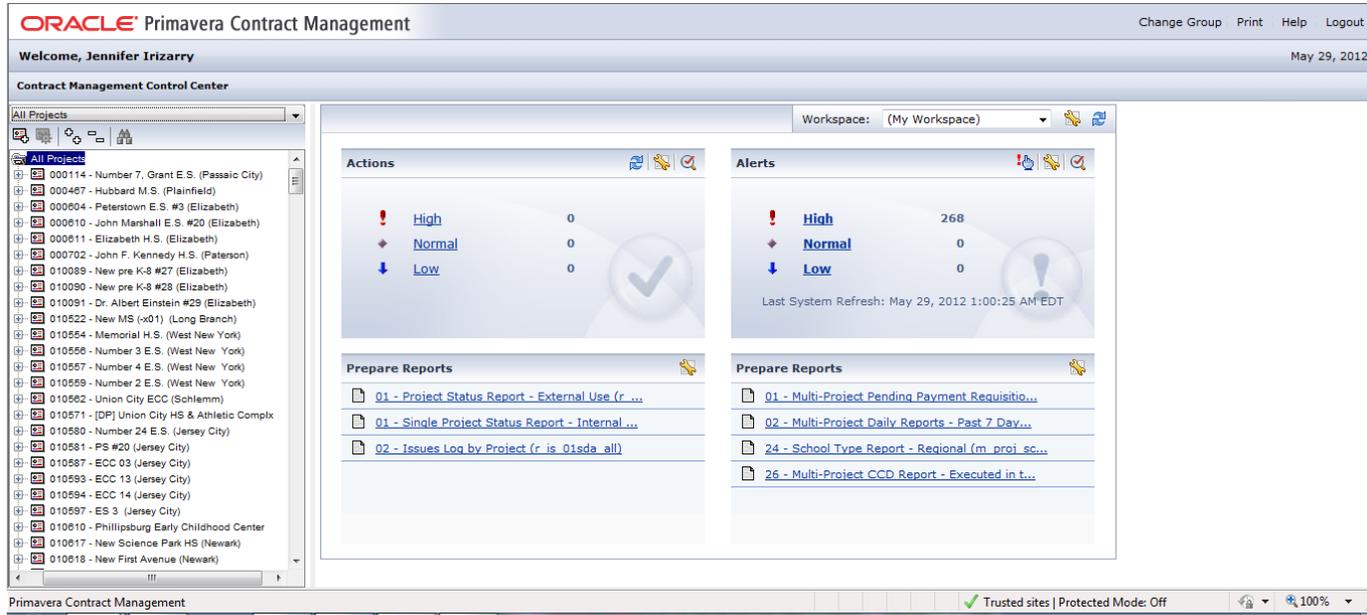
3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version was created.



## IV. Changing Punch List Item Status

A Punch list is written by the Architect and transmitted to the GC through the PMF/CM. As the GC completes the items on the list, they will notify the PMF/CM. When punch list items are completed, their status should be changed to **closed**. Items can also be **cancelled** if needed.

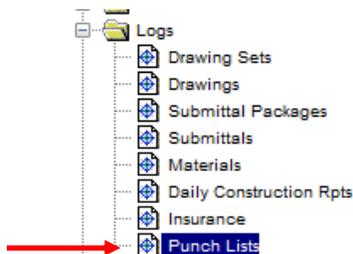
1. Once logged into Primavera, the Contract Management Control Screen displays (as shown).



