

Kahua Quick Reference Guide

Communications

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Kahua's Communications app can be used to produce various project communications (Letters, Memos, Transmittals, or Fax Cover Sheets) and to track/log communications produced in other apps. Messages in Kahua can be copied into a project's Communications app so they are accessible by the project team and can also be archived with the project.

Navigating to Communications

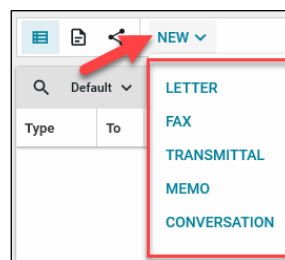
1. Open the project using Project Finder on the left side bar.
2. Select "**Communications**" from the App launcher.

Creating a New Communication Record

This action is typically created by the following roles: **GSA-Regional Kahua Program Manager, GSA-Regional Manager, GSA-PM/COR, GSA-Design Review Coordinator, EXT-AE, EXT-CMa, EXT-Customer User, EXT-Contractors, EXT-PM, or EXT-Lease Broker Contractor.**

Communications App

1. Click **New**, and select a Letter, Fax, Transmittal, Memo, or Conversation communication type.



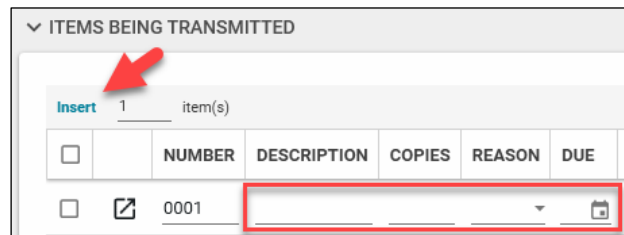
Details Section

2. Select one or more Kahua contacts from the dropdown in the **To** field.
 - a. If they are not already a Kahua contact, you can request to have them added by your Kahua Program Manager (KPM).
3. The **Cc** field also allows you to select only Kahua contacts.
4. The **Cc Other** is for record information only. You can enter non-Kahua contacts to be Cc'd in the communication, but you will have to type their email address in the Send wizard or send them a copy outside of Kahua.
5. Enter the **Subject** to be included in the document and so the record can be easily identified in the Log View.
6. Enter the body of the communication in the large text box under the Subject.
 - a. You can copy and paste into the box.
 - b. Text can be edited in the record.
7. Click **Add Signature**, and enter the **PIN** to include your signature on the printed document. (Signatures and PINs are set up in My Settings opened by clicking on your name in the top right-hand corner of the screen.)
8. Complete any other applicable fields for your Communications record.

Note: Each Communication type has different Detail fields available.

Items Being Transmitted (Transmittals Only)

9. **Insert** a row for each item being transmitted.
10. For each item enter:
 - a. **Description** of the item.
 - b. Number of **Copies**, if applicable.
 - c. **Reason** for transmission, if applicable.
 - d. **Due Date**, if applicable.



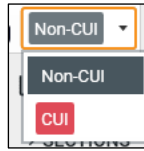
ITEMS BEING TRANSMITTED						
Insert 1 item(s)						
<input type="checkbox"/>	NUMBER	DESCRIPTION	COPIES	REASON	DUE	
<input type="checkbox"/>	0001				<div style="border: 1px solid red; padding: 2px;"> ▼ 📅 </div>	

References Section

11. To attach a document that does not exist within the project, click the **Upload** button.
 - a. If using the desktop app, multiple documents can be uploaded at one time.
12. To attach a document that exists within the project, click the **Add Kahua Doc** button.

Controlled Unclassified Information/Non-Controlled Unclassified Information

13. In the top right-hand corner of the form, select **CUI** or **Non-CUI**.
 - a. External users will not have access to view CUI forms.



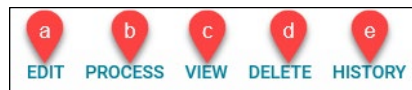
Save

14. Click **Save** to save any changes made and to exit Edit mode.
15. The item will be included in the Log View.

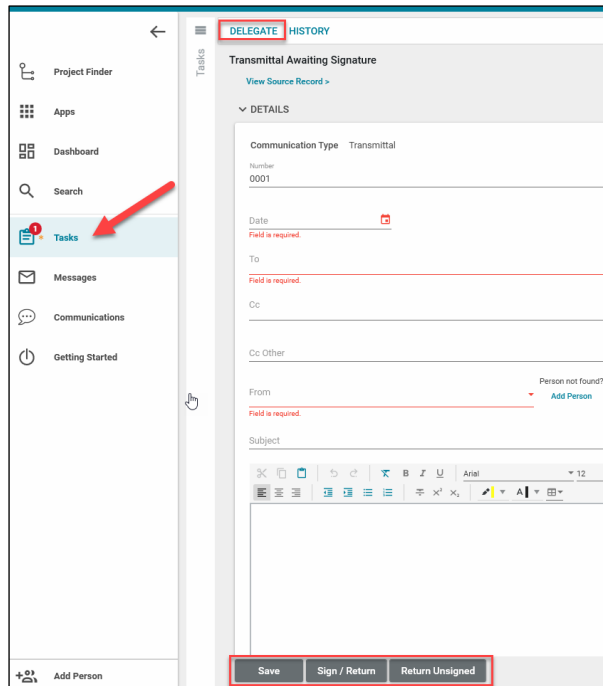
Manage an Existing Communication Record

This activity is typically managed by the following roles: **GSA-Regional Kahua Program Manager, GSA-Regional Manager, GSA-PM/COR, GSA-Design Review Coordinator, EXT-AE, EXT-CMa, EXT-Customer User, EXT-Contractors, EXT-PM, or EXT-Lease Broker Contractor.**

