Kahua Quick Reference Guide
EVSE Project Updates

Project Lifecycle Applicability

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After an EVSE project has been created, it must be updated on a monthly basis. This Quick Reference Guide (QRG) walks you through the steps of updating your project in the following apps: Projects, Sustainability, Milestones, Scheduling, and Project Directory.

Projects App Updates

The following roles have permission to perform this activity: **GSA-Regional KPM**, **GSA-PM/COR**, **GSA-Regional Manager**, **GSA-Project Creator**, and **GSA-Sustainability Admin**.

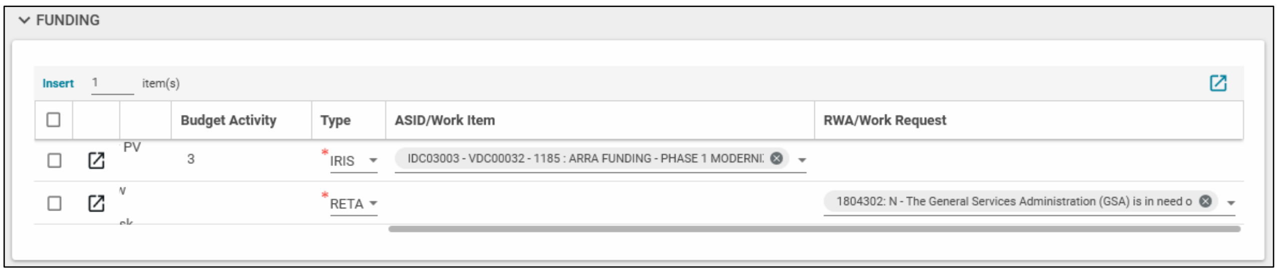
Update IRIS Work Items or RETA Work Requests

The IRIS Work Items and RETA Work Requests listed in the **Funding** section are linked to several Kahua apps and determine funding information that is available via IRIS or RETA integrations so it is important this information stays updated. You can delete, edit, and add more items as needed.

1. Open the project using **Project Finder** in the left navigation pane.
2. Click the pencil icon next to the project name to open the project for edits.

3. Click the **Edit** button on the top toolbar of the Project Details.

4. Edit the funding numbers:
    a. To edit an existing ASID/Work Item, select the appropriate number in the **ASID/Work Item** drop-down list.
    b. To edit an existing RWA/Work Request, select the appropriate number in the **RWA/Work Request** drop-down list.
    c. To delete an existing ASID/Work Item or RWA/Work Request, put a check mark in the row containing the current number and click the **Delete** link.
    d. To add a new ASID/Work Item or RWA/Work Request, click the **Insert** link to add a new row. Select IRIS or RETA in the **Type** drop-down list. Select the appropriate number in the ASID/Work Item or RWA/Work Request drop-down list.



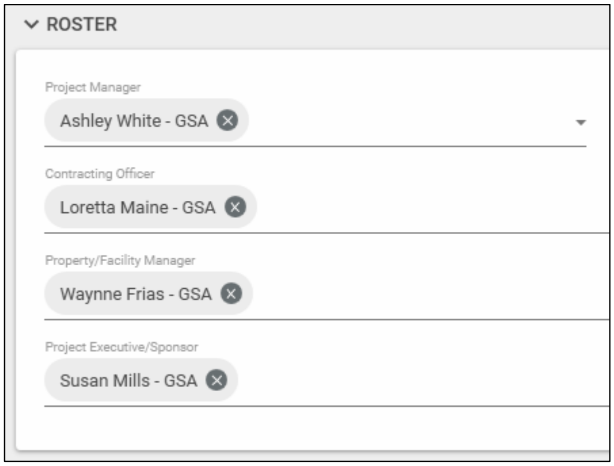
5. Click the **Save/Close** button.
6. To close the form, click the **X** in the top right corner.

Update the Roster: Project Manager

The **Project Manager** field in the **Roster** is a required field when a project is created, but it can be changed at any time. Changing the Project Manager in the Project form gives the new Project Manager GSA-PM/COR permissions and removes the permission from the previous Project Manager.

1. Open the project using **Project Finder** in the left navigation pane.
2. Click the pencil icon next to the project name to open the project for edits.

3. Click the **Edit** button on the top toolbar of the Project Details.
4. In the **Project Manager** field in the **Roster** section, click the arrow to open the list, and click on the name of the new Project Manager.

