



Kahua Release Notes

GSA Kahua Version 2024.1

3.9.2024

The GSA Kahua Version 2024.1 goes into Production on **March 9, 2024**. Below you will find summaries of the enhancements that go into effect with this release.

Enhancements:

User Interface (Web version only)

- Project edit icon changed to an information icon
- Added empty log view landing page

File Manager Application

- File Manager, Controlled Folders - Ability to move a file to a different folder
- Title Block Template improvements
- New File Manager permissions for QA Accept/Reject and Release/Supersede

Design Review Application

- Design Review: Additional options for File Review Status, and ability to set default value
- Design Review: Configuration options to hide References section
- Design Review: Track Recommended Review Status for all reviewers in the design review workflow

Automated Account Removal

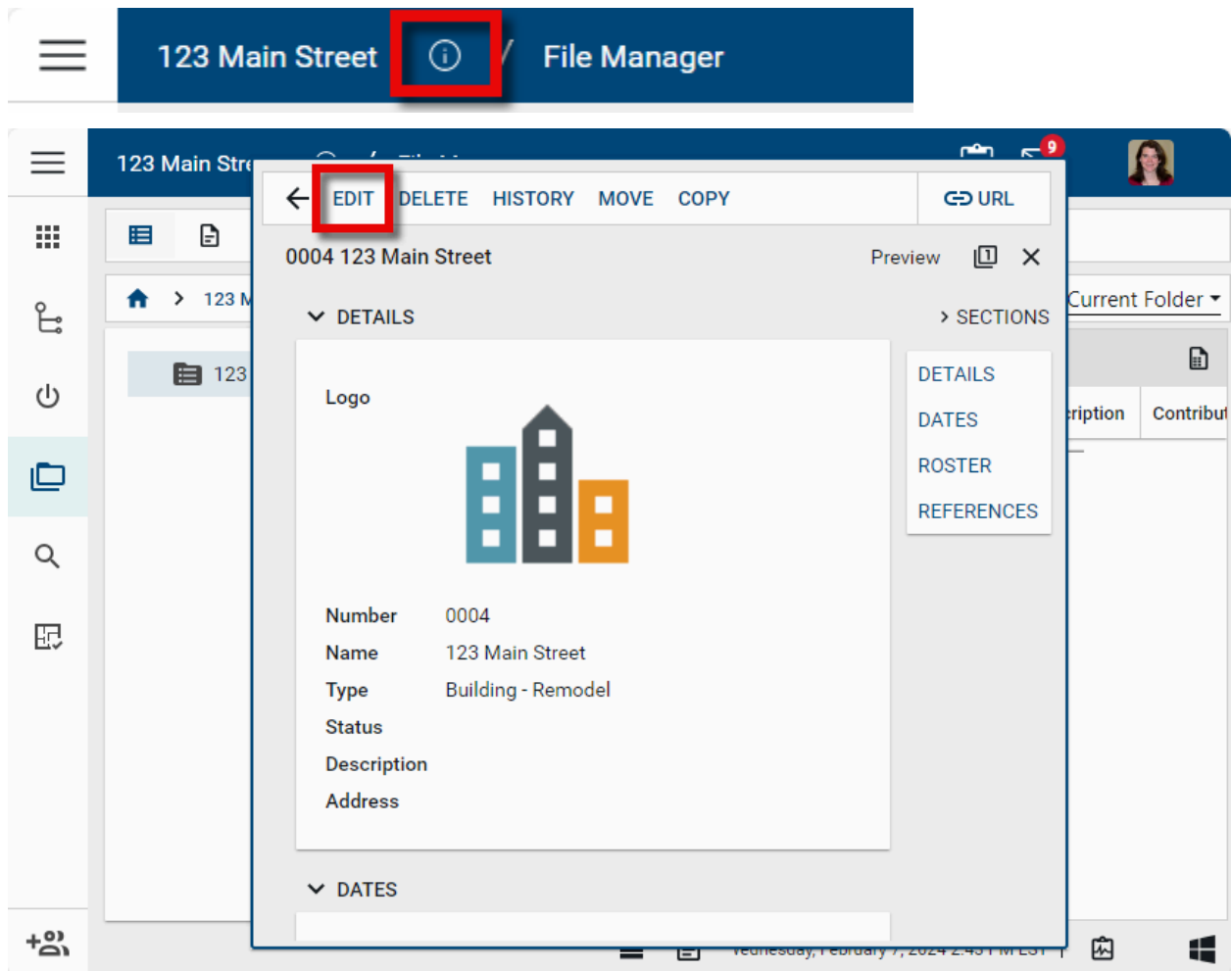
Onboarding Registration Changes

- Updated user invitation and registration process
- Updated email invitation
- Added email verification
- Improved the registration page

User Interface

Project edit icon changed to an information icon

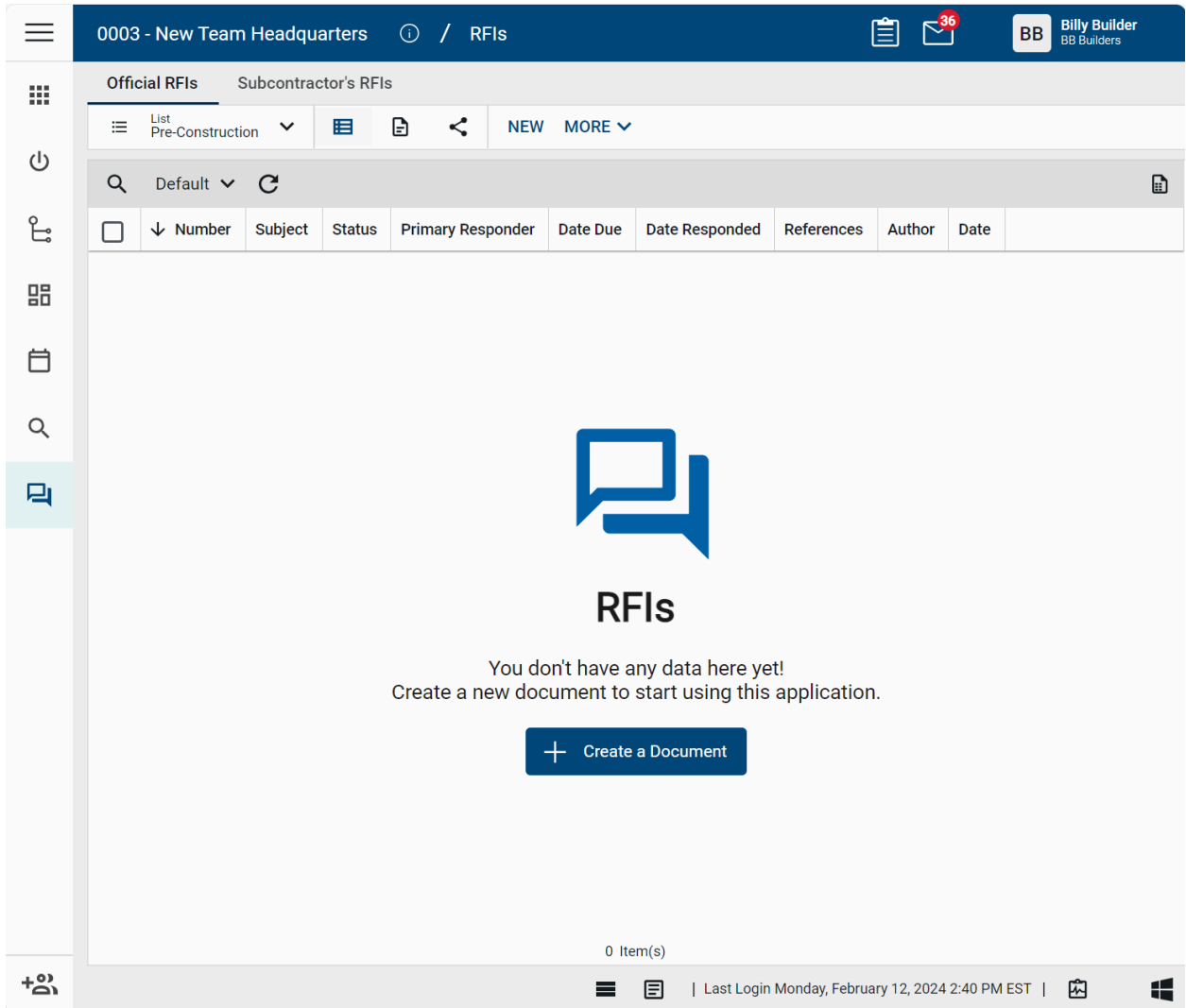
The pencil icon in the Header and in Project Finder has been changed to an information icon to better symbolize the function of viewing project information. This allows the user to view and select Edit as an action more accurately.