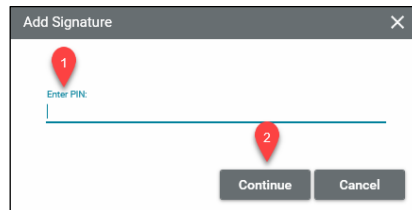
1. From the log view, click the Communications record that you wish to edit.
2. There are several buttons available across the top of the window:
 - a. Click **Edit** to open the record back up in edit mode.
 - b. Use **Process** to create a new RFI or Punch List Item using the information in the Communications record.
 - i. Select the Target Application.
 - ii. If processing to an RFI, select the Pre-Construction or Construction Target List.
 - iii. Click **Start Processing**.
 - iv. Some fields may map across to the new record, and the Portable View of the Communication Record will be attached to the bottom of the new RFI or Punch List Item.
 - c. Click **View** to see a preview of the Portable View.
 - d. **Delete** will remove the record from the Communications application.
 - e. Use **History** to see when and by whom the record was created and edited.



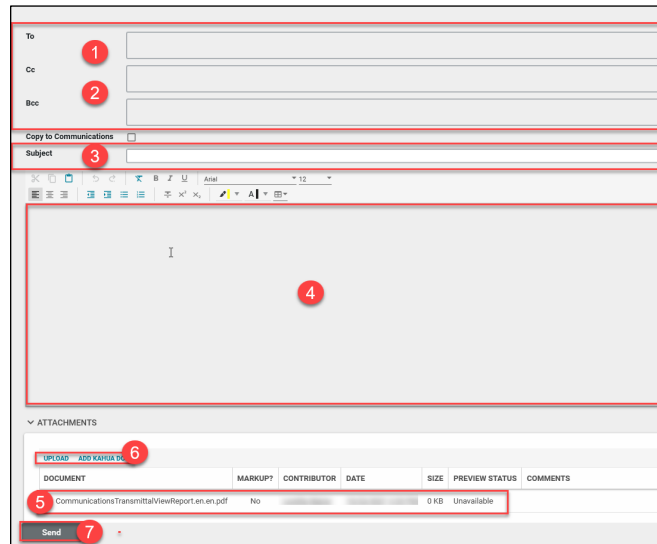
3. There are several options at the bottom of the window:
 - a. Click **Submit for Signature (Letters, Fax, and Transmittals Only)** to send it to the **To** contact to sign.
 - i. The person selected in the **To** field of the record will receive an email in their inbox and a **Kahua Task**.
 - ii. There is a **Delegate** option at the top of the Task that allows the recipient to forward the document for another Kahua user to sign.
 - iii. They can edit the document in the **Task**.
 - iv. Across the bottom of the Task, they will have the options to **Save, Sign/Return, or Return Unsigned**.



- v. If you use the Send for Signature option, you will have the option to **Recall** it until the signer returns it.
- b. **Sign** will add your signature to the document without opening it back up in Edit mode.
 - i. Enter your **PIN** in the Add Signature box.
 - ii. Click **Continue**.



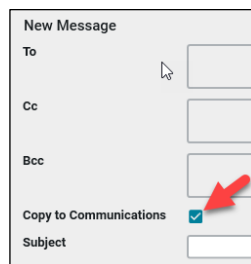
- c. **Send** opens the Send wizard.
 - i. The **To** and **Cc** contacts entered in the Details of the record will pull into the wizard.
 - ii. Enter email addresses for anyone listed in the **Other Cc** field of the form's Details in the **To**, **Cc**, or **Bcc** fields.
 - iii. Enter a **Subject** for the email.
 - iv. Enter the body of the email in the large box below Subject.
 - v. The Portable View of the record will be attached.
 - vi. Other documents can be attached to the email by clicking on **Upload** or **Add Kahua Doc**.
 - vii. Click **Send**.



Copy to Communications from other Apps (Message Type)

This activity is typically managed by the following roles: **GSA-Regional Kahua Program Manager, GSA-Regional Manager, GSA-PM/COR, GSA-Design Review Coordinator, EXT-AE, EXT-CMa, EXT-Customer User, EXT-Contractors, EXT-PM, and EXT-Lease Broker Contractor.**

1. The Communications app will also include **Messages**. They will appear in the Log View with a new **Type of Message**.
2. The **Copy to Communications** feature within the **Send** wizard of another app will copy the message to Communications.
 - a. Select the **Copy to Communications** checkbox below the Bcc field.
 - b. The message will copy into Communications upon **Send**.



3. The **Messages** app is global, which means messages regarding any project all appear in your Messages app. You can copy a Message into the Communications app of a specific project.
 - a. Open the **Messages** app.
 - b. Select the Message to copy into the project's Communications.
 - c. Click **Copy to Communications** at the top of the list view.



Communications Log View

This activity is typically available to the following roles: **GSA-Regional Kahua Program Manager, GSA-Regional Manager, GSA-PM/COR, GSA-Design Review Coordinator, EXT-AE, EXT-CMa, EXT-Customer User, EXT-Contractors, EXT-PM, or EXT-Lease Broker Contractor.**

1. There are multiple Log Views available that filter or group Communications in different ways:
 - a. **Default** Log View is sorted by Number (which is set by sequence of the type but not sorted by the type)
 - b. **EASi Output** displays the URL to the location in EASi containing the Communications documents
 - c. **Group by Type** organizes the files by Type (Letter, Fax, Transmittal, Memo, or Conversation)
 - d. **Filtered by each Type** shows only Communications of a particular type (Conversations, Faxes, Letters, Memos, Messages, or Messages from Email)
2. **Manage Views** allows you to set your own Columns, Sort order, Scope, Indicators, Filters, and Groups.

