Kahua Quick Reference Guide
Charter & PMP App – Project Management Plan

About the PMP Sub App

The Project Management Plan (PMP) guides project execution and control. It is the compilation of the results of all the other planning processes into one complete document. The plan identifies project objectives, risks, opportunities, strategies, and the team's ability to meet the project's goals and objectives during the project lifecycle.

The PMP sub app is used to gather the necessary information and create the formal PMP that can be printed to PDF document. There are two PMP types available: Full and Condensed. When the full PMP is not necessary, you can use a condensed version.

Important Notes

Enter Data into a Text Field

1. Type large blocks of text in another program, such as MS Word, and copy & paste (Ctrl + C and then Ctrl + V) into the field.

Creating a List

1. Enter the number of items you need.
2. Click **Insert**.
3. The flyout icon will open the list so that the Description can be typed in the larger text field and the Previous/Next buttons allow for easily navigating through the list of items.
4. Type large blocks of text in another program, such as MS Word, and copy & paste (Ctrl + C and then Ctrl + V) into the field.
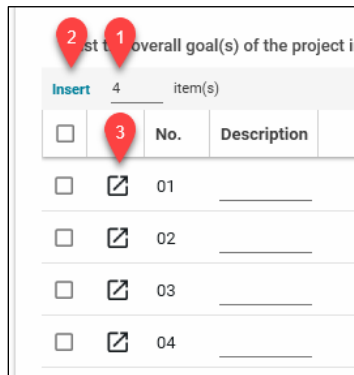
Navigate to the Charter and PMP App

1. Open the project using Project Finder on the left side bar.
2. Select **Charter & PMP** from the App launcher. This can be found under the **Other** column.

Process a Charter into a PMP

This activity is typically completed by the following role: **PM/COR**.

Approved Charters can be processed into a PMP so that data that is relevant to both documents does not have to be entered twice.

1. Open the **Charter** sub app.
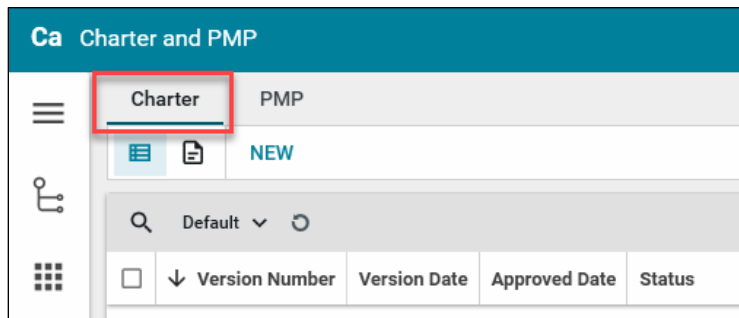
2. Click **Process to PMP** or **Process to PMP (Condensed)** from the bottom action bar of the form pane of the Approved Charter.
3. The new PMP record is opened in Edit mode with data entered in the Charter already filled out.

Create a New PMP

This action is typically created by the following role: **PM/COR**

If you are not processing an existing Charter into a PMP, you can start a new one from the PMP sub app.

1. Open the **PMP** sub app.
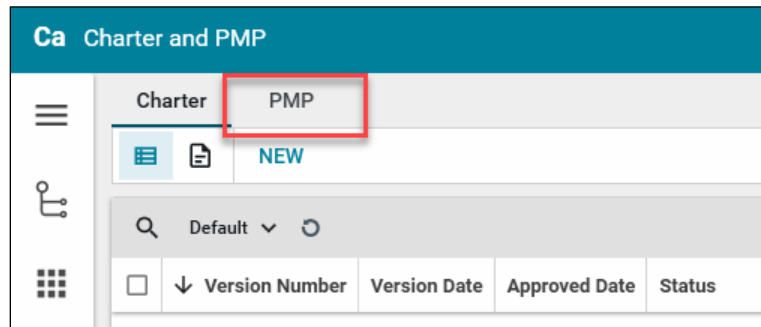
2. Click **NEW** to open the new PMP record.
3. The new PMP record is opened in Edit mode.

Details Section

4. The **Type** can be changed to the full **PMP** or **PMP (Condensed)**.
5. The **Version Date** auto populates with the current date but can be edited.
6. Enter a **Start Date**.
7. The **Status** will start as Draft and will update automatically as the PMP is Published, Superseded, or Cancelled.
8. The **Project Name, Project Number, Customer, Building, Address, Sponsor,** and **Project Manager** will auto populate from the Project details.
9. Select the **Region**.
10. Enter the **Managing Organization**.

    Note: The Project Name, Project Number, Customer, Building, Address, Sponsor, and Project Manager are not editable from the PMP app, changes must be made in the Project details.

Background

11. Enter a **Background History** of the project that describes the beginnings of the project, any previous or associated projects (such as design, previous lease, previous version of software program, etc.), as well as the project's current status at the time of PMP development.
12. List overall goals of the project in the **Objectives** section.
13. List the **GSA Performance Measures Affected by this Project**
14. List the everyday decision makers on your project in the **GSA Core Team** section.
15. List those who may have input at various stages of the project, stakeholders (both internal and external), and anyone who may be interested in regular or semi-regular communication in the **Global Team** section.
16. *(Full PMP Only)* List any **Concurrent Projects** that may be occurring either before, during, or after the project starts and describe the impact they may have on any item planned for this PMP.

