Kahua Quick Reference Guide
CILP

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The CILP app is used to gather documents from the regions to be submitted to Central Office as part of the budget request process. Using the app, the Central Office Portfolio Group will create a new CILP call in Kahua and distribute the call to the regions. The Regional Portfolio Group will create CILP Document Repositories and work with Regional SMEs to upload required documents. Once the documents are uploaded, the Regional Portfolio Group will submit them to the GSA CO Portfolio Group who will review all documents.

Distribute a New CILP Call

This action is typically created by the following role: **GSA-CO Portfolio (CILP)**.

1. Open Kahua.
2. Click the **Project Finder** app located on the left navigation pane.
3. Click the **GSA Domain**, click the **GSA partition**, and click **Select**. (Make sure to check the top title bar to ensure you are working in the correct partition).
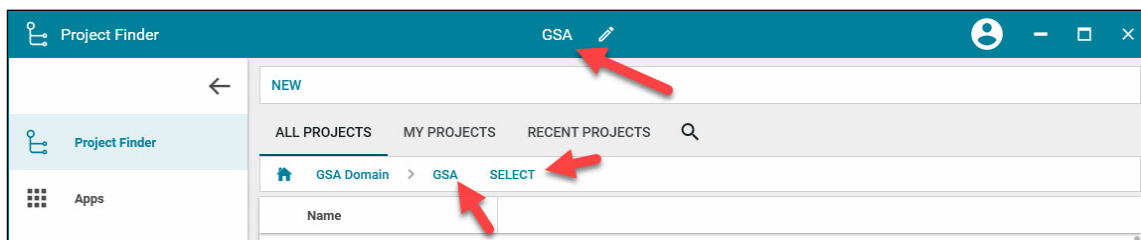

4. Click the **App launcher** on the left navigation pane.
5. Select the **CILP app** in the **Project Identification, Initiation and Planning** column.
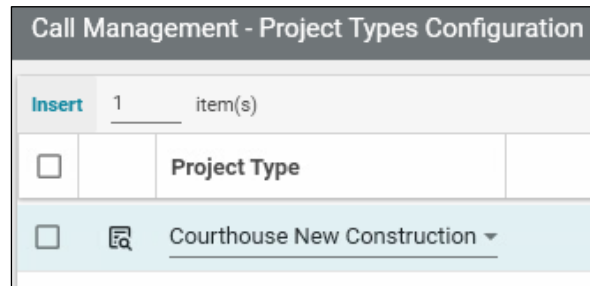6. In the **CILP Calls** tab, click **New**.
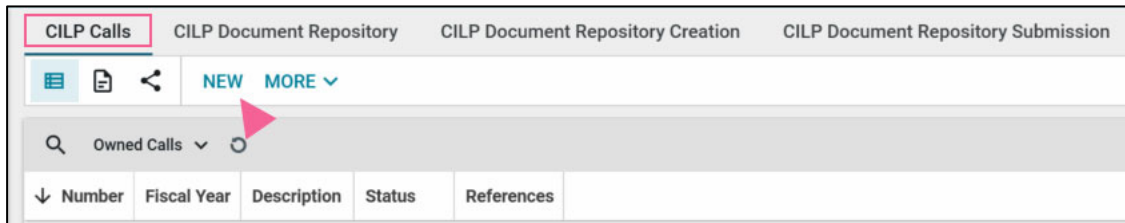
7. In the **Details** section:
   a. Select the **Type**.
   b. Select the **Fiscal Year**.
   c. Enter a **Description** of the call.
8. In the **Distribution** section, click **Insert** to select people who should be notified of the CILP call in the **CC Notification List**. For each contact added, add the following information:
   a. Click the dropdown to select the **Region**.
   b. Click the dropdown to select the **User**.

