Kahua Quick Reference Guide
Design Review

About Design Review

As sets of drawings are uploaded to Kahua, the Title Block Extraction Wizard can be used to extract and auto-generate the metadata associated with each drawing. The attribute mapping is based on the Title Block Template you select, but it maps fields such as Sheet Title, Sheet Number, and Revision Number to different regions on a representative drawing. This optional feature is setup before the Design Review process begins.

The Design Review Process automates the review process from identification of review items to decision and approval using **controlled** folders. Kahua's controlled folders 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.

Part A1: Add Files to File Manager without Title Block

Typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-CO Portfolio (CILP), GSA-Design Review Coordinator, GSA-Measures Manager, GSA-Regional PBS Budget, GSA-PBS Budget, GSA-PM/COR, GSA-Regional CILP, GSA-Regional KPM, GSA-Regional Manager, EXT-AE, EXT-CMa, EXT-Contractors, EXT-Contractors (Limited), EXT-Customer User, Lease Broker Contractor, EXT-PM, Uncleared Contractor**

NOTE: Please review the GSA Security Matrix for which permission groups can contribute to each controlled folder in File Manager. This information can be found under the "File Manager –

Folders" tab.

1. Open the appropriate project using Project Finder on the left side bar.
2. Select **File Manager** from the App launcher.
3. Select the appropriate **controlled** folder for the type of file to be uploaded. For example, dwg files will 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 Kahua Quick Reference Guide.
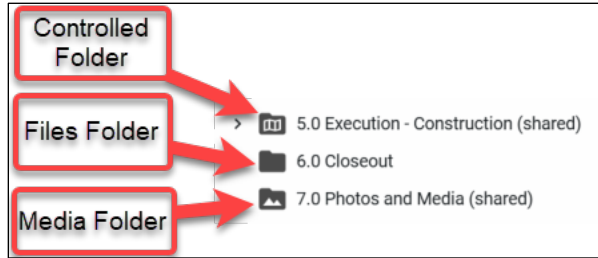

4. Once in the correct folder, click **ADD FILES** in the log toolbar.
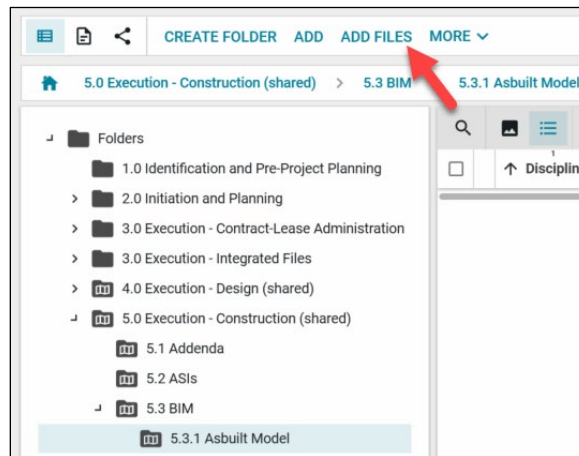
5. Navigate to the appropriate file, click **Open**, click **Continue**.
6. In the **Add Files** window, select **None** from the drop-down list if a title block template will not be used.
7. Click **Continue**.
8. In the next Add Files window, enter a **Rev Number**. If necessary, enter additional information such as the Sheet Number, Sheet Title, Rev Date, and any comments for the Project Manager.
9. Click **OK**.
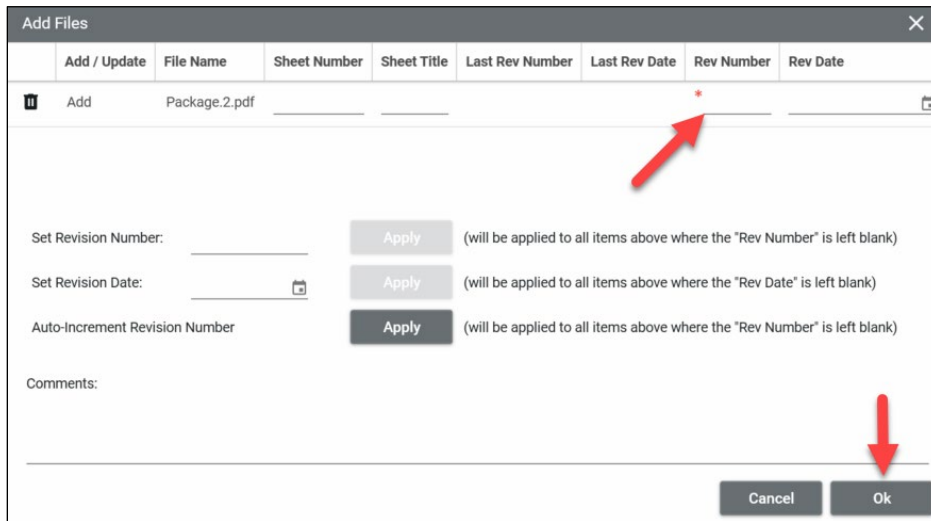
10. Notify the Project Manager and other users that the files are ready for review. Right click on the folder with uploaded files and select **SEND LINK**.
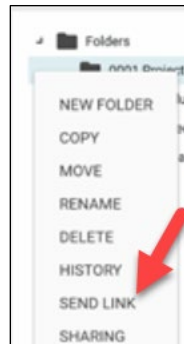

