Kahua Quick Reference Guide
Field Observations
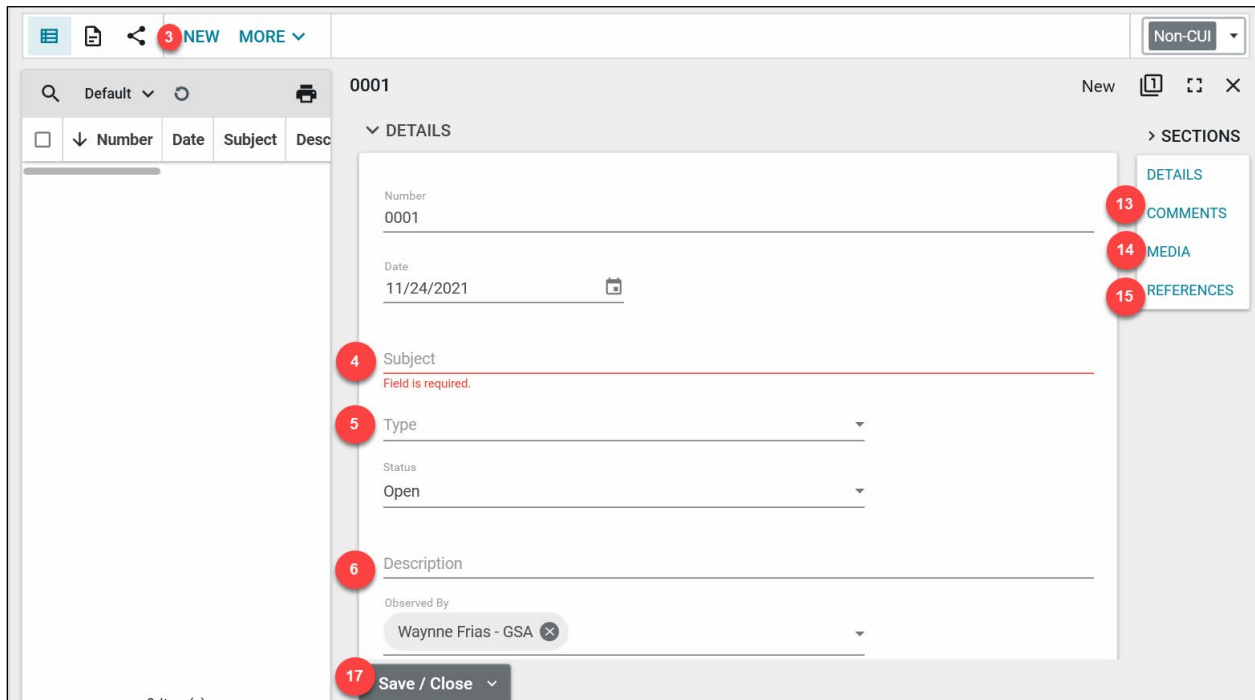
About Field Observations

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The Field Observations app can be used to document issues such as defective work, lack of clean-up, or lack of manpower. The Field Observations app allows the Author to initiate a Field Observation and route it through the Responder for review. Once review is complete, the Author may then close the Field Observation.

Create a Field Observation

1. As the author of the Field Observation, navigate to the appropriate project.
2. Access the **Field Observations** app from the App Launcher under the **Document Management** section.
3. Click **New** to create a new Field Observation.
4. In the form, enter a **Subject**.
5. Select a **Type** from the dropdown list.
6. Enter a **Description**, being as descriptive as possible.
7. The **Observed By** field defaults to the user's name.
8. Enter **Responsible Contact**. When a Responsible Contact is entered, the Responsible Company is populated automatically.
9. Enter a **Due Date**, but leave Resolved Date for the recipient.
10. Select a **CSI Code**. Options in the CSI Code dropdown list can be set up in your project kickoff meeting with Admin.
11. Select **Location**. Options in the Location drop-down list can be set up in your project kickoff meeting with Admin.
12. Enter **Notes**.
13. In the Comments Section, enter comments.
14. In the Media Section, click **Add** to attach any applicable photos. You may select multiple photos to upload.
15. In the References Section, you can add a document that exists within the project by clicking the **Add Kahua Doc** button.
16. To add a document that does not exist within the project, click the **Upload** button. Multiple documents may be uploaded at one time.
17. Click the **Save/Close** button.
18. Review the form to check for accuracy.
19. Click the **Send to Responsible** button.

Respond to an Observation (Responder)

1. Click on the Field Observation task in the **Tasks** app.
2. Responder will respond by one of the following:
   a. Enter **Comments/Updates**, and click **Submit Update** the work is **not complete**.
   b. Enter **Comments/Updates**, and click **Mark Complete** if the work is **complete**.
3. Click **Return** and enter a **Reason** (the items belong to a different company).

   Note: A task will remain with the contact throughout the updates process. Only when the task is marked complete does it go away.

Close an Observation (Author)

1. Within the appropriate project, access the **Field Observations** app from the App Launcher under the **Document Management** section.
2. Click on the **Field Observation** and view all comments and the status.
3. Add **Comments** as needed.
4. Click **Close**.