Kahua Quick Reference Guide
Design Review

Project Lifecycle Applicability

Execution

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Kahua's Design Review functionality automates the review process from identification of review items to decision and approval using controlled folders, which integrate overnight to the PBS Building Data Repository (BDR) and Enterprise Document Management System (EDMS). Kahua's controlled folders in File Manager are optimized for: multiple revisions of documents, enforced numbering & nomenclature, standardized workflow, and repeatable distribution.

Additionally, the Design Review workflow provides the flexibility for collaboration among internal team members and the ability to assign a coordinator to ensure responses are clear, accurate, and comprehensive before sending for approval or marking complete.

Design Review Workflow Roles

During the design review workflow there are four roles that can be utilized per design review set. The following table outlines the details of what each role has the capability to complete during the review step.

Role	Responsibility
Preliminary Review / SME Reviewers (Complete task in Tasks app)	Preliminary Reviewer(s) receive a task to add markups and comment to a design review set. Preliminary Reviewers can view files for review, add General Comments regarding the overall design review set, add markups and/or review comments on Files for Review, and extract their own text markups from a drawing. The Preliminary Review step can have more than one reviewer assigned, such as multiple Subject Matter Experts (SMEs). Once a preliminary reviewer completes their task, other reviewers will be able to see the markups and/or comments made. They can also have access to close comments. Once all preliminary reviewer(s) completes their task or the preliminary review step is ended prematurely, the design review moves to the next review step.
Primary Review / Lead Reviewers (Complete task in Design Review app)	Primary / Lead Reviewer(s) receive a task to navigate to the design review set to complete the design review. Primary / Lead Reviewer(s) can view files for review, add General Comments regarding the overall design review set, add markups and/or review comments on Files for Review, extract text markups from a drawing, and if necessary, can 'End the Preliminary Review' step to move the workflow along. The Primary / Lead Review step can have more than one reviewer assigned, such as Project Managers or CMas.

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	The Primary / Lead Review step is a first come first serve review step. The first person to complete the review moves the design review to the next review step.
Final Review / Final Reviewer (Complete task in Design Review app)	The Final Reviewer receives a task to navigate to the design review set to complete the design review. The Final Reviewer can view files for review, add General Comments regarding the overall design review set, add markups and/or review comments on Files for Review, extract text markups from a drawing, workflow the design review set and review comments, and complete the design review. Only one reviewer can be assigned, such as the GSA Project Manager or a Design Review Coordinator.
Review Manager(s) (Complete task in Design Review app)	The Review Manager(s) can act as the Primary / Lead Reviewer and the Final Reviewer during a design review set. This includes being able to provide markups and/or review comments, General Comments, extract text markups from a drawing, workflow the design review set and review comments, and complete the design review. There can be more than one Review Manager, such as Project Managers or CMas.
Comment Reviewers (Complete task in Tasks app)	The Comment Reviewers will default as the Responsible for addressing comments when sent for Evaluation.

Part A1: Adding Files to File Manager without Title Block

This action can be executed by the following roles: **GSA-CO PBS Budget**, **GSA-CO Portfolio (CILP)**, **GSA-Design Review Coordinator**, **GSA-Measures Manager**, **GSA-PM/COR**, **GSA-Regional CILP**, **GSA-Regional Manager**, **GSA-Regional PBS Budget**, **GSA-Regional SME**, **EXT-AE**, **EXT-CMa**, **EXT-Customer User**, **EXT-Customer User (Limited)**, **EXT-Lease Broker Contractor**, **EXT-PM**, **Uncleared Contractor**, and **Uncleared Lessor**.

Note: Please review the link GSA Kahua Security Matrix to determine which permission groups can contribute to each controlled folder in File Manager. This information can be found on the "File Manager – Folders" tab in the spreadsheet.

1. Open the appropriate project using **Project Finder** in the launch bar.
2. From the apps launcher, select the **File Manager** app.

3. Select the appropriate **controlled** folder for the type of file to be uploaded. For example, dwg files should be uploaded to the Native Drawings folder. The Design Review process will only work with controlled folders. To learn more about the different folders in File Manager, please refer to the File Manager Quick Reference Guide.
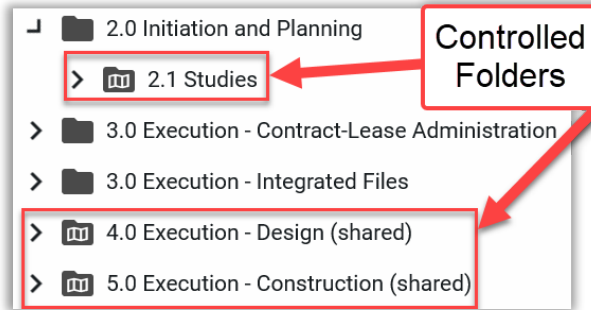

4. Make sure the drop-down list in the top right corner says **Current Folder**. Then click **ADD FILES** in the log actions bar. Select either **FROM COMPUTER** or **FROM GOOGLE DRIVE** (if you enabled Google Drive in your profile settings). Refer to the User Profile Settings Quick Reference Guide for more information on enabling Google Drive uploads.
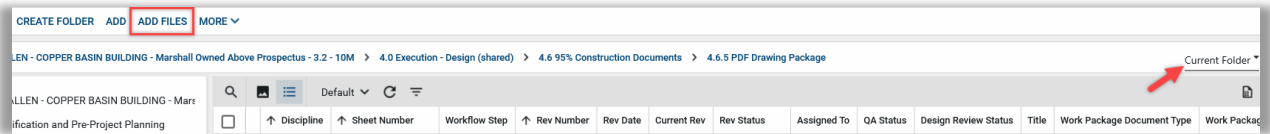
5. Navigate to the appropriate file(s), click **Open**.
6. In the Add Files window, if not using the Split File feature, make sure the checkbox **Keep Source File after Splitting** is checked then click **Continue**.

Note: Controlled folders can split uploaded multi-page and ZIP files with multiple drawings or other file types into individual files. Leave the **Split File** checkbox unchecked if the file needs to be uploaded as-is. For more information about controlled folders, please reference the File Manager Quick Reference Guide.
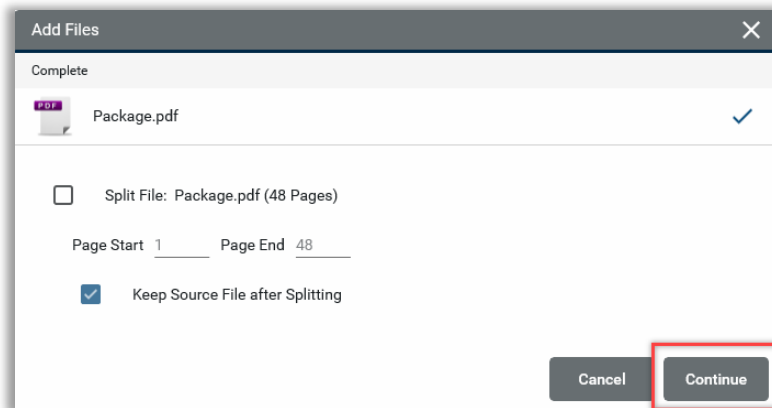
7. In the Add Files window, if not using the Title Block Extraction, select **None** from the Get Document\Revision Info From drop-down list. If applicable, enter in a Batch Name and select a Batch Date. A best practice naming convention for the Batch Name is: Kahua Project Number – Building Name – Set Name/Scope (i.e. 95%CDs).

8. Click **Continue**.

   Note: The Batch Name and Batch Date fields are optional, but they can be used to identify a group of documents or drawings when filtering or creating reports. If using Title Block Extraction, please refer to the section below Part A1.2: Adding Files to File Manager with Title Block Extraction (optional)
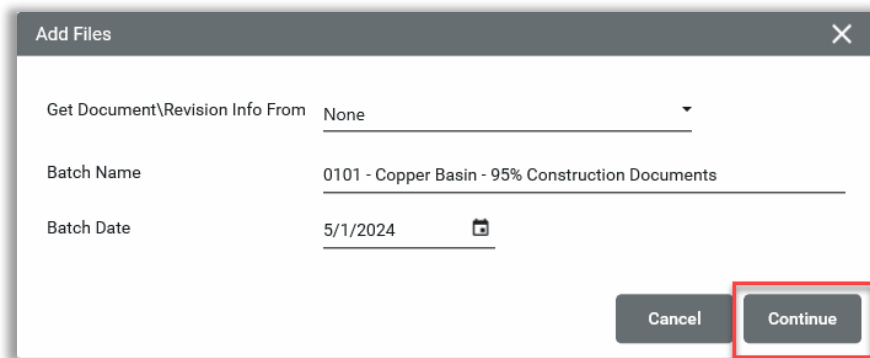
9. In the Add Files window, enter a **Rev Number**. If applicable, enter additional information such as the **Sheet Number**, **Sheet Title**, **Rev Date**, or any **Comments**. When complete, click **Ok**.
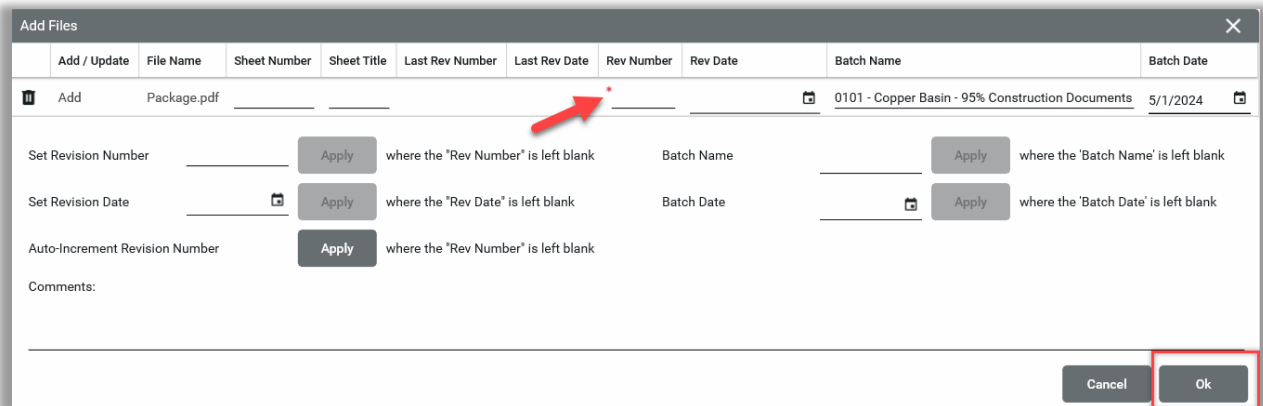
10. When all files associated with the deliverable have been uploaded, notify the Project Manager and any other required users that the files are ready for review. To send a direct notification from Kahua, right click on the primary folder that contains all the deliverable files and select **SEND LINK**.
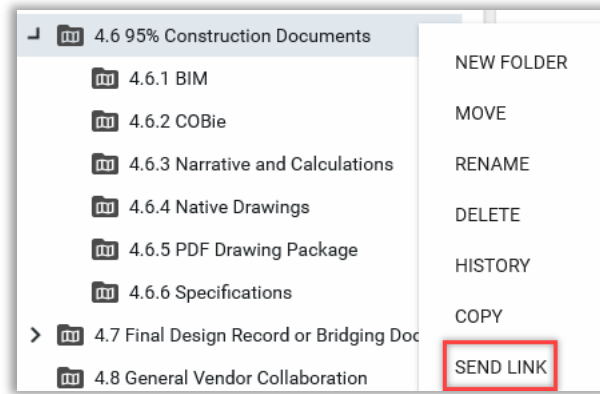
11. The **New Message** window displays. Enter the GSA Project Manager's name in the **To** field, and fill out additional information as necessary.
12. To keep a copy of the message in the project's Communications app, check the **Copy to Communications** box.
13. When complete, click **Send**.
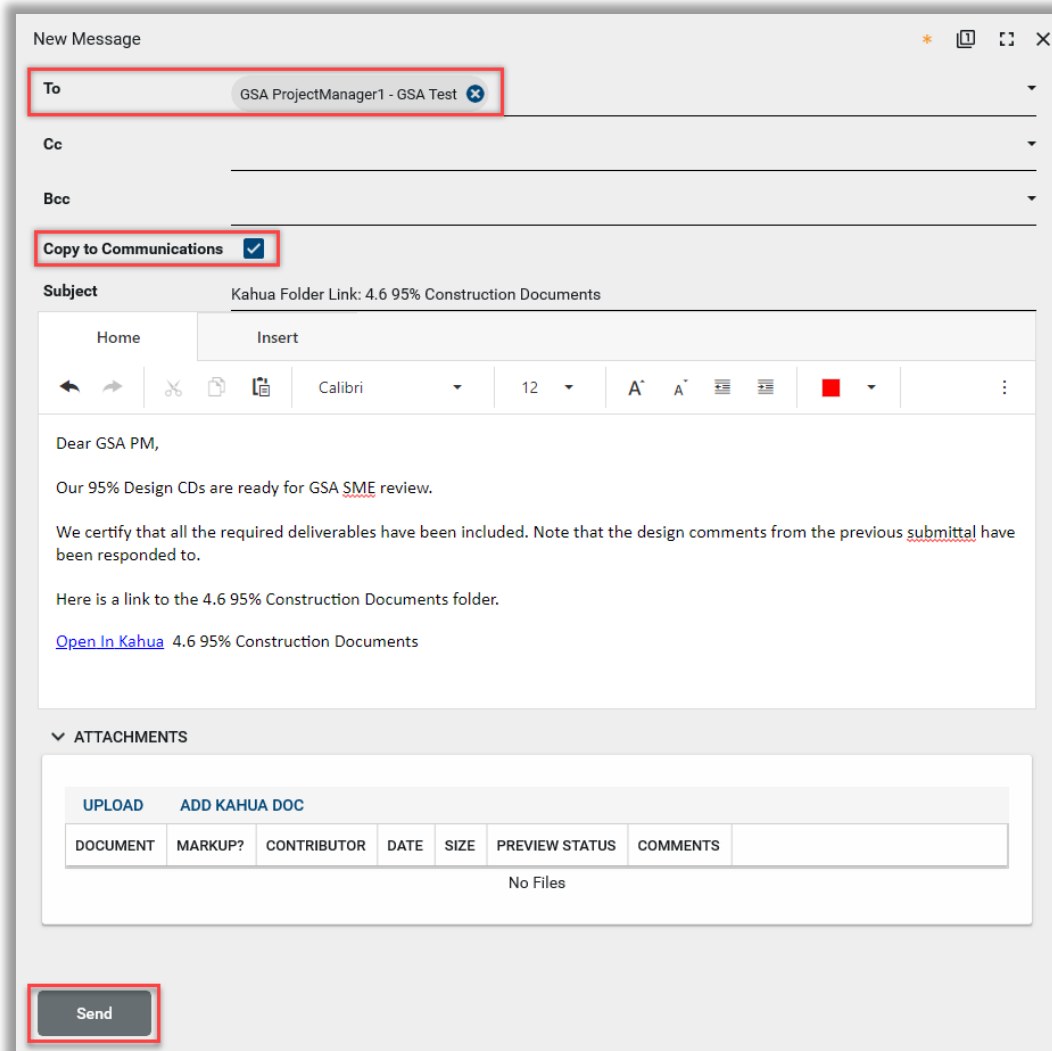
13. Notice the **File Manager Workflow Step** changes to "Draft" and the **File Manager Rev Status** changes to "Uploaded". To proceed to the next step, please see Part A2: Submitting Files for QA Check.

