

# Kahua Quick Reference Guide

## File Manager

### Project Lifecycle Applicability

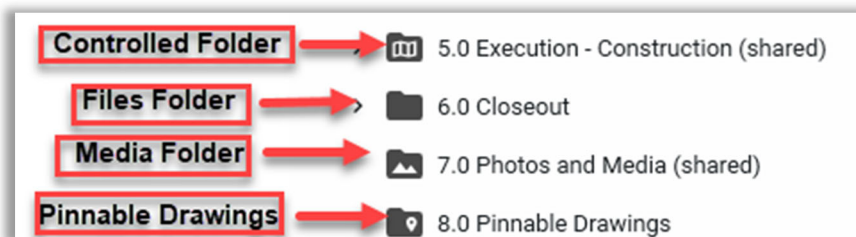


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The File Manager application provides a standardized folder structure for maintaining, managing, and sharing project files with no storage limit.

### Folder Types

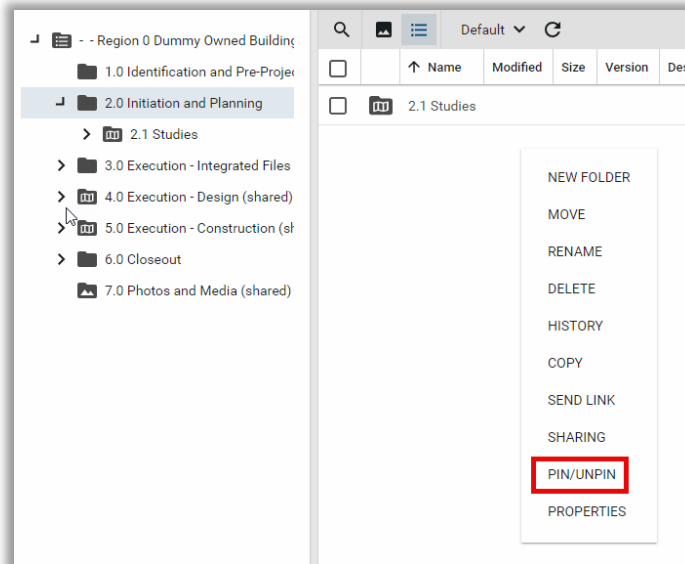


1. **Controlled Folder** – This type of folder is used as a robust Drawing Log and to manage any type of document. This folder group offers revision management, Review and approval workflow with ball-in-court tracking, and distribution management. For more information on the Controlled folder, please refer to the [Design Review Quick Reference](#)

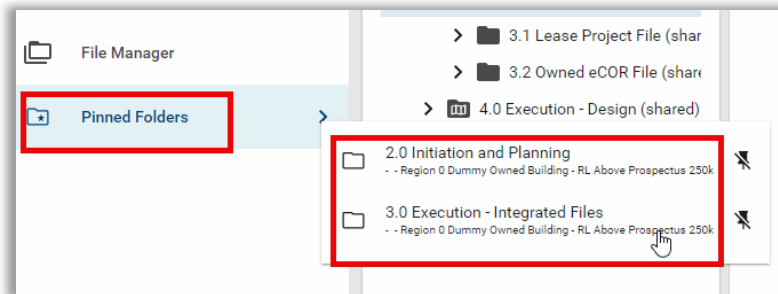
[Guide.](#)

2. Files Folder – Enables files of any type to be managed and shared across both internal and external project stakeholders.
3. Media Folder – Functions and behaves exactly like a standard Files folder, but it enables media-related content, such as photos and videos, to be better described. Files put into a Media folder have additional attributes, such as GPS coordinates, video play duration, and photographer name.
4. Pinnable Drawings - This type of folder is compatible with the Punch List and Location app. Users are able to upload drawings to this folder that will later be used to pin open punch list items to.
5. Pining folders. Users have the ability to pin any folder from file manager to their launch bar on the left-hand side of the screen to quickly access frequently used folders.

- a. **Right click** on the folder.
- b. Select **Pin/Unpin** from the pop up box.



- c. Once pinned an icon called **Pinned Folders** shows up on the launch bar on the left-hand side of the screen and allows you to navigate to the Pinned Folders you have chosen without entering the File Manager app.

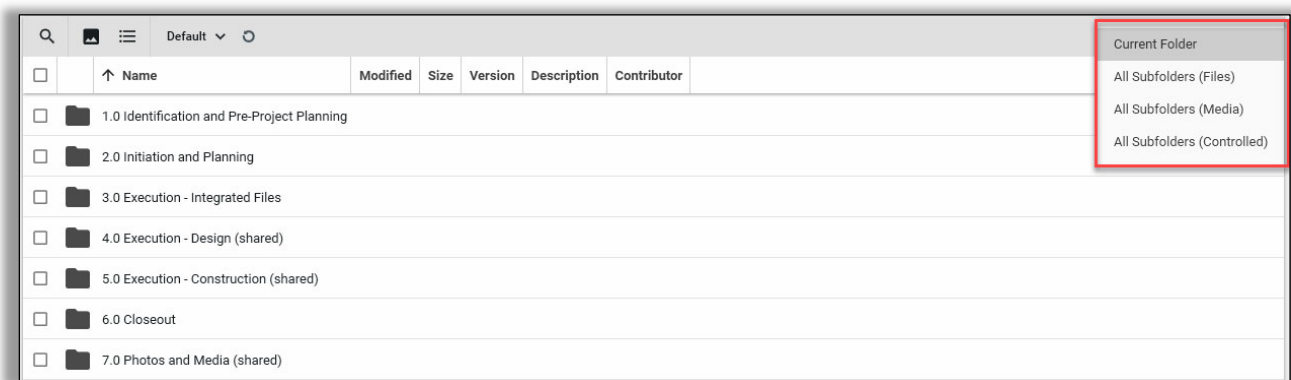


## Navigate File Manager

1. Open the project using **Project Finder** in the left navigation pane.
2. Select **File Manager** from the Other column in the launch bar on the left hand side.
3. Drill down to the lower-level folders by clicking on the arrows on the left side of the folder list.
4. Click on a folder and the contents of the selected folder appears in the middle pane.
5. Click on a file in the middle pane to open a preview of the document on the right.

## Flat File View

To view all the files under the selected folder, whether or not they are in a sub-folder, select a Folder Type 'flat' view from the drop-down list in the top right hand corner of the right pane.



## Create a New Folder

This action is typically completed by the following roles: **GSA-PM/COR**.

### Option 1:

1. In the **folder list**, select the folder where you want to create a sub-folder.
2. Click **Create Folder** in the top ribbon.
3. When prompted, select the folder type.
4. Enter the folder name, then select **OK**.

### Option 2:

1. Right-click the folder where you want a sub-folder and click **New Folder**.
2. When prompted, select the folder type.
3. Enter the folder name, then select **OK**.

## Manage Folders

Right-clicking a folder opens a list of other options for managing the selected folder:

Copy – Copy the folder and all of its contents to another location in the folder structure.