Added empty log view landing page

Throughout Kahua, we have added a new landing page when users open a default log view and there are no records present. From this landing page, users with the appropriate permissions will be able to create new records.



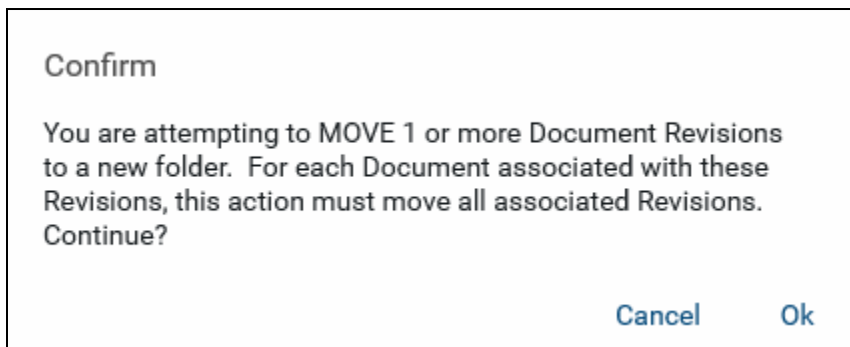


File Manager Application

File Manager, Controlled Folders - Ability to move a file to a different folder

Prior to this release, when an attempt was made to move one or more files from one controlled folder to another, the system would present a message that said: "The destination folder is not compatible".

Now when you attempt to move one or more documents to a different Controlled folder, the system will present the following prompt:



After clicking **Ok**, the selected files and their associated revisions will be moved to the destination folder.

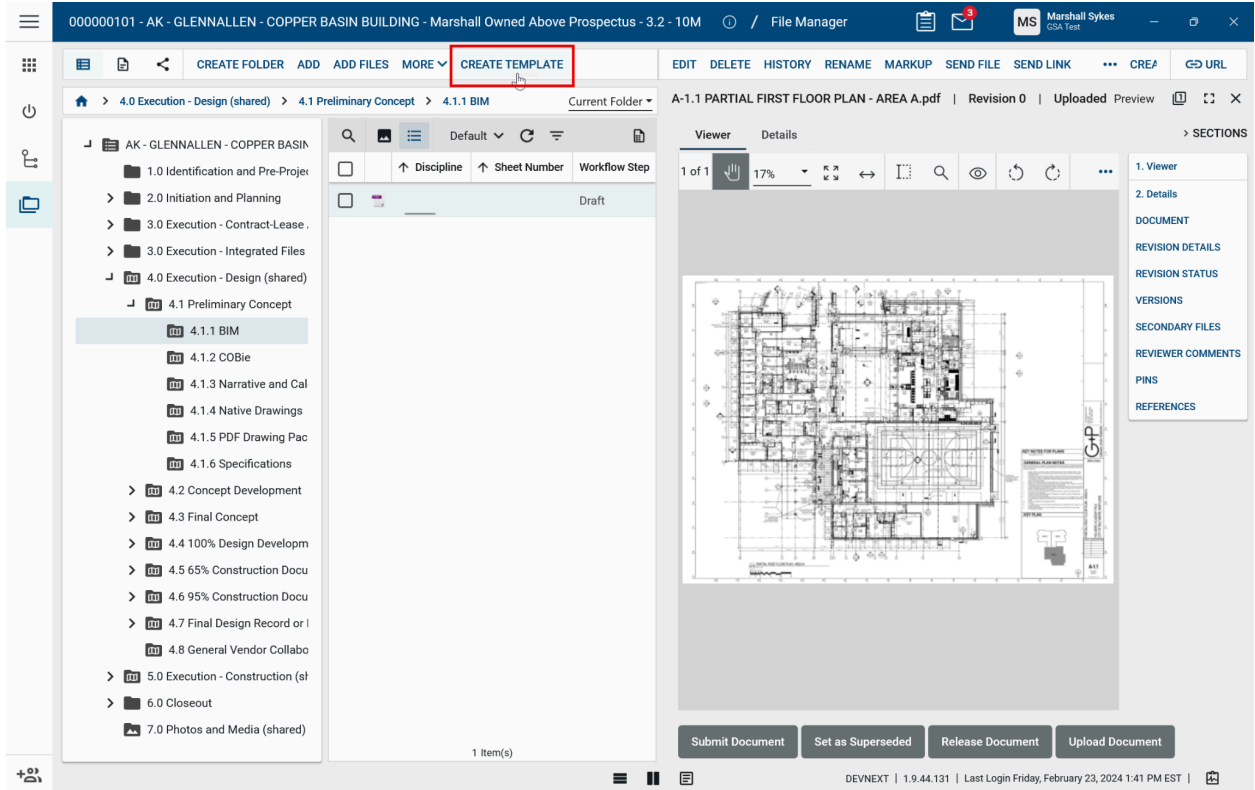
Not all users will have the ability to move files. Only those with the appropriate permissions to the File Manager application and folders will have this ability.