Part A1.2: Adding Files to File Manager with Title Block Extraction (optional)

This action can be executed by the following roles: **GSA-CO PBS Budget**, **GSA-CO Portfolio (CILP)**, **GSA-Design Review Coordinator**, **GSA-Measures Manager**, **GSA-PM/COR**, **GSA-Regional CILP**, **GSA-Regional Manager**, **GSA-Regional PBS Budget**, **GSA-Regional SME**, **EXT-AE**, **EXT-CMa**, **EXT-Customer User**, **EXT-Customer User (Limited)**, **EXT-Lease Broker Contractor**, **EXT-PM**, **Uncleared Contractor**, and **Uncleared Lessor**.

Note: Please review the link GSA Kahua Security Matrix to determine which permission groups can contribute to each controlled folder in File Manager. This information can be found on the "File Manager – Folders" tab in the spreadsheet.

File Manager's title block extraction feature can extract data (i.e. sheet title and sheet number) from a drawing when uploading single sheet drawings of the same size to a project. When using the title block extraction feature, a working folder is created for a user to create a new title block template and confirm the data was extracted correctly from the drawing. This optional feature can also be configured at a project level. To use this feature, the title block must be in the same location on all uploaded same size drawings, and it can only be used on split out or single sheet drawings.

1. Open the appropriate project using **Project Finder** on the launch bar.
2. From the apps launcher, select the **File Manager** app.
3. Select the appropriate **controlled** folder for the type of file to be uploaded. For example, dwg files should be placed in the Native Drawings folder. The Design Review Process will only work with controlled folders. To learn more about the different folders in File Manager, please refer to the [File Manager Quick Reference Guide](#).
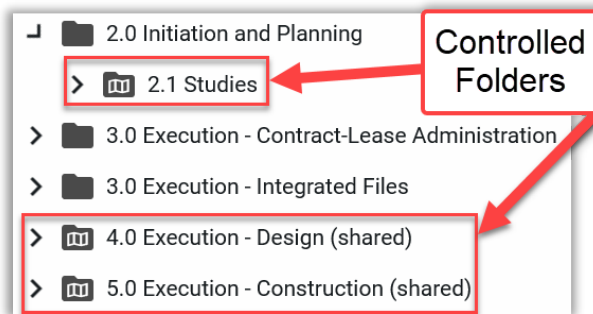

4. Make sure the drop-down list in the top right corner says **Current Folder**. Then click **ADD FILES** in the log actions bar. Select either **FROM COMPUTER** or **FROM GOOGLE DRIVE** if you enabled Google Drive from your profile settings. Refer to the [User Profile Settings Quick Reference Guide](#) for more information on enabling Google Drive uploads.
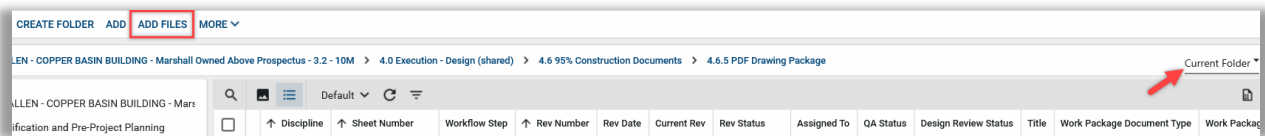
5. Navigate to the appropriate file(s), click **Open**.
6. In the Add Files window, check the box **Split File** and indicate the page numbers that need to be split from the package. To also upload the package with the split files, make sure the checkbox **Keep Source File after Splitting** is checked then click **Continue**.

Note: Controlled folders can split uploaded multi-page and ZIP files with multiple drawings or other file types into individual files. Leave the split file box unchecked if the file needs to be uploaded as-is. For title block extraction, the file(s) will need to be split out or single sheet drawings. For more information about controlled folders, please reference the [File Manager Quick Reference Guide](#).
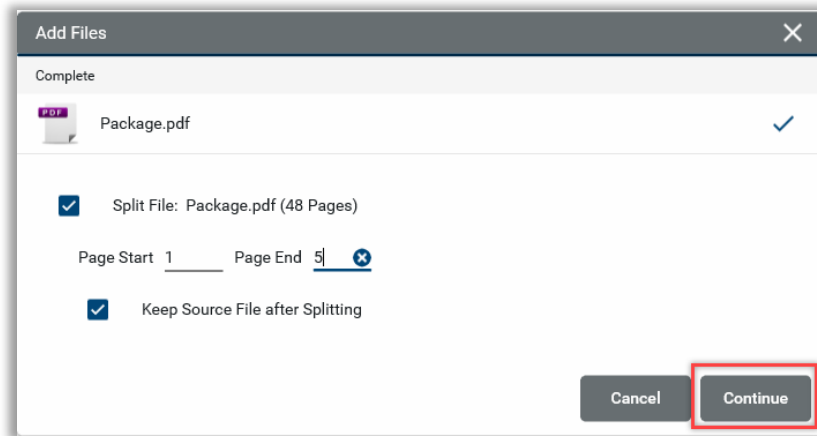
7. In the Add Files window, select or enter the following:
   a. **Get document\Revision Info From**: Title Block using Working Folder
   b. **Title Block Template**: NO TEMPLATE
   c. Working Folder Name defaults to today's date, but it can be edited as needed.
   d. Batch Name and Batch Date are optional and can be entered as needed.
8. Click **Continue** when finished to create a working folder.

Note: The Batch Name and Batch Date are optional, but they can be used to identify a group of documents or drawings when filtering or creating reports.
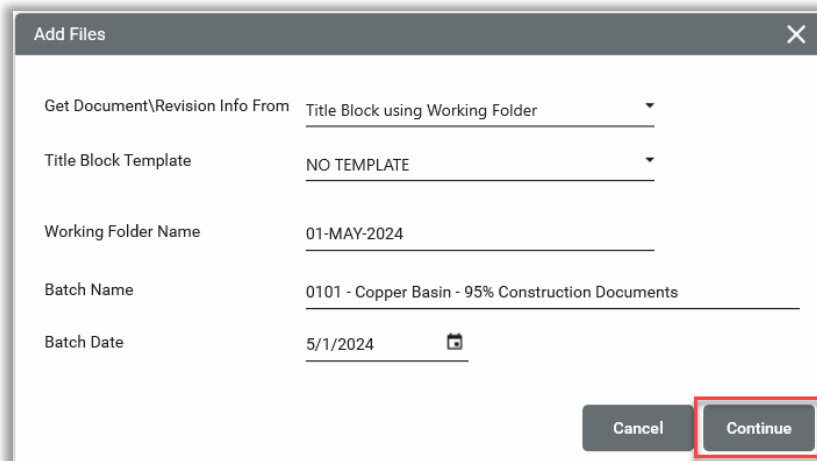
9. From the folder structure, click the newly created working folder, select a file, then click **CREATE TEMPLATE**.
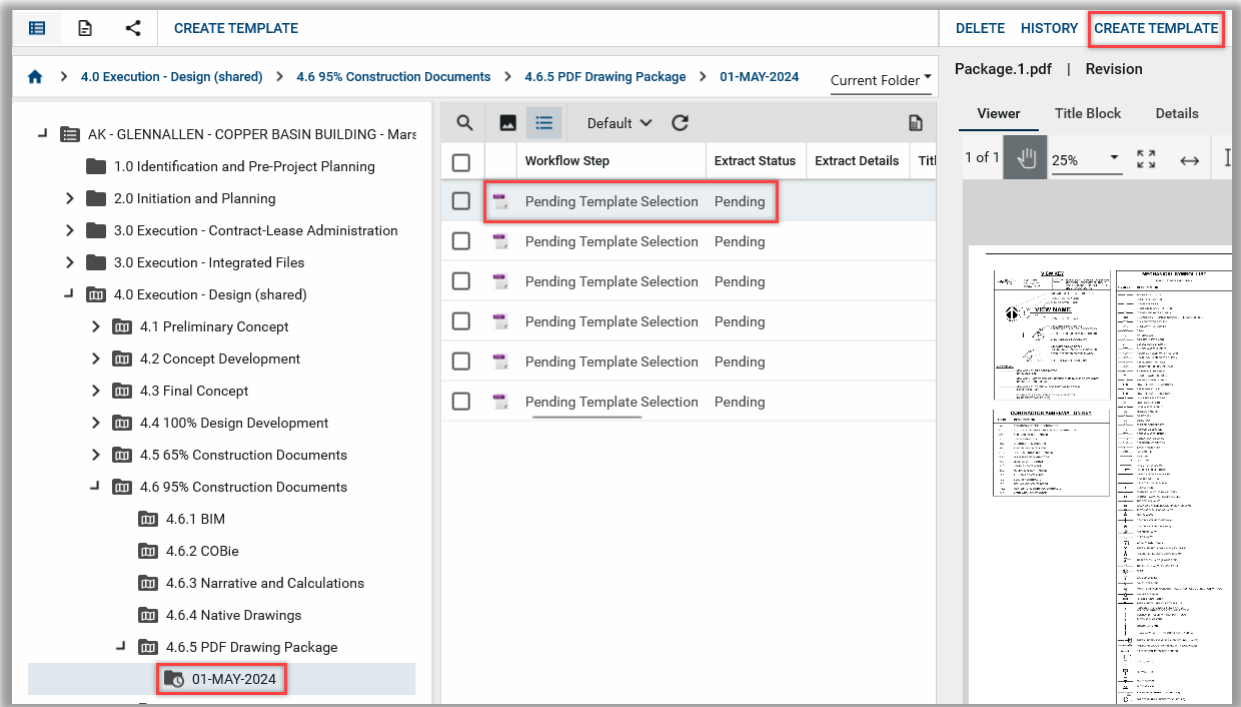
10. In the Text Extraction Template window, use zoom to enlarge the title block section of the drawing and click **ADD**.
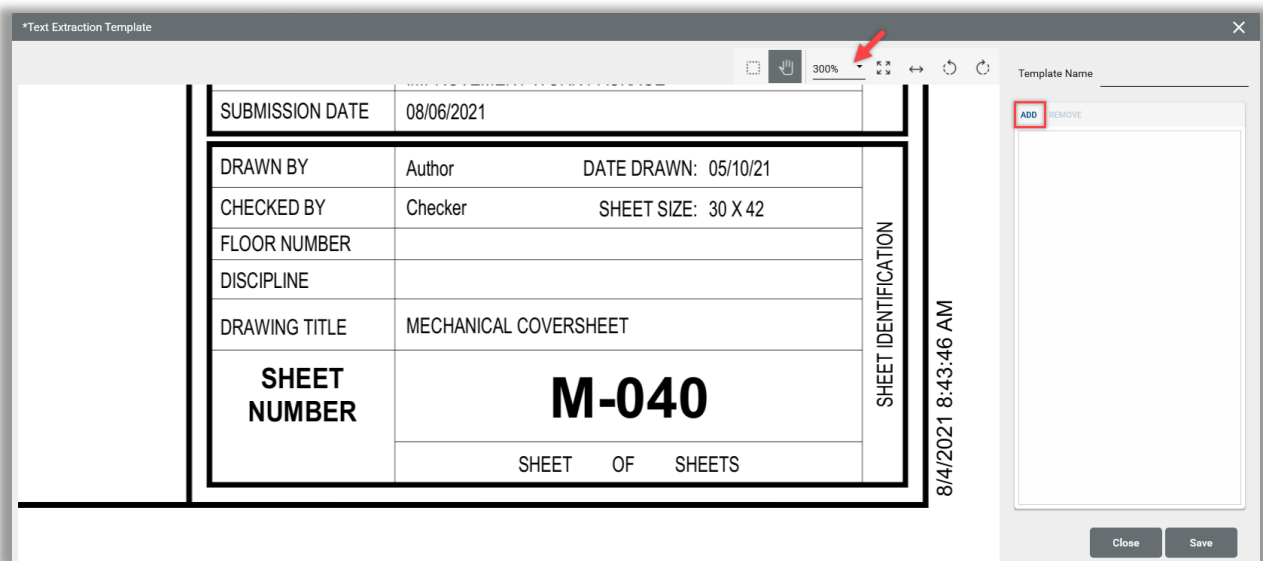