Move – Move the folder and all of its contents to another location in the folder structure.

Rename – Change the name of the folder.

Delete – Delete the folder and all of its contents.

History – Open a pane showing a list of when the folder was created or edited and by whom.

Send Link – Open the Send Wizard with a link to the folder and its contents in the body of the email.

Sharing – DO NOT USE

Properties – Includes two tabs:

- Details – Lists the Name and Partition Path of the folder.
- Notifications – Allows you to set up Notifications to be sent to specific Kahua users when a file is Added, Edited, Deleted, Locked, Unlocked, and/or the Folder is Updated.

Note: Users that are assigned as a Contributor or Moderator can modify folder permissions for particular folders.

## Add Files

This action is typically performed by the following roles: **GSA-PM/COR, External A/E, External CM, External Contractors, External Customers, GSA Client Project Agreement, GSA CO Portfolio CILP, GSA Design Review Coordinator, GSA Measures Manager, GSA PBS Budget, GSA Regional Manager, or GSA Regional Portfolio Manager & CILP.**

Option 1:

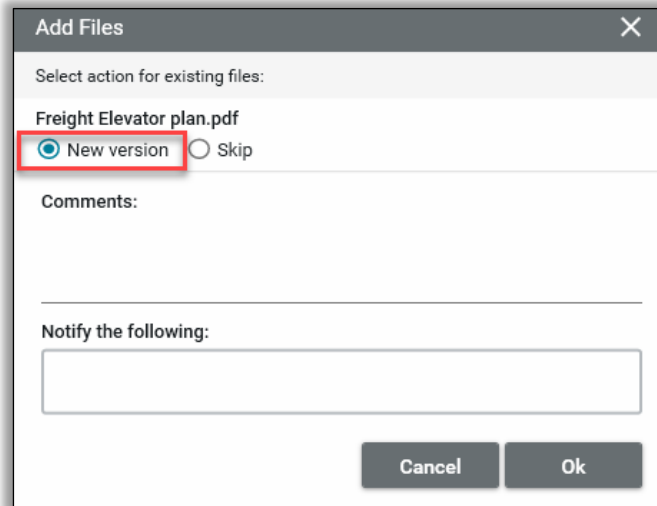
1. Select the folder and click the **Add Files** button in the top ribbon.
2. Select whether to add files from your computer or from Google Drive. For more information on enabling Google Drive uploads, visit the [User Profile Settings QRG](#).
3. Select the appropriate file and click the **Open** button.
4. If necessary, add any comments or select the individuals you wish to notify.
5. Click the **OK** button.
6. If the file is considered Controlled Unclassified (CUI), click file name and select the **Edit** link.
7. In the top right-hand side of the document, select the drop down to designate the document as **CUI**. This is defaulted to blank when first creating a new document.
8. Click the **Save** button. The newly created document is now marked as a CUI document.
- 9.

Option 2:

If you are logged in via the Kahua desktop application, you can drag and drop a file into a folder by opening the folder and dropping the file into the pane on the right side of the screen.

## Upload a New Version of a File

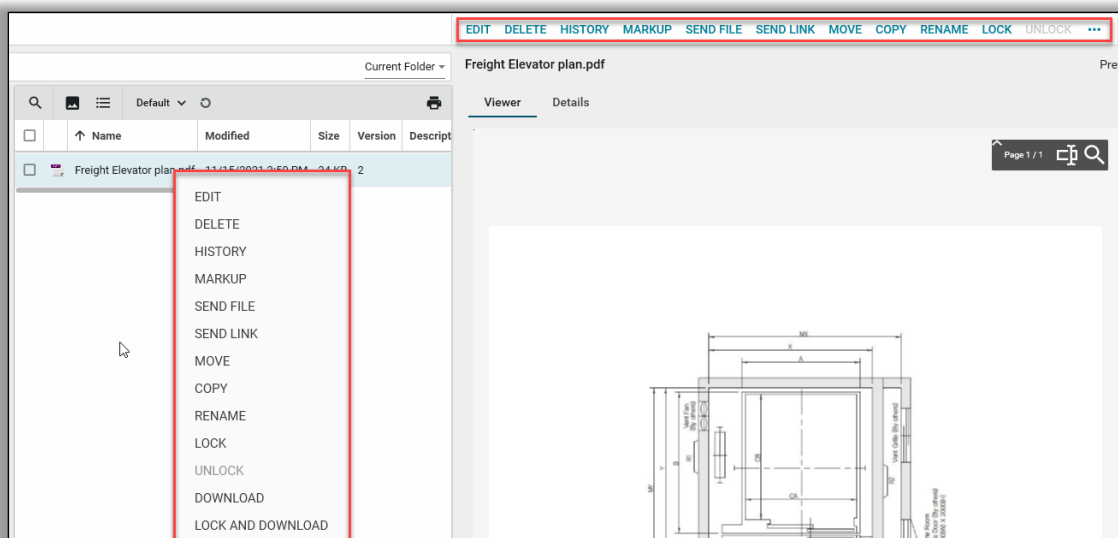
1. Click **Add Files** in the top ribbon and select a file with the exact same name as the previous version.
2. Click **OK**.
3. In the Add Files pane, select **New Version** then click the **OK** button.



4. To access the earlier version of the file, click on the file to open the Details. Scroll down to the **Versions** section. Select the version you wish to view, then click **View**.

## Manage Files

Selecting a file opens a list of options for managing the selected file. The same options are available when you right-click on the file name.



Edit – Open the Details of the file to be edited.

Delete – Delete the file.

History – Open a pane showing a list of who uploaded or edited a file and when the changes were made.

Markup – Open Markup options and a list of previous Markups.

Send File – Open the Send Wizard with the file included as an attachment.

Send Link – Open the Send Wizard with a link to the file in the body of the email.

Copy – Copy the file to another location in the folder structure.

Move – Move the file to another location in the folder structure.

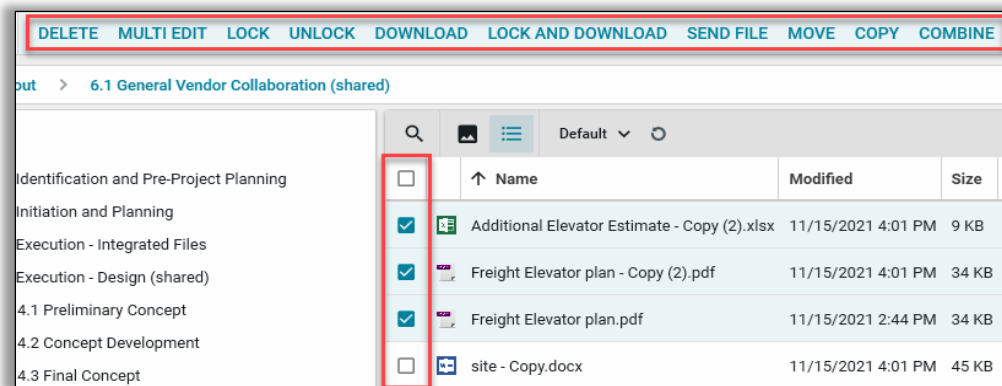
Rename – Change the name of the file.