Title Block Template improvements

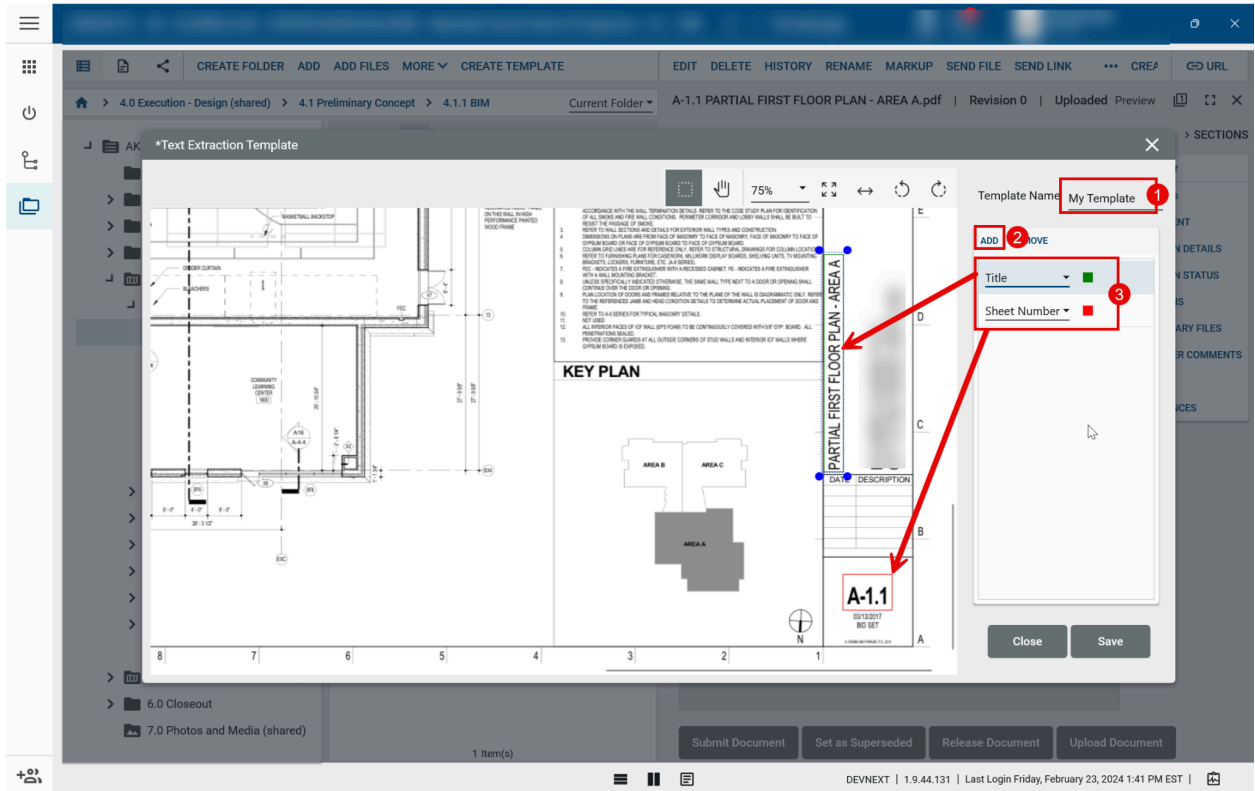
When uploading files into Controlled folders, users no longer have to select a Title Block Template or batch information. If a user wants to use a Title Block Template to auto-populate metadata for their drawing files in Controlled folders, they no longer have to set up their Title Block Template in the Configuration application. Now, users can create and apply Title Block Templates in the File Manager app itself. The steps to do this are below.



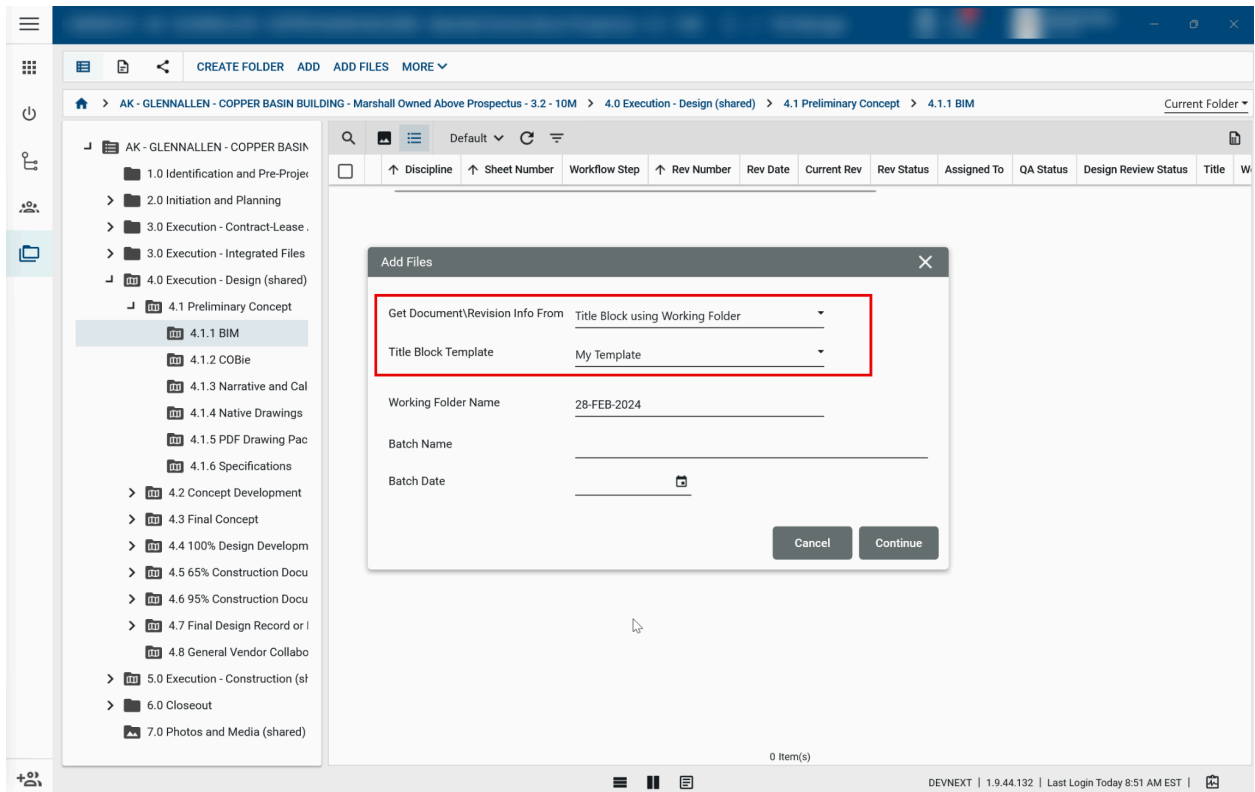
After uploading a drawing into a Controlled folder, upon selecting that file, there will be a new action to “Create Template”.



