Kahua Quick Reference Guide
File Manager

About File Manager

The File Manager application provides a standardized folder structure for maintaining, managing, and sharing project files with no storage limit.

Folder Types

1. Controlled Folder – This type of folder is used as a robust Drawing Log and to manage any type of document. This folder group offers Revision Management, Review and Approval Workflow with 'Ball-in-Court' tracking, and Distribution Management. For more information on the Controlled folder, please refer to the Design Review Quick Reference Guide.
2. Files Folder – Enables files of any type to be managed and shared across both internal and external project stakeholders.
3. Media Folder – Functions and behaves exactly like a standard Files folder, but it enables media-related content, such as photos and videos, to be better described. Files put into a Media folder will have additional attributes, such as GPS coordinates, video play duration, and photographer name.

Navigating File Manager

1. Open the project using **Project Finder** on the left navigation bar.
2. Select **File Manager** from the Other column in the App launcher.
3. Drill down to the lower-level folders by clicking on the arrows on the left side of the folder list.
4. Click on a folder and the contents of the selected folder will appear on the middle pane.
5. Click on a file in the middle pane to open a preview of the document on the right.

Flat File View

To view all the files under the selected folder, whether or not they are in a sub-folder, select a Folder Type 'flat' view from the dropdown in the top right hand corner of the right pane.
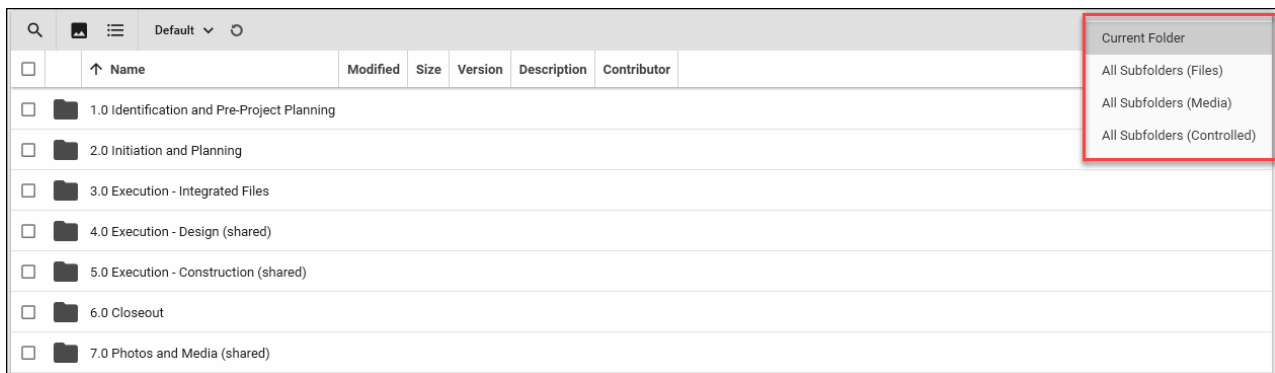
Create a New Folder

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

Option 1:

1. In the **folder list**, select the folder where you want to create a sub-folder.
2. Click **Create Folder** in the top ribbon.
3. When prompted, select the folder type
4. Enter the folder name, then select **OK**.

Option 2:
1. Right click the folder where you want a sub-folder and click New Folder.
2. When prompted, select the folder type.
3. Enter the folder name, then select **OK**.

Managing Folders

Right clicking a folder opens a list of other options for managing the selected folder:

Copy – Copy the folder and all of its contents to another location in the folder structure.

Move – Move the folder and all of its contents to another location in the folder structure.

Rename – Change the name of the folder.

Delete – Delete the folder and all of its contents.

History – Open a pane showing a list of when the folder was created or edited and by whom.

Send Link – Open the Send Wizard with a link to the folder and its contents in the body of the email.

Sharing – DO NOT USE

Properties – Includes two tabs:

- Details – Lists the Name and Partition Path of the folder.
- Notifications – Allows you to set up Notifications to be sent to specific Kahua users when a file is Added, Edited, Deleted, Locked, Unlocked, and/or the Folder is Updated.

Add Files

This action is typically performed by the following roles: **Administrators, GSA-PM/COR, External A/E, External CM, External Contractors, External Customers, GSA Client Project Agreement, GSA CO Portfolio CILP, GSA Design Review Coordinator, GSA Measures Manager, GSA PBS Budget, GSA Regional Manager, GSA Regional Portfolio Manager & CILP,** or **GSA Regional Systems Administrator**.
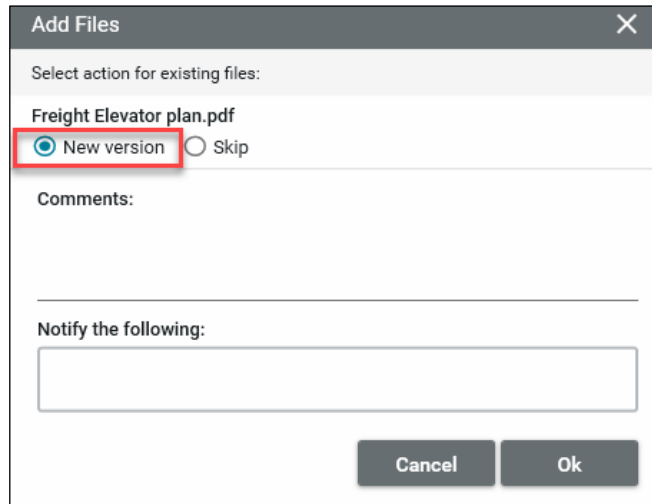
Option 1:

1. Select the folder and click the **Add Files** button in the top ribbon.
2. Follow the prompts to upload the file.
3. If necessary, add any comments or select the individuals you wish to notify.
4. Click **OK**.

