

Kahua Quick Reference Guide

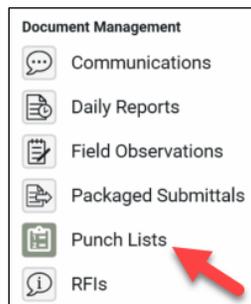
Punch Lists

About Punch Lists

Through the Punch List application, users can create defect items for subcontractors or vendors by using a library of defect items commonly found on projects. The application allows users 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.

Navigating to Punch Lists

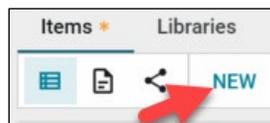
1. Open the project using Project Finder on the left side bar.
2. Select **Punch Lists** from the App launcher.



Creating a Punch List Item

This activity is typically created by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Regional KPM, GSA-Regional Manager, GSA-PM/COR, EXT-AE, EXT-CMa, EXT-Contractors, EXT-PM, EXT-Lease Broker Contractor, or Uncleared Contractor.**

3. In the Items tab, click **NEW** to open the Punch List Details form view.

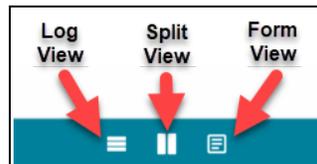


4. In the **Punch List Details (Create)** form view, select **CUI** or **Non-CUI** in the top right-hand corner of the form.

Note: External users will not have access to view CUI forms.



Note: Use the three focus buttons in the bottom blue bar to adjust your form view if necessary.

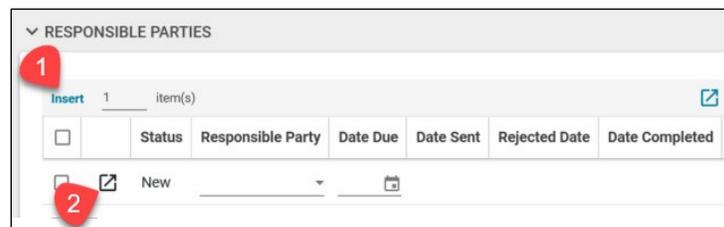


Details Section

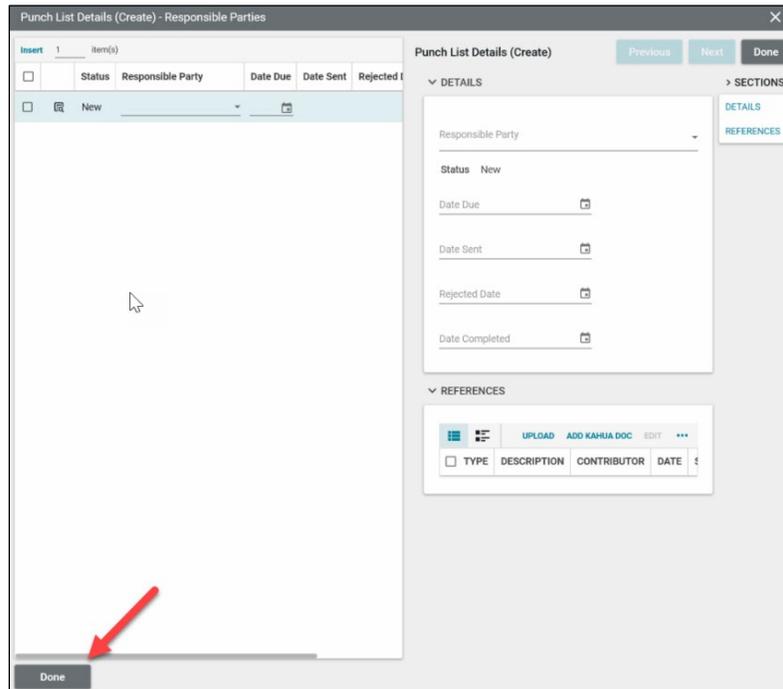
5. The number, observed date, and originator will auto populate but can change if necessary.
6. Click the **Location** drop-down list and select a location to reference where the item was identified. The Location drop-down list is populated from the Locations application and is accessed by users with the appropriate permissions.
7. Click the **Library Type** drop-down list and select a library Item. The Library Type drop-down list is populated from the Libraries tab and is editable by users with the appropriate permissions.
8. Select a **Defect** from the drop-down list. The selected defect populates the required Subject field. Edit the Subject field as needed.
9. Enter a **Description**, select a required **Type**, select a **CSI Code**, select a required **Due Date**, and enter a **Root Cause** if applicable. The other fields (Rejected Date and Completed Date) can be left blank and will be filled out during approval workflow process.