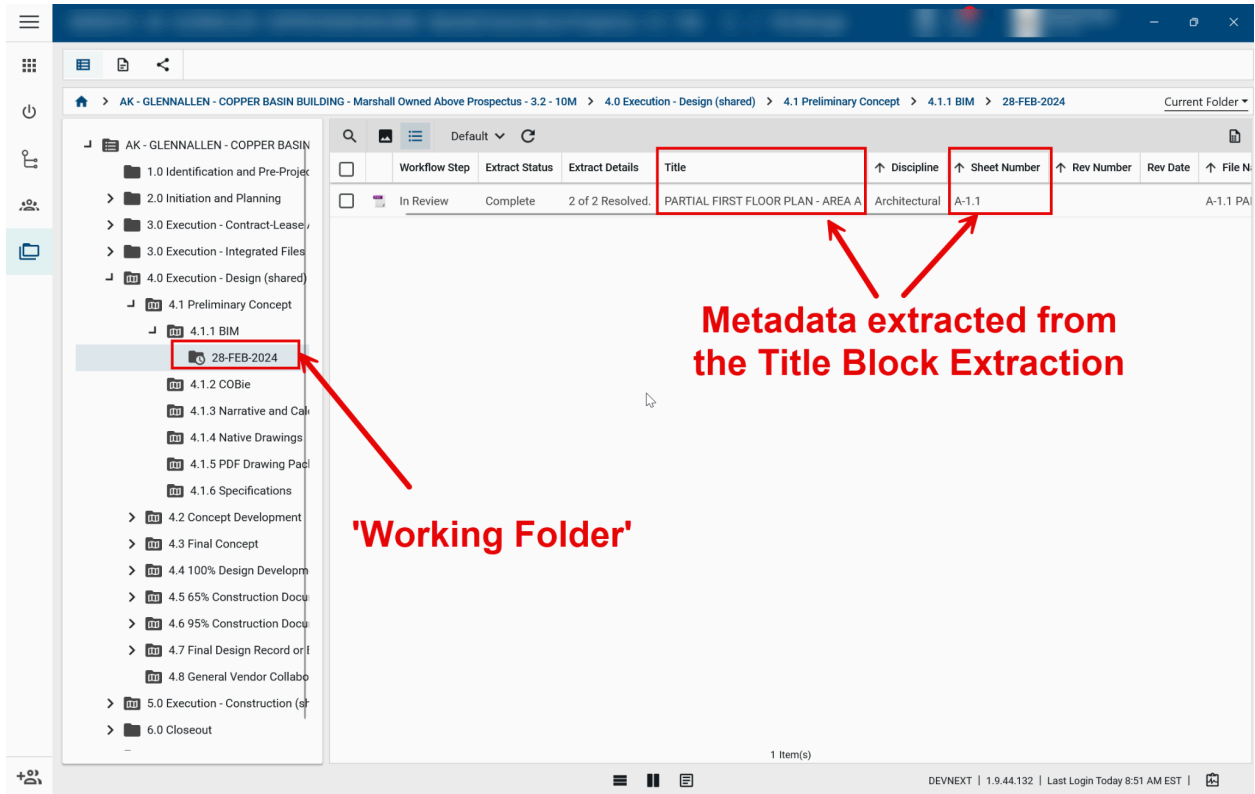
Clicking “Create Template” will bring up the Title Block Template creation interface. Here, a user can 1) Name their template, and 2) Notate on the drawing where to pull metadata information from on said drawing(s).



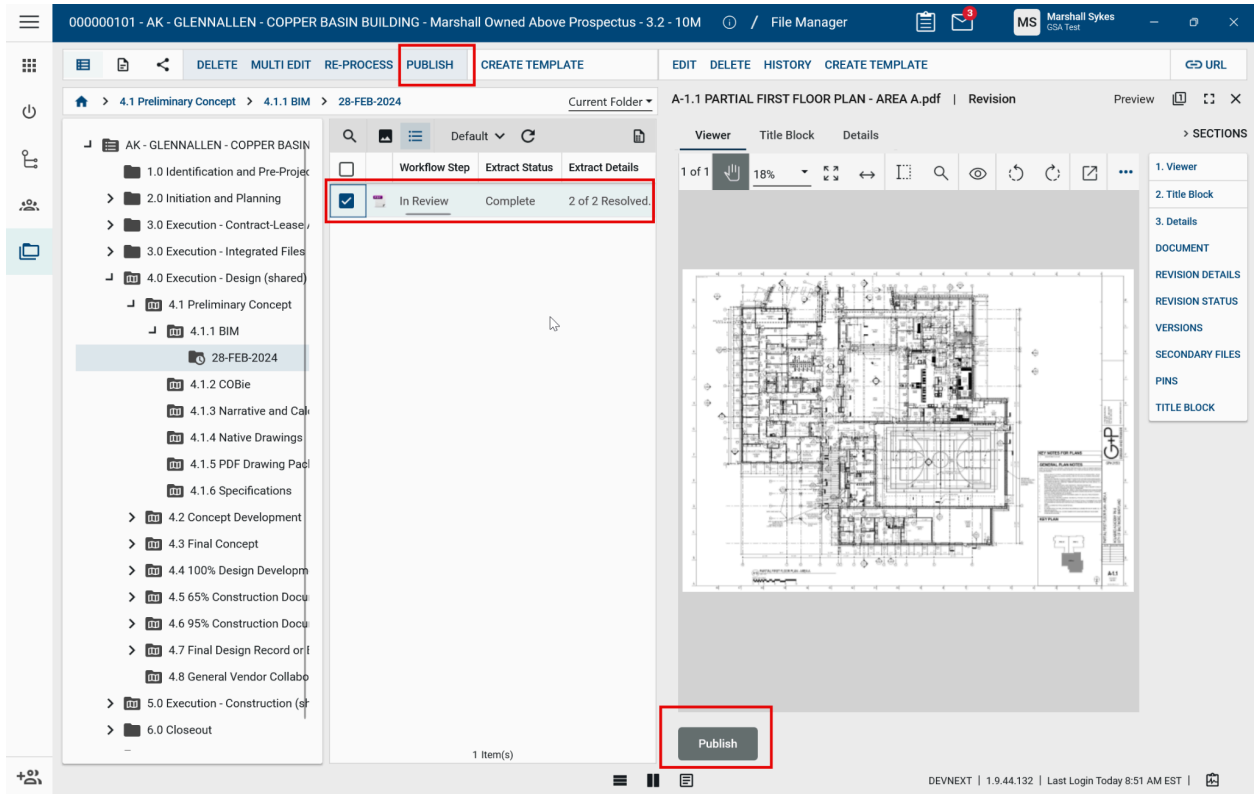
After Saving the Title Block Template, users can then use the Title Block Template to pull in metadata for their drawing files when adding new documents.