Lock/Unlock – Lock the file, preventing other users from uploading a new version while you are working on the file. This helps with version control. The file History displays who locked the file. Unlock when you are ready to allow others to edit.

Download – Initiate a download of the file locally.

## Manage Multiple Files

The checkbox to the left of the file name opens several of the same options with the addition of **Multi-Edit** and **Combine**. You can select one or more files to manage at one time using the options in blue on the left side of the top bar.

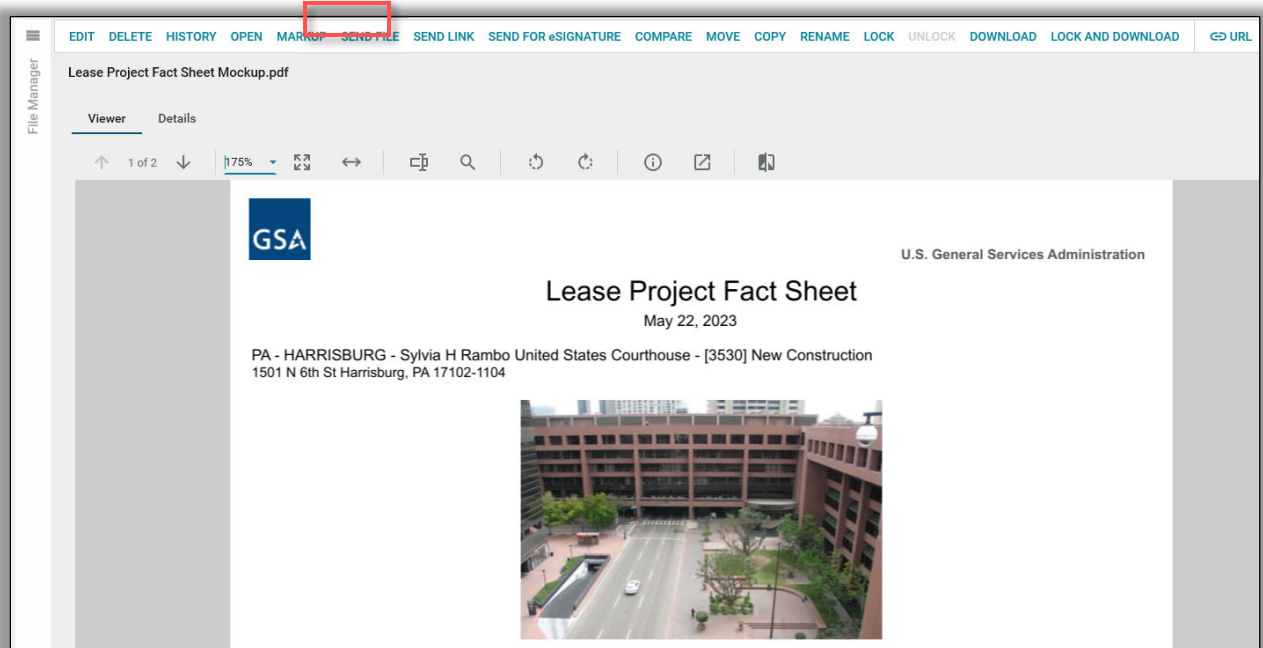


Multi Edit – Allows you to make edits to the Details of multiple files at one time.

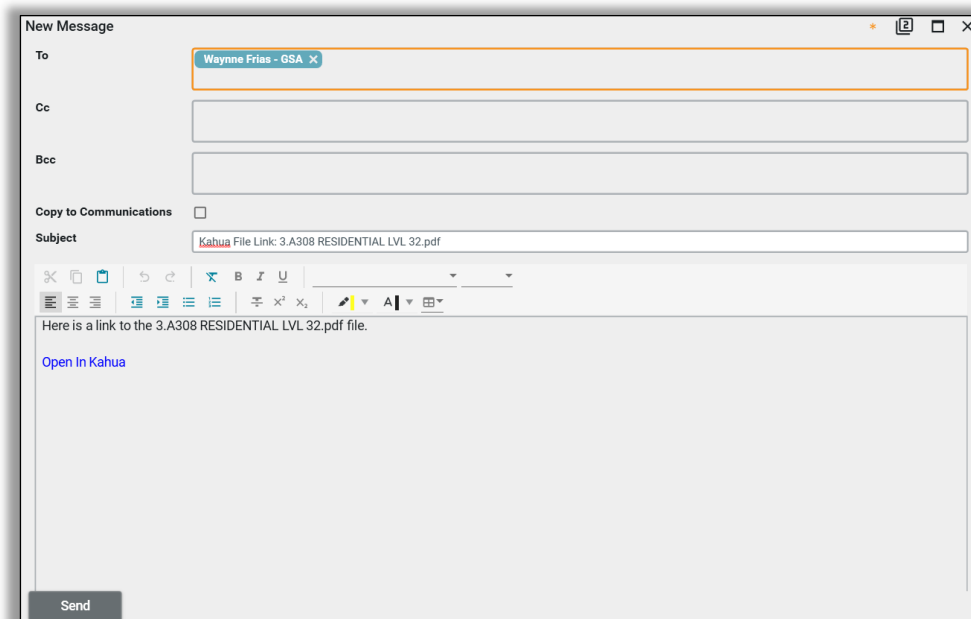
Combine – Combines selected files into one PDF document.

## Send File

1. Navigate to the folder where the file you would like to send is located.
2. **Open** the File to display the file within the Kahua File Viewer.
3. Click the **Send File** link at the top navigation bar of the File Viewer.



4. A **New Message** window will populate, enter the Kahua usernames in the **To**, **Cc**, or **Bcc** fields. The user may also add text to the body of the message.

