

Kahua Quick Reference Guide

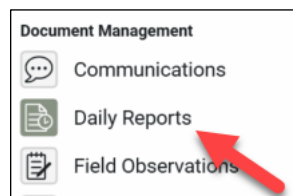
Daily Reports

About Daily Reports

The Daily Reports application allows the Author to initiate a Daily Report, route it through the Subcontractor or Assignee for additional information, and route back to the Author to be closed and distributed. The app lets subcontractors and vendors contribute to Daily Reports and keep track of the tasks, maintains a log of all Daily Reports in the project, and has a built-in workflow to manage through the report. The Daily Report contains and logs documentation of the events taking place on the project site including companies, equipment, material received on the projects, the day’s weather, relevant attachments such as photos, and notes. Reports may be shared with external parties to collaborate, review, and respond accordingly.

Navigating to Daily Reports

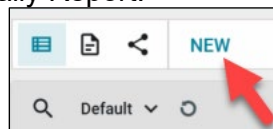
1. Open the project using Project Finder on the left side bar.
2. Select **Daily Reports** from the App launcher.



Creating a Daily Report

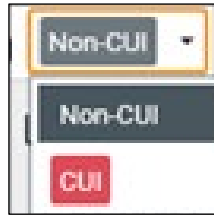
This activity is typically created by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Regional KPM, GSA-Regional Manager, GSA-PM/COR, EXT-CMa, EXT-Contractors, EXT-PM, EXT-Lease Broker Contractor, or Uncleared Contractor.**

1. Click **NEW** to create a new Daily Report.

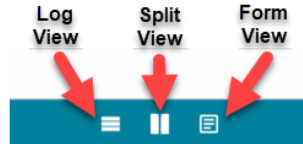


2. In the **New Daily Report** form view, select **CUI** or **Non-CUI** in the top right-hand corner of the form.

Note: External users will not have access to view CUI forms.



Note: Use the three focus buttons in the bottom blue bar to adjust your form view if necessary.



Details Section

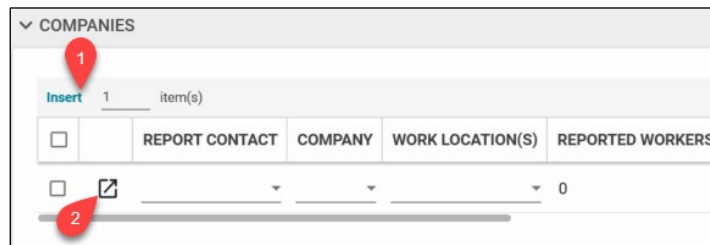
1. The report date and author will auto populate but can be changed if necessary. There can only be one name in the Author field.
2. Click the **Work Location(s)** drop-down list and select a location.

Note: The locations drop-down list is populated from the Locations application and is accessed by users with the appropriate permissions.

3. Select individual(s) the Daily Report will be distributed to in the **Distribution** field.
4. Select individual(s) the Daily Report will be distributed to in the **Distribution** field.
5. Select the **Type** from the drop-down list.
6. If applicable, enter any **Notes**.
7. If applicable, click **Add Signature** to add a signature to the Daily Report. For more information on setting up a Signature in Kahua, please refer to the Introduction and Navigation Quick Reference Guide.

Companies Section

8. If applicable, change the number 1 to the number of Companies, then click **Insert**.
9. Click the **flyout button** next to the new line item to open the **New Daily Report - Companies** window.



