

Kahua Quick Reference Guide

Action Items

Project Lifecycle Applicability



About Action Items

- [Create an Action Item](#)
- [Submit an Action Item Comment](#)
- [Submit an Actionable Task](#)
- [Close an Action Item Comment](#)
- [Close an Actionable Task](#)
- [Complete an Action Item](#)

The Action Items application allows a Kahua User to create Action Items that can be used to record any type of items that need to be tracked in your projects. Each Action Item can be created with Items that will create tasks that the Assigned to user will need to complete. This Tasks will include a notification to the responsible user.

Create an Action Item

Action Items are typically created by the following roles: **GSA PM**, **GSA Staff/SMEs**, **EXT-CMa**, and **GC/Design Builder**.

1. The Action Items App is a global app that can be accessed once logged into Kahua. Users do not have to be in a specific partition or project in order to create Action Items.
2. In the left navigation pane, select **Action Items** from the App Launcher.
3. Click the **New** button.
4. In the Details section, add a **Description**.
5. Select a **Priority**.
6. Select a **Discipline**.
7. The Author is auto populated with the creator's username. You may change this and select another user if needed.
8. Select a user for the **Functional Responsibility**.
9. Fill out any dates within the **Original Request**, **Target Completion**, **Revised Target Completion**, and/or **Actual Completion Date**, as needed.
10. Enter **Notes**, if desired.

11. In the References section, you can also upload any document or add a Kahua Doc.

Save

1. If you wish to save the Action Item and continue to make edits before sharing with others, use one of the following options on the Save menu:
 - a. **Save** saves the Action Item and allows the author to continue to edit.
 - b. **Save/New** saves and closes the Action Item and opens a new Action Item form.
 - c. **Save/Close** saves the Action Item and closes Action Item Edit window.
2. Once saved, the Action Item will be included in the Log View.

Note: Save, and save often when working in Kahua.

Edit an Action Item

1. To edit an Action Item, return to the Action Items app.
2. Click the Action Item **title** in the log to open the record.
3. Click the **Edit** button.
4. Make any applicable changes.
5. Click **Save**.

Assign an Action Item Comment

1. In the Comments section, click the **Insert** button.
2. Select the **Responder**.
3. Enter the **Due Date**.
4. Click the **Mark Active** button. The Action Item must be Marked Active in order to send the comments for the responder to follow up.
5. Once the Action Item is Active, click the **Send Comments** button next to the Comments that you would like to send to the responder.
6. The Action Item Comment will now be sent to the Responder as a Task to follow up.

Assign an Actionable Task

1. In the **Actionable Tasks** section, click the **Insert** button.
2. Select the **Assigned To** user.
3. Enter the **Date Assigned**.
4. Enter the **Subject**.
5. Enter the **Due Date**.
6. Click the **Mark Active** button. The Action Item must be Marked Active in order to send the Actionable Item for the Assigned to user to follow up.
7. Once the Action Item is Active, click the **Assign** button next to the Actionable Tasks that you would like to send to the Assigned To user.
8. The Actionable Tasks will now be sent to the Assigned to User as a Task to follow up.

Recall an Action Item Comment or Actionable Tasks

1. To recall an Action Item Comment or Actionable Task, click the **Recall** button next to the Action Item Comment or Actionable Task. This stops the workflow process and closes any open tasks. Users with open tasks for the Action Item Comment or Actionable Task

will receive a notification the Action Item Comment or Actionable Task has been recalled. The Action Item Comment or Actionable tasks will need to be resubmitted to restart the process.

Submit an Action Item Comment

This activity is typically managed by the following roles: **GSA PM, GSA Staff/SMEs, EXT-CMa, and GC/Design Builder.**

1. The Responder can access the Action Item using one of several different methods:
 - a. Task Notification contained in the email.
 - b. Sign into Kahua, click the task icon, and select the Action Items task.
 - c. Open the project, open the Action Items app and click the Action Item title.
2. Scroll to the Comments section and add any applicable Responder Comments.
3. Click the **Submit** button.

Submit an Actionable Task

This activity is typically managed by the following roles: **GSA PM, GSA Staff/SMEs, EXT-CMa, and GC/Design Builder.**

1. The Assigned to user can access the Action Item using one of several different methods:
 - a. Task Notification contained in the email.
 - b. Sign into Kahua, click the task icon, and select the Action Items task.
 - c. Open the project, open the Action Items app and click the Action Item title.
2. Scroll to the Actionable Tasks section, and add any applicable Action Updates.
3. Click the **Submit** button.

Close an Action Item Comment

This activity is typically managed by the following roles: **GSA PM, GSA Staff/SMEs, EXT-CMa, and GC/Design Builder.**

1. Open the project, open the Action Items app, and click the Action Item title.
2. Scroll to the Comments section and click the **Close** button next to the Action Item Comment.

Close an Actionable Task

This activity is typically managed by the following roles: **GSA PM, GSA Staff/SMEs, EXT-CMa, and GC/Design Builder.**

1. Open the project, open the Action Items app, and click the Action Item title.
2. Scroll to the Actionable Tasks section and click the **Close** button next to the Actionable Task.

Complete an Action Item

This activity is typically managed by the following roles: **GSA-PM or EXT-CMa.**



1. Open the project, open the Action Items app, and click the Action Item title.
2. Click the **Mark Complete** button.
3. The Action Item will now be completed.

Note: Action Items cannot be marked complete until all open comments or actionable tasks are closed.

Resources

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

Related Guidance

[Tasks QRG](#)