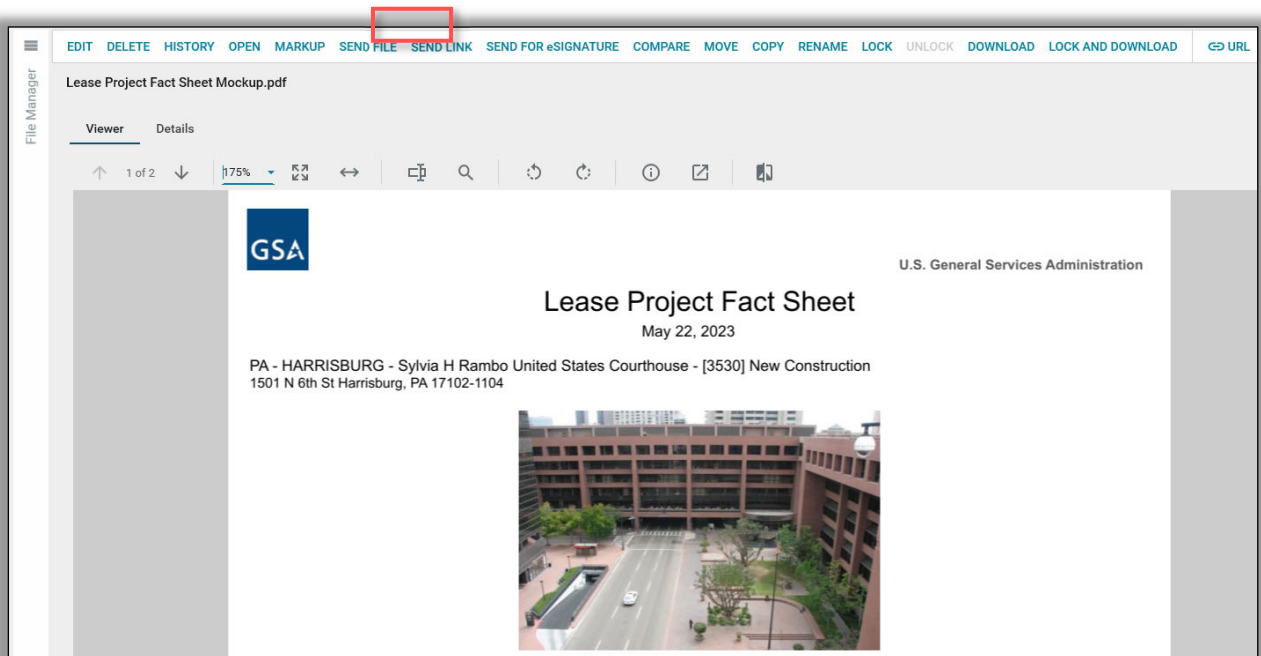


5. Click the **Send** button.

**Note:** Sending CUI documents is not allowed in Kahua because it violates CUI requirements. If you need to send CUI documents, a link may be sent directing the user to access the file from Kahua. Security Groups in place will ensure the correct users have access.

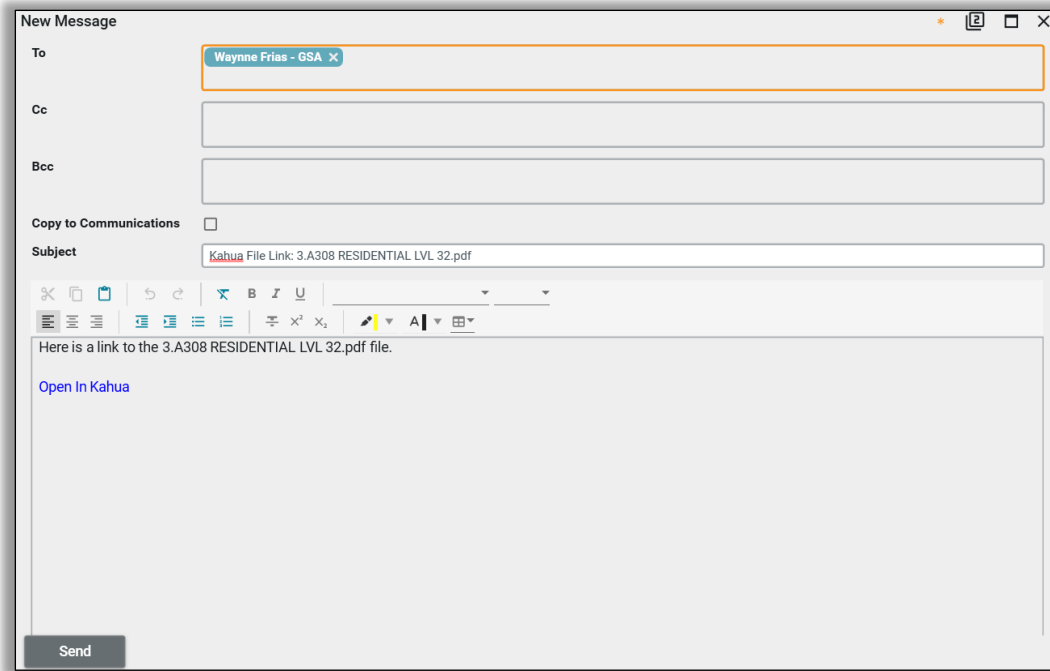
## Send Link

1. Navigate to the folder where the file you would like to send is located.
2. **Open** the Fe to display the file within the Kahua File Viewer.
3. Click **Send Link** at the top navigation bar of the File Viewer.



4. A **New Message** window will populate, enter the Kahua usernames in the **To**, **Cc**, or **Bcc** fields. The user may also add text to the body of the message.



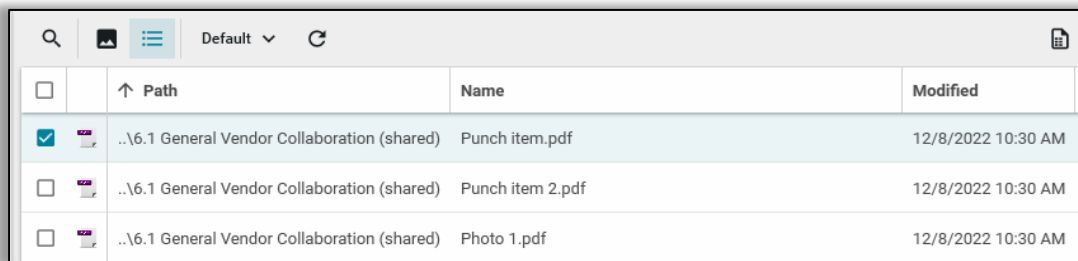


5. Click the **Send** button.
6. Once the user receives the message, they will need to log in to Kahua in order to view the file.

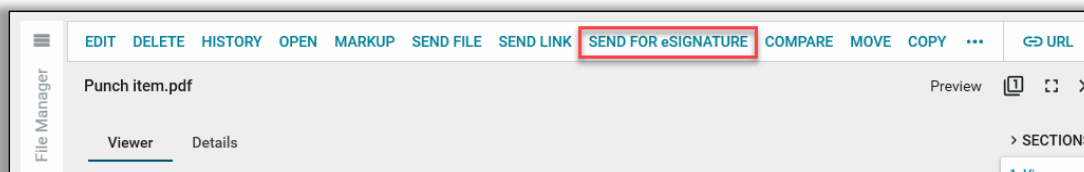
### Send for eSignature

**Note:** An active DocuSign account is required to complete this step. For complete DocuSign account activation instructions, please refer to the DocuSign QRG.