11. Click and drag to create a box around the data you wish to extract then select the appropriate label from the drop-down list for the associated color. When drawing your box, please try to stay within the given title block lines on the drawing.
    a. Label drop-down list options: **Title**, **Sheet Number**, **Rev Number**, **Description**, **Notes**, **Reference Number**, and **Discipline**.
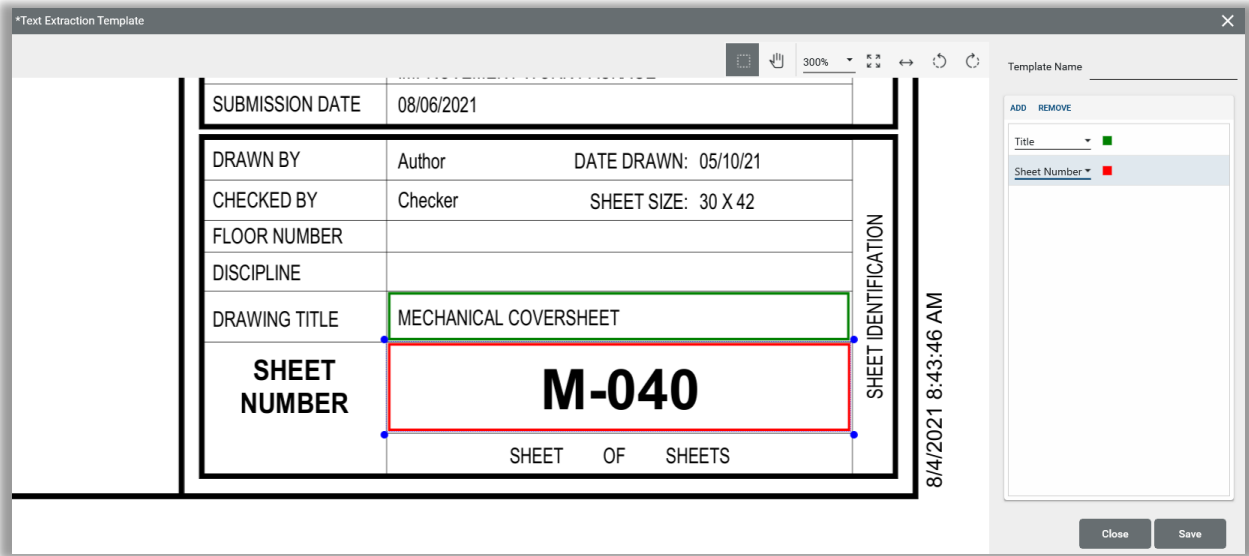
12. When complete, enter a **Template Name** and click **Save**.
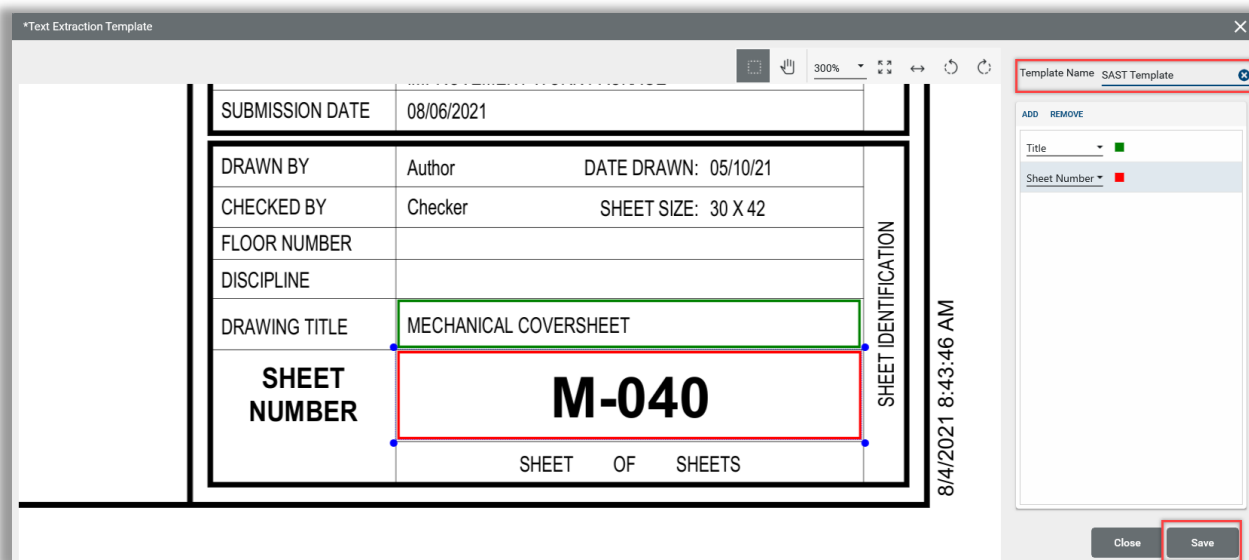

13. Once saved, the **Save** button will be grayed out, and you can click **Close** to close out of the window.


14. To apply and process your new template, select the files in your working folder, and click **RE-PROCESS** from the log actions bar.
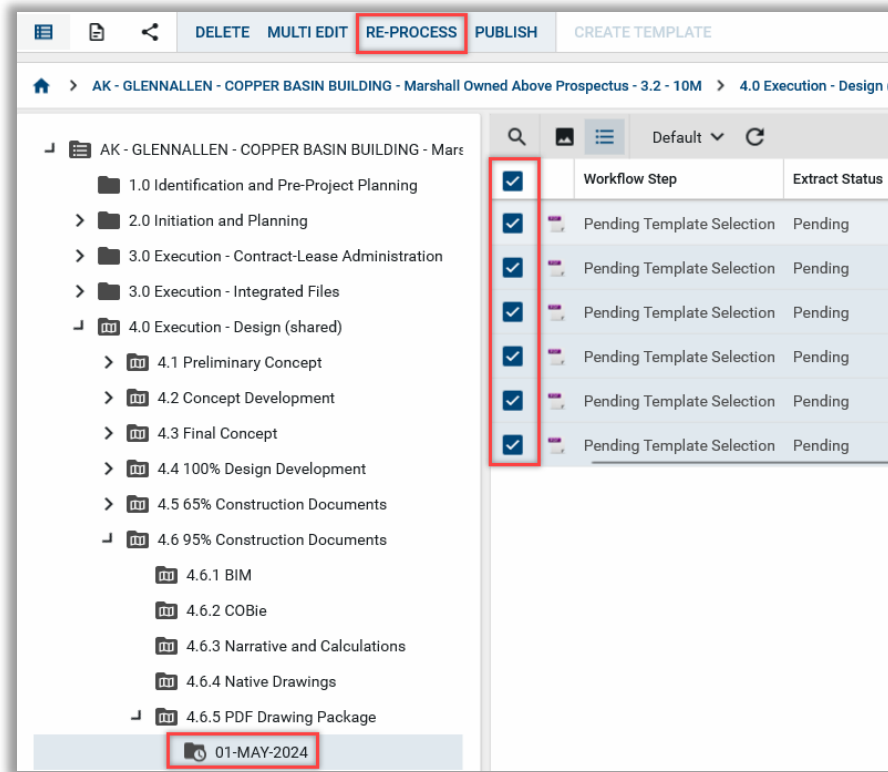
15. In the Re-Process window, select your new template from the **Title Block Template** drop-down list then click **Ok**. This will change the Workflow Step of the files to "Processing".
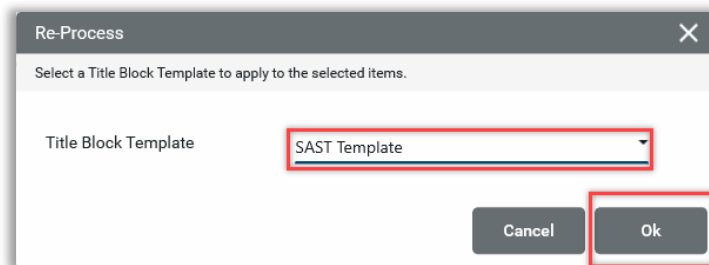
16. If needed, you can click the **Refresh** button to help pull in the extracted data. Notice the Workflow Step changes to "In Review" and the Extract Status says "Complete". Verify the extracted data pulled in accurately for each file. Once complete, select the files and click **PUBLISH** from the log actions bar. This will add the new extracted data back to the original file's location.
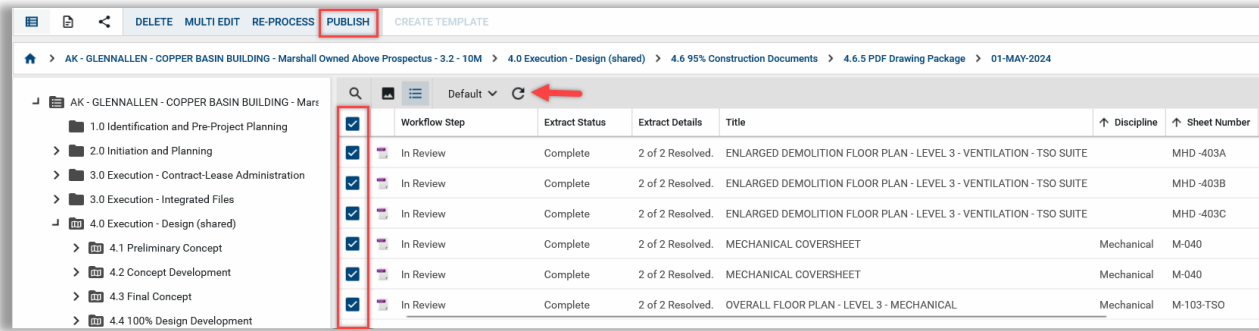
17. In the Publish window, add the required **Rev Number** and any additional information as necessary. Click **Ok** once complete. The Workflow Step will change to "Published".
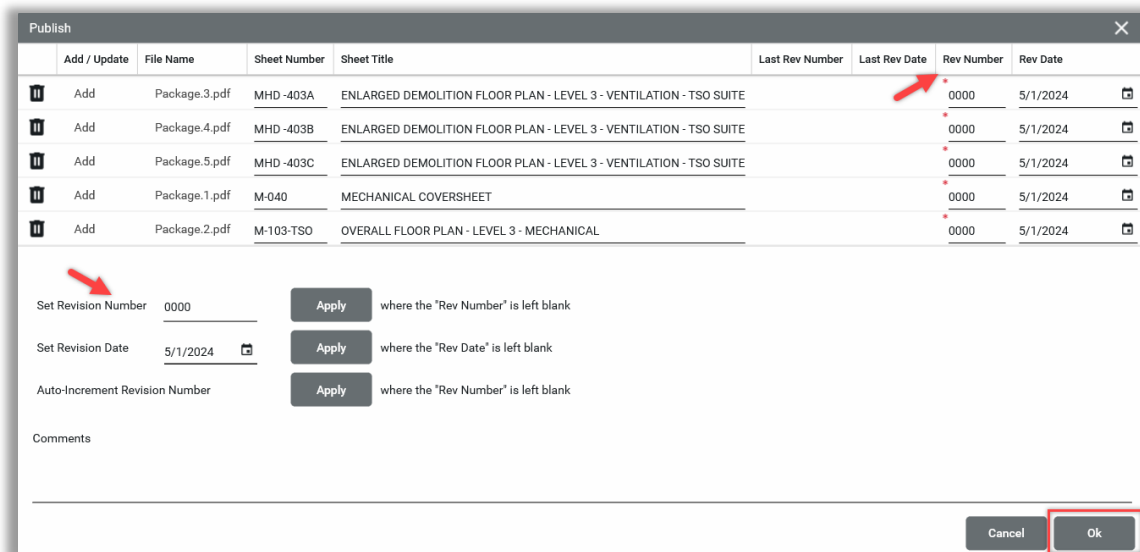
18. Return to the primary folder with your files and proceed with rest of the Design Review process. Please continue with step 10 from Part A1: Adding Files to File Manager without Title Block Extraction.

Part A2: Submitting Files for QA Check

This action can be executed by the following roles: **GSA-CO PBS Budget**, **GSA-CO Portfolio (CILP)**, **GSA-Design Review Coordinator**, **GSA-Measures Manager**, **GSA-PM/COR**, **GSA-Regional CILP**, **GSA-Regional Manager**, **GSA-Regional PBS Budget**, **GSA-Regional SME**, **EXT-AE**, **EXT-CMa**, **EXT-Customer User**, **EXT-Customer User (Limited)**, **EXT-Lease Broker Contractor**, **EXT-PM**, **Uncleared Contractor**, and **Uncleared Lessor**.

1. Navigate to the appropriate project using **Project Finder**. From the apps launcher, open the **File Manager** app, and select the primary folder that contains all the deliverable files.

   Note: If you received a message with a direct link to the file's location in Kahua, click **Open Folder** in the message.

2. With the primary folder selected, use the drop-down menu in the top right to select **All Subfolders (Controlled)**. This will allow a user to see all the files uploaded within the selected controlled folder and show which subfolder the file was uploaded into.
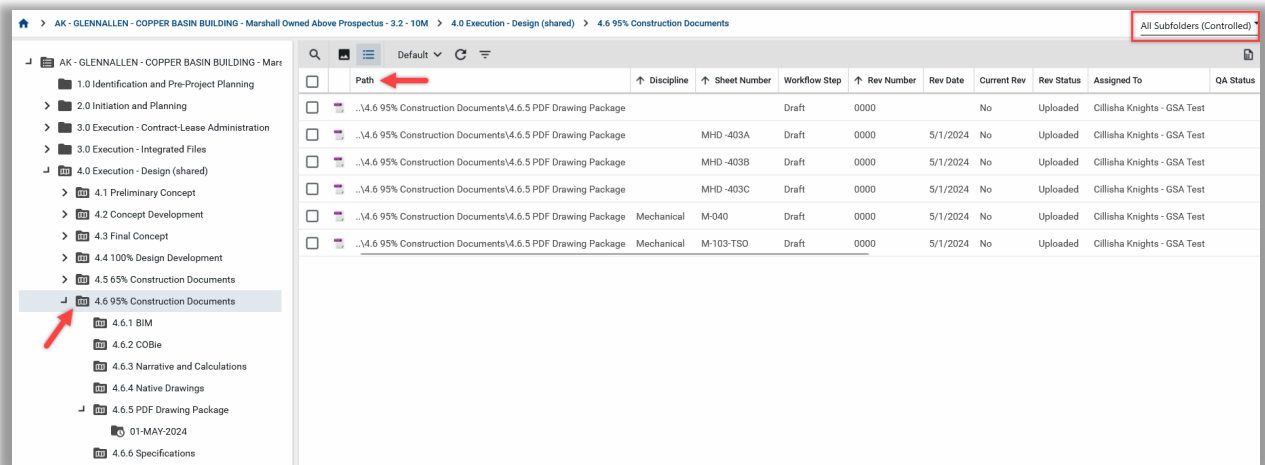
3. If necessary, before submission, review and edit any additional details by editing each file or using multi-edit:
   a. Select the checkbox next to the file(s) to edit.
   b. Click **MULTI EDIT** on the log actions bar.
   c. Add additional information as necessary in the **MULTI EDIT** window.
   d. Click **Save**.
4. Submit the files to the QA Check workflow step by selecting the checkbox next to the appliable file(s) and clicking **Submit** on the log actions bar.
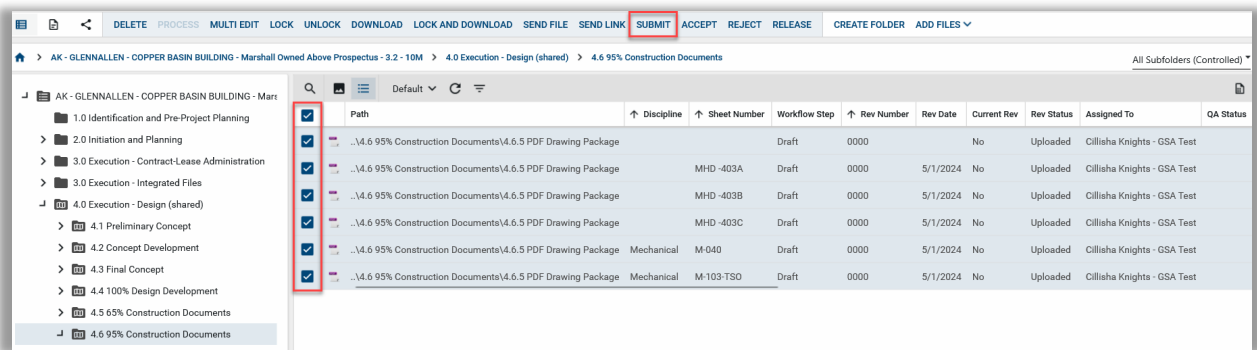
5. If applicable, in the Submit File(s) window, enter in the **Batch Name** and **Batch Date**. A best practice naming convention for the Batch Name is: Kahua Project Number – Building Name – Set Name/Scope (i.e. 95%CDs).
6. Click **Ok**. The files are now in the "QA Check" workflow step where the quality and contents of the files can be checked ensuring the files are ready to be reviewed by Subject Matter Experts (SMEs).
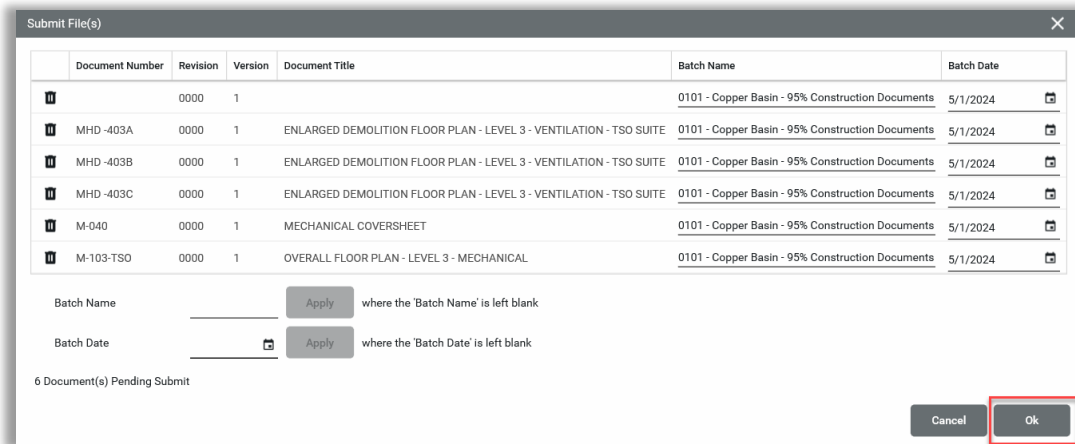
Note: If the user performing the QA Check is different, the **SEND LINK** feature can be used to directly notify the user where the files can be in File Manager. Please refer to step 10 in Part A1: Adding Files to File Manager without Title Block Extraction for further instructions on using the **SEND LINK** feature.

