# URS/FS: Punchlist Tracking SharePoint Add-In

1. Overview

   The scope of this User Requirements Specification (URS) / Functional Specification (FS) is Punchlist Tracking SharePoint Add-In. The Punchlist Tracking SharePoint Add-In will allow for the tracking of punchlist items.

2. User Requirements

   2.1. User shall be able to add punchlist items

   2.2. User shall be able to update punchlist items

   2.3. User shall be able to delete punchlist items

   2.4. User shall be able to filter the list of punchlist items by FSE

   2.5. User shall be able to export the list of punchlist items to Excel

   2.6. Requirements 2.1, 2.2, 2.3, and 2.4 shall be available on mobile devices via Safari (for Apple iOS) and Firefox and Chrome (for Android OS)

   2.7. Requirement 2.5 shall be available on desktop devices via Microsoft Edge and Internet Explorer 11 or later browsers.

3. Punchlist Landing

   The Punchlist landing page (default.aspx) consists of:

   3.1. Header

      3.1.1. Punchlist – shows the number of Punchlist Items displayed versus the number existing when a filter is applied (e.g. "Punchlist 23/50")

      3.1.2. Filter button ▼ – toggles the Filters pane

      3.1.3. Chart button ◔ – toggles the Charts pane

      3.1.4. Types – redirects to the Types list (…/PunchlistTracking/lists/Types/AllItems.aspx)

      3.1.5. FSEs – redirects to the FSEs list (…/PunchlistTracking/lists/FSEs/AllItems.aspx)

      3.1.6. Personnel – redirects to the Persons list (…/PunchlistTracking/lists/Persons/AllItems.aspx)

      3.1.7. Punchlist – redirects to the Punchlist list (…/PunchlistTracking/lists/Punchlist Items/AllItems.aspx)

      3.1.8. Add New - redirects to the Add page (…/PunchlistTracking/Pages/Add.aspx)

   3.2. Filters Pane

      3.2.1. **FSEs** (populated from the FSEs list) allows filtering by one selected FSE or none

      3.2.2. **Personnel** (populated from the Personnel list) allows filtering by one selected Person or none

      3.2.3. **Open/Closed/Both** allows filtering by Closed, Open (not closed), or both

      3.2.4. **GMP/Non-GMP/Both** allows filtering by GMP, Non-GMP, or both

      3.2.5. **Item Number** allows filtering by one Punchlist Item number (e.g. "DCS001-PL-0001")

3.2.6.  Reset button resets all filter controls and the Punchlist list, and hides the Charts pane

3.2.7.  Apply button applies the current filters to the Punchlist list and Charts

3.3.  Charts Pane

3.3.1.  Items by Type shows percent of filtered Punchlist Items of each type defined in the Types list

3.3.2.  Items Open/Closed shows percent of filtered Punchlist Items open versus percent closed

3.3.3.  Items GMP/Non-GMP shows percent of filtered Punchlist Items that are GMP versus those that are non-GMP

3.4.  Punchlist Items Pane

3.4.1.  Displays Punchlist Item **Number** and **Short Description** in accordion format header

3.4.2.  Displays remaining Punchlist Item data on header select

3.4.3.  Punchlist Item data that has not been set is displayed as "-"

3.4.4.  Images that have not been uploaded are displayed as "No image provided"

3.4.5.  Only one Punchlist Item is expanded at a time

3.4.6.  Open Punchlist Items (where Closed = null) may be edited by clicking the Edit button ☐ , which redirects to the Edit page (…/PunchlistTracking/Pages/Edit.aspx)

4.  Add

The Add page (add.aspx) consists of:

4.1.  **FSE**: user input populated from FSEs list (.../PunchlistTracking/lists/FSEs/AllItems.aspx). **FSE** is a required field.

4.2.  **Item Number**: user input automatically populated on FSE select in the format "FSEID-PL-xxxx", where xxxx is a sequential number unique to the FSE. Any hyphens (" - ") are removed from the FSEID on the construction of the Punchlist Item number. **Item Number** is a required field.

4.3.  **Short Description**: user input that is used in the Punchlist Items list header. See 3.4.1 above. **Short Description** is limited to 255 characters and is a required field.

4.4.  **Open Date**: user input employing a date picker. **Open Date** is a required field.