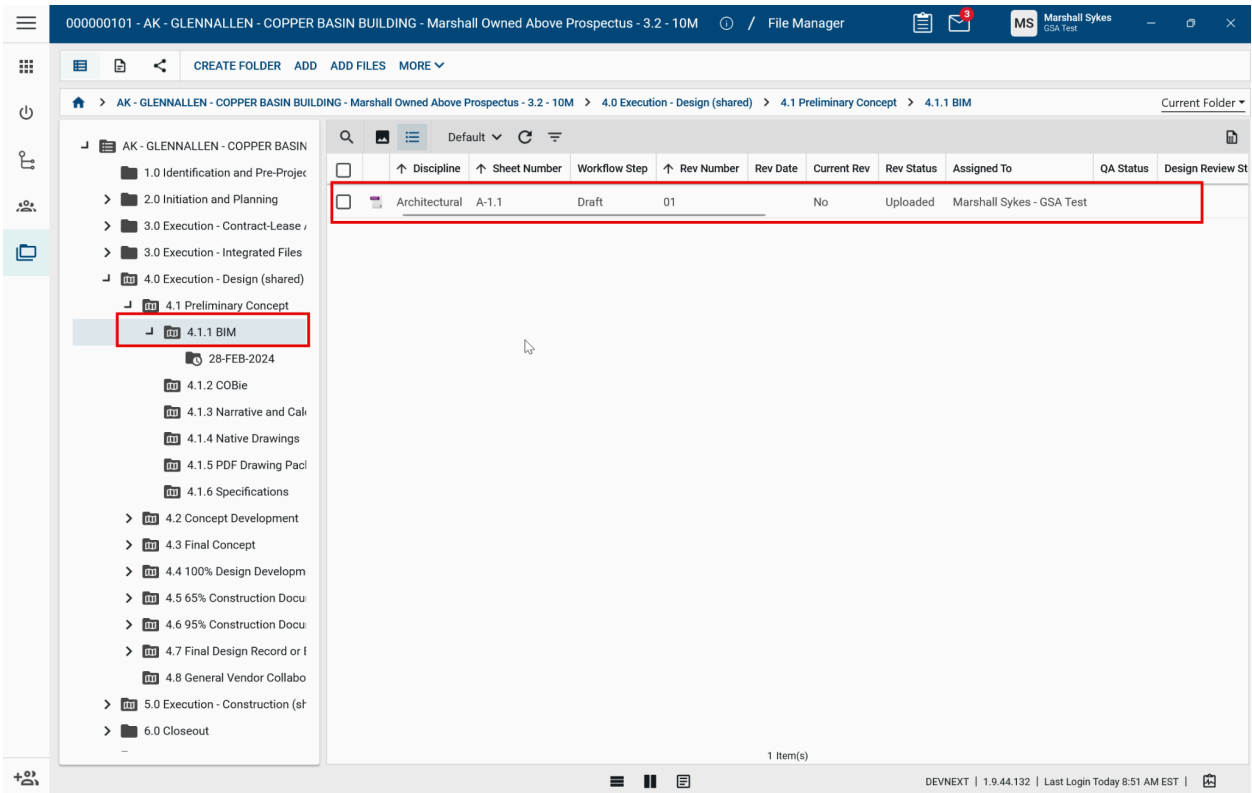
When using a Title Block Template, and after uploading the file(s), the files are staged in a 'Working Folder' where the metadata extraction process is done. Here you can confirm that the extraction worked as expected.



If it's determined the Title Block extraction was successful, the user should then select the file and click "Publish" which will move the file from the "Working Folder" to the folder they originally uploaded the file to.



After Publishing the file, it is moved back into the folder where the end user originally uploaded the file to.



This functionality is extremely helpful in populating metadata on files when uploading multiple drawings that have a similar Title Block layout.

New File Manager permissions for QA Accept/Reject and Release/Supersede

Three new roles for File Manager have been added to the Groups app. The three new roles are:

- Controlled - QA Manager (QA Accept / Reject)
- Controlled - Release
- Controlled - Supersede

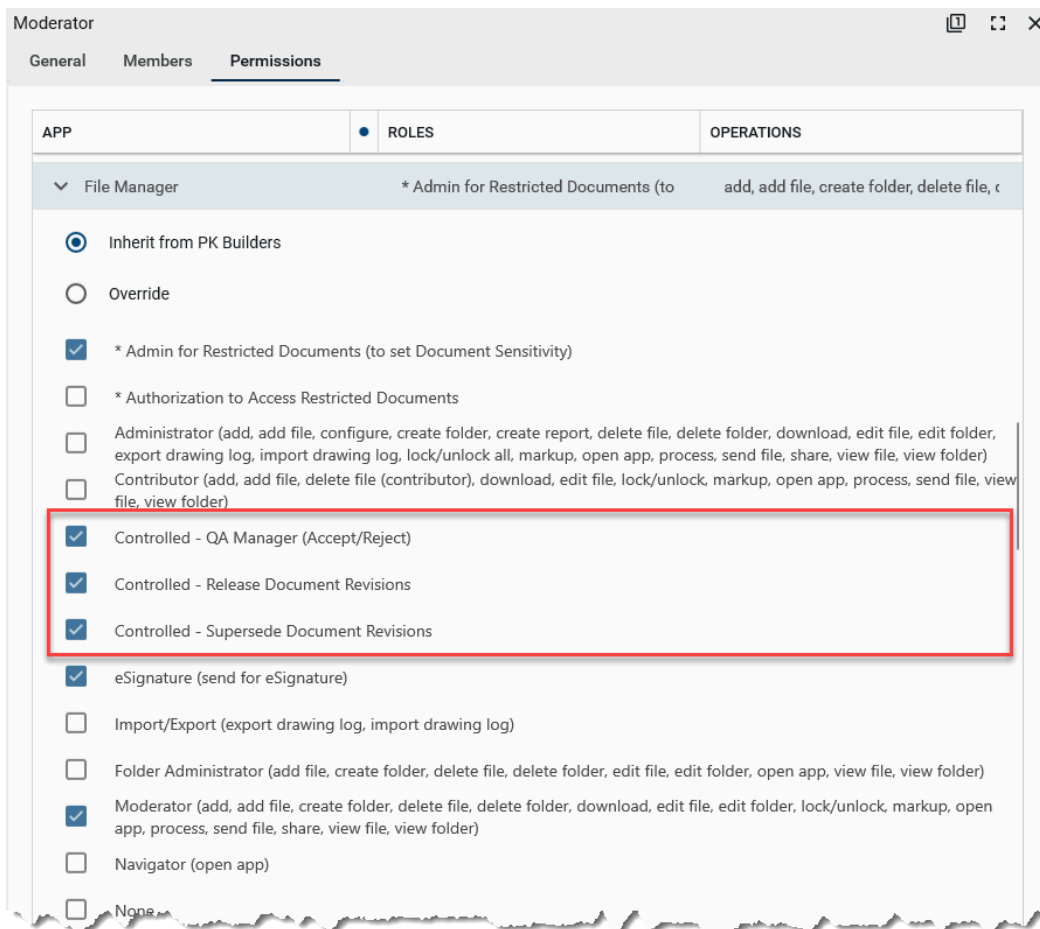


To match existing behavior, groups that currently include either the Administrator, Moderator, or Contributor roles for File Manager will have the **Controlled - QA Manager (QA Accept/Reject)** role selected by default as well.