11. The **New Message** form view displays. Select the Project Manager in the **To** field and fill out additional information as necessary.
12. To keep a copy of the message in the Communications application, check the **Copy to Communications** box.
13. When complete, click **Send**.
14. Notice the following status changes:
    a. File Manager Workflow Step = Draft
    b. File Manager Rev Status = Uploaded

## Part A2: Review Files and Submit for QA Check

Typically created by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Design Review Coordinator, GSA-PM/COR, GSA-Regional KPM, GSA-Regional Manager**

1. With the steps followed above, an email notification may have been sent to review the files and submit for QA Check.
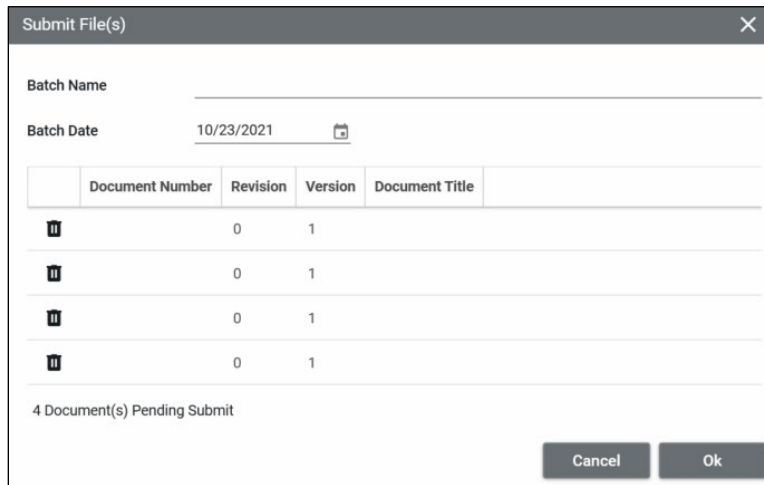2. Click **Open Folder** from the email notification and log into Kahua.

a. If not taken to the correct project or folder, log into Kahua and navigate to the correct project or folder using Project Finder. Use the App Launcher to access File Manager and locate the appropriate folder that needs to be reviewed.

3. Once in File Manager, to see all the files uploaded in the controlled subfolders, click on the main parent folder in the folder tree then use the drop-down menu in the top right to select **All Subfolders (Controlled)**.
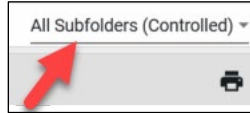
4. If necessary, review and edit any additional details by editing each file or using multi-edit:
    a. Select the box next to each file or select all files.
    b. Click **Multi-Edit** from the log toolbar.
    c. Add additional information as necessary in the **Multi Edit** window.
    d. Click **Save**.
5. Submit the files to the QA Check workflow step by selecting the files and click **Submit** from the log toolbar.
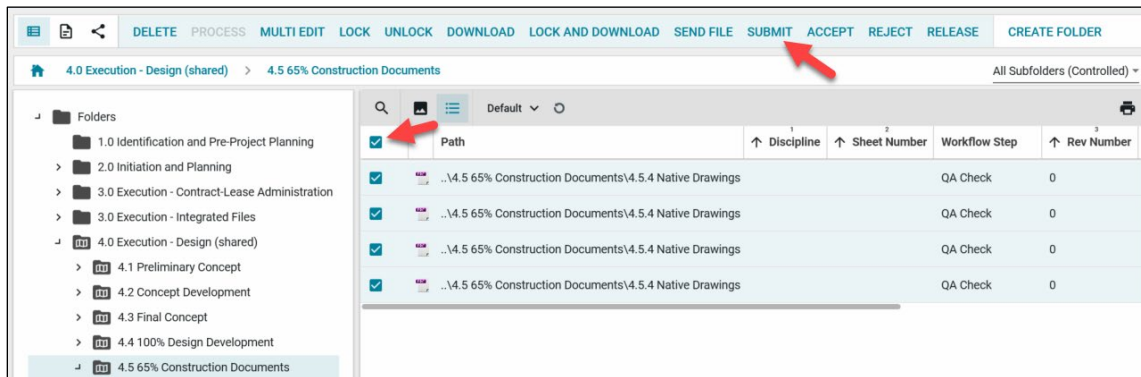
6. Enter a **Batch Name** in the **Submit File(s)** window.
7. Click **Ok**. The files are now in the QA Check workflow step where the quality and contents of the files can be checked.
8. If the individual(s) performing the QA Check is different, an email or Kahua message can be sent to notifying the user that the files are in the QA Check workflow step.