Option 2: If you are logged in via the Kahua desktop application, you can drag and drop a file into a folder by opening the folder and dropping the file into the pane on the right side of the screen.

Uploading a New Version of a File

1. Click **Add Files** in the top ribbon and select a file with the exact same name as the previous version.
2. Click **OK**.
3. In the Add Files pane, select **New Version** then click the **OK** button.

4. To access the earlier version of the file, click on the file to open the Details. Scroll down to the **Versions** section. Select the version you wish to view, then click **View**.

Managing Files

Selecting a file opens a list of options for managing the selected file. The same options are available when you right click on the file name.
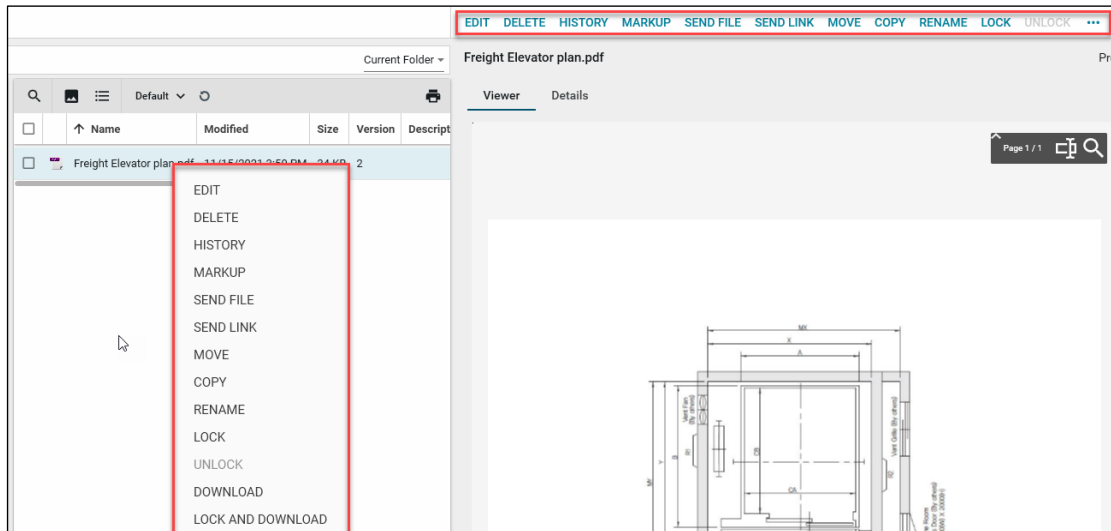
Edit – Open the Details of the file to be edited.

Delete – Delete the file.

History – Open a pane showing a list of when the file was uploaded or edited and by whom.

Markup – Open Markup options and a list of previous Markups.

Send File – Open the Send Wizard with the file included as an attachment.

Send Link – Open the Send Wizard with a link to the file in the body of the email.

Copy – Copy the file to another location in the folder structure.

Move – Move the file to another location in the folder structure.

Rename – Change the name of the file.

Lock/Unlock – Lock the file, preventing other users from uploading a new version while you are working on the file. This helps with version control. The file History will display who locked the file. Unlock when you are ready to allow others to edit.

Download – Initiate a download of the file locally.

Managing Multiple Files

The checkbox on the left side of the file name opens several of the same options with the addition of Multi-Edit and Combine. You can select one or more files to manage at one time using the options in blue on the left side of the top bar.
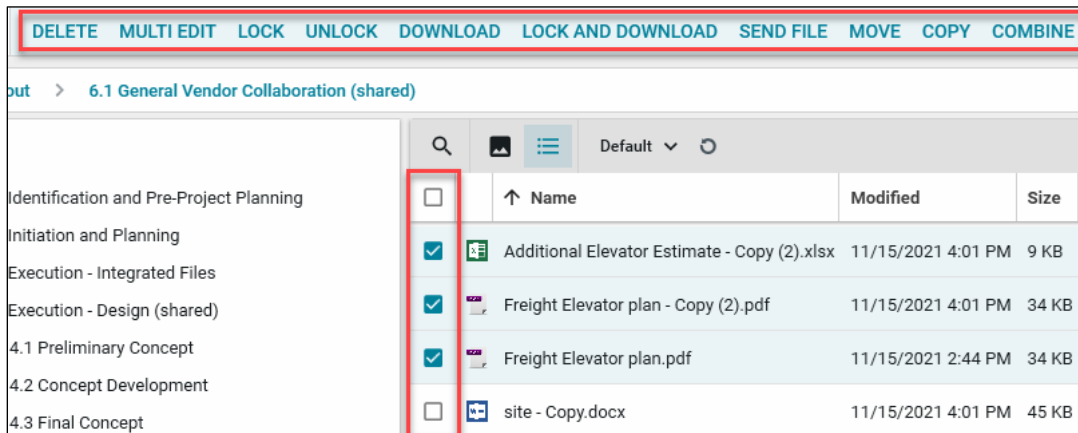
Multi Edit – Allows you to make edits to the Details of multiple files at one time.

Combine – Combines selected files into one PDF document.