Responsible Parties Section

10. Click **Insert**. If there are multiple Responsible Parties, change the number 1 to the number of Responsible Parties, then click **Insert**.
11. Click the **flyout button** next to the new line item to open the **Punch List Details (Create) – Responsible Parties** window.



12. Select the **Responsible Party** from the drop-down list and **Date Due**. If there are additional Responsible Parties, click the **Next** and **Previous** button to fill out the information for each line item.
13. Click **Done** to close the window.



Approval Section

14. Select at least one **Approver** from the drop-down list. There can be up to three approvers for a punch list item. The approval process moves sequentially from the first, to the second, then to the third approver before returning to the author.

Media Section

15. If applicable, click **ADD** to attach a thumbnail view of any supporting photos.
16. To include the photo(s) in the printable portable view, click **INCLUDE FOR PRINT**
17. To add additional details to the photo, click on the thumbnail view of the photo. When complete, click **Done**.

NOTE: Any media file added to the Media section is logged in the Media Manager application. For more information on the Media Manager application, please refer to the Media Manager Kahua Quick Reference Guide.



Reference Section

18. Attach any supporting documentation such as photos or pdf files by clicking **UPLOAD** or **ADD KAHUA DOC**, navigating to the appropriate file, clicking **Open**, adding **Comments**, and clicking **OK**.
19. Click the **Save/Close** button to complete the creation of a Punch List item.

Punch List Workflow

This activity is typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Regional KPM, GSA-Regional Manager, GSA-PM/COR, EXT-AE, EXT-CMa, EXT-Contractors, EXT-PM, EXT-Lease Broker Contractor, or Uncleared Contractor.**

20. After entering all relevant information, click one of the following:
 - a. **Send to Responsible** – This action button sends a task to the Responsible Parties to complete the punch list item where it can be managed from the Tasks list. Upon response from the Responsible Party, the punch list item flows directly into an approval workflow per the listed Approvers in the Approval section.
 - b. **Send for Approval** – If the punch list item is complete, click this action button to initiate the approval process. The punch list item will request approval from each approver listed in the Approvers section.
 - c. **Lock** – This action button allows the author to lock the punch list item so that no one else can work in the document or make any changes to it. To continue working in the document, click **Unlock**.



Responding to a Punch List Item as a Responsible Party

This activity is typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Regional KPM, GSA-Regional Manager, GSA-PM/COR, EXT-AE, EXT-CMa, EXT-Contractors, EXT-PM, EXT-Lease Broker Contractor, or Uncleared Contractor.**

Note: Kahua allows the Responsible Party to respond to unresolved punch list items with comments as well as references to indicate that the item is ready to be routed through the approval process. The user listed in the Responsible Party field receives a task in Kahua and an email noting a punch list item has been assigned to them and the resolution due date.

1. Click the **link** in the email or click **Tasks** in the left navigation pane in Kahua to access assigned tasks. If there are new tasks in Kahua, there will be a red indicator with the number of tasks assigned to the logged in user.
2. Open the assigned punch list item to review and respond.

Note: To learn more about Tasks and the different ways you can open tasks, please make sure

to review the Tasks eLearning video.

Outcome Section

3. Add additional notes detailing corrective actions in the **Notes** field.

Media Section

4. If applicable, click **ADD** to attach a thumbnail view of any supporting photos.
5. To include the photo(s) in the printable portable view, click **INCLUDE FOR PRINT**
6. To add additional details to the photo, click on the thumbnail view of the photo. When complete, click **Done**.

