Kahua Quick Reference Guide
Reports

Project Lifecycle Applicability

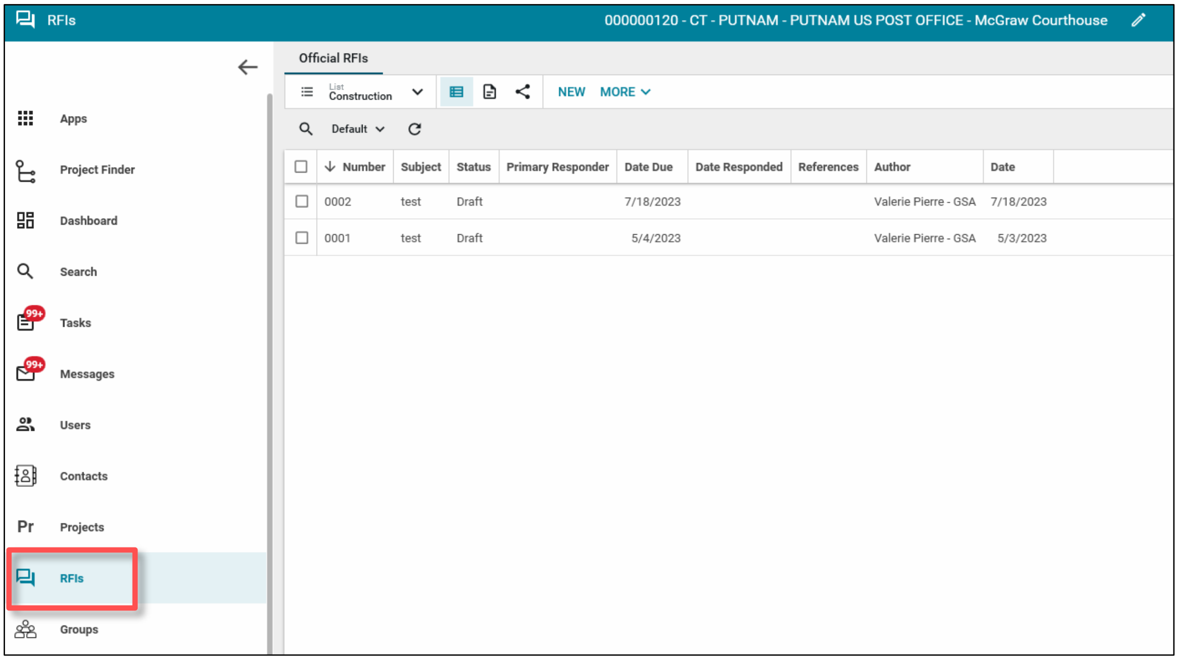
Identification/ Initiation	Planning	Execution	Closeout

About Reports

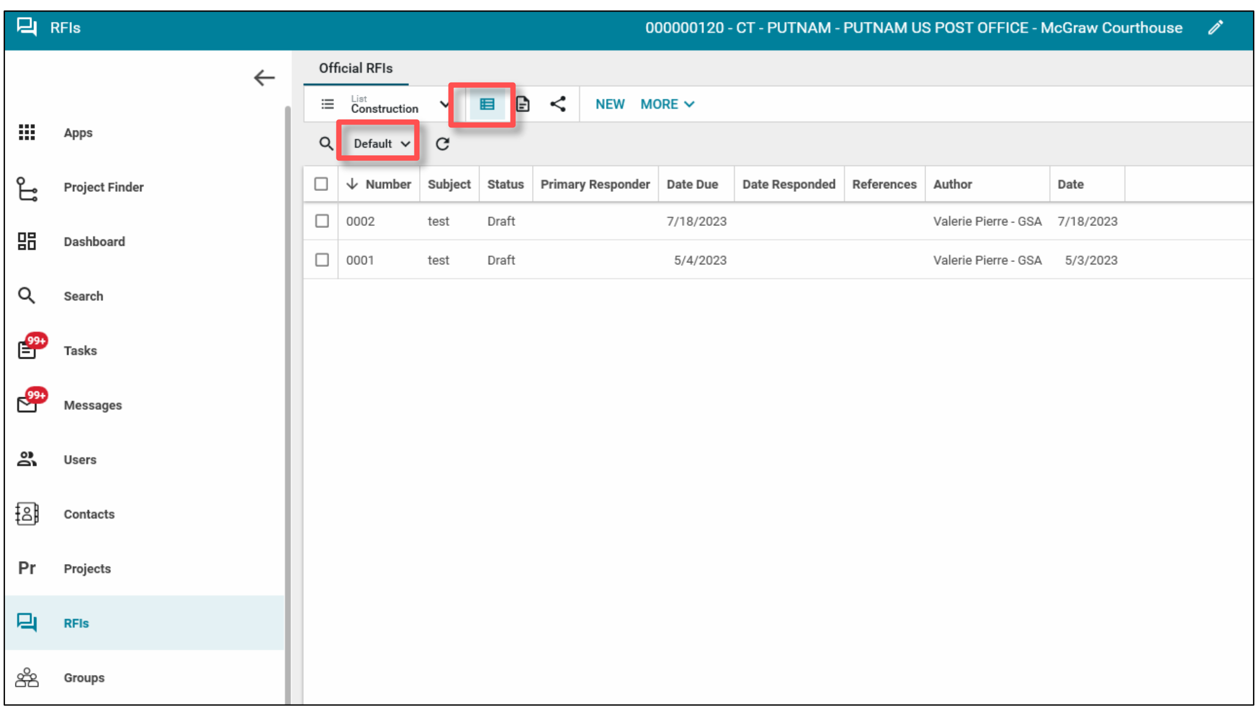
The Kahua report wizard allows users to create a report for within a Kahua app. The Scheduled Reports capability provides a way to automate the generation and distribution of reports to both users and non-users, via email notifications and messages. This QRG applies to most applications in Kahua, especially Document Management applications.