7. Notice the File Manager Workflow Step changes to "QA Check", the File Manager Rev Status changes to "Submitted to QA", and the File Manager QA Status is "Pending Review". To proceed to the next step, please see Part A3: Performing the QA Check.

Part A3: Perform the QA Check

This action can be executed by the following roles: **GSA-CO PBS Budget**, **GSA-CO Portfolio (CILP)**, **GSA-Design Review Coordinator**, **GSA-Measures Manager**, **GSA-PM/COR**, **GSA-Regional CILP**, **GSA-Regional Manager**, **GSA-Regional PBS Budget**, **GSA-Regional SME**, **EXT-AE**, **EXT-CMa**, **EXT-Customer User**, **EXT-Customer User (Limited)**, **EXT-Lease Broker Contractor**, **EXT-PM**, **Uncleared Contractor**, and **Uncleared Lessor**.

The QA Check process allows a user to do a brief review of the uploaded files. The objective is to perform a quality check and ensure the files are ready to be reviewed by SMEs and other reviewers. Some of the quality checks include making sure the file was uploaded to the correct folder in File Manager, the correct version was uploaded, adding in any missing details, and marking the document CUI (controlled unclassified information) as applicable. For more information about how to mark a document CUI, please refer to the File Manager Quick Reference Guide.

1. Navigate to the appropriate project using **Project Finder**. From the apps launcher, open the **File Manager** app, and select the primary folder that contains all the deliverable files.

   Note: If you received a message with a direct link to the file's location in Kahua, click **Open Folder** from the message.

2. With the primary folder selected, use the drop-down menu in the top right to select **All Subfolders (Controlled)**. This will allow a user to see all the uploaded files within the selected controlled folder and show the subfolder where the file was.

3. For the file(s) that pass the QA Check, select the checkbox next to the file(s) and click **ACCEPT** in the log actions bar. Then click **Ok** to confirm. For the file(s) that fail the QA check, select the checkbox next to the file(s) and click **REJECT** in the log actions bar.

Note: When rejecting a file during the QA Check, a **Reason for Rejection** window will appear to enter the reason for rejection and provide the maximum number of calendar days to revise and resubmit the file. This will allow the user who uploaded the file(s) to reupload a new version.
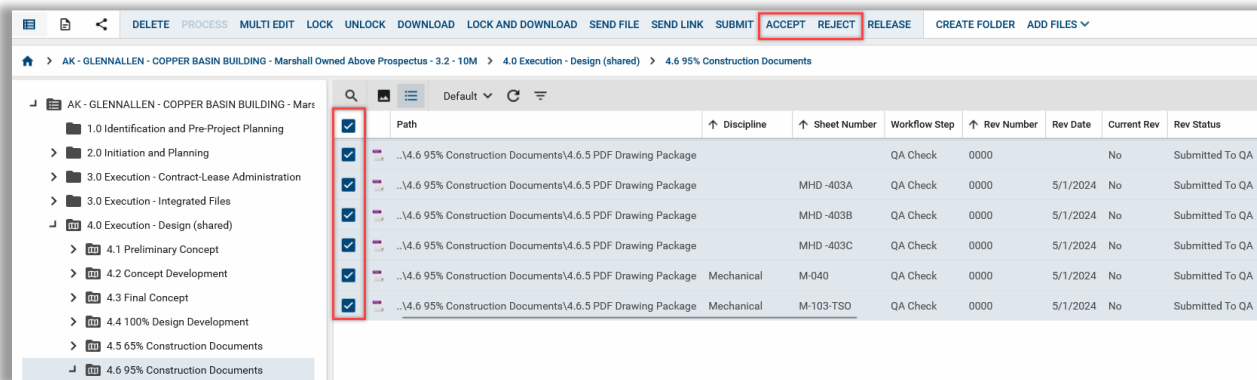
4. Notice the File Manager Rev Status changes to "QA Accepted" or "QA Rejected" and the File Manager QA Status changes to "Accepted" or "Rejected". To proceed to the next step, please see Part A4: Process Files into a Design Review Set.

Note: If the user processing the files into a design review set is different, the **SEND LINK** feature can be used to directly notify the user where the files can be in File Manager. Please refer to step 10 in Part A1: Adding Files to File Manager without Title Block Extraction for further instructions on using the **SEND LINK** feature.
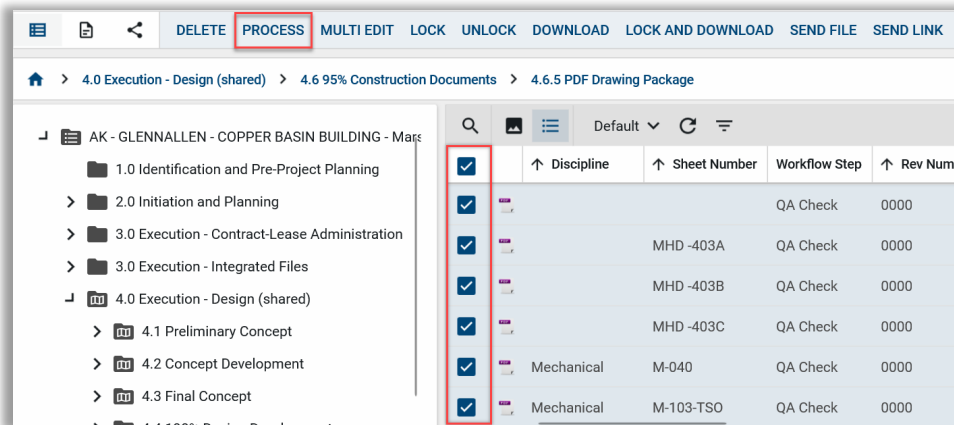
Part A4: Process Files into Design Review Set

This action can be executed by the following roles: **GSA-Design Review Coordinator**, **GSA-PM/COR**, **GSA-Regional Manager**, **EXT-CMa**, and **EXT-PM.**

1. Navigate to the appropriate project using **Project Finder**. From the apps launcher, open the **File Manager** app, and select the primary folder that contains all the deliverable files.

Note: If you received a message with a direct link to the file's location in Kahua, click **Open Folder** from the message.

2. With the primary folder selected, use the drop-down menu in the top right to select **All Subfolders (Controlled)**. This will allow a user to see all the uploaded files within the selected controlled folder and show the subfolder where the file was uploaded.
3. Select the checkbox next to the applicable accepted file(s) that need to be processed in the same design review set. Then click **PROCESS** in the log actions bar.

4. In the Process window, the target application will default to "Design Review Sets". Click **Continue** to process the files into a new design review set. The Design Review application will automatically open to fill out additional details.
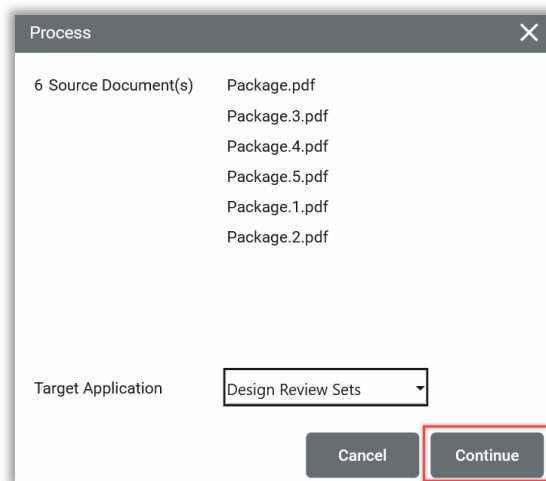
5. If applicable, in the **New Design Review Set** window, select **CUI** or **Non-CUI** in the top right-hand corner of the form.

Details Section

6. The number field will auto-populate once saved.
7. Enter a **Title** as required. A best practice naming convention for the Title includes: Kahua Project Number – Building Name – Set Name/Scope (i.e. 95%CDs).

8. If applicable, select **Review Manager(s)**. Review Manager(s) can be defaulted in the project to always appear in a new design review set. If needed, please contact your Regional Kahua Program Manager for further assistance. For more information on the Review Manager role, please refer to the <u>Design Review Workflow Roles</u> section.

Reviewers Section

Note: Reviewers can be defaulted in the project to always appear in a new design review set. If needed, please contact your Regional Kahua Program Manager for further assistance. For more information about the different reviewer roles, please refer to the <u>Design Review Workflow Roles</u> section.

9. In the **SME Reviewer(s)** field, select the applicable users who need to participate in the Preliminary Review.
10. In the **SME Review Duration** field, enter the number of calendar days for the Preliminary Review period.
    a. Example: If a design review set was submitted for review on 05/01/20xx, and the Review Duration was 7 calendar days, the Review Due Date will be 05/08/20xx.
11. If applicable, in the **Lead Reviewer** field, select the appliable users who need to participate in the Primary Review. This section is optional but can be the CMa or a Project Manager if needed.
12. If appliable, in the **Lead Reviewer Duration** field, enter the number of calendar days for the Primary Review period. This section is only applicable if using a Lead Reviewer.
    a. Example: If a design review set was submitted for review on 05/01/20xx, and the Review Duration was 7 calendar days, the Review Due Date will be 05/08/20xx.
13. In the **Final Reviewer (Review Coordinator)** field, select the applicable user to participate in the Final review. This section can be the Design Review Coordinator in the region or GSA Project Manager.
14. In the **Final Review (Review Coordinator) Duration** field, enter the number of calendar days for the Final Review period.
    a. Example: If a design review set was submitted for review on 05/01/20xx, and the Review Duration was 7 calendar days, the Review Due Date will be 05/08/20xx.
15. If applicable, in the **Comment Reviewers** field, select the applicable user(s) who need to be responsible for responding to the Design Review comments.

Notifications Section

16. In the **Distribution Notifications** field, enter individual users or a distribution list. Users will be notified when the design review is completed with the final review status for each file.

Note: For assistance with creating a distribution list, please see the <u>Distribution Lists Quick Reference Guide</u>.

Files For Review Section

This section shows the files that were processed from File Manager and where reviewers will be providing their markups and review comments.

References Section

17. If applicable, attach any supporting documentation to the **References** section using the **UPLOAD** or **ADD KAHUA DOC** buttons. Files uploaded in this section are not part of the official review.
18. Once all updates have been made to the record, click **Save**.
19. In File Manager, notice the File Manager Workflow Step changes to "Design Review", the File Manager Rev Status changes to "Issued for Design Review", and the Design Review Status changes to "Pending Design Review".
20. Review the information for accuracy then click **Submit for Review** to send the design review set to the SME Reviewers. The status of the design review set changes from "New" to "In Review" and the SME Review Due Date is auto populated.

Note: If any changes need to be made after the design review set is submitted, such as updating the dates or removing a reviewer, the set can be **recalled** while assigned to the SME Reviewers. Any markups and comments saved before the recall will remain.

Part B1: SME Reviewer Performs Preliminary Review

This action can be executed by the following roles: **Anyone with a Kahua account listed as a SME Reviewer in the Design Review Set**.

Note: All SME Reviewers will receive a task notification and email to review the design review set at the same time. Once a SME completes their Preliminary Review task, the next reviewer group (Lead or Final Reviewer) will receive an email and message notification. If a reviewer's task is not completed, Kahua will send a reminder email and message notification to the reviewer one day before the review due date. To learn more about Tasks and the different ways you can open tasks, please make sure to review the Tasks Application Quick Reference Guide.

The table below shows what action buttons are available during the Preliminary Review step.

Action Button	Action Button Definition	Available for SME Reviewer(s)	Available for Lead and/or Final Reviewers	Available for Review Manager(s)
Save / Close	Save work and return to finish later.	x		
Submit	Finished with review and submit markups / comments.	x		
Cancel Design Review	Additional documents need to be added to the set and no longer want to continue with the set. Once canceled, it cannot be undone.		x	x
Recall	If any changes need to be made to the dates or to remove a reviewer. Any markups and comments		x	x

	saved before the recall will remain.			
End Preliminary Review	Once all necessary SME Reviewers have reviewed and the design review set is ready to move on to the next reviewer group. Once clicked, the SME Reviewers will no longer be able to provide their review.		x	x
Add Preliminary or Primary Reviewers	If additional SME or Lead Reviewers need to be added to the Design Review Set. Please refer to the Part B2: Review Manager Adding Additional Reviewer(s) for more information.			x

1. Navigate to the **Tasks** application in the launch bar and open the **Design Review task**.

Note: If you received a message with a direct link to your Kahua task, click **link** in the message.

2. If needed, the **View Source Record** button may be used to view the original design review record. However, only users with access to the Design Review Set app will see the information within the app. The **View Selector** buttons at the bottom of the page may be used to expand the record's view.
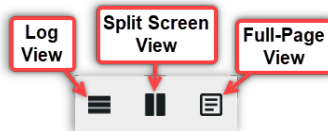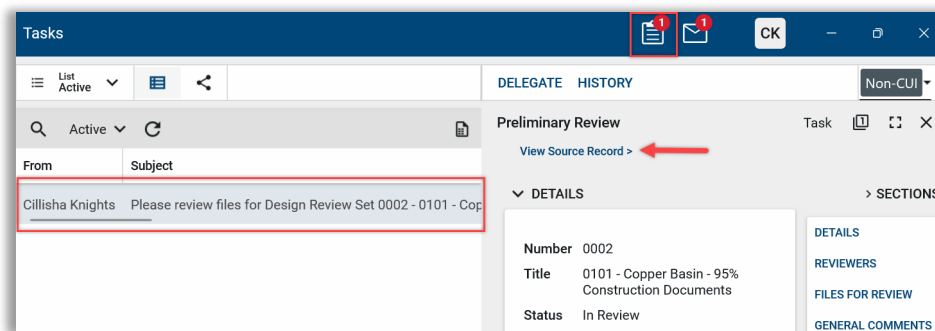
Files for Review Section – Adding Markups

3. In the Files for Review section of the design review task, to **View**, **Download**, or **Markup**

a document, click the three dots to the right of a file. If providing a markup, click **Markup**.