Note: Any media file added to the Media section is logged in the Media Manager application. For more information on the Media Manager application, please refer to the Media Manager Kahua Quick Reference Guide.

Reference Section

7. Attach any supporting documentation such as photos or pdf files for the corrective actions taken to fix the item by clicking **UPLOAD** or **ADD KAHUA DOC**, navigating to the appropriate file, clicking **Open**, adding **Comments**, and clicking **OK**.
8. After updating the punch list item, select one of the following:
 - a. **Save** – This action button allows the Responsible Party to save any uploads or notes entered in the punch list item and return to the item to add additional updates. The punch list item will remain as an active task.
 - b. **Return** – This action button allows the Responsible Party to return the punch list item back to the author.
 - c. **Mark Complete** – This action button allows the Responsible Party to indicate they have completed the punch list item and initiate the approval workflow process per the listed Approvers.



Approving or Rejecting the Punch List Item

Typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Regional KPM, GSA-Regional Manager, GSA-PM/COR, EXT-AE, EXT-CMa, EXT-Contractors, EXT-PM, EXT-Lease Broker Contractor, or Uncleared Contractor.**

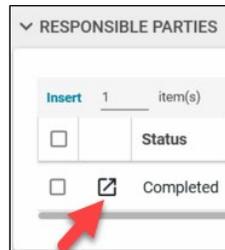
Note: The approval process moves sequentially from the first, to the second, then to the third approver before returning to the author. The individual(s) listed in the **Approver** field receives an email and task notification noting that a punch list item requires approval.

1. Click the **link** in the email or click **Tasks** in the left navigation pane in Kahua to access assigned tasks. If there are new tasks in Kahua, there will be a red indicator with the number of tasks assigned to the logged in user.

2. Open the assigned punch list item to review and respond.

Responsible Parties Section

3. Click the **flyout button** next to each Responsible Party to review the Responsible Party's comments and any uploaded reference documents. Click **Done** to close out the window.



Approval Section

4. Add additional notes in the **Notes** field.

Media Section

5. If applicable, click **ADD** to attach a thumbnail view of any supporting photos.
6. To include the photo(s) in the printable portable view, click **INCLUDE FOR PRINT**
7. To add additional details to the photo, click on the thumbnail view of the photo. When complete, click **Done**.

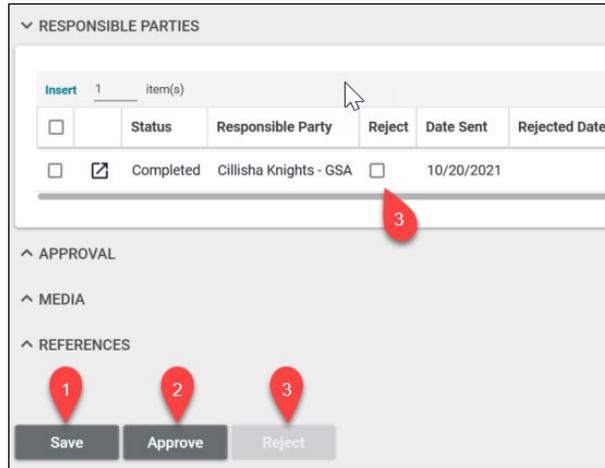
NOTE: Any media file added to the Media section is logged in the Media Manager application. For more information on the Media Manager application, please refer to the Media Manager Kahua Quick Reference Guide.

Reference Section

1. Attach any supporting documentation such as photos or pdf files for the corrective actions taken to fix the item by clicking **UPLOAD** or **ADD KAHUA DOC**, navigating to the appropriate file, clicking **Open**, adding **Comments**, and clicking **OK**.