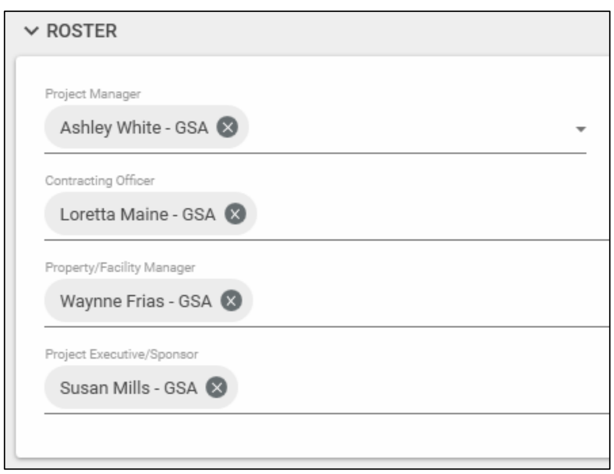


5. Click the **Save/Close** button.
6. To close the form, click the **X** in the top right corner.

Update the Roster: Contracting Officer, Property/Facility Manager, or Project Executive/Sponsor

1. Open the project using **Project Finder** in the left navigation pane.
2. Click the pencil icon next to the project name to open the project for edits.

3. Click the **Edit** button on the top toolbar of the Project Details.
4. In the **Contracting Officer**, **Property/Facility Manager**, or **Project Executive/Sponsor** field in the **Roster** section, click the arrow to open the list, and click on the name of the new team member.



5. Click the **Save/Close** button.
6. To close the form, click the **X** in the top right corner.

Note: Adding project team members to the Project Roster does not include them in the

Project Directory.

Update the Internal Status or Client Status

Several new sections that were not available in the Create New Project form appear after a new project has been created: Internal Status, Client Status, Dates, Additional Scope, and Sustainability. Edit mode allows you to complete these sections except for the Dates section, which is managed by the Milestones app.

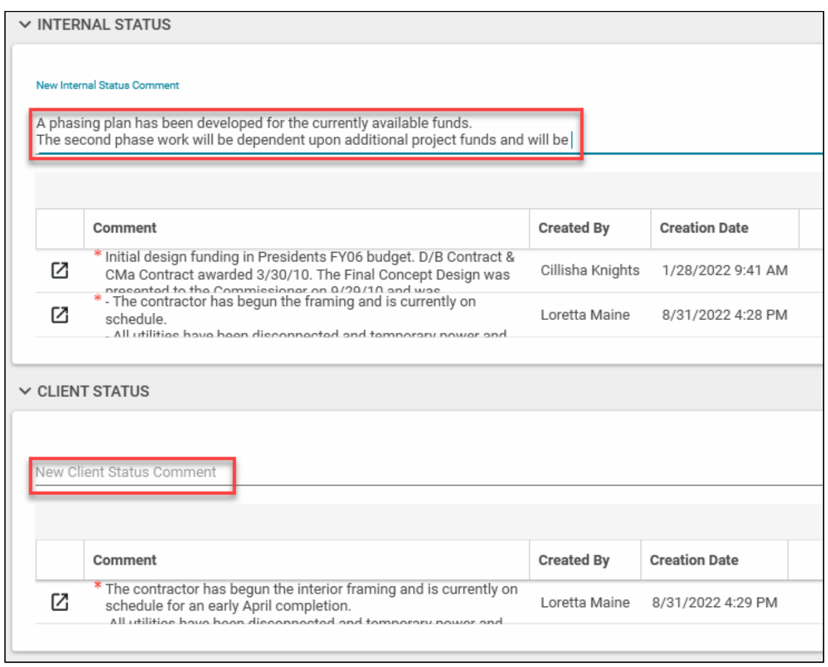
Use the Status fields to enter a narrative about the project. The Internal Status is meant for internal GSA stakeholders and should include a level of detail that gives internal stakeholder an understanding of what is taking place on the project. The Client Status is used to give external stakeholders, including customers, a project update.

1. Open the project using **Project Finder** in the left navigation pane.
2. Click the pencil icon next to the project name to open the project for edits.

3. Click the **Edit** button on the top toolbar of the Project Details.

Each **Internal Status** and **Client Status** entry creates a new row in the section and includes the Comment, Created By, and Creation Date (and time).