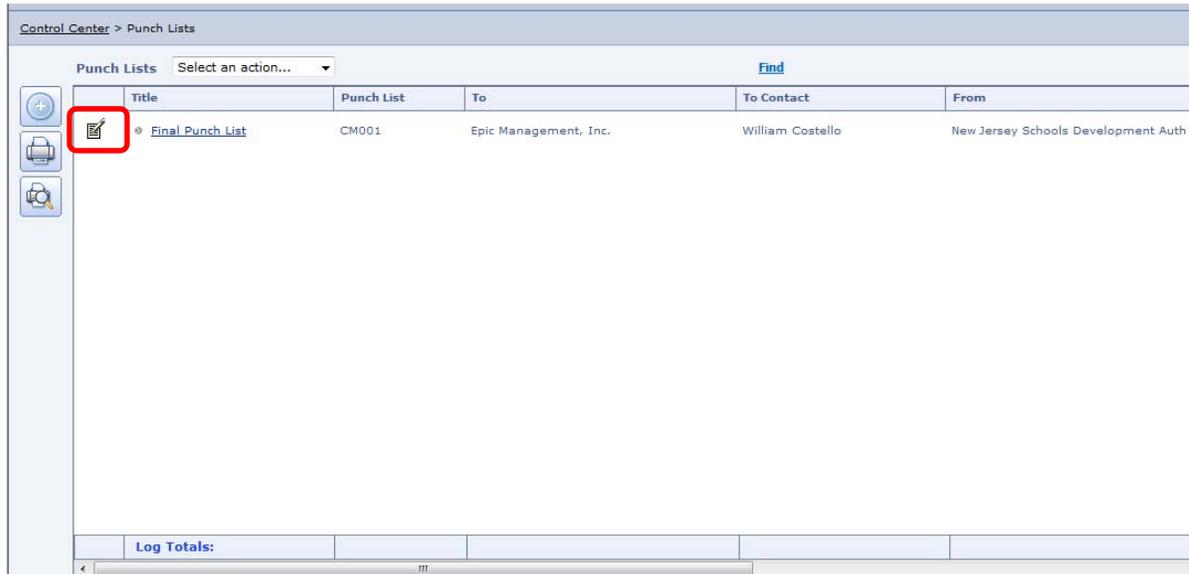
2. Select your desired project.



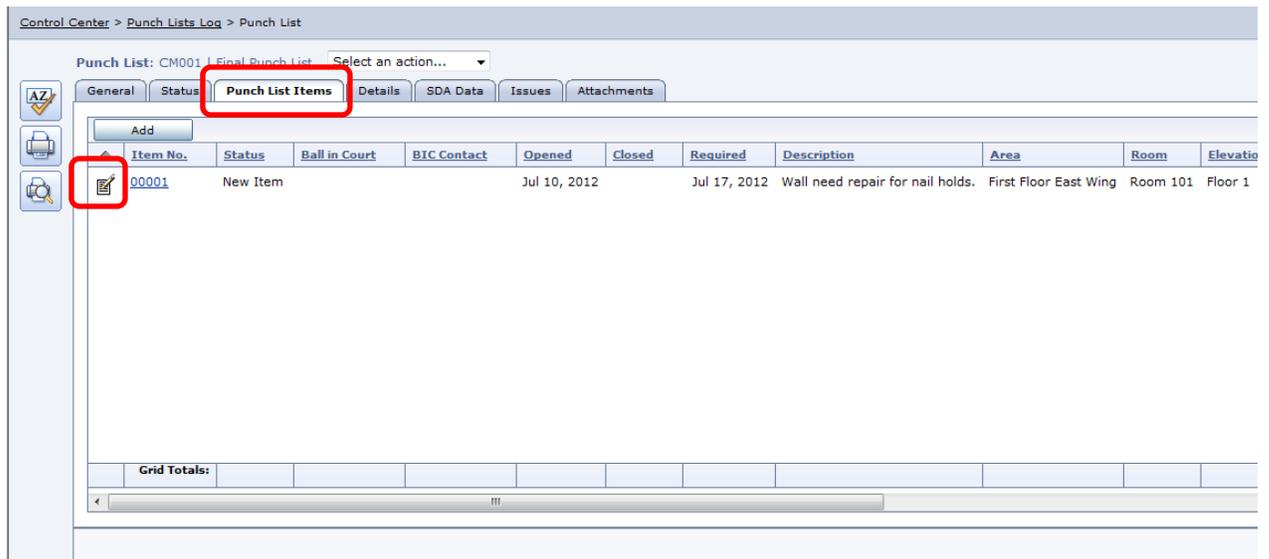
3. Open the **Logs** folder (a list of modules will display) and select the **Punch List** folder.



- The **Punch Lists log view** displays. Select the punch list you want to update by clicking the **edit document icon** next to the punch list name.



