Kahua Quick Reference Guide
Reports

About Reports

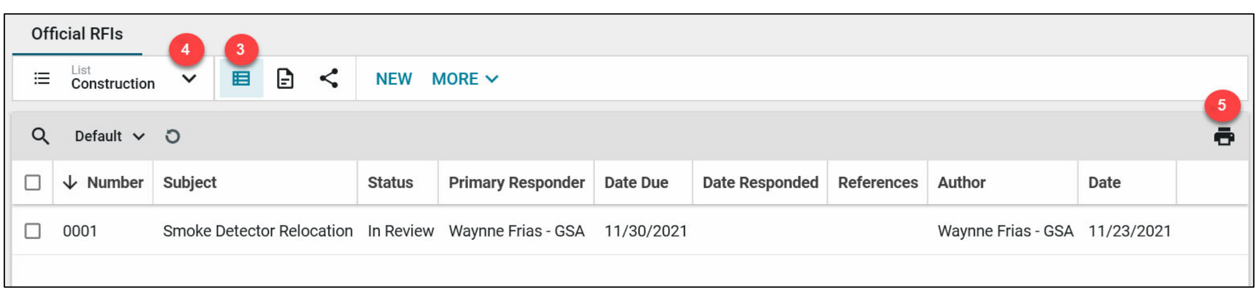
The Kahua report wizard allows users to create a more complex report for an application in Kahua. The Scheduled Reports capability provides a way to automate the generation and distribution of reports to both users and non-users, via email notifications and messages. This QRG applies to most applications in Kahua, especially Document Management applications.

Important Notes

- Kahua supports producing reports in three common formats (.CSV, .XSLX, and .PDF).
- A report may also be saved in the Project's File Manager by selecting **Save to Kahua**.

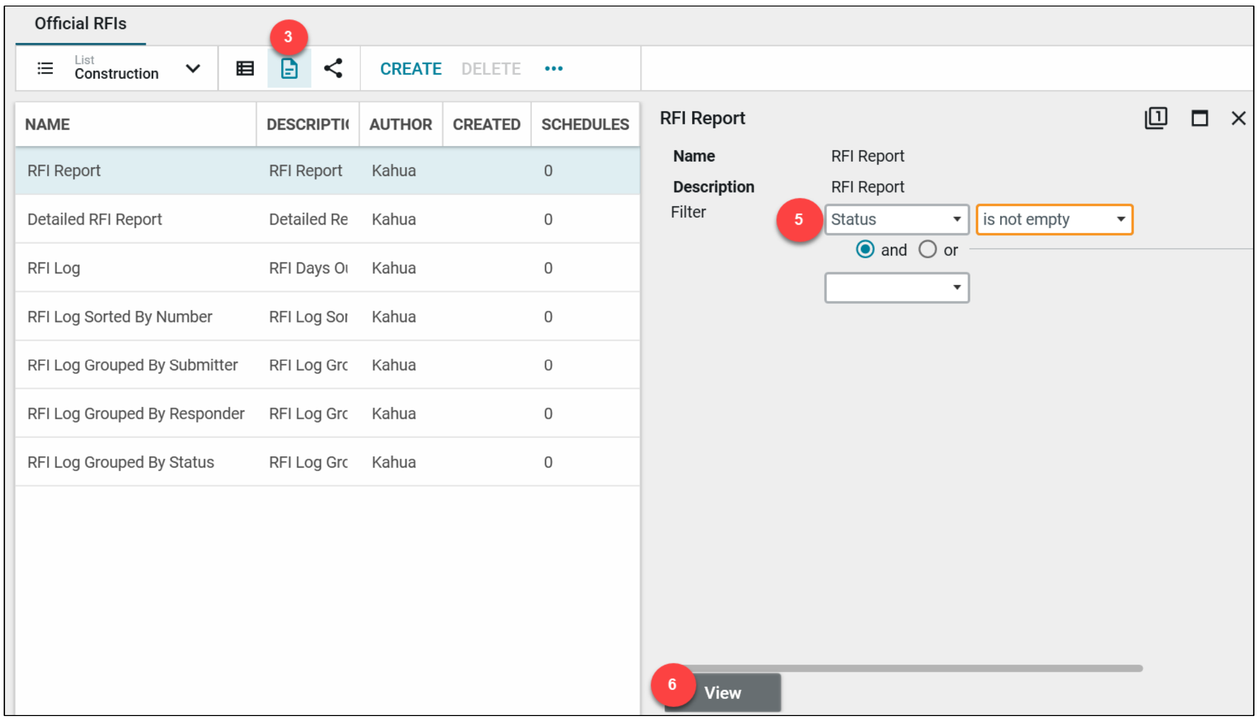
Create a Report in Log View

1. Navigate to the appropriate project using Project Finder in the left side bar.
2. Navigate to the app for which you would like to create a report such as RFIs, Submittals, etc.
3. Click the **Lists** icon above the log view to access the log's list. To generate a report, you will need to have items in the log view.
4. Click the **Log View** dropdown list near the search icon.
5. Click the log view you wish to print, download, or send a report.
6. Click the **printer** icon to generate the report.



View or Send a Standard Report

1. Navigate to the appropriate project using Project Finder in the left side bar.
2. Navigate to the application you would like to generate a standard report for.
3. Click the **Reports** icon above the log view to access the reports.
4. Select a report from the list presented. The detail pane displays the selected report.
5. Select any filters to use on the report data.
6. Click **View**. The report displays in the detail pane.
7. To send a standard report, click **Send** when the report appears in the detail pane.



Schedule a Report

1. Navigate to the appropriate project using Project Finder in the left side bar.
2. Navigate to the application you would like to manage a scheduled report for.
3. Click the **Reports** icon above the log view to access the reports.

   The “Schedules” column indicates whether a report has been scheduled or not, and how many scheduled runs have been created.
   - For example, the “Open RFIs” report might have 2 scheduled runs: one to be generated once a day for internal record keeping, and a second to be run once a week to be sent to the project manager (perhaps a different filter).

4. Select the Report you wish to schedule and click **Manage Scheduled Reports** in the toolbar.
   a. **Note**: To view what the report looks like before scheduling, click the report then click **View** in the details pane.

5. In the “Schedule Reports” window that pops up, click **New**.
6. Enter in applicable information:
    a. A name for the report
    b. The range of dates and time to start and end the report generation
        i. **Note**: The “Start Time” corresponds to the user’s local time. Select a time that is appropriate for the users you are creating the scheduled report for. Your local time can be changed in your Kahua settings.
    c. The report frequency (i.e. Daily, Weekly, Monthly) and recurrence.
    d. Contact recipients (list from Kahua contacts) and email recipients (user who don’t have access to Kahua)
        i. **Note**: Users in Kahua will receive an email and Kahua message. Users outside of Kahua will receive an email.
    e. Any filters that you want applied each time the report is generated
    f. The delivery method (may be sent as an attachment or be directed to file manager folder)
7. Click the **Save** button.