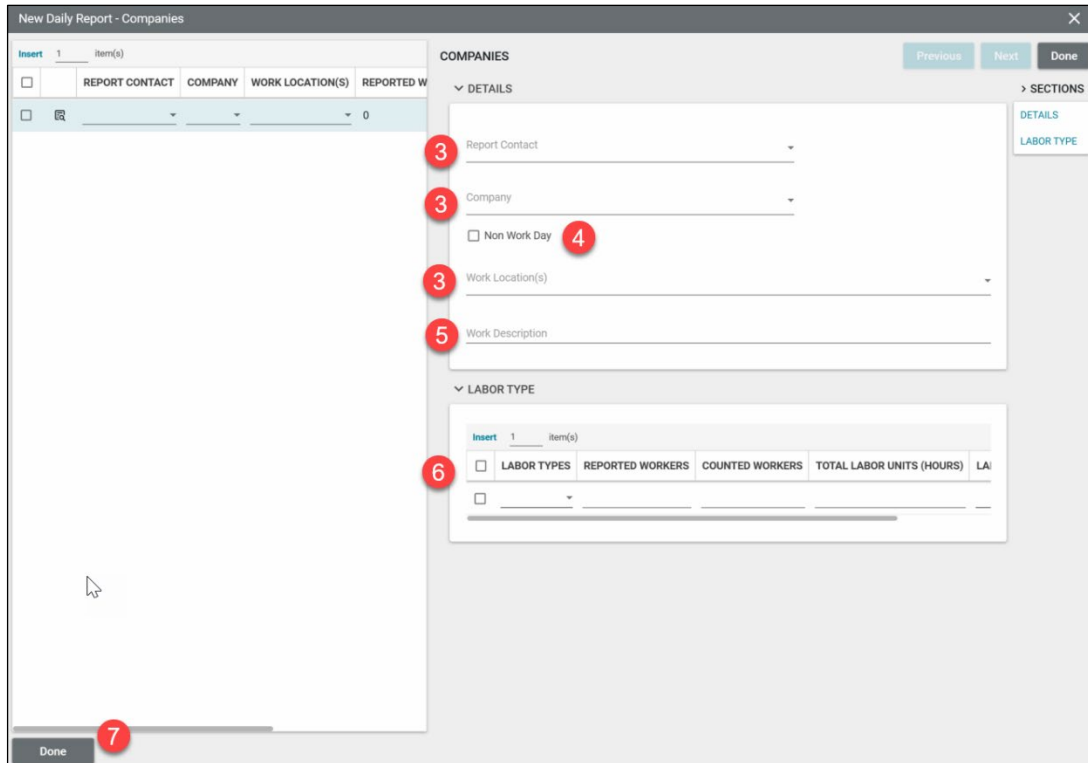
10. Select the **Report Contact** who should complete the daily report. The **Company** for the Report Contact will auto populate. Select the **Work Location(s)** from the drop-down list.
11. If applicable, check the **Non-Work Day** box. This checkbox can be completed by the

subcontractor. For additional information, refer to the **Responding to a Daily Report Task** section below.

12. Enter a **Work Description**.
13. If applicable, fill out the information in the **LABOR TYPE** section.

Note: If there are additional Companies, click the **Next** and **Previous** button to fill out the information for each line item.

14. Click **Done** to close the window.



Equipment Section

15. If applicable, change the number 1 to the number of Equipment items, then click **Insert**.
16. Click the **flyout button** next to the new line item to open the **New Daily Report - Equipment** window.
17. If applicable, fill out or select the **Asset Number, Equipment Item, Report Contact, Area Used, Status, Reading, or Notes**. The Company field will auto populate once the Report Contact is selected.
18. Click **Done** to close the window.

Note: If there are additional Equipment items, click the **Next** and **Previous** button to fill out the information for each line item.

Materials Received Section

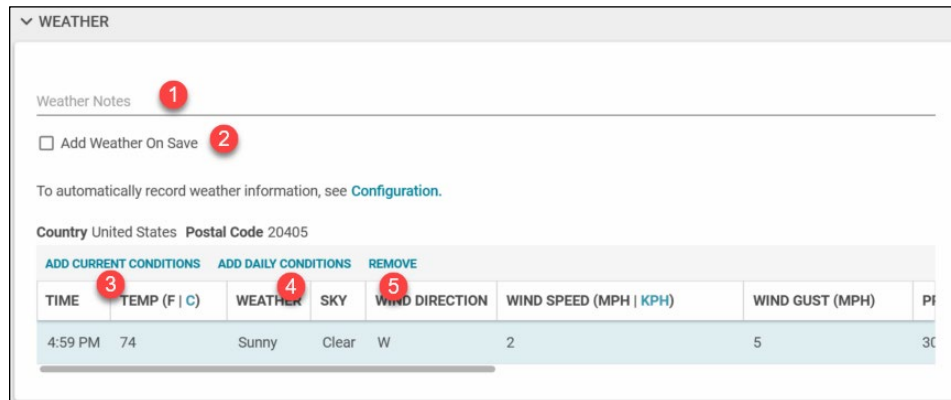
19. If applicable, change the number 1 to the number of Equipment items, then click **Insert**.

20. Click the **flyout button** next to the new line item to open the **New Daily Report – Materials Received** window.
21. If applicable, fill out or select the **Description, Quantity Received, Unit of Measure (UOM), Work Location(s), Time, Report Contact,** and **Notes**. The Company field will auto populate once the Report Contact is selected.
22. Click **Done** to close the window.