Groups that currently include the Administrator or Moderator roles for File Manager will have both the **Controlled - Release** and the **Controlled - Supersede** roles selected by default.

The intent of this change is to provide greater control and granularity around who can do what. Some organizations want only certain individuals to be able to be in the QA Role and Accept/Reject documents, and only other individuals to Release or Supersede documents.

NOTE: The Release and Supersede roles do not come into play when documents are processed into a Design Review and then released by virtue of completing that Design Review.





Design Review Application

Design Review: Additional options for File Review Status, and ability to set default value

Previous to this change, as files in a Design Review Set were given a **Review Status**, the only available options were:

- A - Approved
- B - Approved as Noted
- C - Revise and Resubmit

With this release, there are two new values available for **Review Status**:

- No Comment
- Not Applicable

Additionally, it's now possible to set a default value, such that it's no longer necessary to manually enter a status for every-single-file in the Design Review Set (which in some cases involves hundreds of documents).

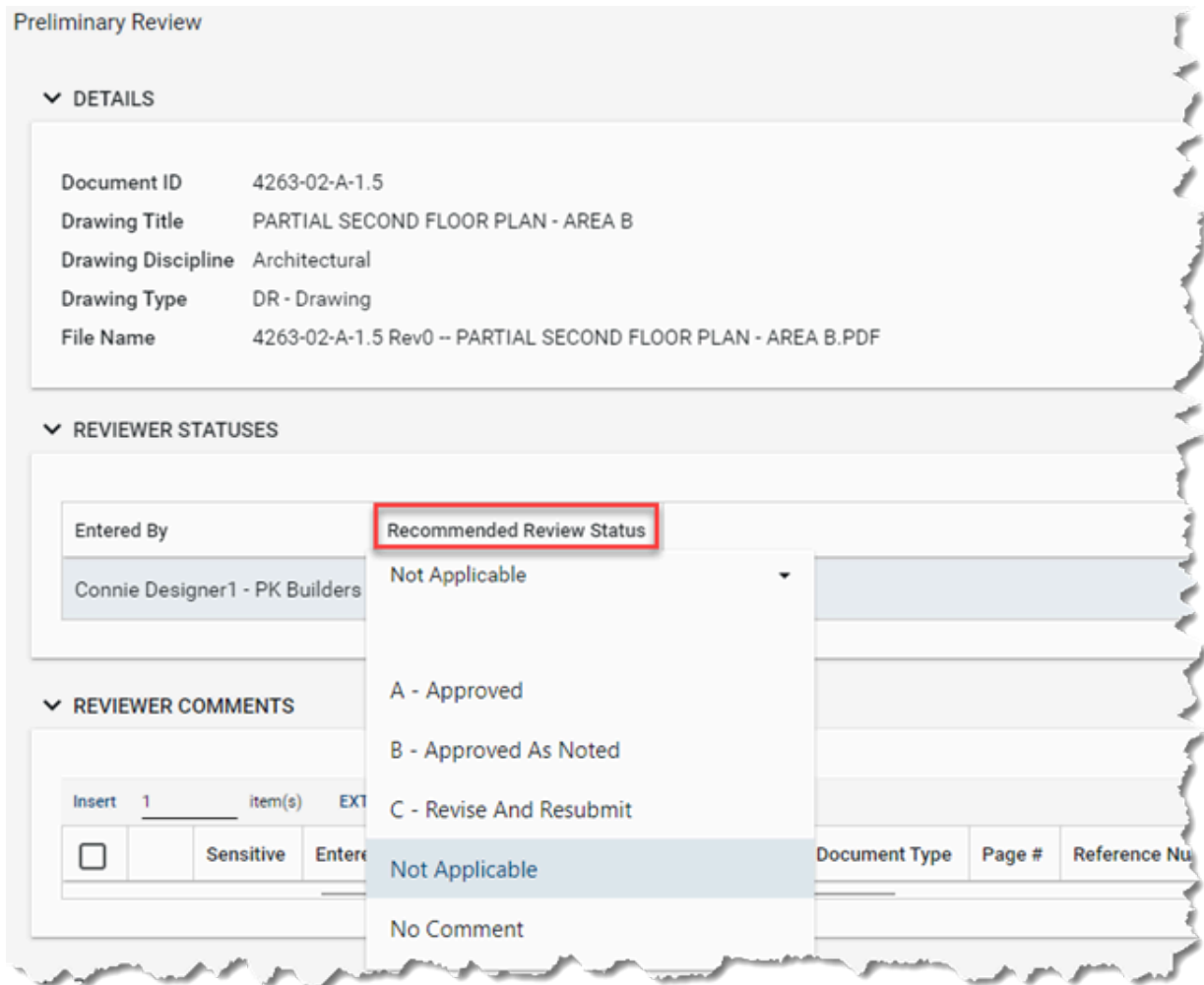
These changes improve the usability for reviewers who only need to review a subset of the design package that pertains to their area of expertise; no longer requiring them to 'touch' every file unnecessarily.

NOTE: By default, the **Recommended Review Status** will remain 'blank', which mimics current behavior.

The screenshot shows the 'Design Review Sets' configuration page with the 'Defaults' tab selected. The 'Design Review File (Task)' dropdown is set to 'Inherit'. A modal dialog titled 'Lookup List Values - Recommended Review Status' is open, showing a 'Default Value' dropdown set to 'NA' and 'Cancel' and 'Ok' buttons. Below the dialog, a table lists the configuration for 'Recommended Review Status'.

Name	Data Type	Default Value
Recommended Review Status	Lookup	NA

A 'Save' button is visible at the bottom left of the configuration area.