Create a Report in Log View

1. Navigate to the appropriate partition using Project Finder in the left navigation pane.
2. Navigate to the desired app such as RFIs, Submittals, Projects, etc.



3. Click the **Lists** icon above the log view to access the log's list. To generate a report, you will need to have items in the log view.
4. Click the **Log View** drop-down list next to the search icon. If you would like to create your own Log View, refer to the Log Views QRG.

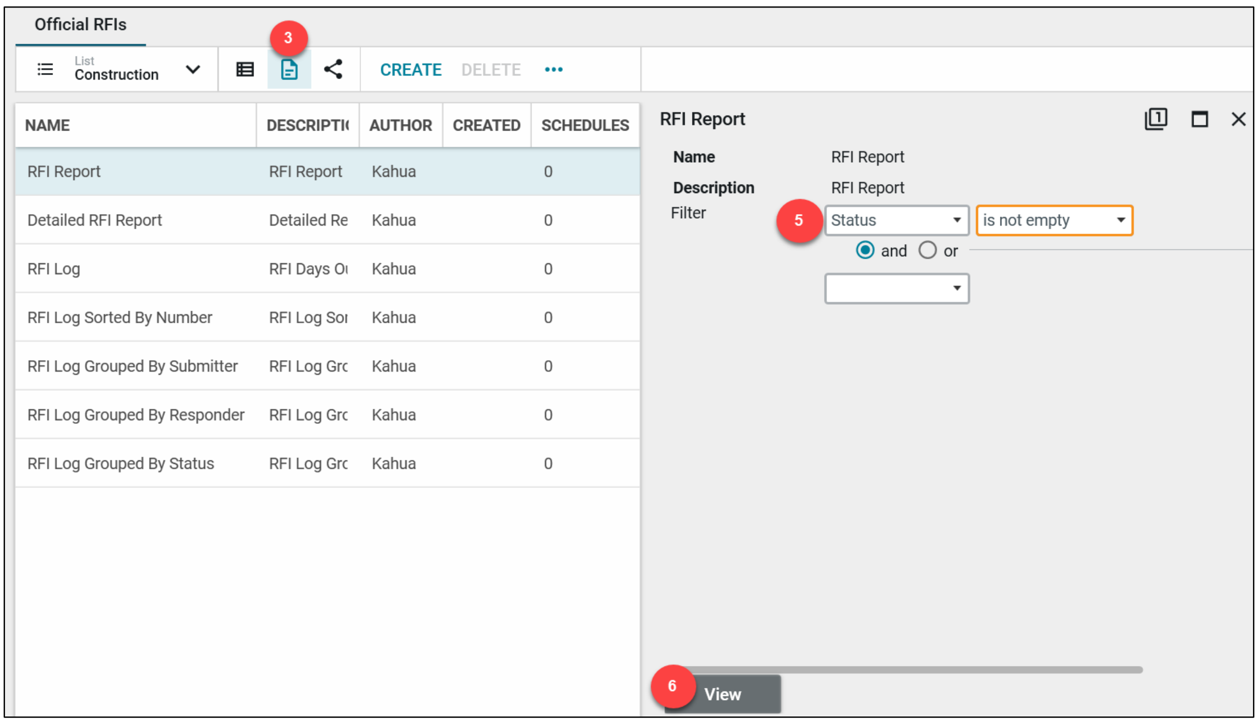


5. In the drop-down list, select the log view you wish to print, download, or send.

6. Once the log view is displayed, click the Open in Reporting icon to generate the report.
7. The report is launched in a new window. From here, you can download the report in .CSV, .XSLX, or .PDF format.