4. To enter a new Status, enter text in the **New Internal Status Comment** or **New Client Status** field.

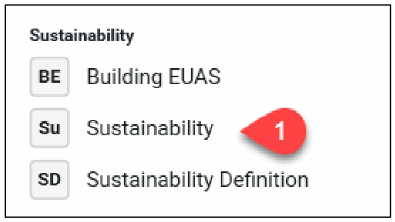


5. Click the **Save/Close** button.

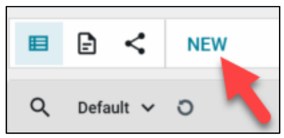
Add Charging Stations and Ports Information in the Sustainability App

Create a Building's Sustainability Record

1. Open the project using **Project Finder** in the left navigation pane.
2. Select **Sustainability** in the Sustainability section of the App Launcher.



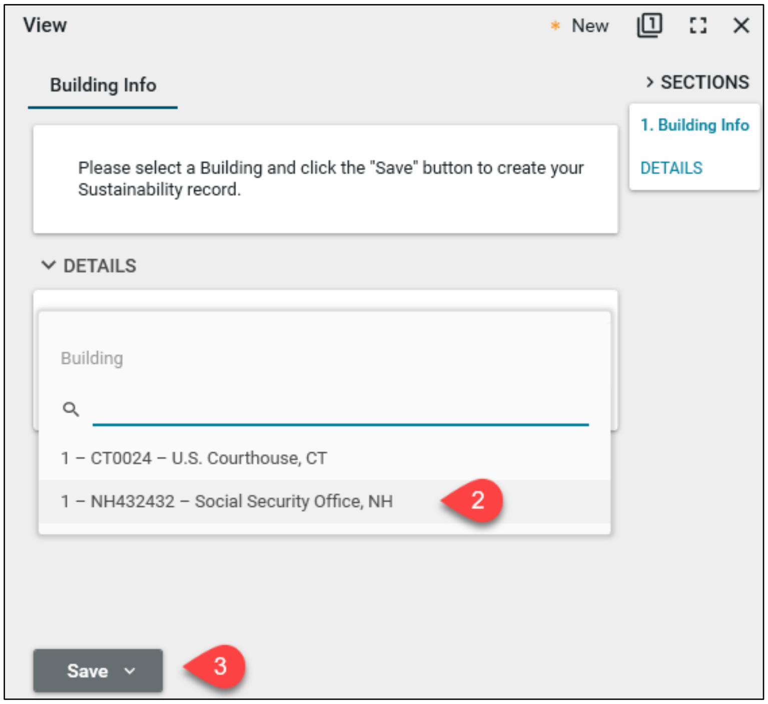
3. Click on **New** at the top of the page to create a new Sustainability record.



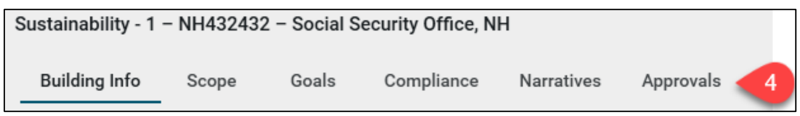
4. Select the building in the **Building Info** pane. The options in this list come from the Buildings that are selected in the **Buildings** section of the Projects app.

   Note: Only one Sustainability record per Building can be created in a project, but the project may contain multiple buildings.

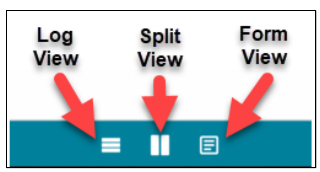
5. Click the **Save/Close** button.



6. The six tabs for Sustainability information will appear across the top of the new record.



Note: Use the three focus buttons in the bottom blue bar to adjust your form view if necessary.



Building Info

The **Building Info** tab displays the Building information for this Sustainability record.

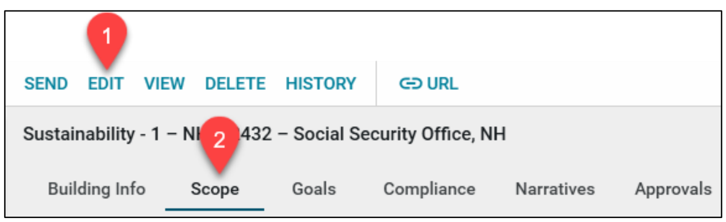
7. Review the **Details** for accuracy, and if changes need to be made, work with the Project Manager.