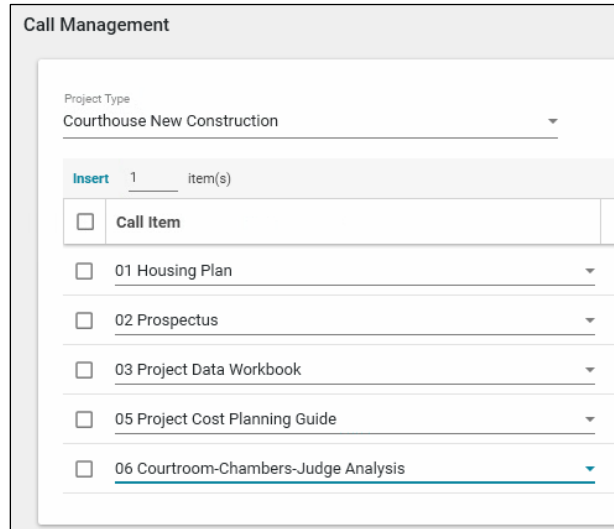   **Note:** Changing the number field beside Insert will allow the user to add multiple lines at one time.

9. In the Documents section, click the **Insert** button to create a list of the documents the regions should submit. For each document:
   a. Enter the document **Name**.
   b. Enter a **Description**.
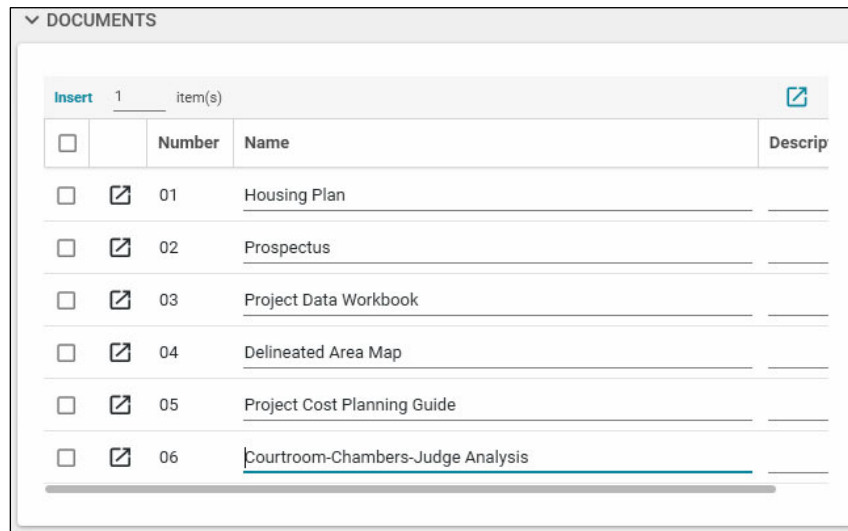
10. **Optional**: In the Project Types Configuration section, you can assign required documents by project type. For example, the Courtroom-Chambers-Judge Analysis can be assigned to only Courts projects. Click **Insert** to add one or more **Project Types**.
    a. Click the expand button to open the **Project Types** window.
    b. Select a **Project Type**.
    c. On the right side, select the documents required for the selected project type.

11. To attach the call document or other supporting documents, click **Upload** in the **References** section and follow the prompts.
12. Click the **Save/Close** button.
13. Click the **Distribute** button to send a request to the user(s) selected in the Distribution list. They will receive a message in Kahua and a copy in their email client.

Create a CILP Document Repository

This action is typically completed by the following roles: **GSA-Regional CILP**.

1. Open Kahua.
2. Using the **Project Finder** app, click the **arrow** beside the applicable region to open the **Region**'s partition.

Note: Always check the top tool bar to make sure you are working in the correct partition.

3. Click the **App Launcher** on the left navigation pane.
4. Click **CILP** in the **Project Identification, Initiation and Planning** column.
5. On the **CILP Calls** tab, click the dropdown arrow in the header and change the list view to "**All Owned Calls**" to review any Owned Calls that have been distributed to the region.

