

Kahua Quick Reference Guide

Export/Import Feature

Project Lifecycle Applicability



About the Export/Import Feature

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The Export/Import feature is available in many Kahua apps, but it differs in each app. Export pulls all records entered into the Kahua app to an Excel workbook. Data can be edited, and new records can be added to the Excel file and which can then be Imported to update the information in Kahua.

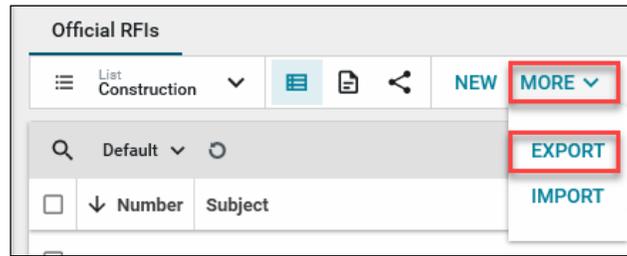
Export

This action is typically completed by the following roles: **GSA Regional Kahua Program Manager**, **GSA-PM/COR**, and **EXT-CMa**.

Always export the apps data before starting edits. Even if no data has changed within the app you are adding to or editing, data may have changed in the supporting apps.

Ensure there is at least one complete record in the app in Kahua before exporting. This will make it easier to know what information should be entered and where because some of the column names do not match up with the field names in Kahua. This will also help with knowing how each column should be formatted in the Excel workbook for importing.

1. Click **More** at the top of the List view and select **Export**.
2. Follow the prompts to name the exported file and select where it will be saved.



Edit or Add New Records to the App

1. Open the exported file and open the tab with the app name. This will be the data entry tab.



2. Using the format of the record that was exported from Kahua as a guide, add additional rows.

- **Row Number** (Column A)
 - Number each new row sequentially, starting from the next number after the rows that were exported from Kahua.

RowNumber	RecordKey	Number	Date	Subject
2	R1NBfDUzMTc4NjN8NzU2NjUzOXwyMHw4NzcyNTI4	0003	3/21/2022	RFI #1
3				
4				
5				
6				

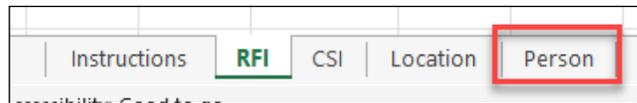
- **Record Key** (Column B)
 - When adding new rows, leave this field empty
 - When editing existing rows, do not change or delete the **Row Number** or the **Record Key** (Columns A and B). These are the fields tell the system where imported information belongs.

RowNumber	RecordKey	Number	Date	Subject
2	R1NBfDUzMTc4NjN8NzU2NjUzOXwyMHw4NzcyNTI4	0003	3/21/2022	RFI #1
3				
4				
5				
6				

- **Text Fields** – Type in or copy/paste (Ctrl+C/Ctrl+V) data.
- **List Fields** – Dropdowns will include the options that are available in Kahua; select from the dropdown or enter the exact word format to match the option in the list.
 - You will be able to copy down or copy/paste, as needed.

RowNumber	RecordKey	Number	Date	Subject	Status	Au
2	R1NBfDUzMTc4NjN8NzU2NjUzOXwyMHw4NzcyNTI4	0003	3/21/2022	RFI #1	Complete	2
3						
4						
5						
6						

- **Dates** – Format to match the dates in the record that was exported. (Typically: M/D/YYYY)
- **People** – Enter the Row Number that represents the person’s name as found in the Person tab of the Excel Workbook.
 - Open the **Person** tab.



- Find the person. You may need to use the Find feature of Excel as the list of people may be very long.

RowNumber	RecordKey	Prefix	FirstName	LastName
2	R1NBfDB8MjA3MzUyOXwyM3w4OTUxNDY5	Ms.	Loretta	Maine
3	R1NBfDB8NDQxOTgzM3wxNHw3MMDM0ODg0	Ms.	Ashley	White

- Return to the data entry tab and enter the **Row Number** from **Column A** of the **Person** tab in the applicable field.

RowNumber	RecordKey	Number	Date	Subject	Status	Author
2	R1NBfDUzMTc4NjN8NzU2NjUzOXwyMHw4NzcyNTI4	0003	3/21/2022	RFI #1	Complete	2
3					Recalled	
4						2
5						2
6						2

- The next column to the right in the data entry tab will be the **Reference** column. Enter “**RowNumber**”. This refers to the name of the column where you found the number entered in the previous column.