4. If adding markups, please refer to the Markup Tools section in the document for an overview of the tools. To ensure markups are successfully saved, click the **Save** icon in the top right corner. Once saved, the icon will change from blue to grey. To view a compiled list of markups made by all reviewers on the file, click the **View** button then **Show Markup Panel**. To close the window after saving, click the 'x' in the top right corner.

5. Once all markups have been made to the files, the text markups can be extracted from the documents. Navigate to the Files for Review section of the design review task, click the **flyout button** next to the file to open the **Preliminary Review > Files for Review** window. In the Reviewer Comments section, click **EXTRACT / IMPORT MARKUPS**. Make sure the markups that need to be extracted are selected then click **Ok**.
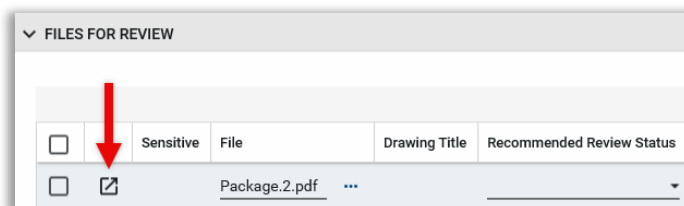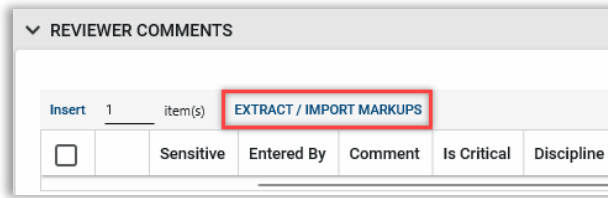
6. Repeat this step for each file with markups. The **Next** and **Previous** arrows can be used. SME Reviewers will only be allowed to extract their own markups, and it will be added to the Reviewer Comments section.
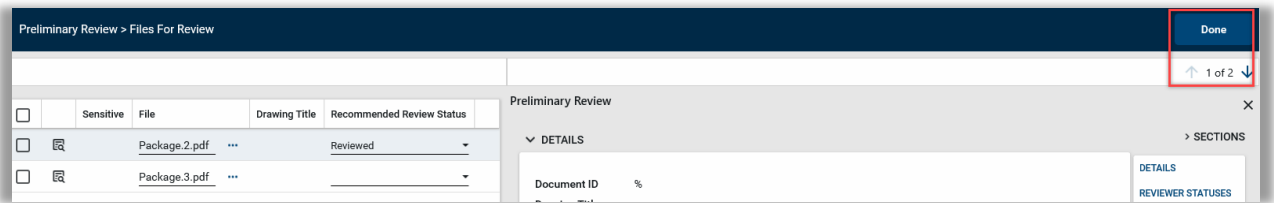
File for Review Section – Adding Reviewer Comments

7. To add Reviewer Comments, in the Files for Review section of the design review task, click the **flyout button** next to a file to open the **Preliminary Review > Files for Review** window.
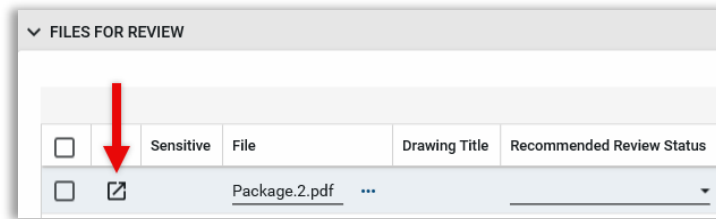
8. In the Reviewer Comments section, click **Insert** to add comments and additional information as applicable for the file.
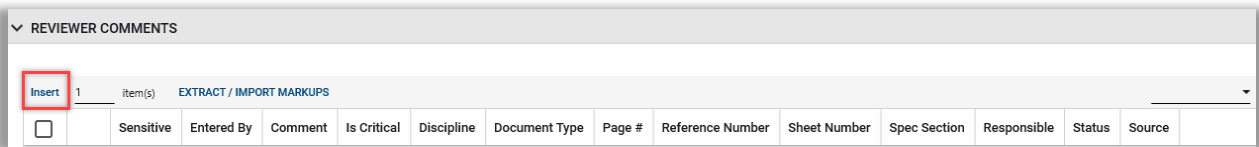
9. Repeat this step for each file that needs Reviewer Comments. The **Next** and **Previous** arrows can be used. When complete, click **Done** in the top-right corner.
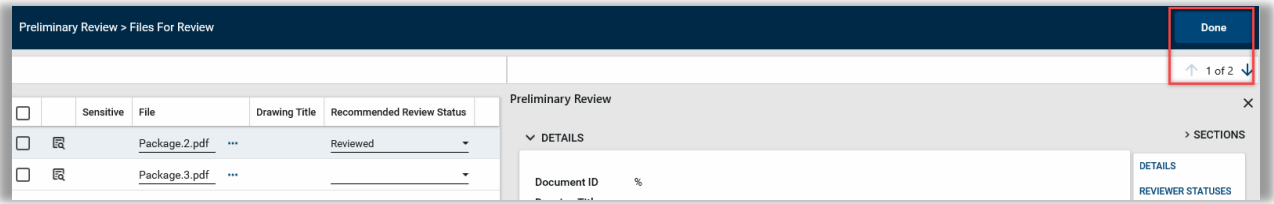
Files for Review Section – Adding Recommended Review Status

10. In the Files for Review section, select a **Recommended Review Status** from the drop-down list for each file. The **Copy To All** and **Copy To Selected** buttons can also be used.
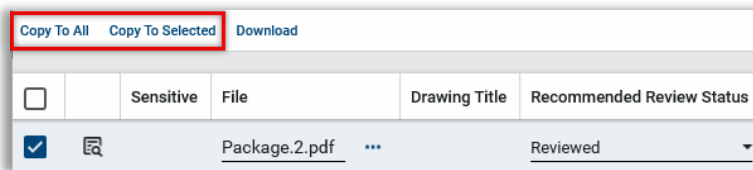
Note: The Recommended Review Status can also be selected from the Reviewer Statuses section of the **Preliminary Review > Files For Review** window.
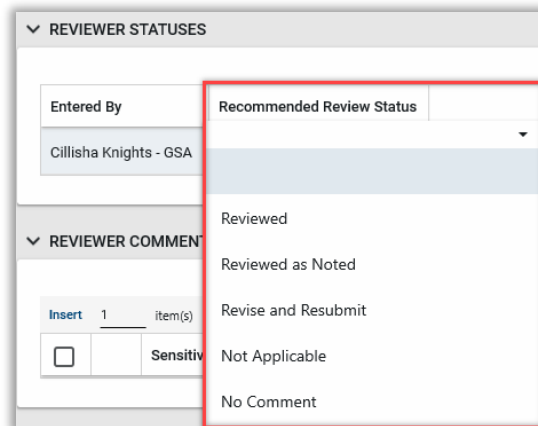
General Comments Section

Note: General Comments are only visible in the Design Review app. They are not transferred back to the File Manager app. General Comments will appear in the Design Review Comments sub-app.

11. If applicable, click **Insert** to enter a General Comment and additional information as needed for the overall design review set.
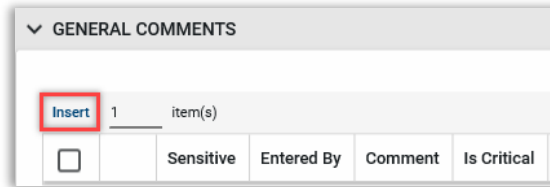
References Section

12. If applicable, attach any supporting documentation to the **References** section using the **UPLOAD** or **ADD KAHUA DOC** buttons. Files uploaded in this section are not part of the official review.
11. Click **Save / Close** to save the data and return to the task later or click **Submit** to complete the Preliminary Review task.

Part B2: Review Manager Adding Additional Reviewer(s)

This action can be executed by the following roles: **GSA-Design Review Coordinator**, **GSA-PM/COR**, **GSA-Regional Manager**, **EXT-PM**, **EXT-CMa**, and **EXT-CMa (Limited)**.

Note: If needed, Review Managers can add additional SME Reviewers and Lead Reviewers while a Design Review Set is in review. New reviewers will receive a task notification and email to review the design review set. If any changes need to be made to the dates or to remove a reviewer, the set can be **recalled** while assigned to the SME Reviewers. Any markups and comments saved before the recall will remain.

1. Navigate to the appropriate project using **Project Finder**. From the apps launcher, open the **Design Review > Review Sets** app.
2. Click on the appropriate design review set that needs additional reviewers.
3. At the bottom of the screen, click **Add Preliminary Reviewers**. If additional Primary Reviewers need to be added, click arrow pointing down and choose **Add Additional Primary Reviewers.** Add the additional reviewers as necessary.
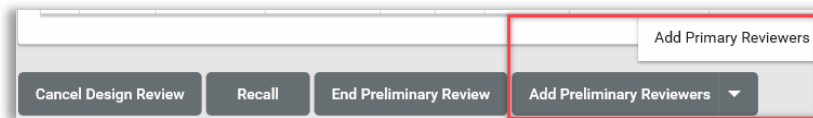
Part B3: Lead Reviewer or Review Manager Performs Primary Review (optional)

This action can be executed by the following roles: **GSA-Design Review Coordinator**, **GSA-PM/COR**, **GSA-Regional Manager**, **EXT-PM**, **EXT-CMa**, and **EXT-CMa (Limited)**.

The table below shows what action buttons are available during the Primary Review step.

Action Button	Action Button Definition	Available for Lead Reviewer(s)	Available for Final Reviewer	Available for Review Manager(s)
Save / Close	Save work and return to finish later.	x		x
Send to Next Reviewer	Finished with review and submit markups / comments.	x		x
Cancel Design Review	Additional documents need to be added to the set and no longer want to continue with the set. Once canceled, it cannot be uncanceled.	x	x	x
End Primary Review	Once all necessary Lead Reviewers have reviewed and the design review set is ready to move on to the next reviewer group. Once clicked, the Lead Reviewers will no longer be able to provide their review.		x	x
Add Primary Reviewers	If additional Lead Reviewers need to be added to the Design Review Set. Please refer to the Part B2: Review Manager Adding Additional Reviewer(s) for more information.			x

1. Navigate to the **Tasks** application in the launch bar and open the **Design Review task**.

   Note: If you received a message with a direct link to your Kahua task, click **link** in the message.

2. Click **View Source Record** in the task to open the Design Review Set sub-app.
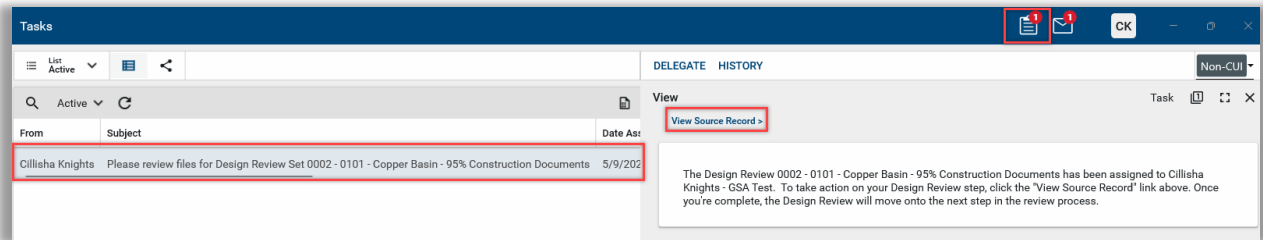
3. In the Design Review Set, click **Edit** in log actions bar.

The View Selector buttons at the bottom of the page may be used to expand the record's view.

Notifications Section

4. In the **Distribution Notifications** field, enter individual users or a distribution list. Users will be notified when the design review is completed with the final review status for each file.
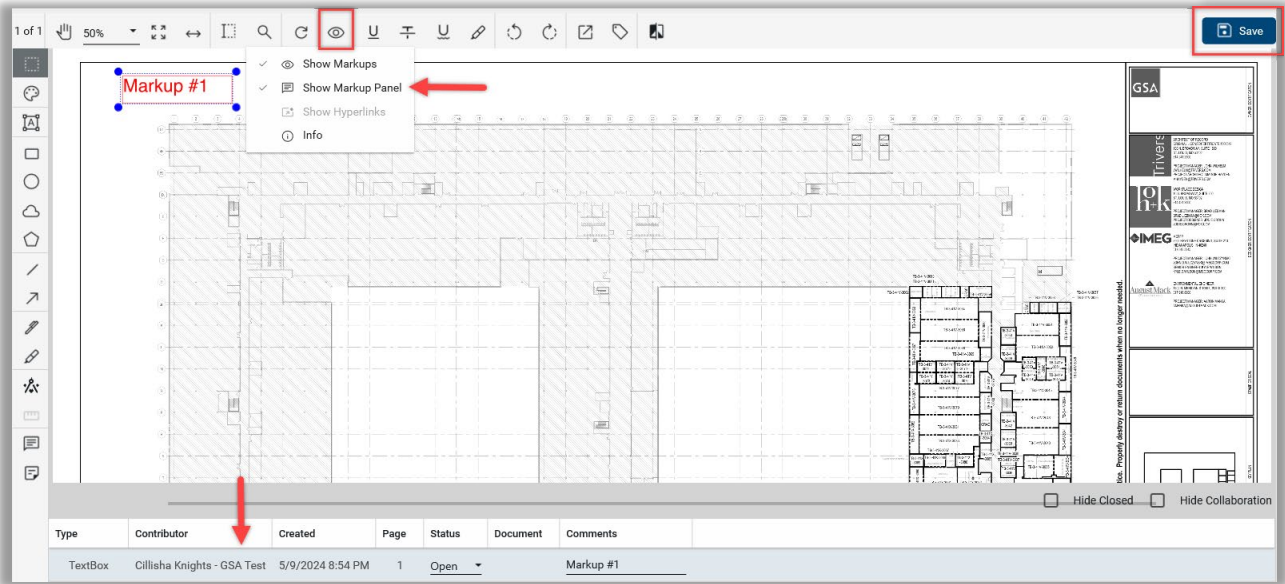
Note: For assistance with creating a distribution list, please see the Distribution Lists Quick Reference Guide.
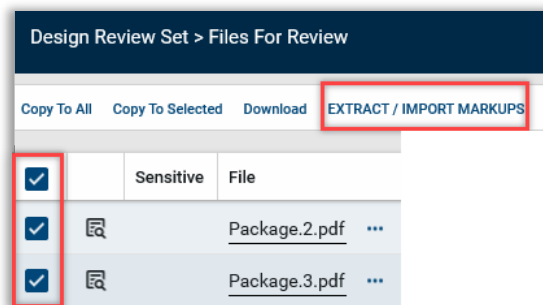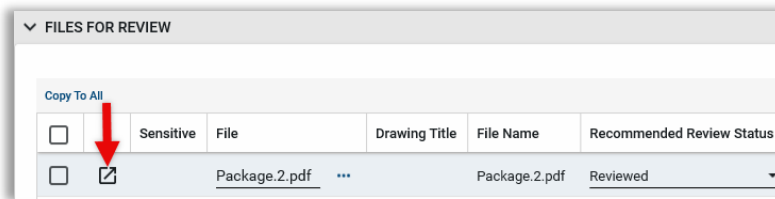
Files for Review Section – Adding Markups

5. While in edit mode in the Files for Review section of the design review set, to **View**, **Download**, or **Markup** a document, click the three dots to the right of a file. If providing a markup, click **Markup**.