9. Notice the following status changes:
    a. File Manager Workflow Step = QA Check
    b. File Manager Rev Status = Submitted to QA
    c. File Manager QA Status = Pending Review
    d. File Manager Design Review Status = blank

Part A3: Perform QA Check

Typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Design Review Coordinator, GSA-PM/COR, GSA-Regional KPM, GSA-Regional Manager**

1. If step 8 of "Part A2: Review Files and Submit for QA Check" is applicable, an email or Kahua message may have been sent to login and perform the QA check.
2. Once in File Manager within the appropriate project, to see all the files uploaded in the controlled subfolders, click on the main parent folder in the folder tree then use the drop-down menu in the top right to select **All Subfolders (Controlled)**.
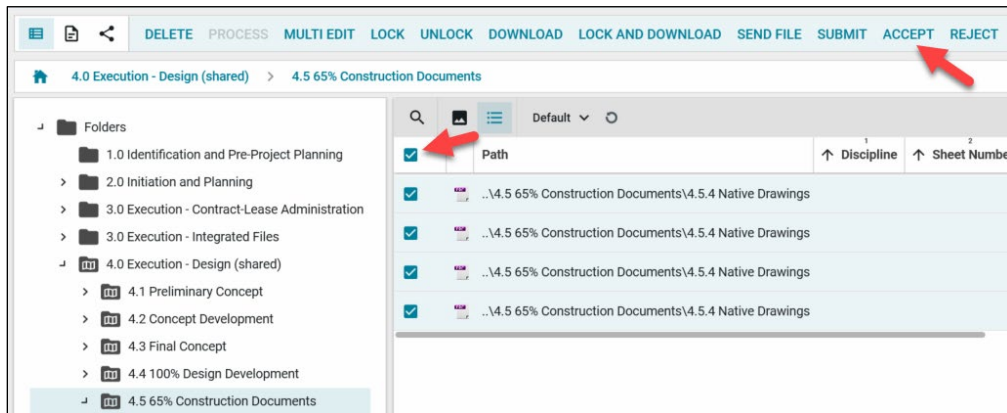

3. Review each file and edit any additional details or use multi-edit:
    a. Select the box next to each file or select all files.
    b. Click **Multi-Edit** from the log toolbar.
    c. Add additional information as necessary in the **Multi Edit** window.
    d. Click **Save**.
4. For the file(s) that pass the QA Check, select the box next to the file(s) and click **ACCEPT** in the log toolbar.

3. In the **Accept File(s)** window, confirm the selection by clicking **Ok**.
4. For the file(s) that fail the QA Check, select the box next to the file(s) and click **REJECT** in the log toolbar.
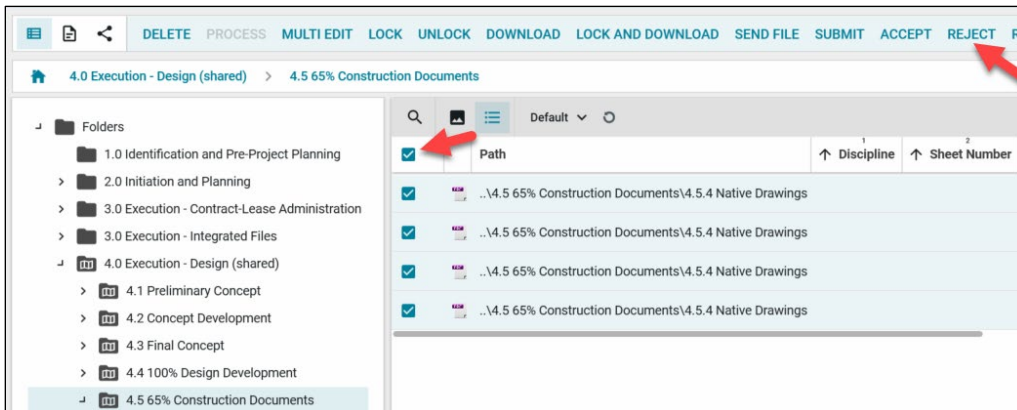
5. In the **Reason For Rejection** window, enter a reason for rejection and the maximum number of calendar days to revise and resubmit. Click **Continue**. This will allow the user who uploaded the files to reupload, and the process starts again from the beginning.
6. If the individual processing the files into a Design Review Set is a different individual, an email or Kahua message can be sent notifying the user that the files have been accepted and is ready to be processed into a Design Review Set.
7. Notice the following status changes:
    a. File Manager Workflow Step = QA Check
    b. File Manager Rev Status = QA Accepted or Rejected
    c. File Manager QA Status = Accepted or Rejected
    d. File Manager Design Review Status = blank

Part A4: Process Files into Design Review Set

Typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Design Review Coordinator, GSA-PM/COR, GSA-Regional KPM, GSA-Regional Manager, EXT-PM**

**NOTE:** Only accepted files can be processed into a Design Review Set.

1. If step 6 of "Part A3: Perform QA Check" is applicable, an email or Kahua message may have been sent to login and process the accepted files into a Design Review Set.
2. Once in File Manager within the appropriate project, to see all the files uploaded in the controlled subfolders, click on the main parent folder in the folder tree then use the drop-down menu in the top right to select **All Subfolders (Controlled)**.