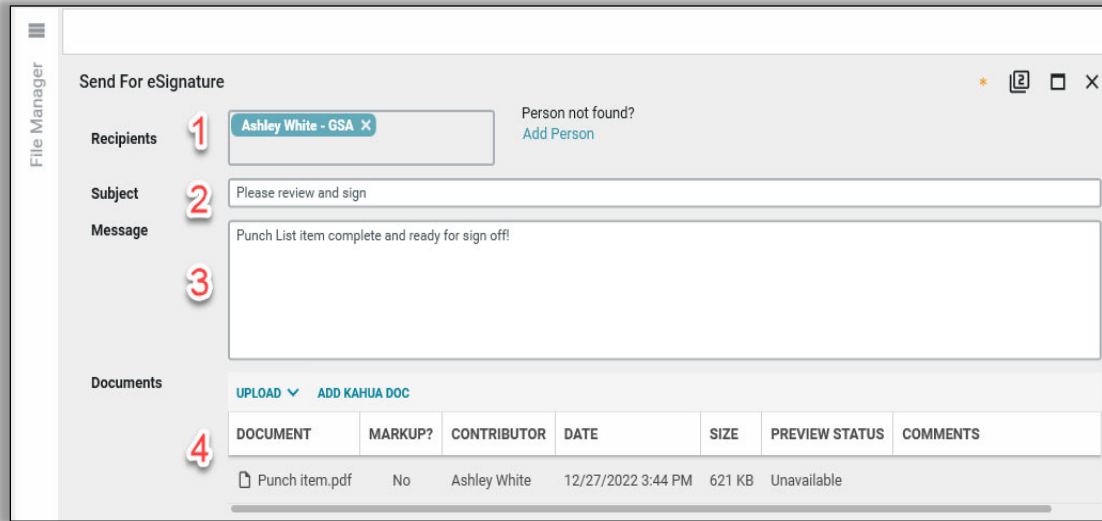
1. Click on the document that requires an eSignature.



2. Once the document is open, additional action buttons appear in the ribbon above. Click **Send For eSignature**.



- The eSignature screen appears for users to begin completing steps 1-4 to send their document for signature. The eSignature form pre-attaches the document needed for signature in the **Documents** section.



- If users need to add additional documents to the request, select **Upload** or **Add Kahua Doc**.

DOCUMENT	MARKUP?	CONTRIBUTOR	DATE	SIZE	PREVIEW STATUS	COMMENTS
Punch item.pdf	No	Ashley White	12/27/2022 3:44 PM	621 KB	Unavailable	

- Once complete, click **Send** to request signature from the user listed in **Recipients**.
- After clicking **Send**, a consent notification appears requesting authorization for DocuSign to send a signature request on the sender's behalf. Click **Ok** if you agree.

**Send For eSignature**

Recipients: Ashley White - GSA Person not found? Add Person

Subject: Please review and sign

Message: Punch List item complete and ready for sign off!

Documents: **DocuSign Consent Required**

A message has been sent to ashley.white@gsa.gov. You must consent to DocuSign delivering requests on your behalf before continuing.

2022-12-27 16:25:00 GMT-06:00

**OK**

Send

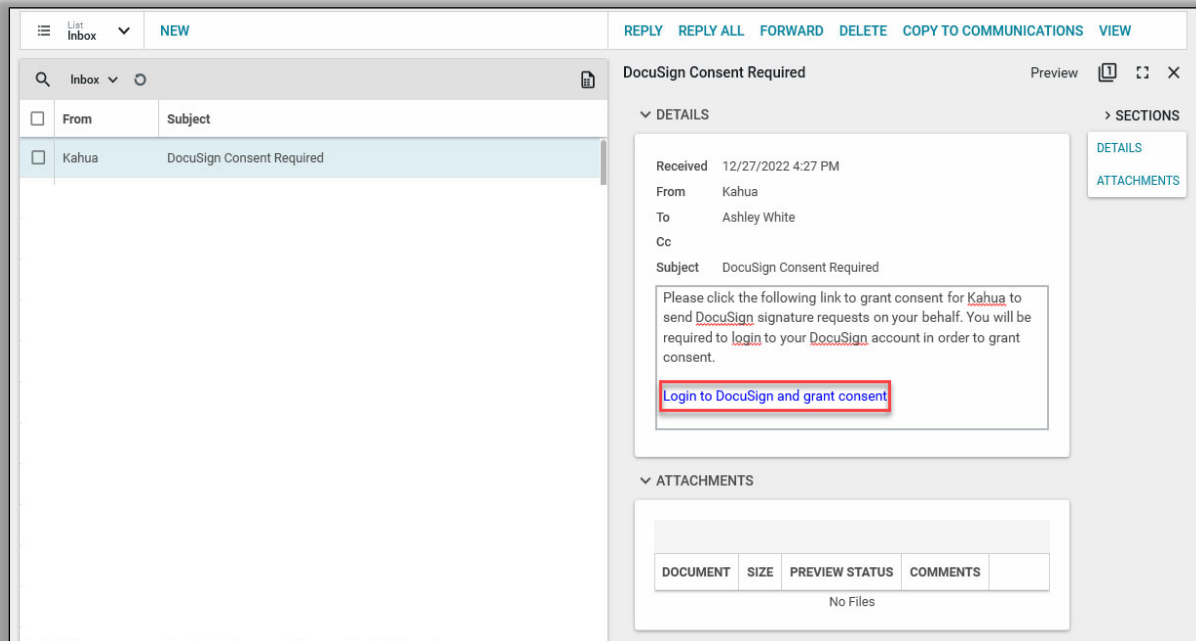
- You can close the window after the previous step has been completed.

## Receive a Document for eSignature

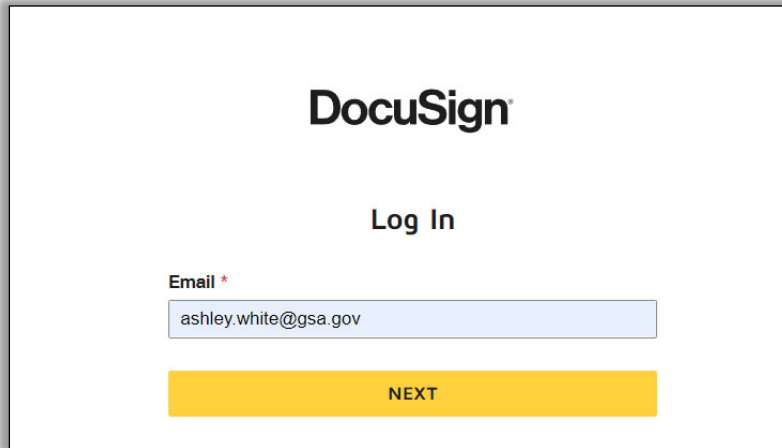
1. Recipient receives a message from Kahua with the subject **DocuSign Consent Required** in their **Messages** inbox.



2. Click on the message to display split screen. Within the **Details** section, user is prompted to click **Login to DocuSign and Grant Access**.