6. Click the **CILP Document Repository Creation** tab from the tab options listed across the top of the app.
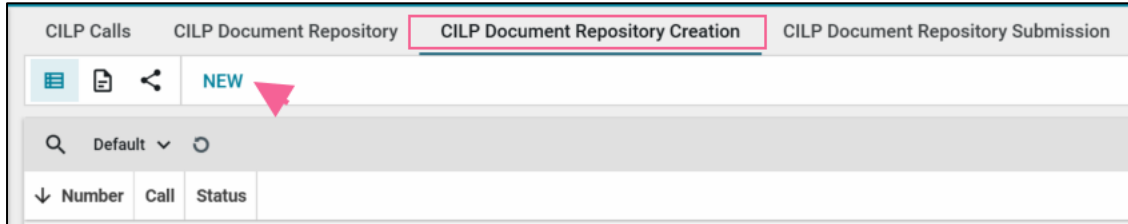
7. Click **New** to create a new CILP document repository.
8. Click the **Select Project(s)** link to add one or more projects. Change the view to show projects **By Partition**.
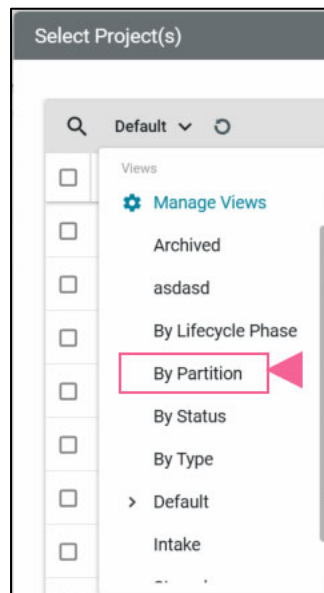
9. Click the **checkbox** beside the project(s) that will be part of the CILP process to create a CILP Document Repository. Click the **Select** button located in the bottom right corner of the window.
10. Select a **Call** from the list of calls sent to the region.
11. Select a **Project Type**.
12. Click the **Next** button located on the bottom left corner of the window.
13. Repeat steps 9 - 12 to create Document Repositories for other Project Types, if applicable.
14. Click the **Insert** button and select from the list of documents requested from the GSA CO Portfolio Group.
    a. To update the **Revision**, click the **flyout icon**.
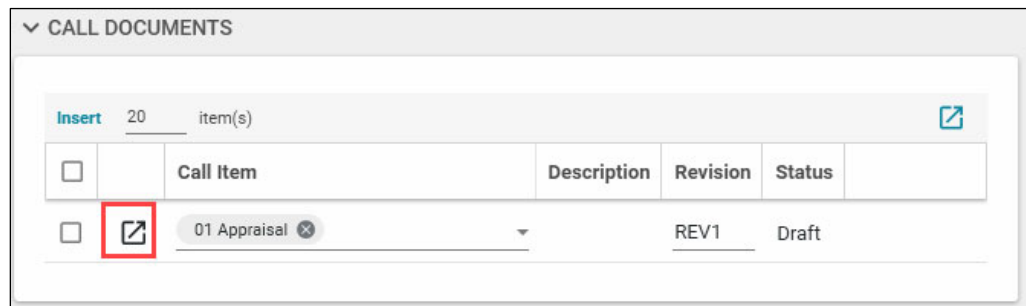
    b. Update the Revision field and click the **Done** button in the bottom left corner of the window.
15. Insert one or more **Other Documents**, if desired. Make sure to add the following information for each line:
    a. Enter the **Name**.
    b. Enter the **Description**.
    c. Update the **Revision** number if necessary.
16. Click the **Save/Close** button.
17. Click the **Start Processing** button.

Upload CILP Documents

This action is typically completed by the following roles: **GSA-Regional CILP**.

1. Make sure to open the **Region partition**.
2. Select the **CILP Document Repository** tab from the list of options.
3. Click an existing project in the log.
4. Click **Edit**.
5. Make changes to the details or upload a document to one or more rows in the **Call Documents** by clicking the **3 blue dots** located on the end of the row and click **Select File**. This opens the Upload File window.
6. In the window, click in the Filename field to select a file from your local computer and click the Open button.
7. Click **Upload** in the Upload File window.
8. Click **OK** on the Add Files window.
9. Make changes to the details or upload a document to one or more rows in the **Other Documents** by clicking the **3 blue dots** located on the end of the row. Click **Select File**.

This opens the Upload File window.
10. In the window, click in the Filename field to select a file from your local computer and click the Open button.
11. Click **Upload** in the Upload File window.
12. Click **OK** on the Add Files window.
13. Click the **Save/Close** button.