3. Select the box next to the accepted file(s) to process from File Manager into a Design Review Set.
4. Click **PROCESS** in the log toolbar.
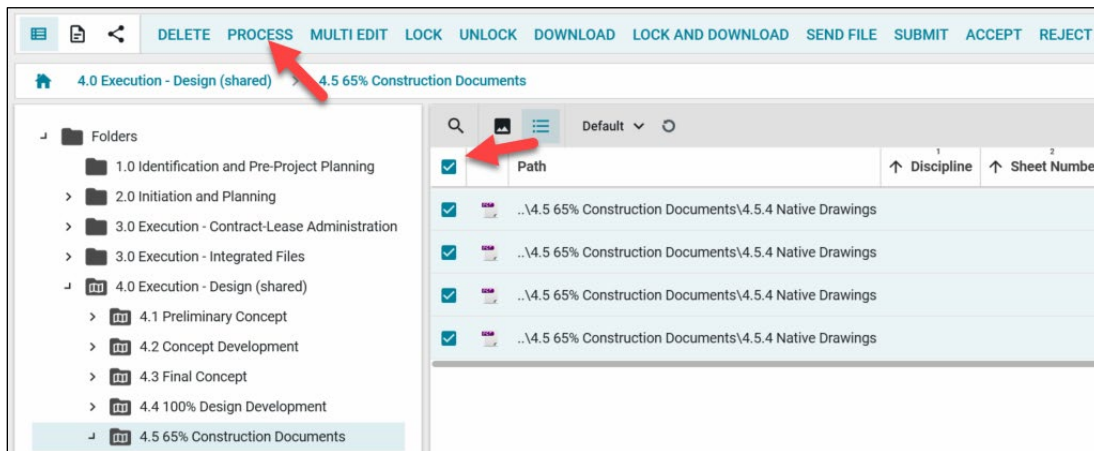
5. The target application will default to Design Review Set and click **Continue**. This will process the files and open the Design Review application automatically.
6. If applicable, in the **New Design Review Set** window, select **CUI** or **Non-CUI** in the top right-hand corner of the form.
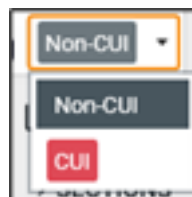
7. Enter a **Title** and fill in any missing information such as additional reviewers or reference documents.

NOTE: The SMEs (subject matter experts) perform the Preliminary Review. The Lead Reviewer(s), which is typically the PM, performs the Primary Review. The Final Reviewer, which is typically the Design Review Coordinator, performs the Final Review.

8. Enter users in the **Distribution Notifications** section such as the AE, Contractor, PM, and Design Review Coordinator.

9. When complete, click **Save** then **Submit for Review** to begin the review process. The review set is now in the Design Review application log.

NOTE: The Design Review Set can be **recalled** while it's in the Preliminary Review. Design Review markups and comments saved before the recall will remain.

10. Notice the following changes:
     a. File Manager Workflow Step = Design Review
     b. File Manager Rev Status = Issued for Design Review
     c. File Manager QA Status = Accepted
     d. Design Review Status = In Review
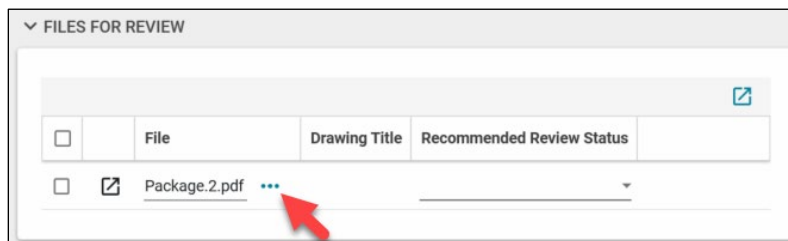
Part B1: SME Reviewer

Typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-National SME, GSA-Regional SME, GSA-Design Review Coordinator, GSA-PM/COR, GSA-Regional KPM, GSA-Regional Manager, EXT-PM, EXT-CMa, EXT-CMa (Limited)**

NOTE: All SME Reviewers will receive a task notification and email to review the design review set at the same time. To learn more about Tasks and the different ways you can open tasks, please make sure to review the Tasks Application Quick Reference Guide and eLearning video.

1. Navigate to the **Tasks** application in the left navigation pane and open the **Design Review task**.

Files for Review Section

2. Click the three dots to the right of the first file to **View, Download,** or **Markup** the file.

3. When adding markups, click the **Save** icon in the top right corner to save all work. All markups will appear in the comment log below, even the markups made by other reviewers. When complete and saved, the save icon will be greyed out and the user may exit the markup view using the 'x' or close button in the top right corner.

4. Click the **flyout button** next to the first line item to open the **Preliminary Review – Files For Review** window and select the **Recommended Review Status** from the drop-down list for each file.
5. If applicable, in the **Details** section, click **Insert** to add any comments for the file.
6. When complete, click **Done**.