View or Send a Standard Report

1. Navigate to the appropriate project using Project Finder in the left navigation pane.
2. Navigate to the desired app.
3. Click the **Reports** icon above the log view to access the reports.
4. Select a report from the list. The detail pane displays the selected report.
5. Select any filters to use on the report data.
6. Click **View** to generate the report.



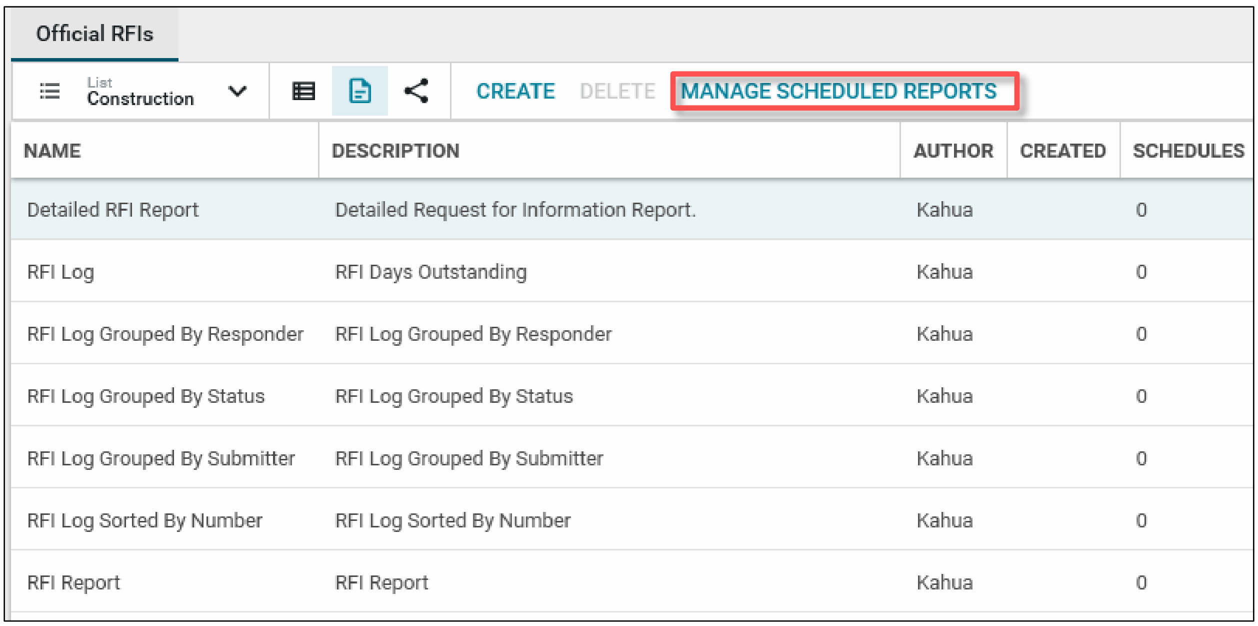
7. To send a standard report, click **Send** icon when the report is finished loading. This opens the New Message window.
8. In the “To” field, begin typing the name or email address of your desired recipient(s). Repeat for the Cc and Bcc fields.
9. Edit the **Subject** line, if needed.
13. Enter your desired text In the body of the message.
14. Click the **Send** button.

Schedule a Report

1. Navigate to the appropriate project using Project Finder in the left navigation pane.
2. Navigate to the desired Kahua app such as Projects, Milestones, or Submittals.
3. Click the **Reports** icon above the log view to access the reports.

   The **Schedules** column indicates whether a report has been scheduled or not and how many scheduled runs have been created.
   - For example, the "Detailed RFI Report" might have 2 scheduled runs: one to be generated once a day for internal record keeping, and a second to be run once a week to be sent to the project manager (perhaps a different filter).