- Click the **Punch List Items** section tab and select the appropriate Item by choosing the **edit document icon** next to the item number.



- When the Punch List Item displays, enter the date the item was closed in the **Closed** field by either typing in the date or by clicking the **calendar icon**.

**Punch List Item**

Item No. *	00001
Opened	Jul 10, 2012
Required	Jul 17, 2012
Closed	Jul 16, 2012

- Scroll to the **Status** field in the **Status** section and select **Closed** from the available options in the drop down list.

**Punch List Item**

Item No. *	00001
Opened	Jul 10, 2012
Required	Jul 17, 2012
Closed	Jul 16, 2012

▼ **Status** - ♦ New Item <BIC - <No BIC Selected>>

Ball in Court <none selected>

Priority Normal ▼

Status

- New Item
- Approved as Noted
- Approved Noted Resubmit
- Approved
- Board Review / Approval
- Cancelled
- Change Mgmt Initiated
- Closed**
- Disapproved
- For Client Records Only
- Make Corrections Noted

▼ **Location**

Area Fir

Room Ro

Elevation Flo

Location Wa

▼ **Description**

- Scroll to the **Description** section and enter any applicable notes.

▼ **Description**

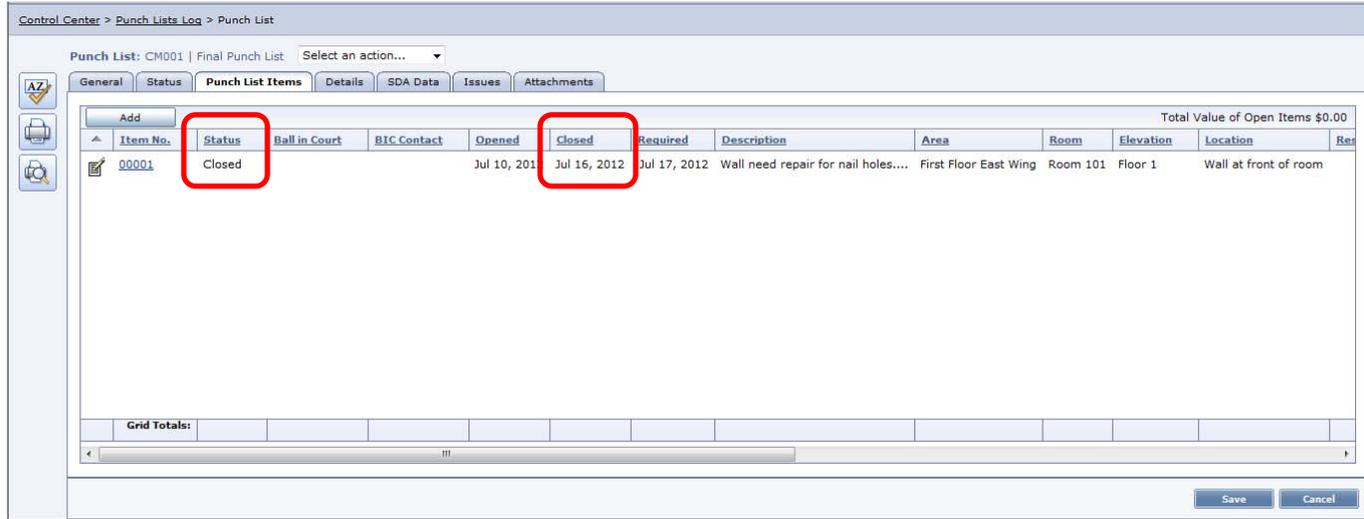
Wall need repair for nail holes.

Item completed 7/16.