6. If adding markups, please refer to the Markup Tools section in the document for an overview of the tools. To ensure markups are successfully saved, click the **Save** icon in the top right corner. Once saved, the icon will change from blue to grey. To view a compiled list of markups made by all reviewers on the file, click the **View** button then **Show Markup Panel**. To close the window after saving, click the 'x' in the top right corner.
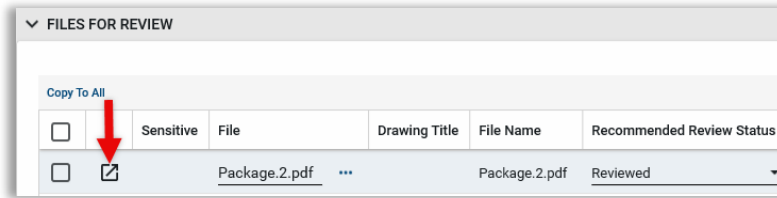
7. Once all markups have been made to the files, the text markups can be extracted from the documents. Navigate to the Files for Review section of the design review task, click the **flyout button** next to a file to open the **Design Review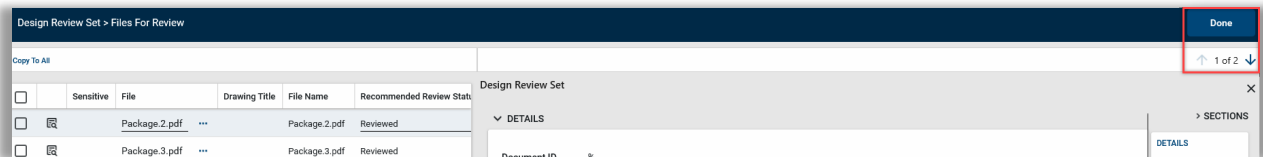 Set > Files For Review** window. In the left windowpane, select all the files and click **EXTRACT / IMPORT MARKUPS**. Make sure the markups that need to be extracted are selected then click **Ok**.

8. Lead Reviewers and Review Managers can extract markups made by all reviewers, and it will be added to the Reviewer Comments section. If markup was already extracted, it will not create a duplicate.

File for Review Section – Adding Reviewer Comments

9. To add Reviewer Comments while in edit mode, in the Files for Review section of the design review set, click the **flyout button** next to a file to open the **Design Review Set > Files For Review** window.

10. In the Reviewer Comments section, click **Insert** to add comments and additional information as applicable for the file.

Note: Users listed as **Comment Reviewers** on the Design Review Set will auto populate under the **Responsible** column but can be changed if needed.

11. Repeat this step for each file that needs reviewer comments. The **Next** and **Previous** arrows can be used. When complete, click **Done** in the top-right corner.

Files for Review Section – Adding Recommended Review Status

12. While in edit mode, in the Files for Review section or Design Review Set > Files For Review window, select a **Recommended Review Status** from the drop-down list for each file. The **Copy To All** and **Copy To Selected** buttons can also be used.
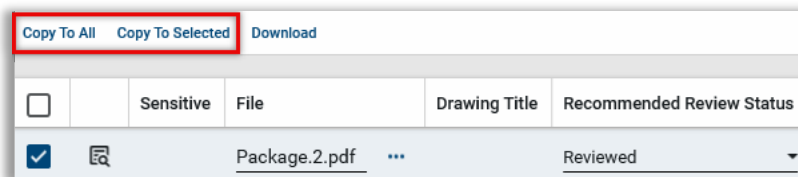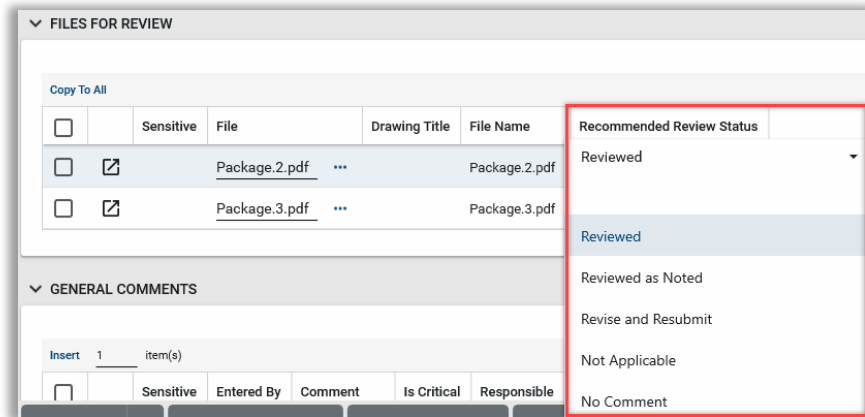
Note: The Lead Reviewer and Review Manager can see the recommended review status for each file made by the SME Reviewers in the Reviewer Recommendations section of the **Design Review Set > Files For Review** window.

General Comments Section

Note: General Comments are only visible in the Design Review app. They are not transferred back to the File Manager app. General Comments will appear in the Design Review Comments sub-app.

13. If applicable, click **Insert** to enter a General Comment and additional information as needed for the overall design review set.

References Section

14. If applicable, attach any supporting documentation to the **References** section using the **UPLOAD** or **ADD KAHUA DOC** buttons. Files uploaded in this section are not part of the official review.
15. Click **Save / Close** to save the data and return to the task later or **Send to Next Reviewer** to complete the Primary Review task and move forward to the Final Reviewer.

Part B4: Final Reviewer or Review Manager Performs Final Review

This action can be executed by the following roles: **GSA-Design Review Coordinator**, **GSA-PM/COR**, **GSA-Regional Manager**, **EXT-PM**, **EXT-CMa**, and **EXT-CMa (Limited)**.
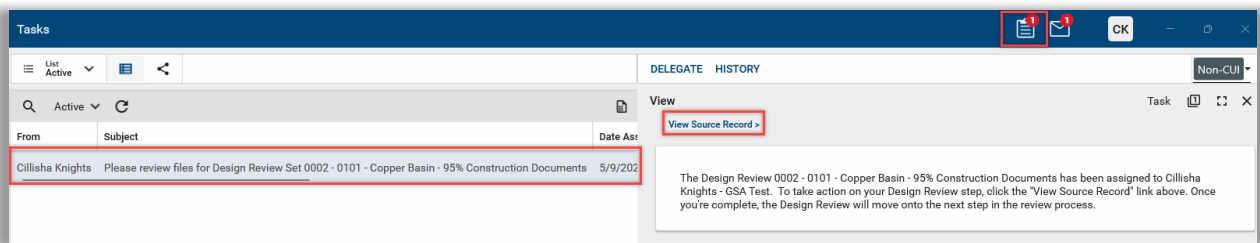
The table below shows what action buttons are available during the Final Review step.

Action Button	Action Button Definition	Available for Final Reviewer	Available for Review Manager(s)
Save / Close	Save work and return to finish later.	x	x
Cancel Design Review	Additional documents need to be added to the set and no longer want to continue with the set. Once canceled, it cannot be uncanceled.	x	x
Complete Review	Finished with the entire design review set. Once completed, it cannot be undone.	x	x

1. Navigate to the **Tasks** application in the launch bar and open the **Design Review task**.

   Note: If you received a message with a direct link to your Kahua task, click **link** in the message.
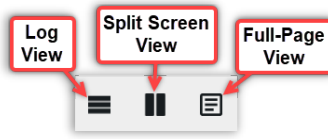
2. Click **View Source Record** in the task to open the Design Review Set sub-app.

3. Click **Edit** in the log actions bar.

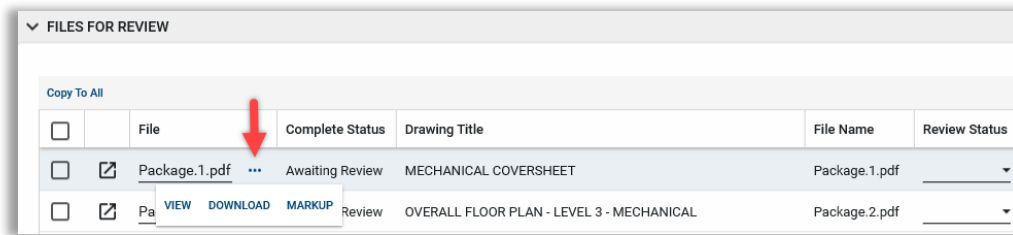The View Selector buttons at the bottom of the page may be used to expand the record's view.

Notifications Section

4. In the **Distribution Notifications** field, enter individual users or a distribution list. Users will be notified when the design review is completed with the final review status for each file.
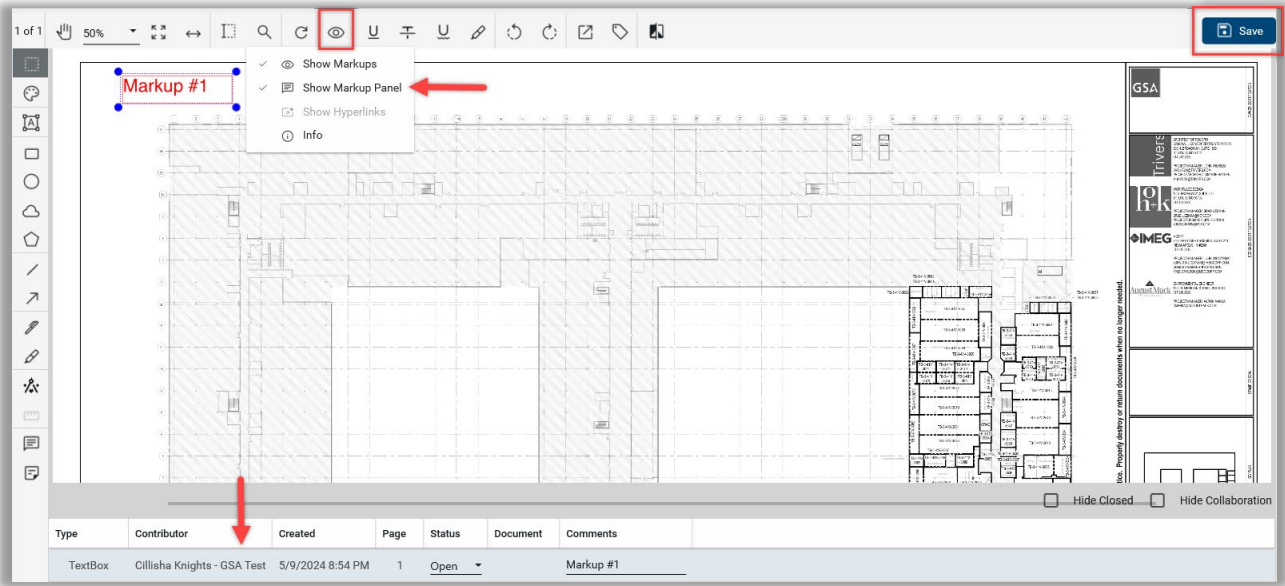
Note: For assistance with creating a distribution list, please see the Distribution Lists Quick Reference Guide.

Files for Review Section – Adding Markups

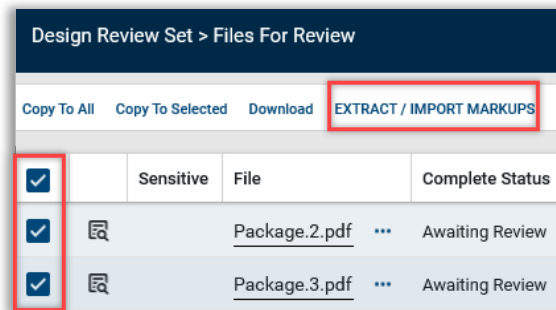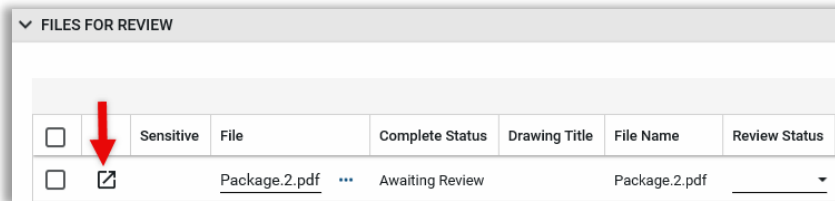5. While in edit mode in the Files for Review section of the design review set, to **View**, **Download**, or **Markup** a document, click the three dots to the right of a file. If providing a markup, click **Markup**.

6. If adding markups, please refer to the Markup Tools section in this QRG. To ensure markups are successfully saved, click the **Save** icon in the top right corner. Once saved, the icon will change from blue to grey. To view a compiled list of markups made by all reviewers on the file, click the **View** button then **Show Markup Panel.** To close the window after saving, click the 'x' in the top right corner.