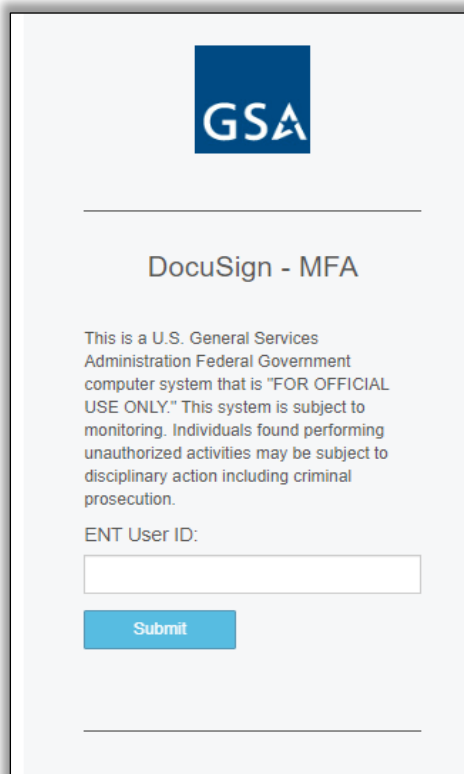


3. After clicking, some users may be redirected to the DocuSign login page. If this is the case for you, click **Next**. If users have already granted access to DocuSign via Kahua, skip to step 6.



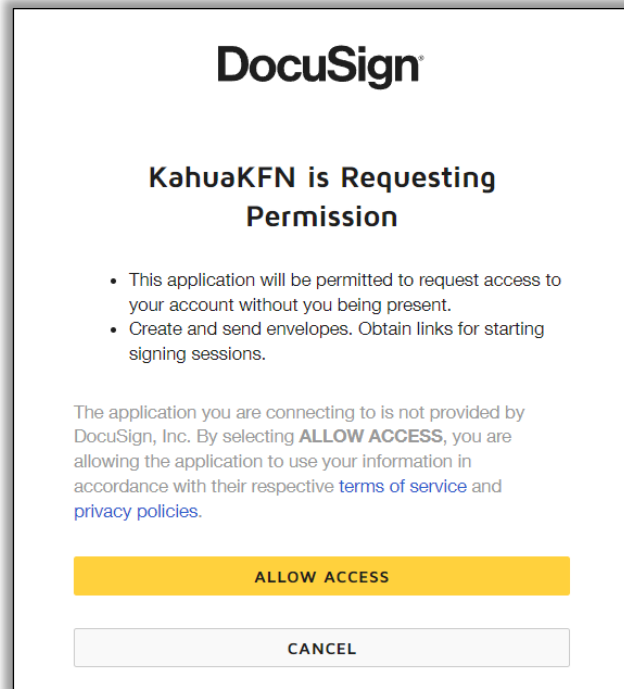
The image shows a DocuSign login page. At the top center is the DocuSign logo. Below it is the text "Log In". There is a label "Email \*" above a text input field containing the email address "ashley.white@gsa.gov". Below the input field is a yellow button with the text "NEXT".

4. User is requested to sign in using either Single Sign On (SSO) or Multi-Factor Authentication.

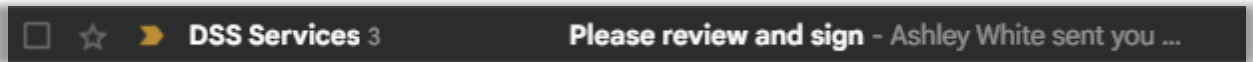


The image shows a DocuSign Multi-Factor Authentication (MFA) page. At the top center is the GSA logo. Below it is a horizontal line, followed by the text "DocuSign - MFA". There is a paragraph of text: "This is a U.S. General Services Administration Federal Government computer system that is 'FOR OFFICIAL USE ONLY.' This system is subject to monitoring. Individuals found performing unauthorized activities may be subject to disciplinary action including criminal prosecution." Below this text is the label "ENT User ID:" followed by a text input field. Below the input field is a blue button with the text "Submit". At the bottom of the page is another horizontal line.

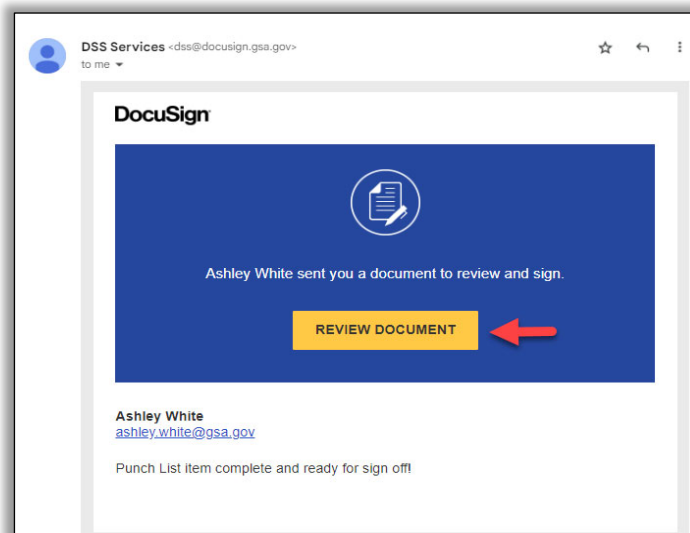
5. Click **Allow Access**.



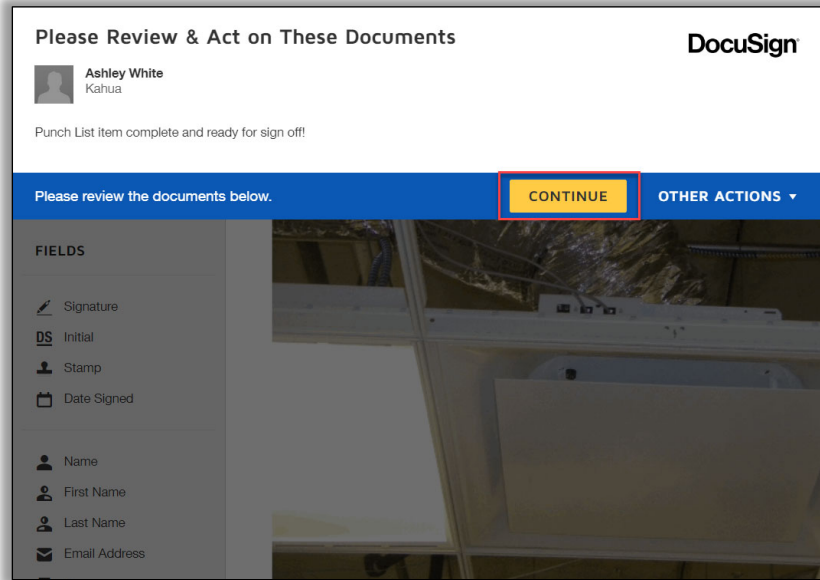
6. User receives an email requesting review and action on the documents attached.