RowNumber	RecordKey	Number	Date	Subject	Status	Author	Author_ReferenceColumn
2	R1NBfDUzMTc4NjN8NzU2NjUzOXwyMHw4NzcyNTI4	0003	3/21/2022	RFI #1	Complete	2	RowNumber
3					Recalled		
4						2	RowNumber
5						2	RowNumber
6						2	RowNumber

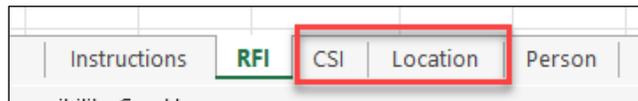
- If you are adding multiple people to one field, use the vertical pipe (|) character between numbers, no spaces. *Example:* 1|12|123
- **Required Fields** – Take care to include data in all required fields. You can open a new record in Kahua and make note of the red Required fields.

3. **Save/Close** the Excel Workbook. The document must be closed before it can be Imported.

Note: Do not manipulate tabs or columns in the exported Excel Workbook. They must remain intact for reimporting data back into your project.

Any column that is used by a supporting app for the selection options will require you to use the same method as the People selection above to enter the Row Number of the applicable item and then “RowNumber” in the **Reference** column. They will vary from app to app, and there will be an additional tab in the exported document for each supporting app.

Applications with **Action Items/Responsible Parties** grids (such as Risk Register or Punch Lists) or **Sub Apps** (such as Packaged Submittals) will have additional data entry tabs in the Excel Workbook. There will be a column in the app-named tab that will tie to the additional data entry tab using the same method as the People selection above.

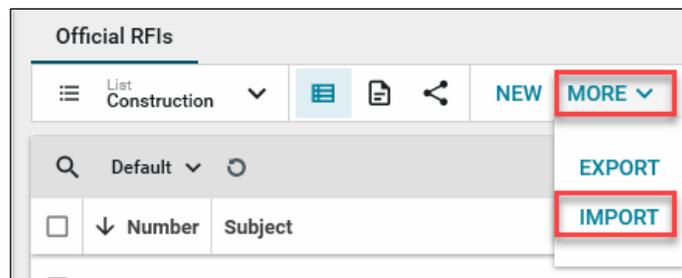


If you enter the wrong number for a person in a field that allows multiple people to be entered, you will not be able to overwrite it with a new Import as it will just add to the list and not delete anyone. You can, however, use the **Multi-Edit** function within Kahua to edit the list of people, as long as the record is not locked.

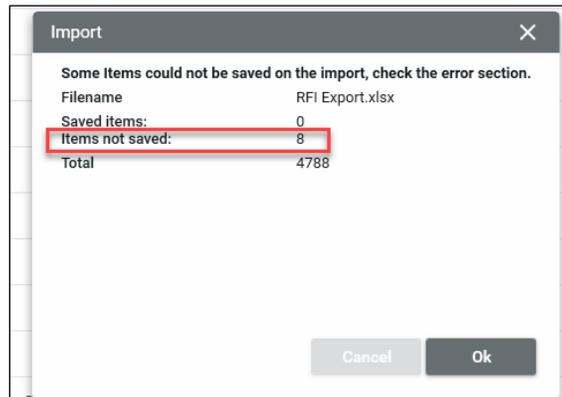
Import

This action is typically completed by the following roles: **GSA-Regional Kahua Program Manager**. Some apps allow the **GSA-PM/COR** to import.

1. Click on the **More** at the top of the List view and select **Import**.



2. Follow the prompts to select and Import the Excel Workbook.
3. When the import is complete but before closing the **Import window**, review the **Items Not Saved** and/or **Errors**. Make note of items that need to be edited.



Important: If the records were added but edits need to be made, you *must* **Export** a new Excel Workbook before making changes and reimporting. Any rows in the Excel Workbook that do not have **Record Keys** will be added again. As a result, your data will be duplicated if you do not start with a newly exported document.

Resources

For more help with this or any other Kahua application, you can access the Calendar for Instructor-led training, Self-paced videos, or additional Quick Reference Guides (QRGs) from this link: [Training: Project management tool | GSA](#)

Related QRGs

[Punch Lists](#)
[Risk Register](#)
[Submittals](#)