7. Once all markups have been made to the files, the text markups can be extracted from the documents. Navigate to the Files for Review section of the design review task, click the **flyout button** next to a file to open the **Design Review Set > Files For Review** window. In the left windowpane, select all the files and click **EXTRACT / IMPORT MARKUPS**. Make sure the markups that need to be extracted are selected then click **Ok**.
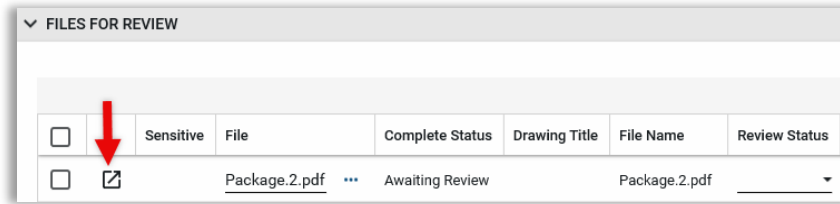

8. Final Reviewers and Review Managers can extract markups made by all reviewers, and it will be added to the Reviewer Comments section. If markup was already extracted, it will not create a duplicate.
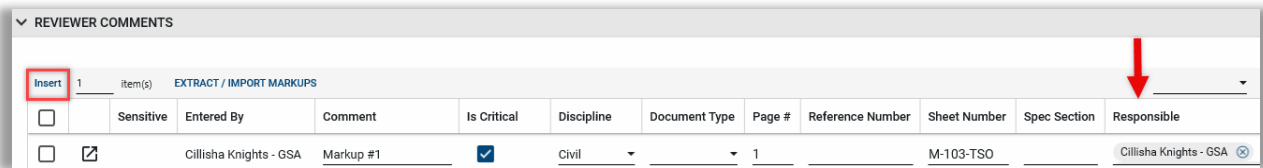
File for Review Section – Adding Reviewer Comments

9. To add Reviewer Comments while in edit mode, in the Files for Review section of the design review set, click the **flyout button** next to a file to open the **Design Review Set > Files For Review** window.
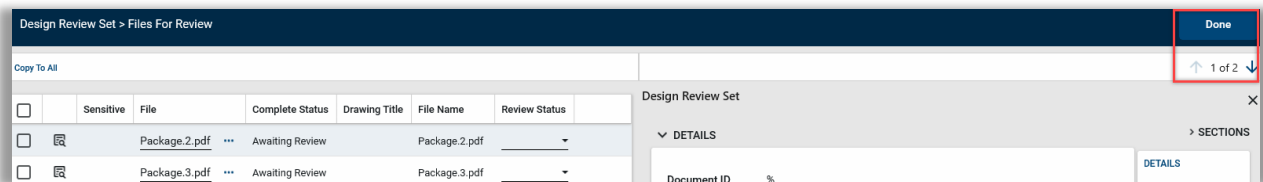

10. In the Reviewer Comments section, click **Insert** to add comments and additional information as applicable for the file.

Note: Users listed as **Comment Reviewers** on the Design Review Set will auto populate under the **Responsible** column but can be changed if needed.


11. Repeat this step for each file that needs reviewer comments. The **Next** and **Previous** arrows can be used. When complete, click **Done** in the top-right corner.

Files for Review Section – Adding Review Status

12. While in edit mode, in the Files for Review section or Design Review Set > Files For Review window, select a **Review Status** from the drop-down list for each file. The **Copy To All** and **Copy To Selected** buttons can also be used.
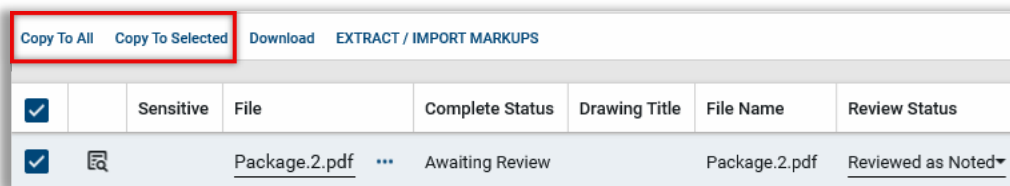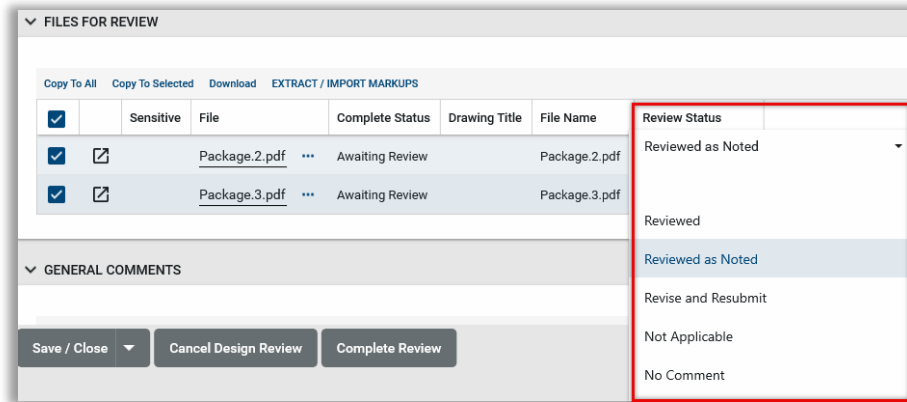
Note: The Final Reviewer and Review Manager can see the recommended review status for each file made by the SME Reviewers and Lead Reviewers in the Reviewer Recommendations section of the **Design Review Set > Files For Review** window.

General Comments Section

Note: General Comments are only visible in the Design Review app. They are not transferred back to the File Manager app. General Comments will appear in the Design Review Comments sub-app.

13. If applicable, click **Insert** to enter a General Comment and additional information as needed for the overall design review set.

References Section

14. If applicable, attach any supporting documentation to the **References** section using the **UPLOAD** or **ADD KAHUA DOC** buttons. Files uploaded in this section are not part of the official review.
15. Click **Save / Close** to save the data and return to the task later.
16. Proceed to the Design Review Comments sub-app for evaluation and to ensure all necessary design review comments are present.

Part C: Manage Design Review Comments

This action can be executed by the following roles: **GSA-Design Review Coordinator**, **GSA-PM/COR**, **GSA-Regional Manager**, **EXT-PM**, **EXT-CMa**, and **EXT-CMa (Limited)**.
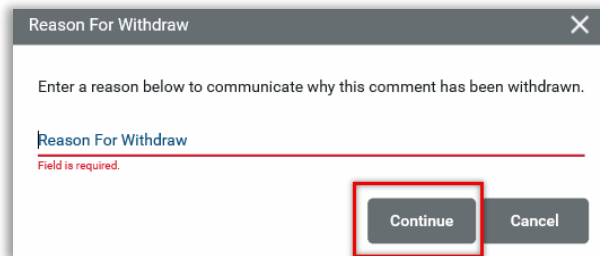
Withdraw a Design Review Comment

After the Preliminary Review is complete, the Lead Reviewers, Final Reviewer / Design Review Coordinator, and Review Manager(s) can withdraw a design review comment if it's invalid or redundant.

1. Navigate to the appropriate project using **Project Finder**. From the apps launcher, open the **Design Review > Review Comments** app. Adjust your log view as needed.
2. Click on the review comment that needs to be withdrawn and ensure the **Viewer** toggle switch is turned off.
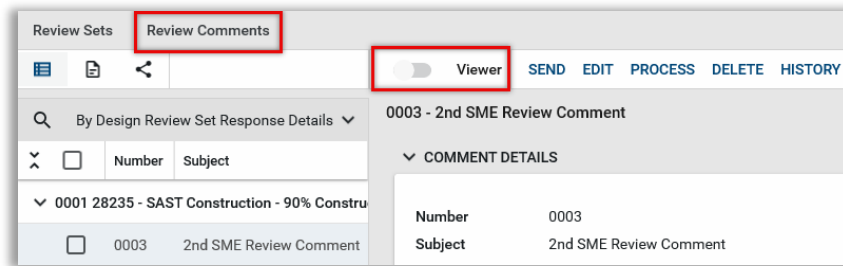
3. At the bottom of the screen, click **Withdraw** and enter a reason for the withdraw. Click **Continue**.
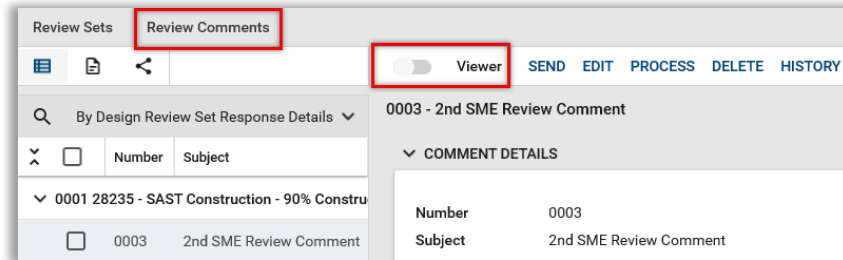

4. The workflow status of the review comment will change to 'Withdraw' and the reason for the withdraw is in the Comment Details section. If needed, the Lead Reviewers, Final Reviewer / Design Review Coordinator, and Review Manager(s) can also **Reopen** the withdrawn design review comment by clicking on the comment.

Close a Design Review Comment

After the Preliminary Review is complete, the Lead Reviewers, Final Reviewer / Design Review Coordinator, and Review Manager(s) can close a design review comment if it can be answered internally.

5. Navigate to the appropriate project using **Project Finder**. From the apps launcher, open the **Design Review > Review Comments** app. Adjust your log view as needed.
6. Click on the review comment that needs to be withdrawn and ensure the **Viewer** toggle switch is turned off.

7. At the bottom of the screen, click **Close** and enter a reason for closing the comment. Click **Continue**.
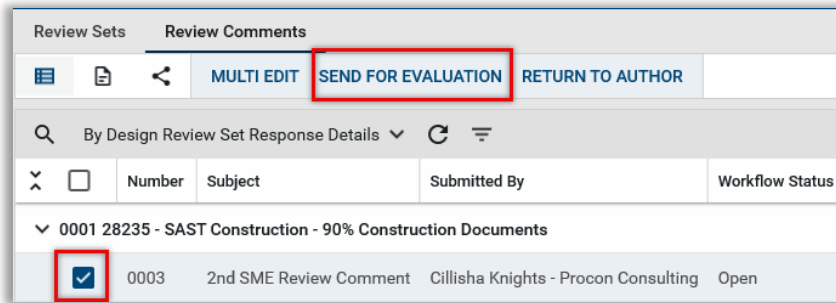

8. The workflow status of the review comment will change to 'Complete' and the reason for closing the comment is in the Comment Details section. If needed, the Lead Reviewers, Final Reviewer / Design Review Coordinator, and Review Manager(s) can also **Reopen** the completed design review comment by clicking on the comment.

Send a Design Review Comment for Evaluation

After the Preliminary Review is complete, the Lead Reviewers, Final Reviewer / Design Review Coordinator, and Review Manager(s) can send a design review comment for evaluation or a response. The review comment is sent to the individual(s) listed under the **Responsible** column or as the **Comment Reviewers** in the design review set.

9. Navigate to the appropriate project using **Project Finder**. From the apps launcher, open the **Design Review > Review Comments** app. Adjust your log view as needed.
10. Use the checkboxes to select the review comment(s) that need to be sent for evaluation. Click **SEND FOR EVALUATION** in the log actions bar then click **Close**.
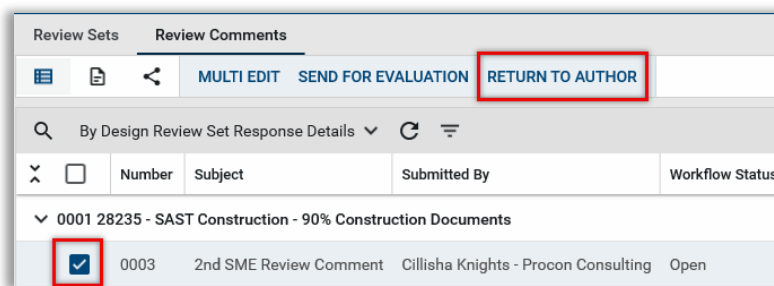
11. The workflow status of the review comment will change to 'Evaluation', the 'Assigned To' field will auto-populate, and a task notification is sent to the listed **Responsible** of the review comment. For details on how to respond to the task notification, please refer to Part D: Respond to Design Review Comments.

12. If needed, the Lead Reviewers, Final Reviewer / Design Review Coordinator, and Review Manager(s) can also **Recall** or **Close** the design review comment by clicking on the comment.

Return Design Review Comment to Author

After the Preliminary Review is complete, the Lead Reviewers, Final Reviewer / Design Review Coordinator, and Review Manager(s) can return a design review comment to the Author (SME or Preliminary Reviewer) if further clarification is needed. The author of the review comment is listed under the **Submitted By** column.

13. Navigate to the appropriate project using **Project Finder**. From the apps launcher, open the **Design Review > Review Comments** app. Adjust your log view as needed.

14. Use the checkboxes to select the review comment(s) that need to be returned to the author. Click **RETURN TO AUTHOR** in the log actions bar.

15. Enter a reason for returning the review comment to the author then click **Continue** and **Close**.

16. The workflow status of the review comment will change to 'Returned', the 'Assigned To' field will auto-populate, and the reason for the return is sent as a task notification to the author of the comment. For details on how to respond to the task notification, please refer to Part D: Respond to Design Review Comments.
17. If needed, the Lead Reviewers, Final Reviewer / Design Review Coordinator, and Review Manager(s) can also **Recall** or **Close** the design review comment by clicking on the comment.

Part D: Respond to Design Review Comments

This action can be executed by the following roles: **Anyone with a Kahua account**

Respond to Review Comment for Evaluation as Responsible or Comment Reviewer

When a review comment is sent for evaluation, the assigned responsible or comment reviewers receives a task notification from Kahua to respond to a review comment. Once responded to, the author or SME that created the review comment, will have the ability to backcheck the response and close the review comment.

1. Navigate to the **Tasks** application in the launch bar and open the **Design Review task**.
2. Review the Comment Details and Comment Classification sections before providing an **Evaluation Response**.
   a. If applicable, select an **Evaluation Status** from the drop-down list, enter an **Evaluation Response**, and/or select the **Impact**.
3. Once complete, click **Submit for Backcheck**. The author or SME of the review comment will receive a task notification to close out the review comment or send it back for another evaluation.

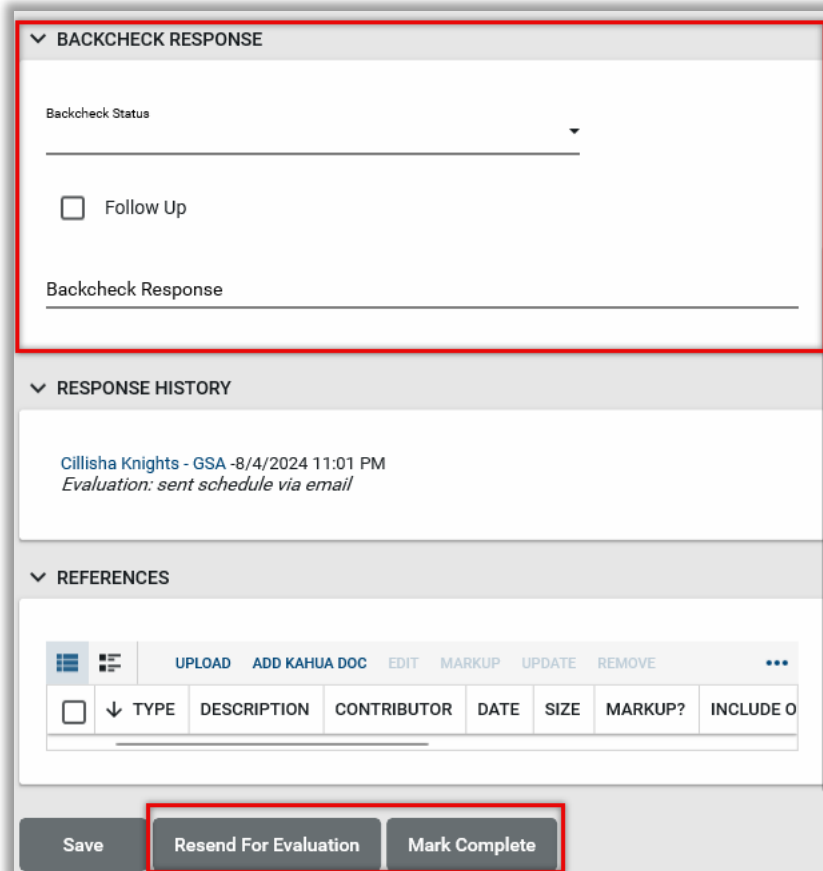## Respond to Review Comment as the Author / SME / Preliminary Reviewer

When a review comment is sent back to the author for a backcheck response or for clarification of the review comment, a task notification from Kahua is sent.