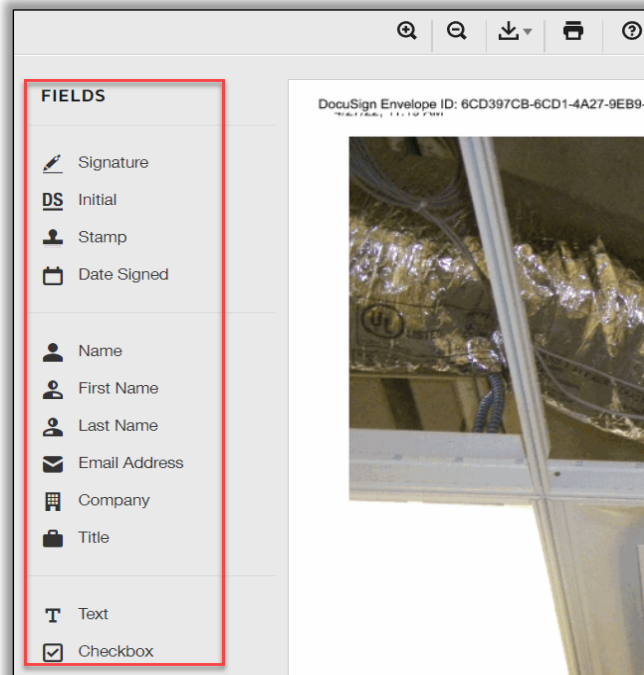
7. Click **Review Document**.



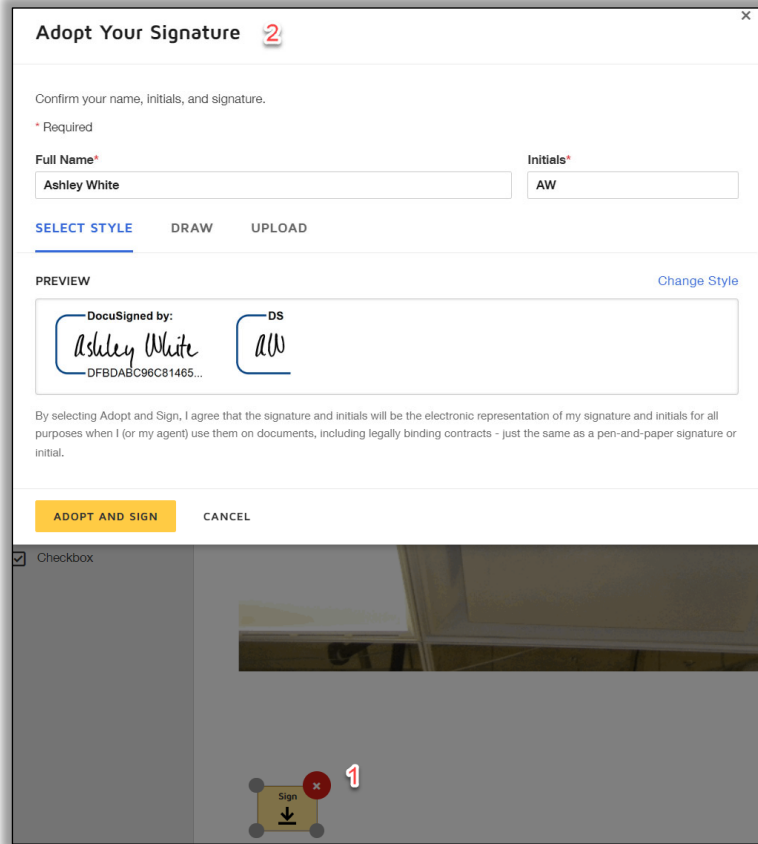
8. Once opened, click **Continue**.



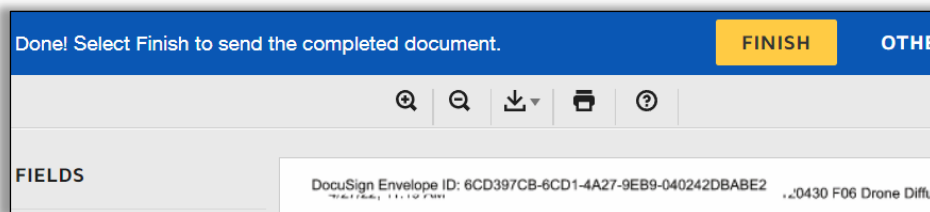
9. Select from the list of actions on the left side of the screen.



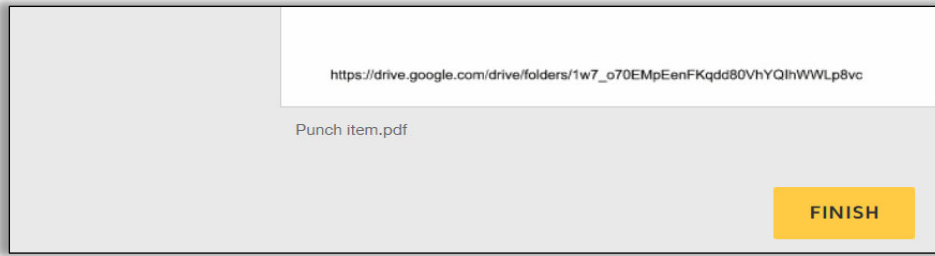
10. Drag the selection to the area in which the user wants their signature to appear. For some, if a signature and initials have not been adopted by the user profile, DocuSign requires this step prior to signing the document.



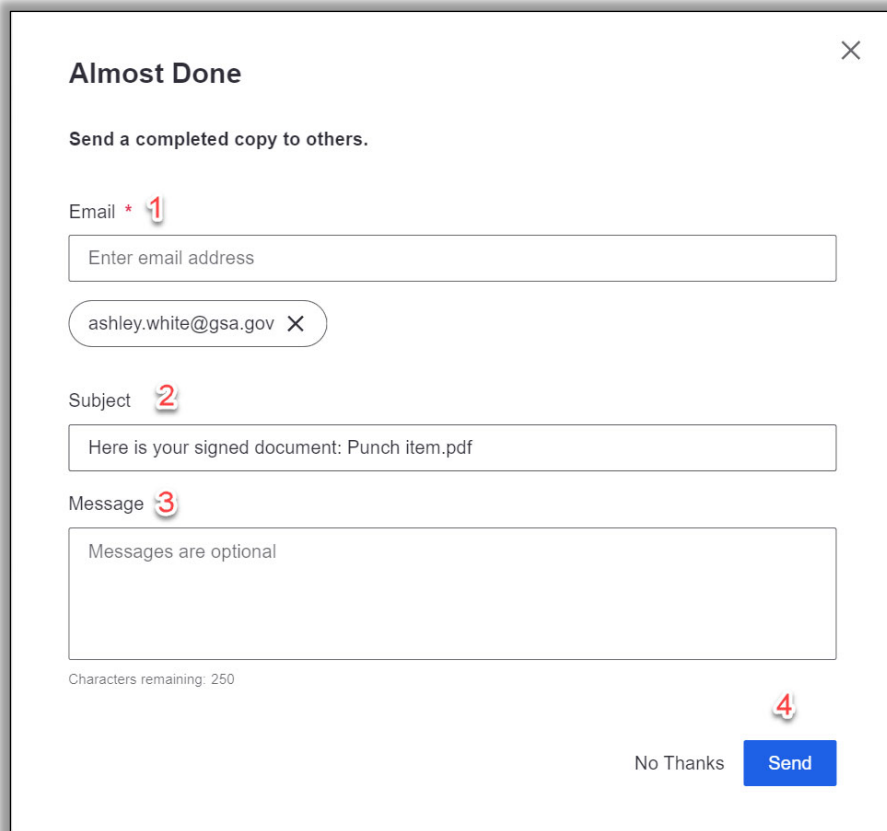
11. Click **Adopt and Sign** once signature style has been selected.
12. User's signature appears on the document. During this step, the signature can be repositioned or enlarged if needed.
13. Once the signature has been captured, click **Finish** either on the top or bottom of the page.