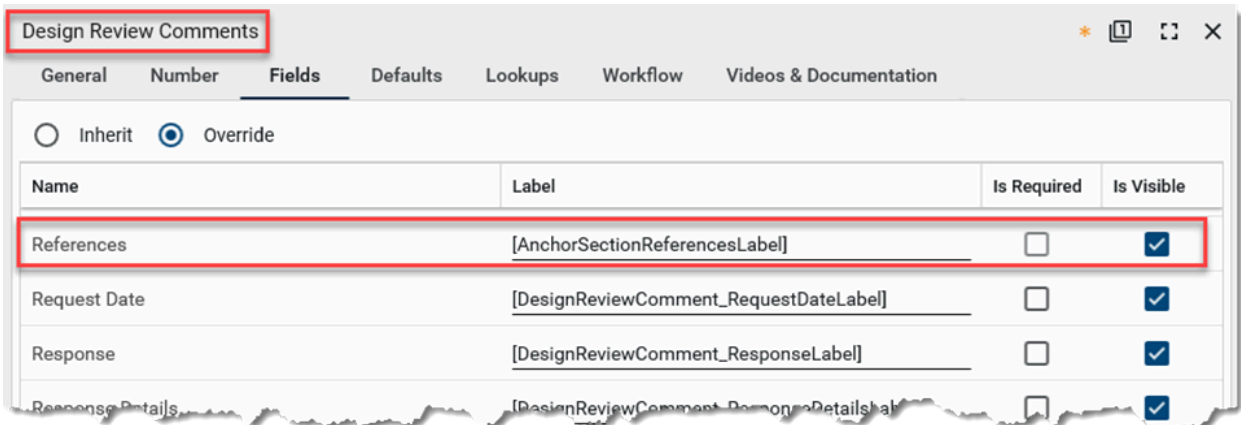
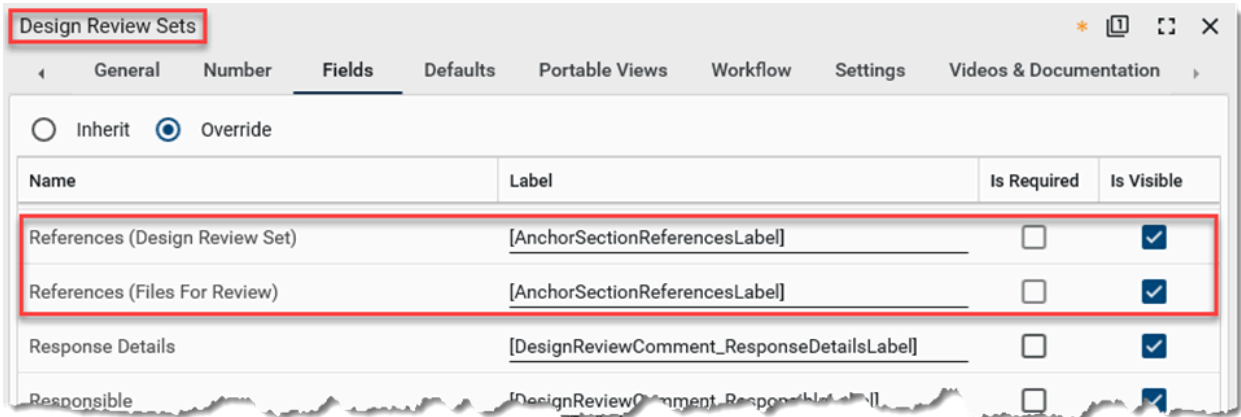


Design Review: Configuration options to hide References section

Three new configuration settings have been added to control the display of the various Reference Sections associated with the Design Review Set:

1. Configuration | Applications | Design Review Sets | Fields | References (Design Review Set)
2. Configuration | Applications | Design Review Sets | Fields | References (Files for Review)
3. Configuration | Applications | Design Review Comments | Fields | References

Though all three References sections will be visible by default, any combination of them can be configured to not appear. Also, any or all can be relabeled as desired.



Design Review Comments - Added ability to view comments and plans together

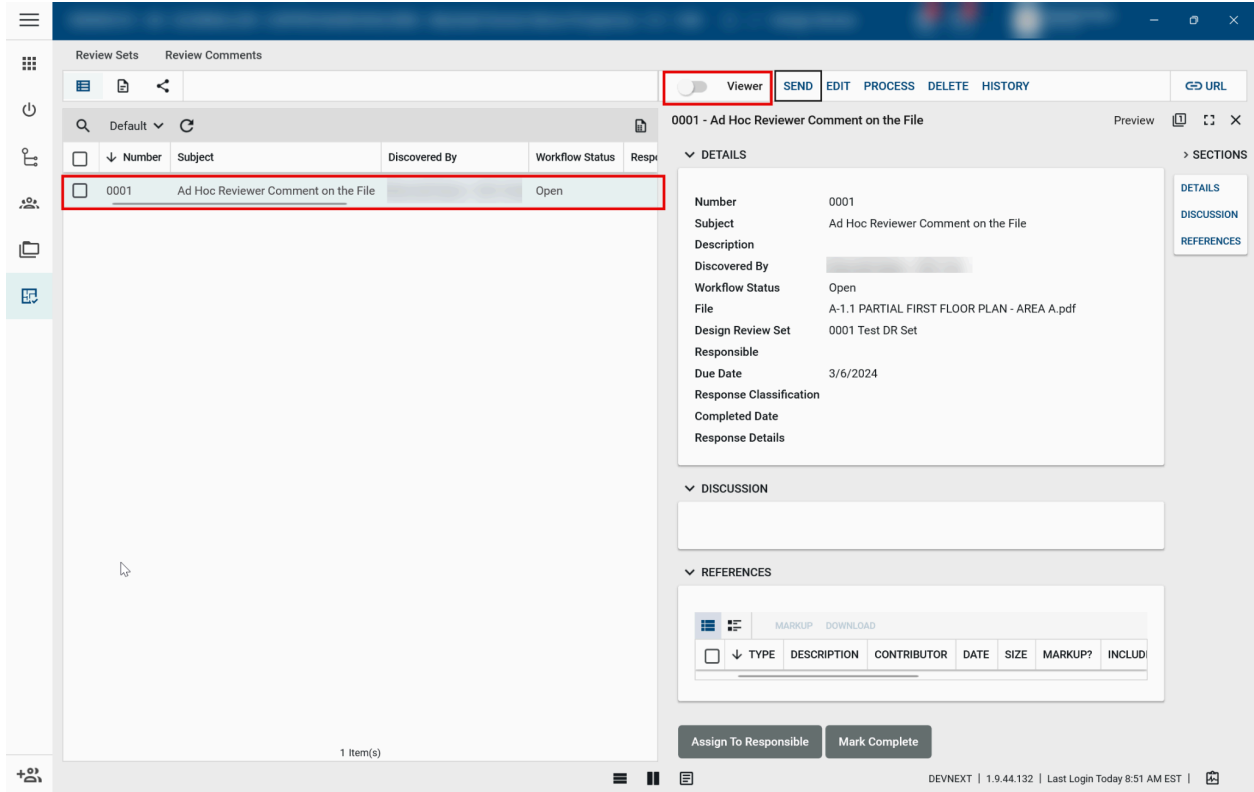
In the Design Review Comments app, we added the ability to view the plans and comments together on the same screen to facilitate logging and reviewing comments. Support for this existed for viewing an extracted markup alongside the drawing/plan, but not ad hoc File comments, which has been added. This feature also has had it's performance greatly improved. Lastly there is now a toggle button to flip between the drawing and the detail view of the record.