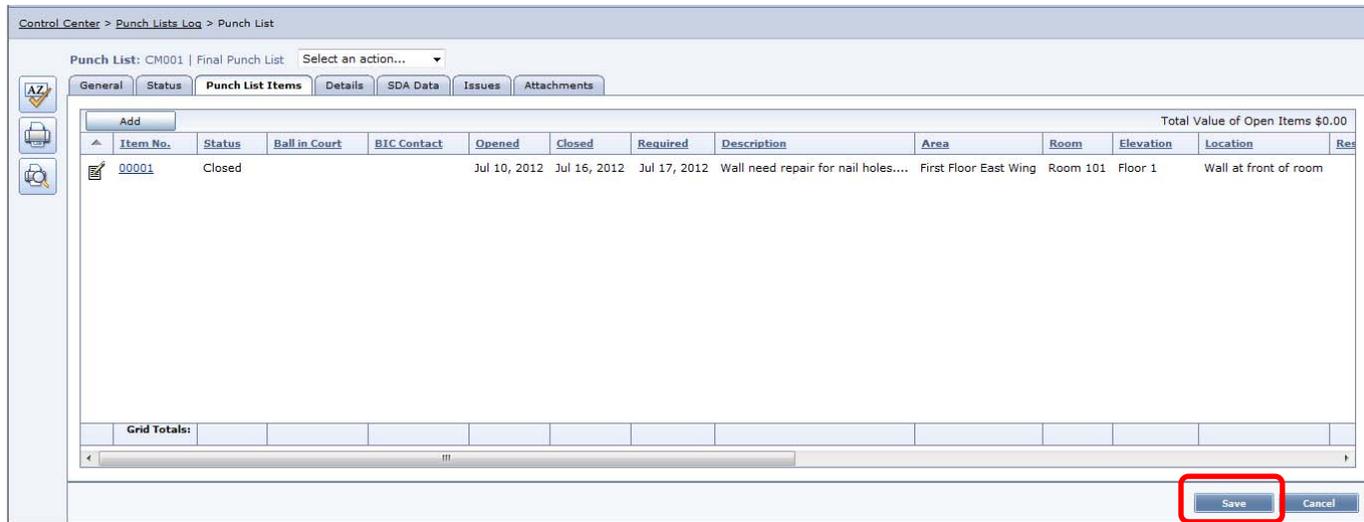
- When completed, scroll to the bottom of the punch list item screen and click the **Save and Close** button to return to the Punch List screen.



- Both the **Status** and the **Closed** fields will display the updates.

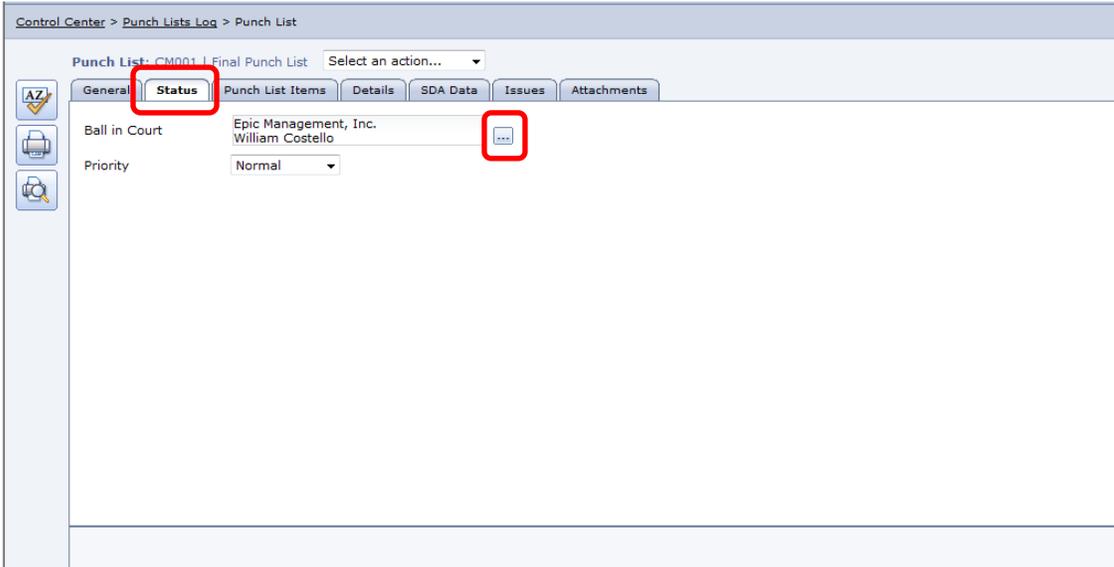


- When all changes are completed, click the **Save** button at the bottom of the window.