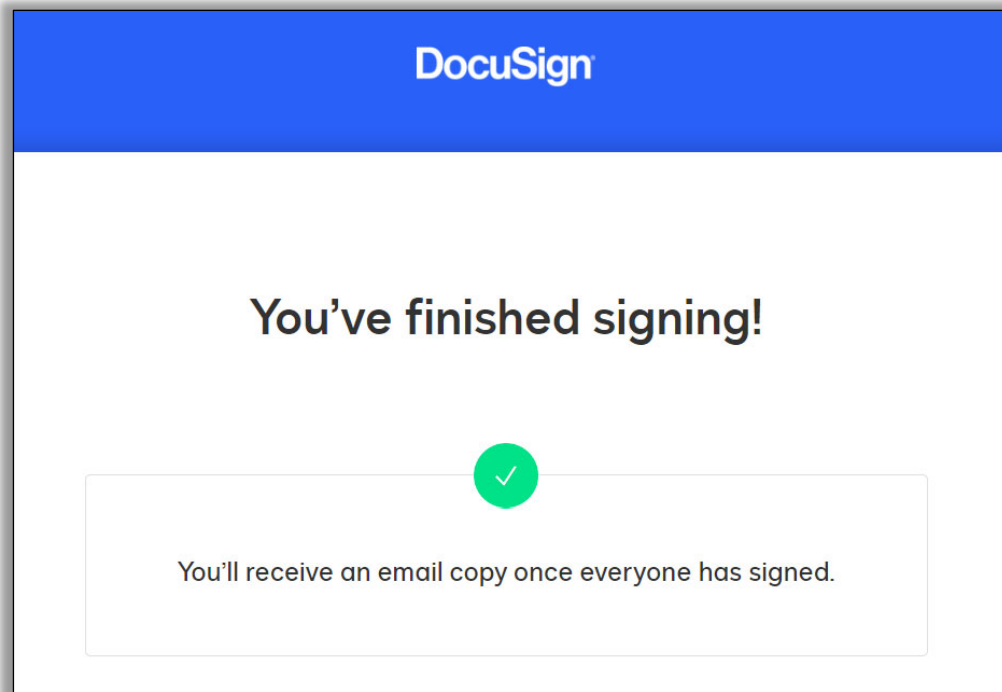




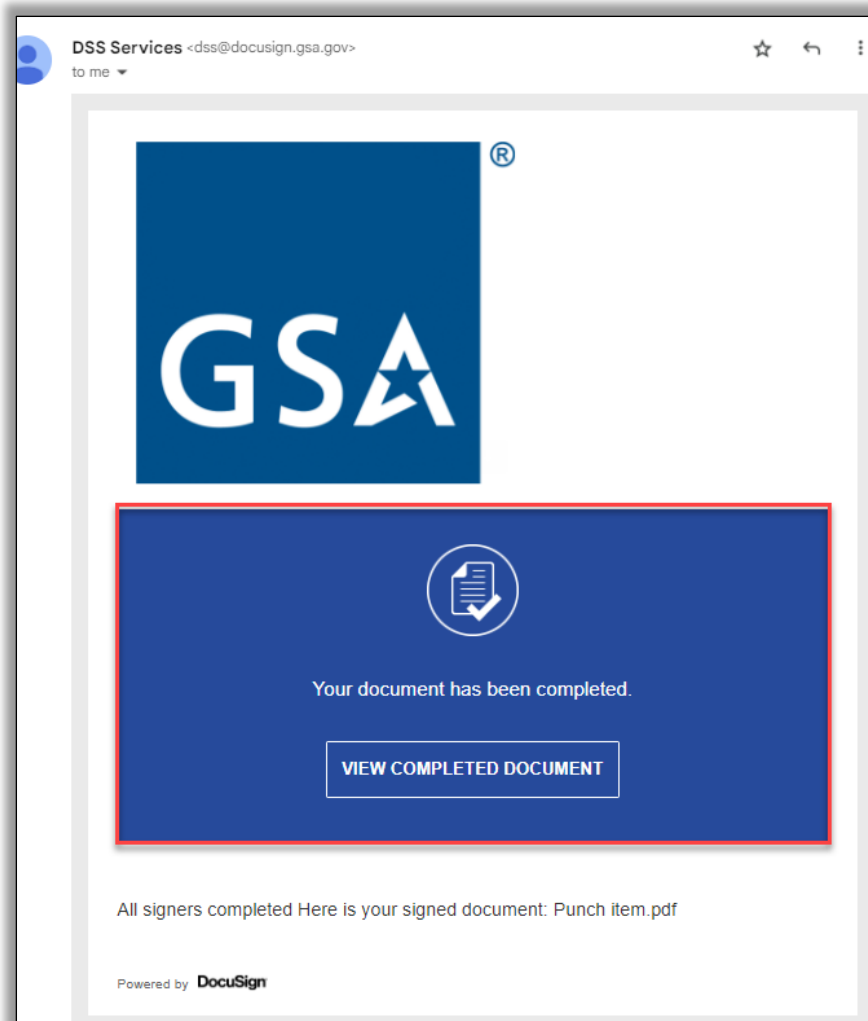
14. A final screen appears, requesting users to enter their email address, subject, and add message, if needed. Once complete, click **Send**.



15. Once the last step has been completed, a confirmation screen appears informing users the process is complete.



16. The original sender requesting an eSignature receives an email notifying them that their document has been signed.



## Integration

Kahua will soon have integration with EDMS/EASi. Through this integration, files uploaded in the 3.2.1 through 3.2.9 subfolders will be synced with EASi. If there are files that you want synced with EASi, they must be in any of the 3.2 sub-folders.

## Resources

For additional help with Kahua applications, you can access the Calendar for instructor-led training, self-paced videos and Quick Reference Guides (QRGs) from this link: [Training: Project Management tool | GSA](#)

## Related QRGs

[Controlled Unclassified Info \(CUI\)](#)  
[Design Review](#)  
[External users: Download Kahua App](#)  
[Internal users: BigFix Download](#)



[User Profile Settings](#)  
[DocuSign](#)  
[Markups](#)