Send for SME/PM Review and Upload

This action is typically completed by the following role: **GSA-Regional CILP**.

There is no workflow for requesting the SME or PM review or upload documents. Using Kahua's Send feature will allow the user to send a message directly from the CILP project.

1. Make sure to open the **Region partition**.
2. Select the **CILP Document Repository** tab from the list of options.
3. Click an **existing project** in the log.
4. Click the **Send** button located on the top of the record.

| SEND | EDIT | VIEW | DELETE | HISTORY | | ⊖ URL | ☗ |

5. Select the SME or PM in the **To** field.
6. Enter a **Subject**.
7. In the **body of the message**, enter instructions for reviewing and uploading the requested documents.
8. Click the **Send** button located on the bottom of the window.
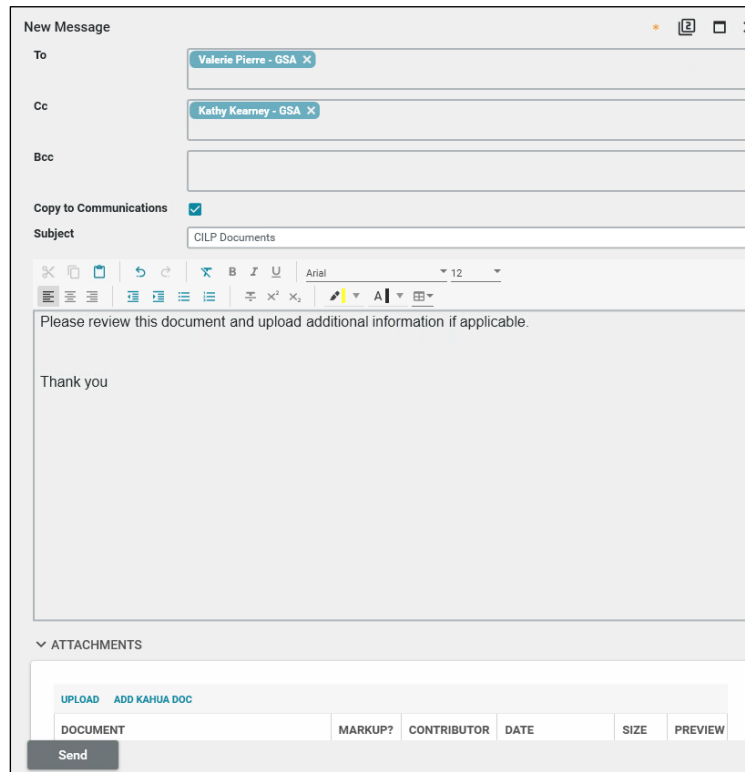
Review and Upload Requested Documents

This action is typically completed by the following roles: **GSA-Subject Matter Expert** or **GSA-PM/COR**.

1. Make sure to open the **Region** partition.
2. Select the **CILP Document Repository** tab from the list of options.
3. On the **CILP Calls** tab, click the **dropdown arrow** beside "Default" and change the list view to "**All Owned Calls**" to review any Owned Calls that have been sent to the region.
4. Click the **CILP Document Repository** tab.
5. Click an **existing project** in the log.
6. Make changes to the details or upload a document to one or more rows in the **Call Documents** by clicking the **3 blue dots** located on the end of the row and click **Select File**. This opens the Upload File window.

	Number	Name	Description	Revision	Status	File	
⬀	01	APPRAISAL		REV1	Draft	Appraisal.docx	•••
⬀	02	CAPITAL PROJECT MANAGEMENT PLAN		REV1	Draft		•••
⬀	03	COST ESTIMATING WORKBOOK for PROJECT DEVELOPMENT		REV1	Draft		•••
⬀	04	COURTHOUSE OA and RENT SUMMARY		REV1	Draft		•••

7. In the window, click in the Filename field to select a file from your local computer and click the Open button.
8. Click **Upload** in the Upload File window.
9. Click **OK** on the Add Files window.
10. Make changes to the details or upload a document to one or more rows in the **Other Documents** by clicking the **3 blue dots** located on the end of the row. Click **Select File**. This opens the Upload File window.
11. In the window, click in the Filename field to select a file from your local computer and click the Open button.
12. Click **Upload** in the Upload File window.
13. Click **OK** on the Add Files window.
14. Click the **Save/Close** button.
16. Click the **X** in the far-right corner to close the record.