Scope

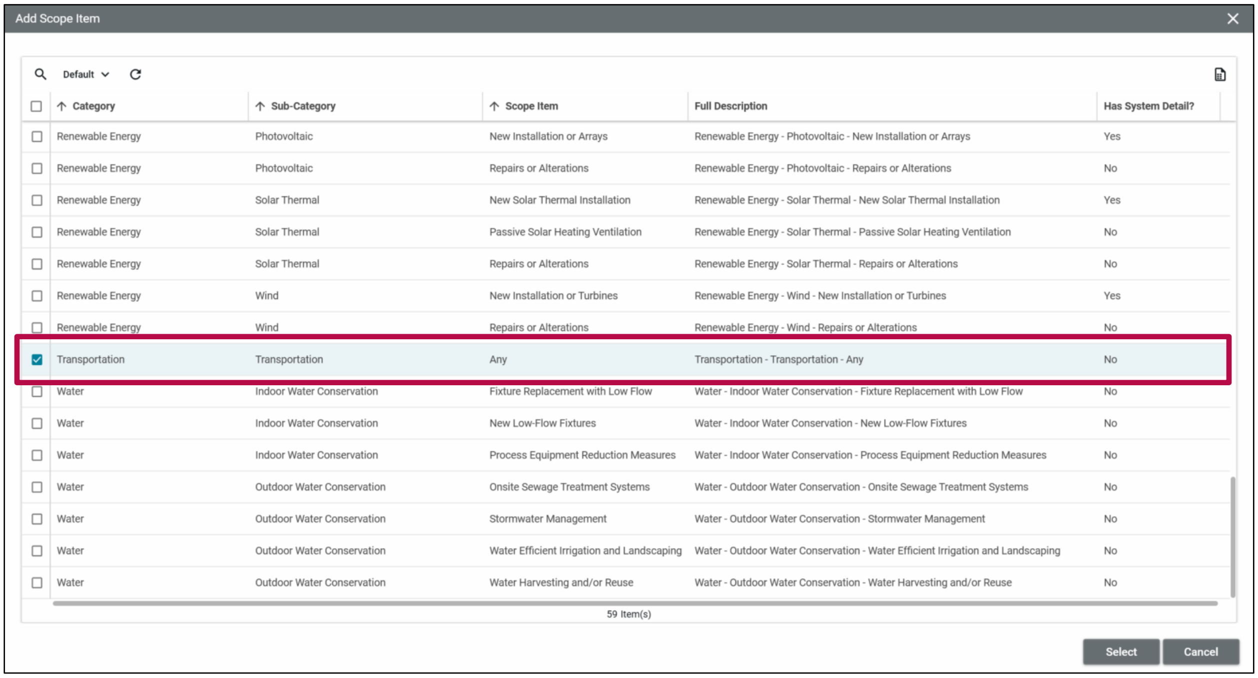
Scope tracking enables GSA to efficiently track, analyze, and report a project's sustainable features. Use this section to add or update all equipment or components being installed or upgraded at the selected building, including all high-performance building features.