NOTE: If there are additional items, click the **Next** and **Previous** button to fill out the information for each line item.
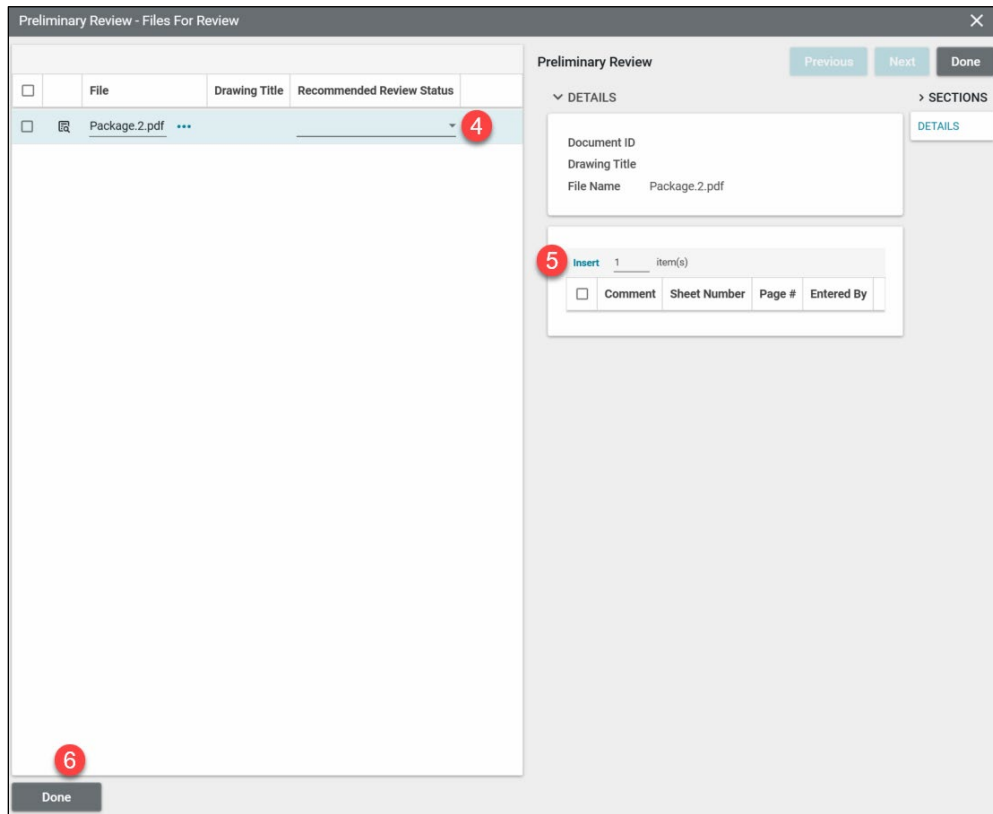
General Comments Section

7. If applicable, add general comments to the overall design review set by clicking **Insert** and entering the comment and page number.

Reference Section

8. 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.**

9. Click **Save** to save the data and return to the document later or click **Submit** to complete the SME Review.

NOTE: The Design Review Set can be **recalled** while it's in the Preliminary Review. Design Review markups and comments saved before the recall will remain. In addition, if the Preliminary Review is complete and the SME(s) do not need to provide a review, the next reviewer (Lead or Final Reviewer) can click **End Preliminary Review**.

Part B2: Lead Reviewer

Typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Design Review Coordinator, GSA-PM/COR, GSA-Regional KPM, GSA-Regional Manager, EXT-PM, EXT-CMa, EXT-CMa (Limited)**

NOTE: If the Preliminary Review is complete and the SME(s) does not need to provide a review, the next reviewer (Lead or Final Reviewer) can click **End Preliminary Review**. Once sent to the next reviewer(s) (Lead or Final Reviewer), the design review set can no longer be recalled.

1. An email notification is sent to the Lead Reviewer(s) to perform the Primary Review once the Preliminary Review is complete.
2. Click **Open in Kahua** from the email notification and log into Kahua to be directed to the design review set.
   a. If not taken to the correct project or app, log into Kahua and navigate to the correct project or app using Project Finder. Use the App Launcher to access Design Review and locate the appropriate review set that needs to be reviewed.
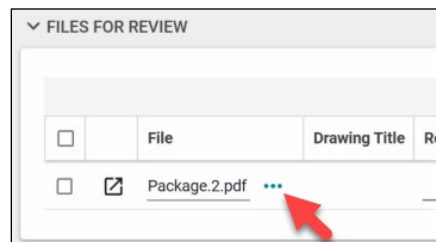3. Click **Edit** in the form toolbar.
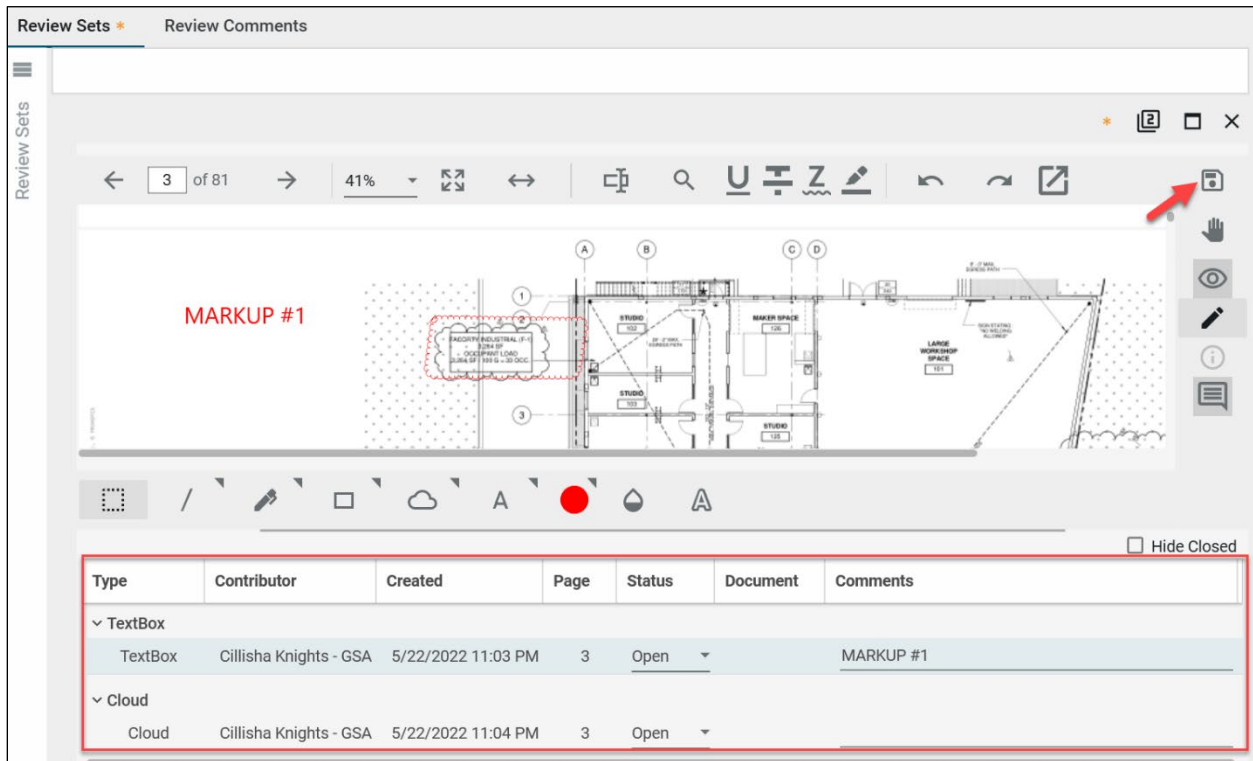