CILP Document Repository Submission

The region can submit documents to the GSA CO Portfolio Group all at one time or in multiple rounds.

This action is typically completed by the following role: **GSA-Regional CILP**.

1. Open the Region partition.
2. Click the App Launcher on the left navigation pane.
3. Select the **CILP app** in the **Project Identification, Initiation and Planning** column.
4. Click the **CILP Document Repository Submission** tab.
5. Click **New**.
6. Enter a **Name** for the submission.
7. Select the **Submission Round**.
8. Click **Insert** to add one or more **CILP Document Repositories**.
9. Click the **flyout icon** beside the first CILP document repository to open the "**More Details**" window.
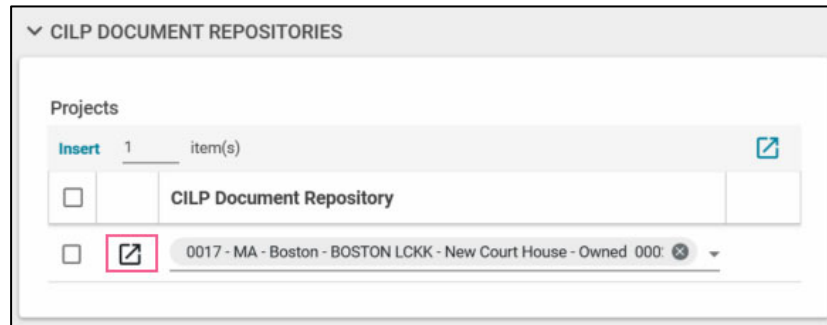
Note: This step is very important because if documents are not selected in the "More Details" window, the submission will be blank.

10. On the right pane, click **Insert** to add one or more rows for **Call Items**.
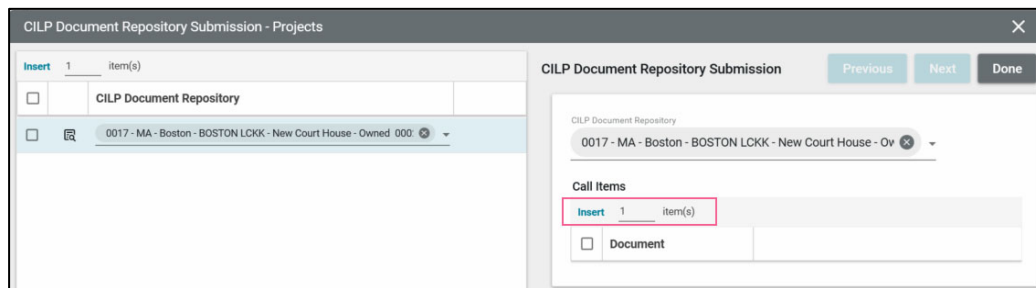
11. Click the dropdown arrow in the Document column and select the document to add for this submission round.
12. Click **Previous/Next** in the top right corner of the window to move through the list of CILP projects.
13. Click the **Done** button located in the bottom left corner of the window.
14. Click the **Save/Close** button.
15. Click the **Submit** button located on the bottom of the record.
16. Repeat the steps above to submit additional CILP Projects.

    Note: The **Status** field for the changes to the Submitted items in the CILP Project Submission tab and the **Status** field.

Download CILP Documents

This action is typically created by the following role: **GSA-CO Portfolio (CILP)**.

1. Open the **GSA partition**.
2. Click the **App launcher** on the left navigation pane.
3. Click the **CILP** app.
4. Click the **CILP Document Repository** tab.
5. Click a **Project** to open the record.
6. To download all the files in a project at one time, click **Download Files** located on the top of the record. Select a **location for the Zip file**, enter **a file name** and click **Save**.
7. To download individual **Call Documents**, click the **blue dots** located on the right side of

the document and choose **View**, **Download** or **Markup**.

8. To download individual **Other Documents**, click the **blue dots** located on the right side of the document and choose **View**, **Download** or **Markup**.