# Kahua Quick Reference Guide
# References Section

## Project Lifecycle Applicability

| Identification/ Initiation | Planning | Execution | Closeout |
|---|---|---|---|

## About the References Section

Attach Reference Documents
Manage Reference Documents

Most applications in Kahua have a References section at the bottom of each record. References allow you to upload a copy of a document as an attachment to the record. You can also process another record from the same or a different application within the project to attach a copy of the Portable View of the initiating record to the References of the destination record.

## Attach Reference Documents

To attach a document in the References section of a record, the record must be open in Edit mode. There are 3 options for attaching references: Upload, Add Kahua Doc, or Process from Another Record.

**Upload**

**Upload** attaches a copy of the file you select from your desktop or from Google Drive to the References section of the record.

1.  Select **Upload** from the References section.
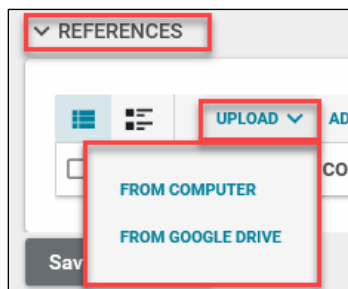
**Note:** If you have **Enable Google Drive Uploads** turned on in My Settings, you will have the option to choose documents **From Computer** or **From Google Drive**.

2. **From Computer**
   a. File Explorer opens.
   b. Navigate to the file to the desired file.
   c. Click **Open**.
   d. Add a **Comment** in the **Add Files** window, if desired.
   e. Click **Ok**.

3. **From Google Drive**
   a. If your Google account is not already synced, the **Sign in – Google Accounts** window will open.
   b. Select the applicable Google account and then **Continue** to allow Kahua to access your Google Account.
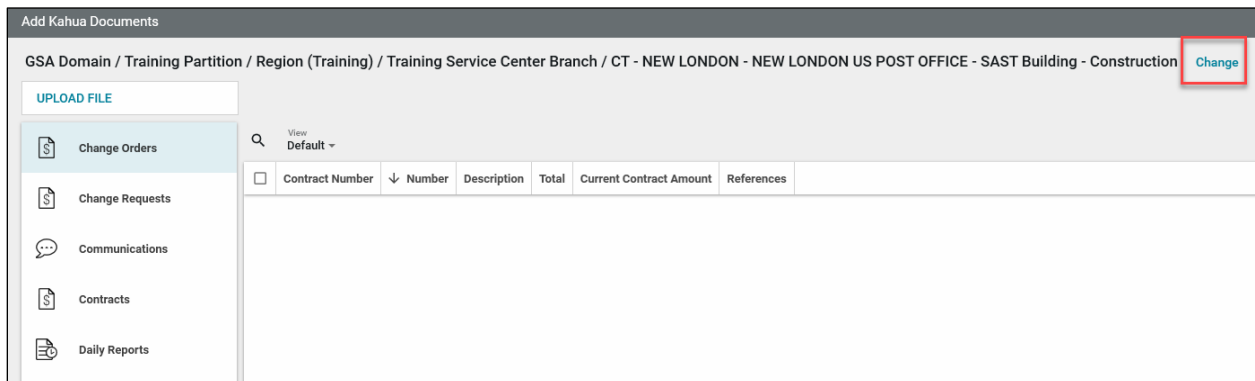   c. Navigate to the file to be attached.

   **Note:** To select a shared document, check the **Include Shared Items** box.

   d. Click **Select**.
   e. Add a **Comment** in the **Add Files** window, if desired.
   f. Click **Ok**.

**Add Kahua Doc**

**Add Kahua Doc** attaches a copy of a file that is already in Kahua. You can select a record or Reference document from most applications in any project you have access to.

4. Click **Add Kahua Doc**.
5. To select a document from a project other than the one you are currently in, click **Change** at the end of the project path at the top of the **Add Kahua Documents** window.
   a. Use the blue arrows in the **Change Project** window to navigate to the correct project.
   b. Click **Done** at the bottom in the **Change Project** window.

| Add Kahua Documents | | | | | | | |
|---|---|---|---|---|---|---|---|
| GSA Domain / Training Partition / Region (Training) / Training Service Center Branch / CT - NEW LONDON - NEW LONDON US POST OFFICE - SAST Building - Construction | | | | | | | Change |
| UPLOAD FILE | | | | | | | |
| Change Orders | | View Default ▾ | | | | | |
| Change Requests | | ☐ Contract Number | ↓ Number | Description | Total | Current Contract Amount | References |
| Communications | | | | | | | |
| Contracts | | | | | | | |
| Daily Reports | | | | | | | |

6. Select the App from the list in the left navigation pane.

7. Check the box on the left side of the record(s) to be include in the References.
8. To view the list documents that are selected, click **Show Selected Documents** at the bottom of the window.
   a. The list includes the Portable View of the selected records and any Reference documents attached to those records.
   b. Click the **X** on the left side of the row to remove a document from the selected list.
   c. Use the **X** in the top right-hand corner to close the **Selected Documents** window.
9. Click **Add** from the bottom left-hand corner of the Add Kahua Documents window.