After updating the punch list item, select one of the following:

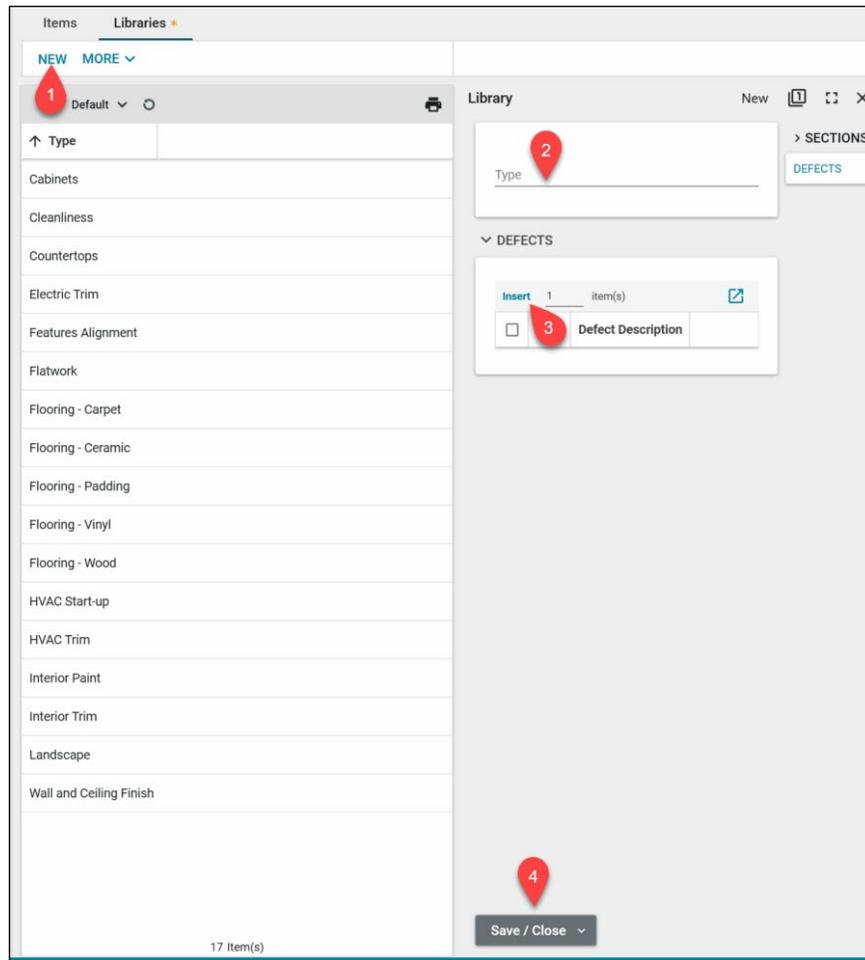
1. **Save** - This action button allows the Approver to save any uploads or notes entered in the punch list item and return to the item to add additional updates. The punch list item will remain an active task.
2. **Approve** – This action button will either end the approval workflow process or route it to the next Approver, if applicable per the Approval section. Approval by the final Approver updates the status of the punch list item to **Closed**.
3. **Reject** – This action button will send the Approver's notes back to the Responsible Party for revision and resubmission. To activate the Reject button, return to the Responsible Parties section and check the box in the Reject column next to the appropriate line Responsible Party.



Creating New Punch List Libraries

This activity is typically created by the following roles: **Domain Administrator** or **GSA-Administrator Group**.

1. To create a new library type, click **NEW** in the log toolbar.
2. Enter a name for the **Library Type**.
3. In the **Defects Section**, click **Insert** to enter in a defect description for each defect.
4. When complete, click **Save/Close**.



Editing Punch List Libraries

This is typically completed by the following roles: **Domain Administrator** or **GSA-Administrator Group**.

NOTE: Numerous libraries of common construction defects are preloaded and organized by category in the Libraries tab. However, a user with the appropriate permissions has the option of modifying and adding to the list.

1. Open the project using Project Finder on the left side bar.
2. Select **Punch Lists** from the App launcher.
3. Click the **Libraries** tab.
4. To edit a library type, click a library type to open the Library form view.
5. Click **EDIT** in the form toolbar to edit the library type name or defects list.
6. When complete, click **Save/Close**.