Note: If there are additional Materials Received items, click the **Next** and **Previous** button to fill out the information for each line item.

Weather Section

23. Add any notes about weather conditions in the **Weather Notes** section.
24. If applicable, check the **Add Weather On Save** box to have the weather information saved.
25. If applicable, click **ADD CURRENT CONDITIONS** to add the current weather conditions of the project to the daily report.
26. If applicable, click **ADD DAILY CONDITIONS**. To activate this option, the project needs to have an end date. For additional assistance, please reach out to Kahua Support or refer to the **Project Weather Configuration** section below.
27. To remove a weather condition, select the weather condition line item and click **REMOVE**.

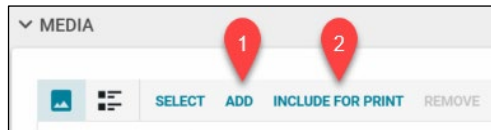


Note: Weather data for daily reports can generate from the project’s setup in the **Configuration** application by users with the appropriate permissions. For additional assistance, please reach out to Kahua Support or refer to the [Project Weather Configuration](#) section below.

Media Section

28. If applicable, click **ADD** to attach a thumbnail view of any supporting photos.
29. To include the photo(s) in the printable portable view, click **INCLUDE FOR PRINT**.
30. To add additional details to the photo, click on the thumbnail view of the photo. When complete, click **Done**.

Note: Any media file added to the Media section is logged in the Media Manager application. For more information on the Media Manager application, please refer to the Media Manager Kahua Quick Reference Guide.



Reference Section

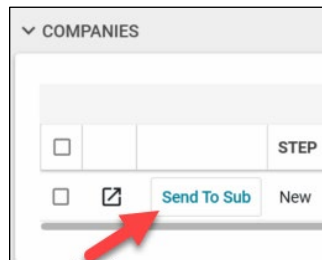
31. Attach any supporting documentation such as photos or pdf files by clicking **UPLOAD** or **ADD KAHUA DOC**, navigating to the appropriate file, clicking **Open**, adding **Comments**, and clicking **OK**.
32. Click the **Save** to complete the creation of a Daily Report.

Daily Reports Workflow

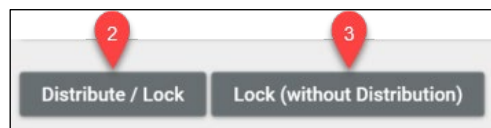
This activity is typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Regional KPM, GSA-Regional Manager, GSA-PM/COR, EXT-CMa, EXT-Contractors, EXT-PM, EXT-Lease Broker Contractor, or Uncleared Contractor.**

After entering all relevant information, select from the workflow options below:

1. **Send to Sub** – In the **Companies** section, next to each company line item, the user can click this button to send a Daily Report Task to the subcontractor(s). The subcontractor(s) will receive an email and task notification in Kahua to fill out additional information in the Daily Report. The information added by the subcontractor(s) can be rejected and returned by the author of the Daily Report.



2. **Distribute / Lock** – This action button will send a PDF copy of the Daily Report and any Reference document that is marked **INCLUDE ON SEND** to the list of recipients in the **Distribution** field. In addition, it will lock the Daily Report so that no further edits can be made. To continue working in the document, click **Unlock**.
3. **Lock (without Distribution)** – This action button allows the author to lock the daily report so that no one else can work in the document or make any changes to it. To continue working in the document, click **Unlock**.



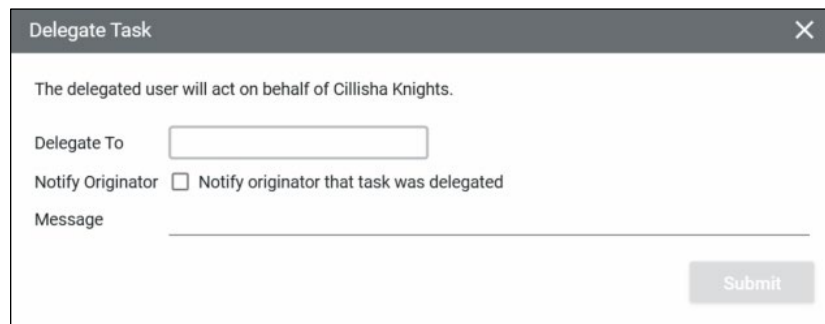
Delegating a Daily Report Task

This activity is typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Regional KPM, GSA-Regional Manager, GSA-PM/COR, EXT-CMa, EXT-Contractors, EXT-PM, EXT-Lease Broker Contractor, or Uncleared Contractor.**

1. Click the **link** in the email or click **Tasks** in the left navigation pane in Kahua to access assigned tasks. If there are new tasks in Kahua, there will be a red indicator with the number of tasks assigned to the logged in user.
2. Open the assigned daily report item.
3. Click **DELEGATE** in the form toolbar.