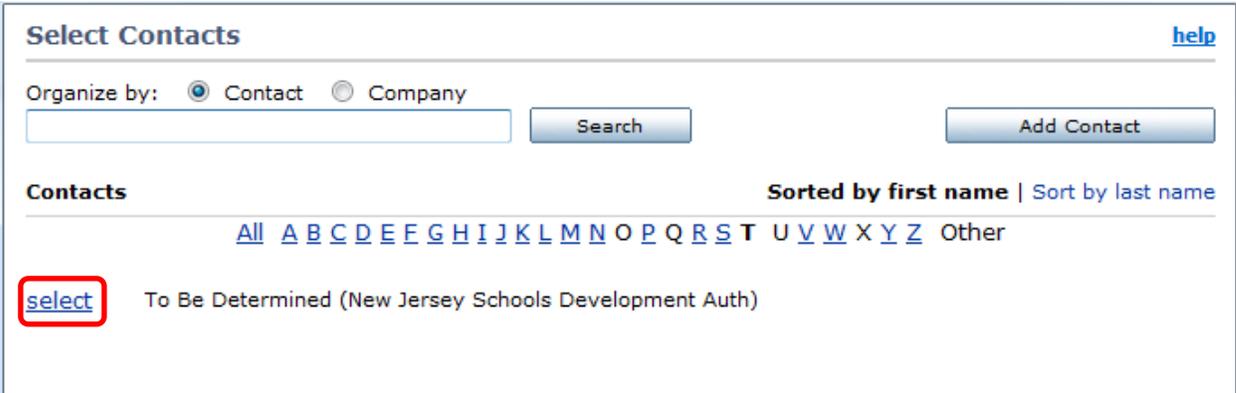


12. When all punch list items have been successfully closed, the document can be considered closed as well. Unlike other Contract Management documents, there is no Status field, therefore, you cannot select a closed status for this document. However, it is recommended to change the **Ball in Court** field to **To Be Determined**. This ensures that this document will not stay in a users' Action Item list.

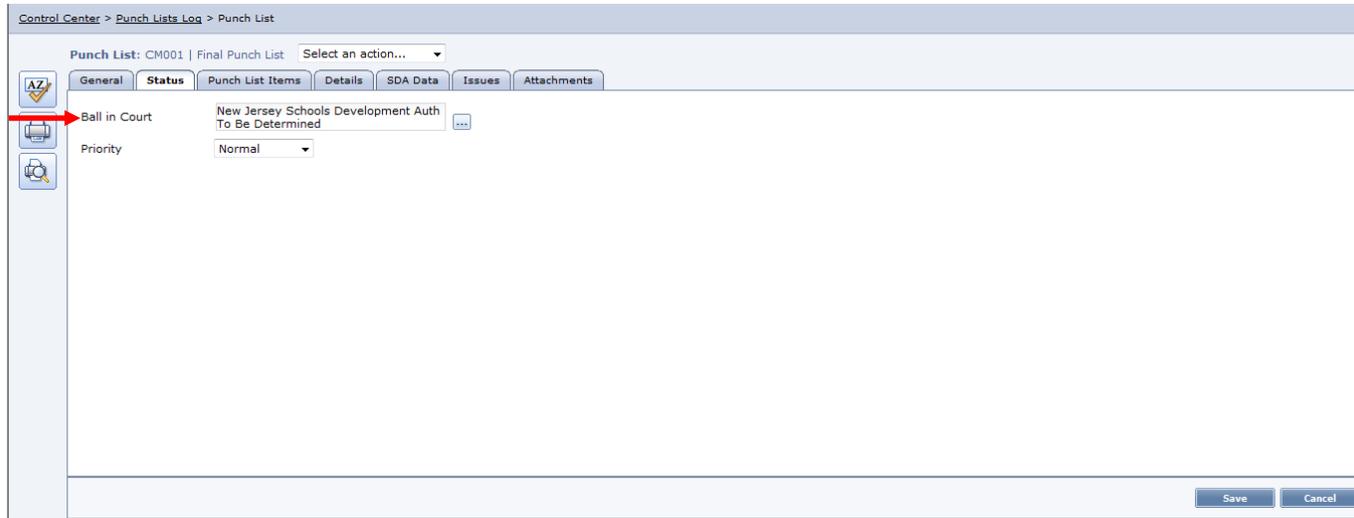
Click the **Status** section tab. Click the **select** button next to the Ball in Court field.