4. Navigate to the **Tasks** application in the launch bar and open the **Design Review task**.

Backcheck Response for Review Comment

a. If responding to a review comment for a backcheck response, the workflow status of the review comment will be 'Backcheck'.

a. Review the Comment Details, Comment Classification, and Current Evaluation sections before providing a **Backcheck Response**. If needed, the author can return to the Design Review Set or use File Manager to view and download the

documents for reference.

b. The **Response History** will keep a log of the back-and-forth response communication.

c. If the listed Responsible or Comment Reviewers need to reevaluate the review comment, click **Resend For Evaluation** to send the review comment back for evaluation. The workflow status of the review comment will change to 'Evaluation' and sent back to the listed Responsible or Comment Reviewers.

d. If the review comment has been addressed, click **Mark Complete**. The workflow status of the review comment will change to 'Complete'.

Return Review Comment for Clarification

b. If responding to a review comment to provide clarification or additional details, the workflow status of the review comment will be 'Returned'.

c. Review the Return Reason before updating the **Comment Details** and **Comment Classification** as necessary. If needed, the author can return to the Design Review Set or use File Manager to view and download the documents for reference.

d. When complete, click **Return**. The workflow status of the review comment will change to 'Open' for the Lead Reviewers, Final Reviewer / Design Review Coordinator, and Review Manager(s) to further manage.
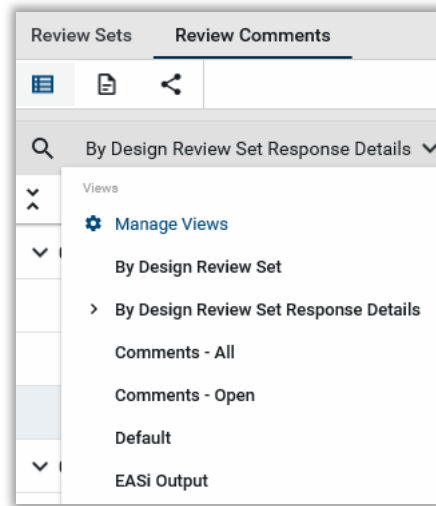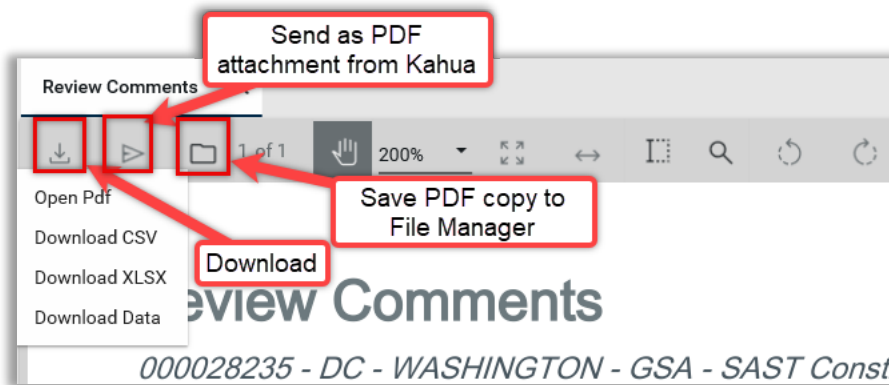
Part E: Download and Send Design Review Comments Log

This action can be executed by the following roles: **GSA-Design Review Coordinator**, **GSA-PM/COR**, **GSA-Regional Manager**, **GSA-National SME**, **GSA-Regional SME**, **EXT-AE**, **EXT-PM**, **EXT-CMa**, **EXT-CMa (Limited)**, **EXT-Customer User**, and **EXT-Customer User (Limited)**

1. Navigate to the appropriate project using **Project Finder**. From the apps launcher, open the **Design Review > Review Comments** app. Adjust your log view as needed before downloading or sending the review comments log. For more information on how to create a log view, please refer to the Log Views Quick Reference Guide.

2. To **Download**, **Send**, or **Save** the review comments log, click the **Print** icon in the top-right corner.


Part F: Complete a Design Review Set

This action can be executed by the following roles: **GSA-Design Review Coordinator**, **GSA-PM/COR**, **GSA-Regional Manager**, **EXT-PM**, **EXT-CMa**, and **EXT-CMa (Limited)**.

The assigned Final Reviewer, Design Review Coordinator, or Review Manager(s) can mark a design review set as complete. Once marked as complete, it cannot be undone.

1. Navigate to the appropriate project using **Project Finder**. From the apps launcher, open the **Design Review > Review Sets** app. Adjust your log view as needed.
2. Once all review comments pertaining to the open design review set have been

addressed and marked complete, click on the design review set and click **Complete Review**. Once a design review set is complete, it cannot be undone.
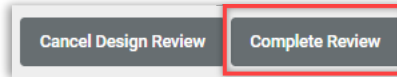

3. In the **Markups and Comments** window, select an option from the drop-down list. If **Copy all Markups and Comments** is selected, all marks and comments associated with a file will automatically be copied back into File Manager. Then click **Continue** and **Close**.
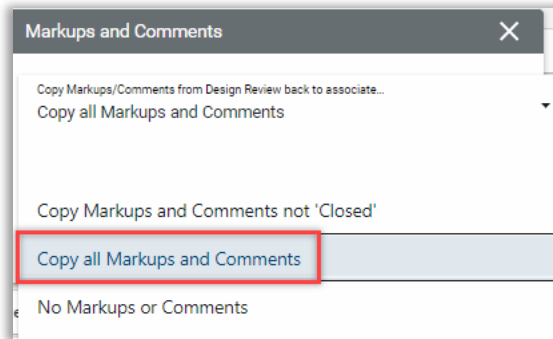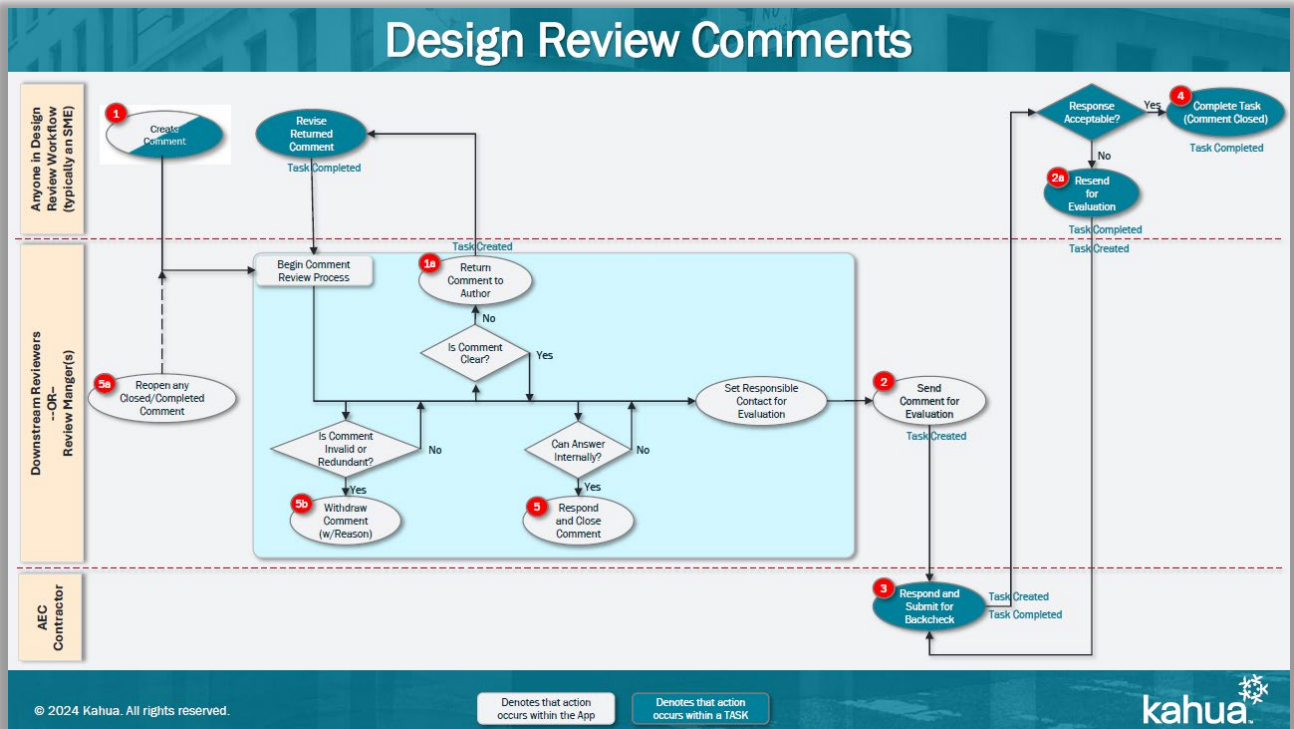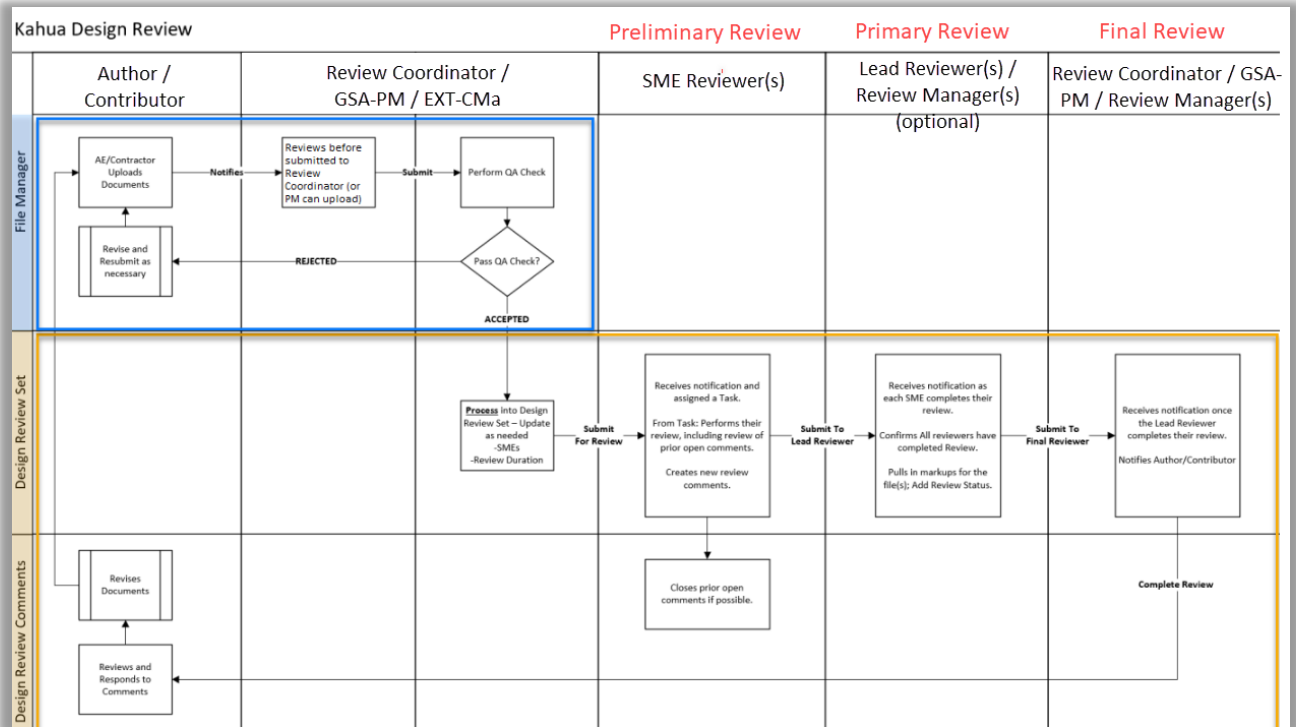

4. Users listed in the Notifications section in the **Distribution Notifications** field receive an email notification indicating each file's final review status. If necessary, the final reviewer can use the **Send** button to send messages from Kahua in regard to the design review set.

Markup Tool
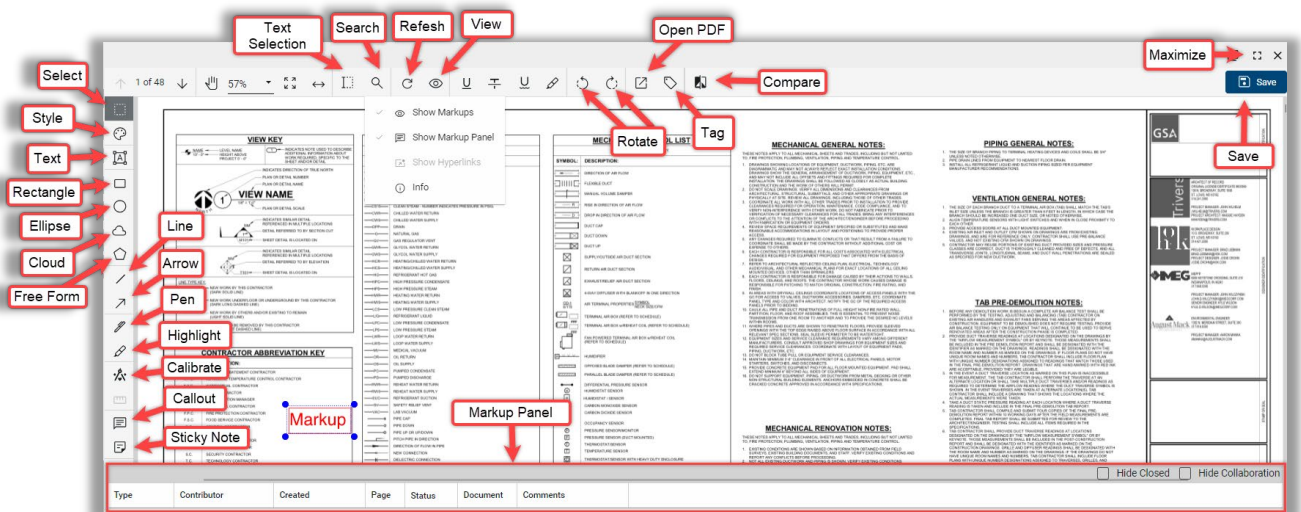
Workflow Diagrams

Resources

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

Related QRGs

File Manager – Learn more about controlled folders and how to mark a document CUI.
Log Views – Learn how to create a managed view for the Review Comments sub-app.
Tasks – Learn how to use the Tasks app.
User Profile Settings – Learn how to setup your Profile Settings.
Distribution Lists – Learn how to create Distribution Lists.