4.5.  **Type**: user input populated from the column definition.  **Type** is a required field.

4.6.  **Responsible**: user input populated from Persons list (…/PunchlistTracking/lists/Persons/AllItems.aspx). **Responsible** is a required field.

4.7.  **GMP/Non-GMP**: user input selection. **GMP/Non-GMP** is a required field.

4.8.  **Long Description**: user input. Not required.

4.9.  **Image**: user input. A file is uploaded using the **Browse** button. Images are uploaded to the Pictures list (.../PunchlistTracking/lists/Pictures/Forms/Thumbnails.aspx) with a file name in the format: [Item Number]_image.png. Not required

4.10.    **Add** button: adds a new Punchlist Item to the Punchlist Items list (.../PunchlistTracking/lists/Punchlist Items/AllItems.aspx)

4.11.  **Back** button: redirects to default.aspx

5.  Update

The Edit page (Edit.aspx) consists of:

5.1.  **FSE, Item Number, Short Description, Open Date, Type, Responsible, GMP/Non-GMP, Long Description, and Image** user inputs as described in section 4. Inputs are prepopulated with data from the Punchlist Tracking list on page load.

5.2.  **Closed Date**: user input employing a date picker. Not required.

5.3.  **Resolution**: user input. Not required.

5.4.  **Resolution Image**: user input. A file is uploaded using the **Browse** button. Images are uploaded to the Pictures list (.../PunchlistTracking/lists/Pictures/Forms/Thumbnails.aspx) with a file name in the format: [Item Number]_imageClosed.png. Not required

5.5.  **Update** button: updates the Punchlist Item in the Punchlist Items list

5.6.  **Back** button: redirects to default.aspx

5.7.  **Delete** 🗑 button: deletes the Punchlist Item from the Punchlist Items list on user confirmation

6.  Functions

6.1.  Security is inherited from local site security.

6.2.  All data is contained with the in the app web for this add-in. There is no data exchange with the host web.

7.  Specifications

**Note: limitations can be lifted in custom versions of the add-in**

7.1.  Number of FSEs is limited to 100

7.2.  Number of Persons is limited to 100

7.3.  Number of Punchlist Items per FSE is limited to 100

7.4.  "Single line of text" fields may contain a maximum of 255 characters, including spaces

7.5.  "Multiple lines of text" fields may contain a maximum of 63,999 characters, including spaces

8.  Application Requirements

8.1.  Application should be run in the latest version Safari on Apple iOS, Firefox or Chrome on Android OS, and Safari, Firefox, Chrome, Internet Explorer, or Edge on desktop.

9. <u>Data</u>

9.1. Punchlist Items (…/PunchlistTracking/Lists/Punchlist Items)

| # | Column Name | Column Type | Required | Notes |
|---|---|---|---|---|
| 1 | Punchlist Number | Single line of text | **Yes** | Auto-generated |
| 2 | Short Description | Single line of text | **Yes** | Short description of punchlist item |
| 3 | Open | Date and Time | **Yes** | Date punchlist item was discovered |
| 4 | Type | Choice | **Yes** | Lookup from Types list |
| 5 | Responsible | Person or Group | **Yes** | Lookup from Persons list |
| 6 | GMP | Boolean | **Yes** | True/false |
| 7 | Closed | Date and Time | No | Date punchlist item was closed |
| 8 | FSE | Lookup | **Yes** | Lookup from FSEs list |
| 9 | Long Description | Multiple lines of text | No | Long description of punchlist item |
| 10 | Item Image | Hyperlink or Picture | No | Picture of punchlist item |
| 11 | Resolution | Multiple lines of text | No | Long description of punchlist item resolution |
| 12 | Resolution Image | Hyperlink or Picture | No | Picture of punchlist item resolution |

9.2. FSEs (…/PunchlistTracking/Lists/FSEs)

| # | Column Name | Column Type | Required | Notes |
|---|---|---|---|---|
| 1 | FSEID | Single line of text | **Yes** | |
| 2 | FSEName | Single line of text | **Yes** | |

9.3. Persons (…/PunchlistTracking/Lists/Persons)

| # | Column Name | Column Type | Required | Notes |
|---|---|---|---|---|
| 1 | FName | Single line of text | **Yes** | |
| 2 | LName | Single line of text | **Yes** | |