Distribution Notifications Section

4. If applicable, add additional users to the **Notifications List**. These users will be notified once the design review set is complete.

Files for Review Section

5. If applicable, click the three dots to the right of the first file to **View, Download,** or **Markup** the file.


6. When adding markups, click the **Save** icon in the top right corner to save all work. All markups will appear in the comment log below, even the markups made by other reviewers. When complete and saved, the save icon will be greyed out and the user may exit the markup view using the 'x' or close button in the top right corner.

7. When complete, click the **flyout button** next to the first line item to open the **Design Review Set – Files For Review** window.
8. In the **Reviewer Recommendations** section, view the recommended review status selected by the SME and any previous comments in the **Reviewer Comments** section.
9. In the **Reviewer Comments** section, click **EXTRACT / IMPORT MARKUPS**.

NOTE: The Extract / Import Markups button appears while in Edit mode and allows the Lead Reviewer to select and extract any previously saved markups on a file. A list of the markups from the document will display in the log and can be used for tracking, reporting, and assigning tasks. The Final Reviewer can extract Kahua markups as well.
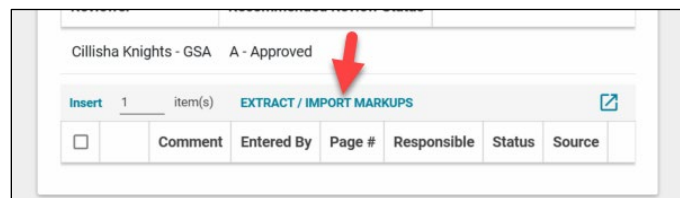
10. If applicable, in the **Reviewer Comments** section, click **Insert** to add any additional comments for the file.
11. Select the **Review Status** for each file from the drop-down list.
12. When complete, click **Done**.

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

General Comments Section

9. If applicable, add general comments to the overall package by clicking **Insert** and entering the comment and page number.

Reference Section

10. 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.**

11. Click **Save/Close** to save the data and return to the document later or click **Send to Final Reviewer** to complete the Lead Review and move forward to the next reviewer.

Part B3: Final Reviewer

Typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-Design Review Coordinator, GSA-PM/COR, GSA-Regional KPM, GSA-Regional Manager, EXT-PM, EXT-CMa, EXT-CMa (Limited)**

NOTE: If the Primary Review is complete and the Lead Reviewer(s) does not need to provide a review, the next reviewer (Final Reviewer) can click **End Primary Review**. In addition, the design review set cannot be recalled.

1. An email notification is sent to the Final Reviewer to perform the Final Review of the review set once the Lead Reviewer completes the Primary Review.
2. Click **Open Folder** from the email notification and log into Kahua.
   a. If not taken to the correct project or folder, log into Kahua and navigate to the correct project or folder using Project Finder. Use the App Launcher to access Design Review and locate the appropriate review set that needs to be reviewed.
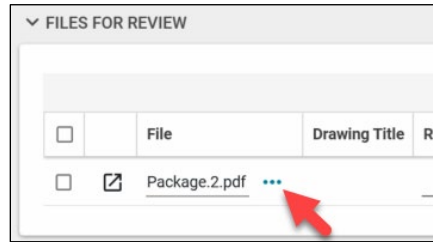3. Click **Edit** in the form toolbar.
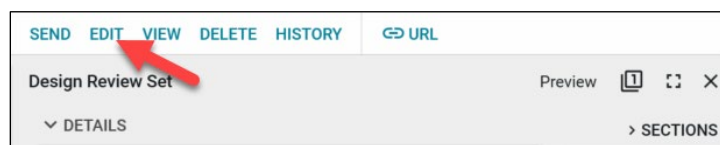
Distribution Notifications Section

4. If applicable, add additional users to the **Notifications List**. These users will be notified once the design review set is complete.