Viewer Toggled On - Comment and Drawing are visible

The screenshot displays a software interface for reviewing documents. At the top, there are tabs for 'Review Sets' and 'Review Comments'. Below the tabs is a toolbar with a 'Viewer' toggle switch, which is currently turned on. Other toolbar options include 'SEND', 'EDIT', 'PROCESS', 'DELETE', 'HISTORY', and 'URL'. A search bar is present with the text 'Default' and a refresh icon. Below the search bar is a table with the following columns: 'Number', 'Subject', 'Discovered By', 'Workflow Status', and 'Resp'. The table contains one row with the following data: '0001', 'Ad Hoc Reviewer Comment on the File', and 'Open'. To the right of the table is a drawing viewer showing a technical drawing of a building floor plan. A red rectangle highlights a specific area on the drawing. The drawing includes a 'KEY NOTES FOR PLANS' section and a 'GENERAL PLAN NOTES' section. The bottom of the interface shows a status bar with the text '1 Item(s)', 'DEVNEXT | 1.9.44.132 | Last Login Today 8:51 AM EST |', and a 'Hide Closed' checkbox.

Number	Subject	Discovered By	Workflow Status	Resp
0001	Ad Hoc Reviewer Comment on the File		Open	

Viewer Toggled Off - Comment and Drawing metadata detail are visible



Design Review: Track Recommended Review Status for all reviewers in the design review workflow

Previously, when Primary/Lead Reviewers or Interim Reviewers would enter their value in the Review Status field, it would be overwritten by the subsequent Primary/Lead Reviewer, Interim Reviewer or Final Reviewer. We have added a new field called **Recommended Review Status** that will record the review status assigned by each reviewer in the design review workflow. These values will appear in a table and can be reported on. Once the design review moves on to the next review step in the workflow, the reviewer will no longer be able to modify the field. Only the Final Reviewer will be able to update the **Review Status** field.



Design Review Set

▼ DETAILS

Document ID 4263-00-S-1.2H
Drawing Title FOUNDATION AND SLAB ON GRADE PLAN - AREA B
Drawing Discipline Structural
Drawing Type DR - Drawing
File Name 4263-00-S-1.2H Rev0 -- FOUNDATION AND SLAB ON GRADE PLAN - AREA B.PDF
Review Status
B - Approved As Noted

▼ REVIEWER RECOMMENDATIONS

Reviewer	Recommended Review Status	Created	Modified
Modesto Designer2 - PK Builders	A - Approved	2/14/2024 2:23 PM	
Connie Designer1 - PK Builders	B - Approved As Noted	2/14/2024 2:25 PM	
Laura Lead - PK Builders	C - Revise And Resubmit	2/14/2024 2:25 PM	2/14/2024 2:27 PM
Frank Final - PK Builders	B - Approved As Noted	2/14/2024 2:25 PM	2/14/2024 2:35 PM
Ian Interim - PK Builders	B - Approved As Noted	2/14/2024 2:35 PM	2/14/2024 2:38 PM



Automated Account Removal

Summary

Automated Account Removal functionality programmatically removes inactive Kahua users from the domain(s) the user has been inactive on. Automated Account Removal functionality is disabled by default and needs to be enabled in Kahua Backend and in Domain Settings app. Inactive users are sent warning email notifications for multiple days before their account is removed. An email notification is also sent to the user once their account has been removed.

A user is deemed inactive if they have not opened a Kahua **domain app** (e.g., RFIs, Submittal Items, Design Review, Cost apps) for the configured inactivity threshold days. Please note only logging in to Kahua without accessing a Kahua domain app is not deemed as activity by a user in a Domain. Also, Tasks and Messages apps are **not** domain apps.

If a removed user account is reinstated, the user will have access to their pre-account removal data and projects.

Onboarding Registration Changes

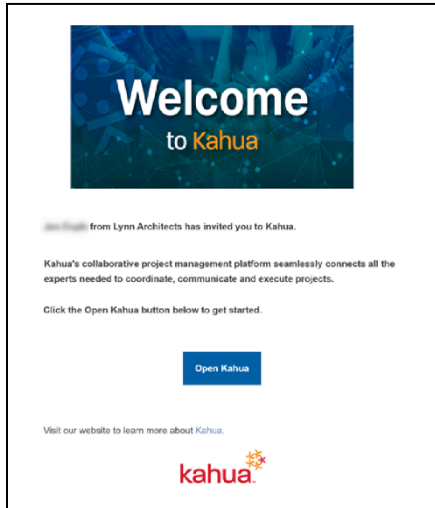
Updated user invitation and registration process

We've updated the email used to invite new users to your Kahua domain, added an email verification process for those users, and improved the registration page for both internal contacts (users in your own company) and external contacts (users in a different company).

Note: Any existing invitations that have not yet been accepted are not impacted by this change and do not have to be re-sent.

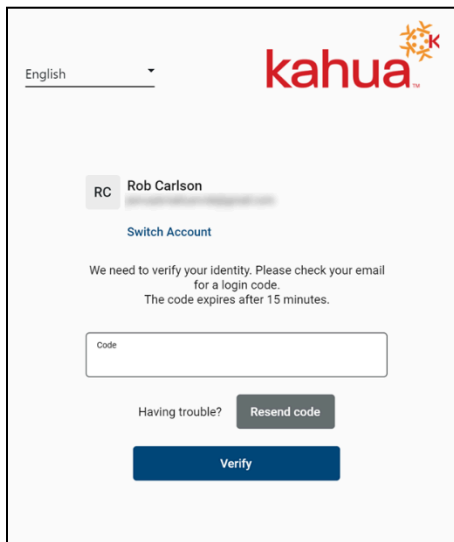
Updated email invitation

The email invitation that is sent to the internal and external contacts you invite to join your Kahua network has been updated. Any pre-existing custom text or links will continue to be included in the email invitation.



Added email verification

When a new user opens Kahua for the first time from the invitation email, a login code will be sent to their email account to verify their email address. The user will be required to enter that code into the login screen. The code will expire after 15 minutes. The user can then request that a new code be sent.





Improved the registration page

New users are required to complete the registration page to create their account. These new users are either internal contacts, which are employees of your own company, or external contacts, which are employees of a different company. The registration pages for both types of users have been updated.

New internal contacts are added in the Users app and will be required to select their password and accept the agreement terms in the updated registration page.

The screenshot shows a registration form with the following sections:

- COMPANY INFORMATION**: Includes a welcome message "Welcome to Kahua! You will be registered with this company.", a company logo with a question mark, the name "Media, Pennsylvania, US", and a "Change Company" button.
- ACCOUNT INFORMATION**: Includes fields for "First Name" (Rob), "Last Name" (Carlson), "Password", and "Confirm Password".
- Agreement**: A checkbox labeled "Accept Terms of Service Agreement" is checked.
- Buttons**: A "Complete Registration" button is located at the bottom right.