**Process from Another Record**

**Process** allows you to attach a copy of the open record's Portable View to the References section of another (Unlocked) record in the same or a different app. The **Process** option is at the top of some records in the following apps: Communications, RFIs, Field Observations, Punch Lists, and Design Review.

**Note:** A record must be open to read-only mode to Process.

1. Click **Process**.
2. Select a **Target Application**.
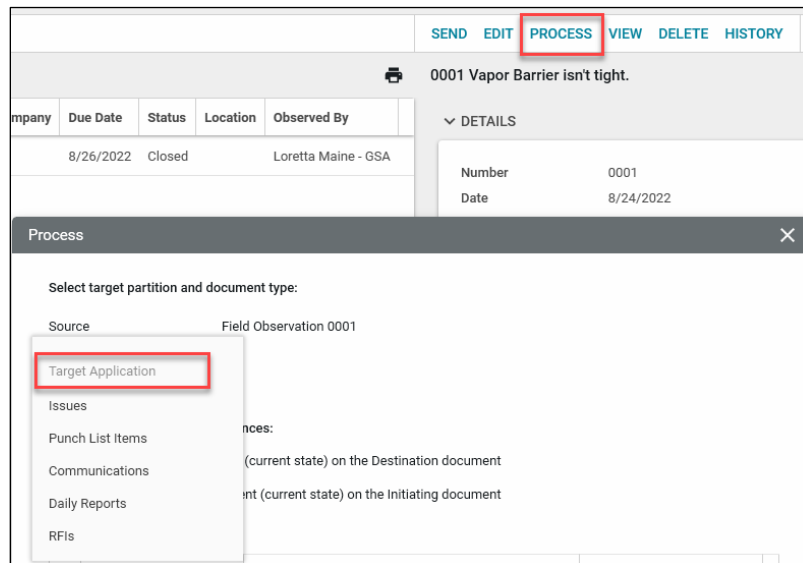


   **Note:** The list may include some applications that are not available to you.

3. If you are processing an RFI to a Sub RFI, you will select either **Create New** or **Add to Existing**.
   a. If Adding to an Existing record, you will select which record from a drop-down list.
3. Other apps will create a new record in the Target/Destination app.
4. Leave the **PDF of Initiating Document** and **PDF of Destination document** boxes checked.
5. References in the Initiating Document are listed at the bottom of the **Process** window.

    b. To attach the References in the Destination app, leave the box on the left side checked. Uncheck the box to keep it from Processing.

    c. To change the Reference Type, select from the drop-down list.

    d. Click the **Start Processing** button.

6. The Destination record opens, and the Initiating record's Portable View and/or selected Reference documents are listed in the References section.

## Manage Reference Document

After a document has been attached to a record, you can View, Markup, and Download from either read-only or edit mode.

**View**

Opens a preview of the highlighted file.

**Markup**

Opens a preview of the highlighted file with Markup options open.

**Download**

Downloads the highlighted file. To download multiple files at once, check the box to the left of the file names and click **Download**.

**Edit, Remove, or Add Composite**

To Edit, Remove, or Add Composite, you must be in Edit mode.



**Edit**

Opens the detail options for the highlighted file. You can **Edit:**
- **File Description** – Defaults to the name of the uploaded file
- **Reference Type** – Defaults to Supporting Document
- **Include on Send** – Select the box if you want the file be attached along with the record's Portable View when **Sending** a record
- **Include Markup on Send** – Select the box if you want to send an attachment with markups or **Send** without any markups.

**Remove**

**Removes** the selected file from the record. To remove multiple files at once, check the box to the left of the file names and then click **Remove**.

**Add Composite**

**Add Composite** allows you to combine multiple files into one.

1.  Enter a **File Name** for the combined file.
2.  Check **Include on Send** to use the combined file for sending.
3.  Check the **Include** box beside each file to include in the combined file.
    a.  The VIEW file is the Portable View of the record.
    b.  **Add More** allows you to add other Kahua Documents or Upload a File from your desktop.



1)  Select the App and the record, and click **Add Selected**. Repeat to add additional files.
2)  Click the **Upload File** icon in the top right-hand corner of the window to select a document(s) from your desktop.
3)  Click **Attach** at the bottom of the Add Kahua Documents window to include the selected files to the References.
4.  Use the up/down arrows to the right of each file to move the files into the correct order for the new file.
5.  Click **Ok**.
6.  Click the **Save/Close** button.

**Note:** You will not be able to do anything with the new file until the **Preview Status** is Rendered. Usually closing the record causes it to fully render unless it is a large file that may take more time.

## Resources

For more help with this or any other Kahua application, you can access the Calendar for Instructor-led training, Self-paced videos, or additional Quick Reference Guides (QRGs) from this link: Training: Project management tool | GSA

## Related QRGs

Intro and Navigation
Markups