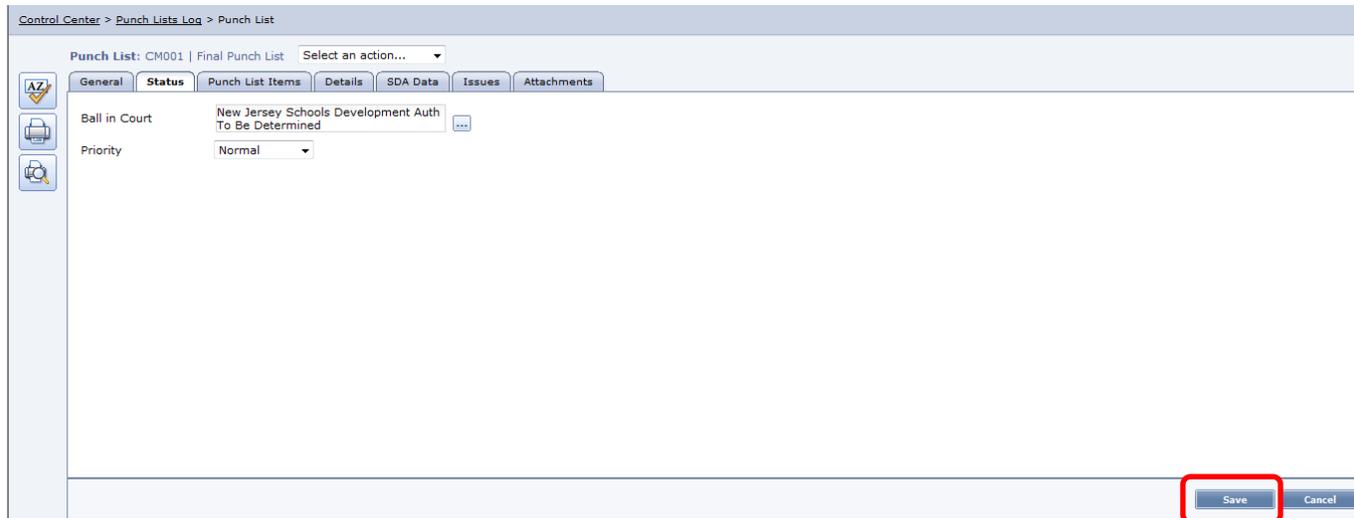
13. Click select next to **To Be Determined** to populate the name in the Ball in Court field. You will return to the previous screen after you make your selection.



14. The **Ball in Court** will now reflect the change.

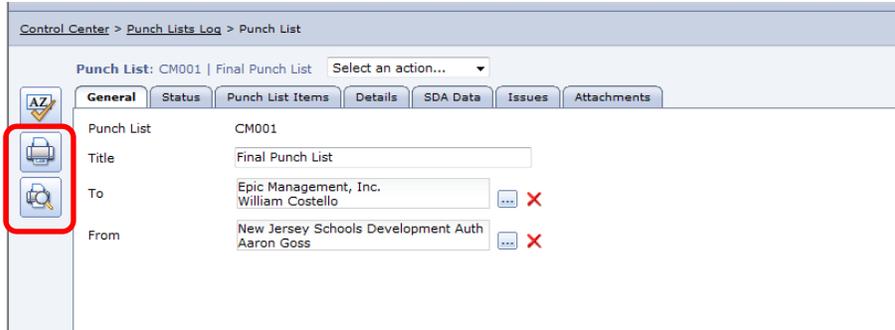


15. Click the **Save** button at the bottom of the window to save your changes.



## V. Print a Punch List

1. With the punch list document open, click the **Print Preview** button on the left side of the screen to view the output. You can also click the **Print** button (printer icon) to send the output directly to a printer or save as a PDF document.



2. When the print preview displays, click the **Print** button to get a printed copy or save as a **PDF** document.