Scope

17. *(Full PMP Only)* List the **Internal Objectives** and any specific details surrounding the project, such as square footage, security requirements, IT specifications, etc.
18. *(Full PMP Only)* List **Customer Objectives** and specific details surrounding the project.
19. *(Full PMP Only)* Summarize how the project will support each of the current **Presidential Priorities**.
20. *(Full PMP Only)* Enter an outline of the **Strategy** to meet and balance the scope objectives.
21. *(Full PMP Only)* Enter an outline of the **Quality Plan** strategy.
22. *(Full PMP Only)* Identify any **Risks** that could potentially affect the ability to complete the project work.
    a. Click **Add Risks.**
    b. Check the box on the left side of each Risk item, from the Risk Register app, to be included in the PMP.
    c. Click **Select** from the bottom of the window.
23. *(Full PMP Only)* List anything that specifically should NOT be included in the scope and any details that are beyond the approved scope in the **Items Not Included in the Scope** section.
24. *(Condensed PMP Only)* Enter the **Scope** of the work to be done.

Schedule

25. List **Internal Objectives** and detail any guiding factors involving the schedule.
26. List **Customer Objectives** and detail any guiding factors involving the schedule.
27. Identify the major milestones in the **Milestone Schedule.**
    a. Click **Add Milestones.**
    b. Check the box on the left side of each Milestone. from the Milestones app, to be included in the PMP.
    c. Click **Select** from the bottom of the window.
28. *(Full PMP Only)* Enter the overall outline of the **Strategy** to manage the project schedule.
29. Identify any **Risks** that could potentially affect deadlines or the overall schedule.
    a. Click **Add Risks**.
    b. Check the box on the left side of each Risk item, from the Risk Register app, to be included in the PMP.
    c. Click **Select** from the bottom of the window.

Budget

30. List **Internal Objectives** and guiding factors involving goals to save as much money as possible.
31. List **Customer Objectives** and detail any guiding factors involving the budget.
32. *(Full PMP Only)* List all **Funding Sources** and quantities.
    a. The funding **Total Amount** will be calculated when you Save the record.
33. *(Full PMP Only)* Enter an outline of the **Strategy** to meet the project budget.
34. Identify any **Risks** that could potentially affect the budget.
    a. Click **Add Risks.**
    b. Check the box on the left side of each Risk item, from the Risk Register app, to be included in the PMP.

c. Click **Select** from the bottom of the window.

Relationships

35. Enter an **Internal Assessment** of the team's working relationships.
36. *(Full PMP Only)* Enter an **External Assessment** of the team's working relationship with outside partners and stakeholders.
37. *(Full PMP Only)* Enter the **Strategy** managing project relationships.
38. *(Full PMP Only)* Identify any **Risks** that could potentially affect the working relationships.
    a. Click **Add Risks.**
    b. Check the box on the left side of each Risk item, from the Risk Register app, to be included in the PMP.
    c. Click **Select** from the bottom of the window.

Communications

39. *(Full PMP Only)* Enter the **Communication** strategies for the project.
40. *(Full PMP Only)* Enter the **Internal Communication Rhythm** for meetings and team communications.
41. *(Condensed PMP Only)* List the communications strategies for the team, the customer and other stakeholders.

Resources *(Full PMP Only)*

42. Enter the **Internal Resource Assessment and Objectives**.
43. Enter the **Customer Resource Assessment and Objectives.**
44. Enter the **Resource Efficiency Plan**.

Scope Feasibility *(Full PMP Only)*

45. Enter the decision about the **Scope Feasibility**.

Scope Feasibility and Implementation Strategy *(Condensed PMP Only)*

46. Complete the **Feasibility Assessment**.
47. Enter the overall **Implementation Strategy**.

Change Control Process *(Full PMP Only)*

48. Enter the **Change Control Process** to address changes to the project and PMP that may occur throughout its duration.

Project Management Plan Review Process *(Full PMP Only)*

49. Enter the **Project Management Plan Review Process** for often the team will reconvene to review the PMP and make changes or updates as necessary.

Closeout Deliverables

50. List the items be completed and either kept on file within PBS or delivered to the

customer for **Closeout Deliverables**.

References

51. Upload and applicable documents to be stored in the PMP record in the **References** section.

Save the PMP

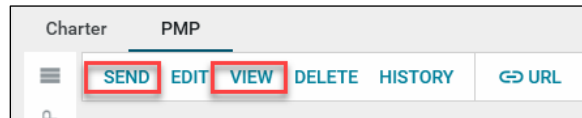52. Click the **Save** button in the bottom action bar.

Publish the PMP

This activity is typically completed by the following role: **PM/COR**.

When edits are complete, the PMP is published and becomes a read-only record**.**

1. Click **Publish** from the bottom action bar.

Send and View the PMP Document

Send - Opens the Send Wizard.
View - Opens a preview of the GSA's PMP form and then a PDF of the document can be opened by clicking on the Open PDF icon.

Create a New Version

To make changes to a published PMP, you must create a New Version.

1. Open the record.
2. Click **New Version** from across the bottom of the details pane.
    a. The information from the previous version will be included in the new version.
    b. The Status of the previous version will change to Superseded.

Cancel a PMP

1. Open the record.
2. Click **Cancel** from across the bottom of the details pane.
    a. The **Status** will change to **Cancelled**.
    b. There is a **Reopen** option at the bottom of the record.