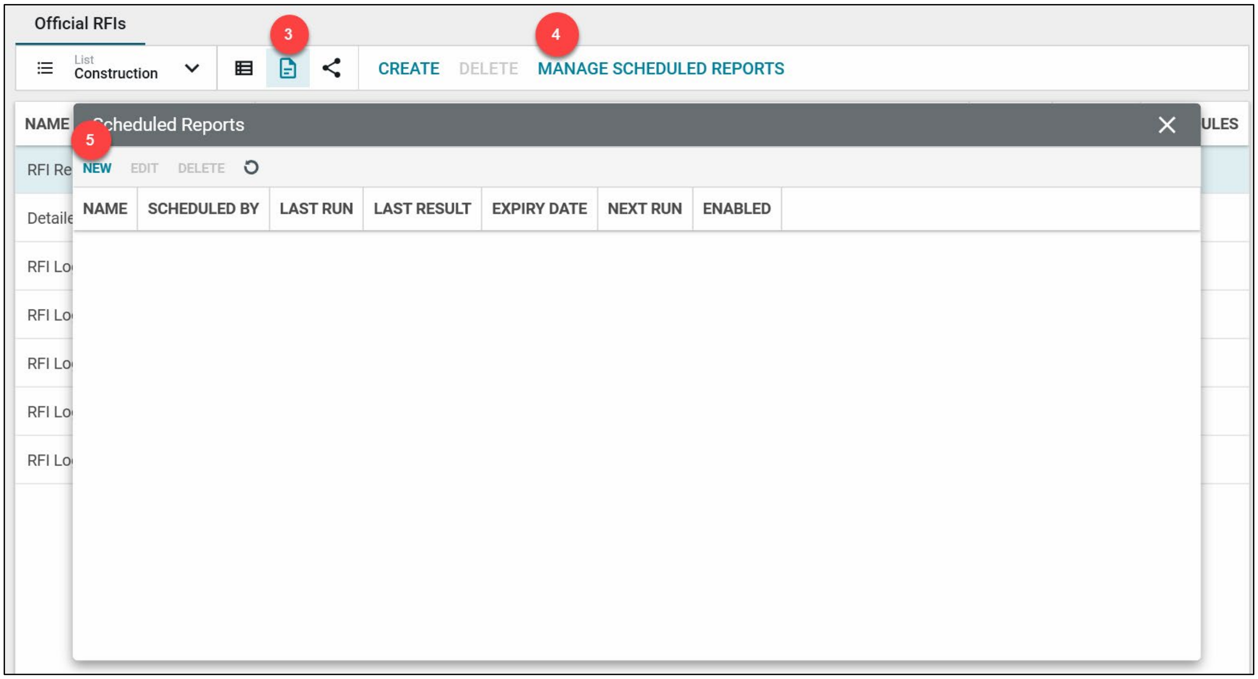
4. Select the Report you wish to schedule, and click **Manage Scheduled Reports** in the toolbar.



NAME	DESCRIPTION	AUTHOR	CREATED	SCHEDULES
Detailed RFI Report	Detailed Request for Information Report.	Kahua		0
RFI Log	RFI Days Outstanding	Kahua		0
RFI Log Grouped By Responder	RFI Log Grouped By Responder	Kahua		0
RFI Log Grouped By Status	RFI Log Grouped By Status	Kahua		0
RFI Log Grouped By Submitter	RFI Log Grouped By Submitter	Kahua		0
RFI Log Sorted By Number	RFI Log Sorted By Number	Kahua		0
RFI Report	RFI Report	Kahua		0

5. In the Scheduled Reports window that opens, click **New**.
6. Enter in applicable information:
   a. A name for the report
   b. The range of dates and time to start and end the report generation
      i. **Note**: The "Start Time" corresponds to the user's local time. Select a time that is appropriate for the users you are creating the scheduled report for. Your local time can be changed in your Kahua settings.
   c. Select the **Contact Recipient** (list from Kahua contacts) and **Email Recipients** (user who do not have access to Kahua).
      ii. **Note**: Users in Kahua will receive an email and Kahua message. Users outside of Kahua will receive an email.
   d. The report **Frequency** (i.e. daily, weekly, monthly) and recurrence.
   e. Select a **Filter** that you want applied each time the report is generated, if desired.
   f. The Delivery Method. The report can be sent as an attachment or be directed to File Manager.

7. Click the **Save** button.



Notification: The report recipient receives a message with the subject: "[Report Name] – Auto-Generated at [DD-Month-YYYYY] [time]." The report is attached in its native format.

Resources

For additional help with Kahua applications, you can access the Calendar for Instructor-led training, Self-paced videos and Quick Reference Guides (QRGs) from this link: [Training: Project Management tool | GSA]

Related Guidance

[File Manager]
[Log Views QRG]