Files for Review Section

5. If applicable, click the three dots to the right of the first file to **View, Download,** or **Markup** the file.

6. When complete, click the **flyout button** next to the first line item to open the **Design Review Set – Files For Review** window.
7. In the **Reviewer Recommendations** section, view the recommended review status selected by the SME and any previous comments in the **Reviewer Comments** section.
8. In the **Reviewer Comments** section, click **EXTRACT / IMPORT MARKUPS**.

NOTE: The Extract / Import Markups button appears while in Edit mode and allows the Lead and/or Final Reviewer to select and extract any previously saved markups on a file. A list of the markups from the document will display in the log and can be used for tracking, reporting, and assigning tasks. The Lead Reviewer can extract Kahua markups as well.
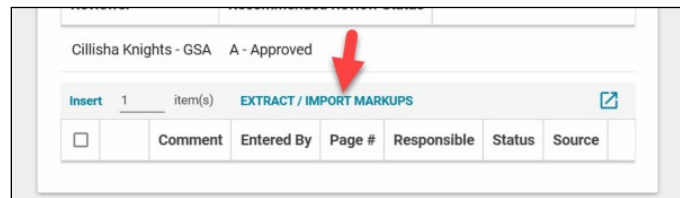
9. If applicable, in the **Reviewer Comments** section, click **Insert** to add any additional comments for the file.
10. Review or select the **Review Status** for each file from the drop-down list.
11. When complete, click **Done** and **Save/Close**.

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

12. Navigate to the **Review Comments** tab to review and ensure markups and comments have been extracted.
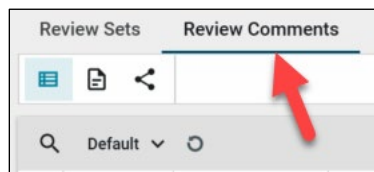
13. Return to the Review Sets tab. Once the design review set is complete, click **Complete Review**.
14. In the **Markups and Comments** window, select an option from the drop-down list in regard to copying markups and comments back to the Reviewer Comments section in File Manager for each file.

NOTE: The window will default to **Copy Markups and Comments not 'Closed'**. The final reviewer has the option to select **Copy all Markups and Comments**.

15. Click **Continue**.
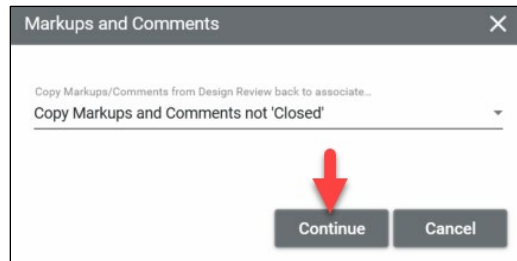
16. Users listed in the **Notifications** field receive a notification for each file with the appropriate status.
    a. If applicable, the final reviewer can use the **Send** button to send messages.

Part C: Markup Tools
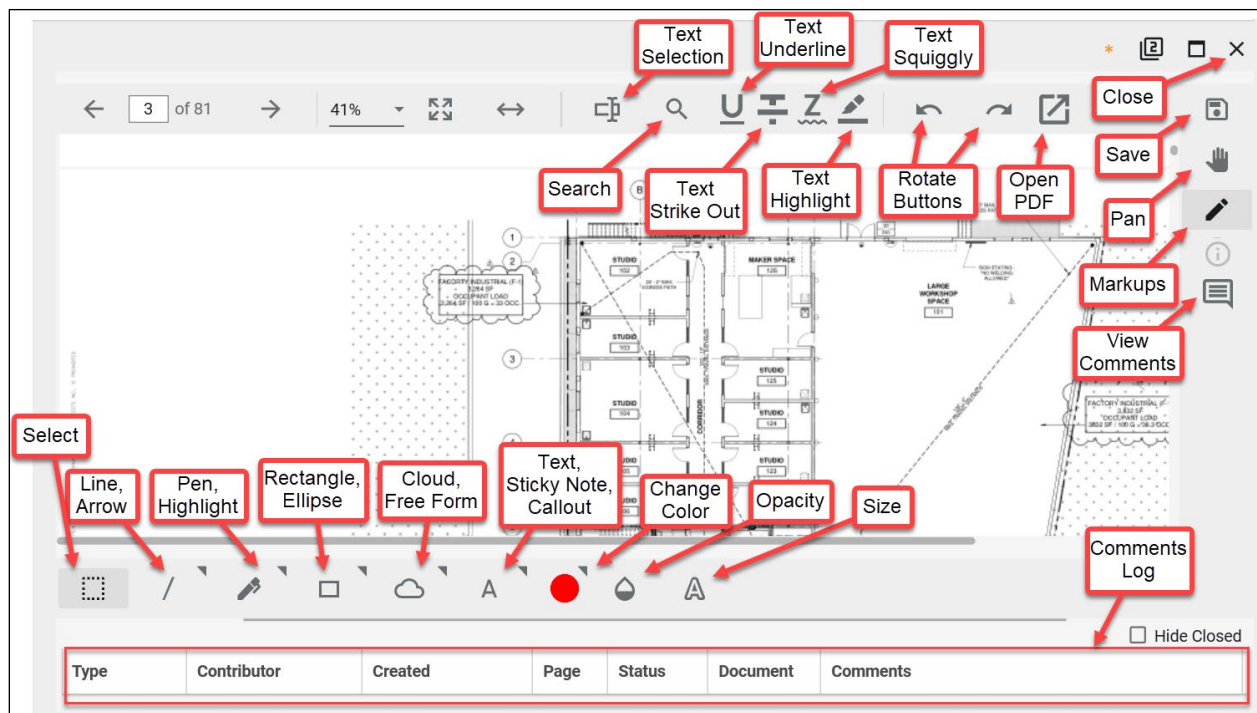
Part D: Assigning Open Review Comments

Typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-National SME, GSA-Regional SME, GSA-Design Review Coordinator, GSA-PM/COR, GSA-Regional KPM, GSA-Regional Manager, EXT-AE, EXT-PM, EXT-CMa, EXT-CMa (Limited)**

1. Navigate to the appropriate project using Project Finder on the left side bar.
2. Select **Design Review** from the App launcher.
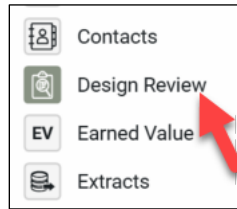
3. Review the comments for the review set by click on the **Review Comments** tab.
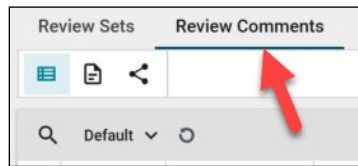
4. Use the **View** drop-down list to change the view to **By Design Review Set Response Details**. This will allow the user to see the response details in the Review Comments log organized by the review set.

NOTE: Users can create and manage their own views by clicking **Manage Views**. To learn more about creating your own view, please refer to the Reports Kahua Quick Reference Guide.
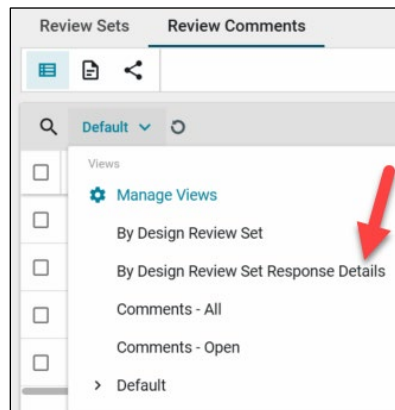
5. To add additional information to each line item (ie. who is responsible, response clarification, or response details), select the comments to edit then click **MULTI-EDIT** in the log toolbar.
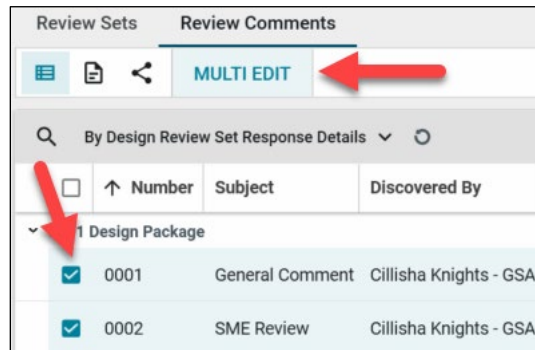
6. In the **Multi-Edit** window, add information as necessary to the open comments. The following options are available:
   a. Select a user in the **Responsible** field to be responsible for addressing the review comment. Select a **Due Date** in the next column if there is a deadline for the user to address the review comment.
   b. Select a **Response Classification** and/or enter **Response Details** to address the review comment.
   c. Use the **COPY TO ALL** button in the window toolbar to copy a selection or response to the entire column.
   d. Use the **COPY TO SELECTED** button in the window toolbar to copy a selection or response to selected line items or rows.
7. When complete, click **Save**.

NOTE: The **Completed Date** column will auto populate once the user clicks **Mark Complete** for the review comment. Any completed comment can be Re-opened. Refer to the **Part F: Closing Out a Review Comment** section below for additional details.

8. To assign each review comment or markup to a user in the **Responsible** field, click on a review comment to open the comment's form view.
9. Click **Assign To Responsible**. The user in the **Responsible** field will receive a task notification to address the open design review comment. Once addressed, the review comment can be marked complete.

Part E: Responding to Assigned Open Review Comments

Typically completed by the following roles: **Anyone**

1. Log into Kahua and navigate to the Tasks app.
2. Click on the assigned task to respond to the Design Review Comment.
3. In the **Response** section, provide a **response clarification**, add information to the **response details**, and select the **completed date**.
4. If applicable, attach references in the **References** section for the Design Review Comment.

5. To return to the document later for additional details, click **Save** to save your work. Once you have completed the task, click **Mark Complete**.

Part F: Closing Out a Review Comment

Typically completed by the following roles: **Domain Administrator, GSA-Administrator Group, GSA-National SME, GSA-Regional SME, GSA-Design Review Coordinator, GSA-PM/COR, GSA-Regional KPM, GSA-Regional Manager, EXT-AE, EXT-PM, EXT-CMa, EXT-CMa (Limited)**

1. Open the project using Project Finder on the left side bar.
2. Select **Design Review** from the App launcher.
3. Click on the **Review Comments** tab.
4. If necessary, use the **View** drop-down list to change the view to **By Design Review Set Response Details**. This will allow the user to see the response details in the Review Comments log organized by the review set.
5. Click on an open review comment to open the comment's form view.
6. Review the details in the comment such as the Response Clarification and Response Details.
7. Click **Mark Complete** to close out the review comment. The **Completed Date** will auto populate, and the workflow status of the review comment will change to **Complete**. The review comment will no longer be editable unless reopened.