4. Select a delegated user from the **Delegate To** field.
5. Check the box to **Notify Originator**. This allows the author of the Daily Report to receive a notification that the daily report task has been assigned to another user.
6. Include a message in the **Message** field to the user being reassigned the task.
7. When complete, click **Submit**.



Responding to a Daily Report Task

This activity is typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Regional KPM, GSA-Regional Manager, GSA-PM/COR, EXT-CMa, EXT-Contractors, EXT-PM, EXT-Lease Broker Contractor, or Uncleared Contractor.**

1. Click the **link** in the email or click **Tasks** in the left navigation pane in Kahua to access assigned tasks. If there are new tasks in Kahua, there will be a red indicator with the number of tasks assigned to the logged in user.
2. Open the assigned daily report item to review and respond.

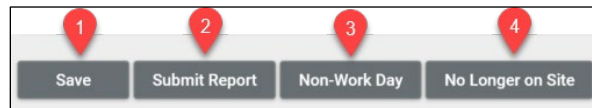
Note: To learn more about Tasks and the different ways you can open tasks, please make sure to review the Tasks eLearning video.

3. Enter in additional information in the blank fields. Use the **flyout button** to add additional information as needed in the **Equipment** and **Materials Received** sections.
4. In the **References** section, attach supporting documentation such as photos or files for the corrective actions taken to fix the item by clicking **UPLOAD** or **ADD KAHUA DOC**,

navigating to the appropriate file, clicking **Open**, adding **Comments**, and clicking **OK**.

After updating the daily report, select one of the following:

1. **Save** – This action button allows the subcontractor(s) to save any uploads or notes entered in the daily report and return to the item to add additional updates. The daily report will remain an active task.
2. **Submit Report** – This action button sends the updates to the author of the daily report. The author can reject or return the daily report to the sub for additional information.
3. **Non-Work Day** – This action button submits the daily report and checks off the **Non-Work Day** checkbox for the report.
4. **No Longer on Site** – This action button moves the task from the **Active Tasks** list to the **Completed** list. The user will not be able to make additional edits to the task beyond this point.



Creating and Copying a Daily Report Template

This activity is typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Regional KPM, GSA-Regional Manager, GSA-PM/COR, EXT-CMa, EXT-Contractors, EXT-PM, EXT-Lease Broker Contractor, or Uncleared Contractor.**

Note: Projects with details that are repeated from day to day may utilize a template that can be copied each day to start the Daily Report.

1. Open the project using Project Finder on the left side bar.
2. Select **Daily Reports** from the App launcher.
3. To create a template, click **NEW**.
4. Select or enter a **Date** that identifies the daily report as the template. (ex: 01/01/1999)
5. Enter in any applicable information needed for the template in the daily report sections.
6. Click **Save**. The daily report template can be edited as the project progresses.
7. Click on the **Daily Report Template** to open the form view.
8. In the form toolbar, click **COPY**. A new daily report opens with the current date and all of the information that was included in the template.

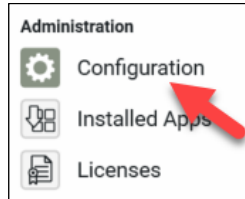


Project Weather Configuration

This typically is completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Regional Manager, GSA-PM/COR, or EXT-PM.**

Note: The Weather tab in the Configurations application provides the opportunity for a project team to capture weather in set increments of time on a Daily Report.

1. In the correct project, navigate to the Configurations application using the App Launcher.



2. Click on the **Weather** tab.
3. Select **Override** to make edits.
4. Select the **Country** from the drop-down list.
5. Enter the **Postal Code** for the project. To test and confirm the data being captured, click **Test**.
6. To enable automatic weather saving, the project needs to have an end date in the Project Details. If the project has an end date, click the **Enabled** checkbox.
7. Determine the **Capture Frequency** by selecting a **Start Time**, **End Time**, and selecting the **Frequency** from the drop-down list.
8. When complete, click **Save**.
9. The weather will begin to save for the project. At the end of the day, a user can open the Daily Report and select **ADD DAILY CONDITIONS** to report the data.