Add Scope Items

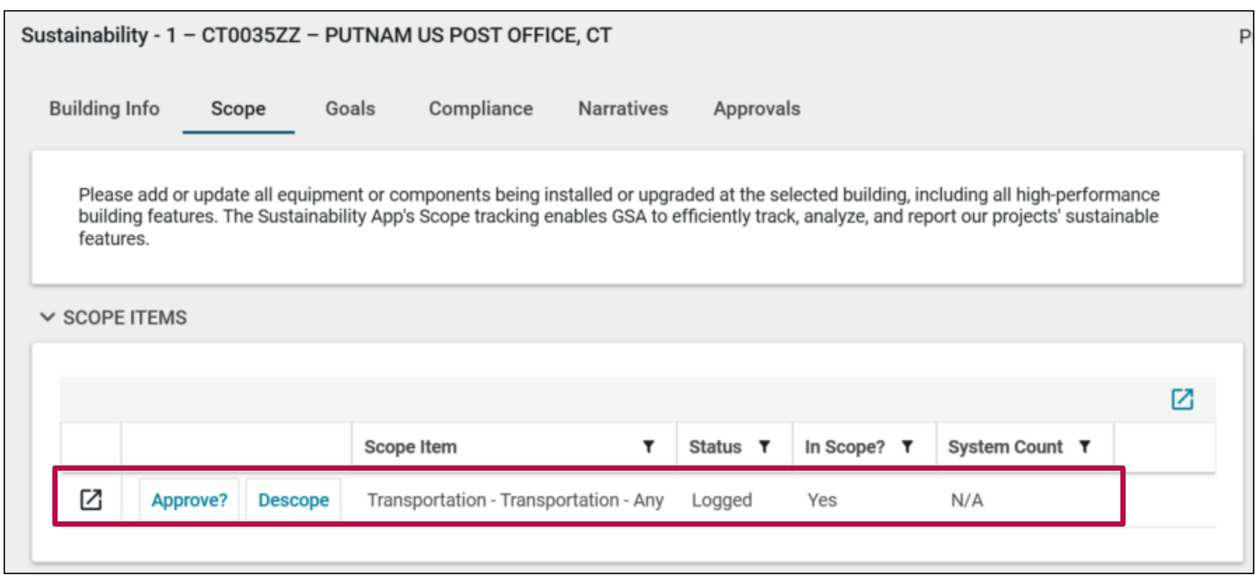
1. If not already in the edit screen, click **Edit** at the top of the record.
2. Select the **Scope** tab.



3. Click the **Add Scope Item** button.
4. Check the box in the far-left column beside the Transportation category.
5. Click the **Select** button.



6. Click the **Save/Close** button.
   a. **Status** of Items will be “Logged”.
   b. **In Scope?** will be “Yes”.

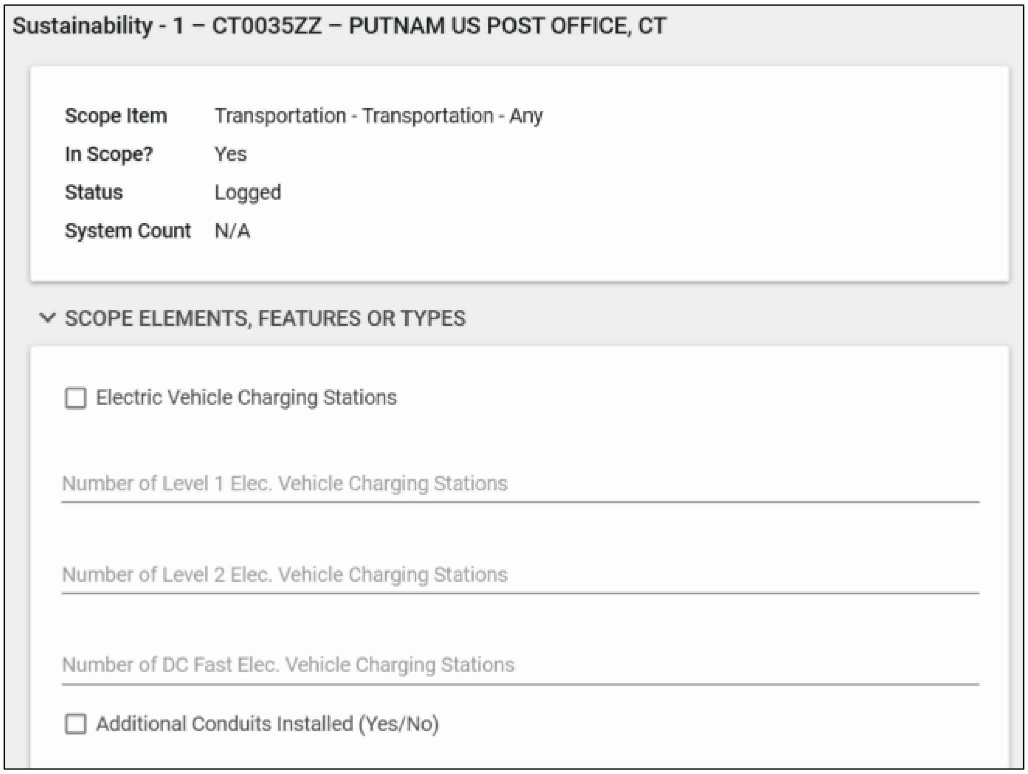


Edit Scope Item Details

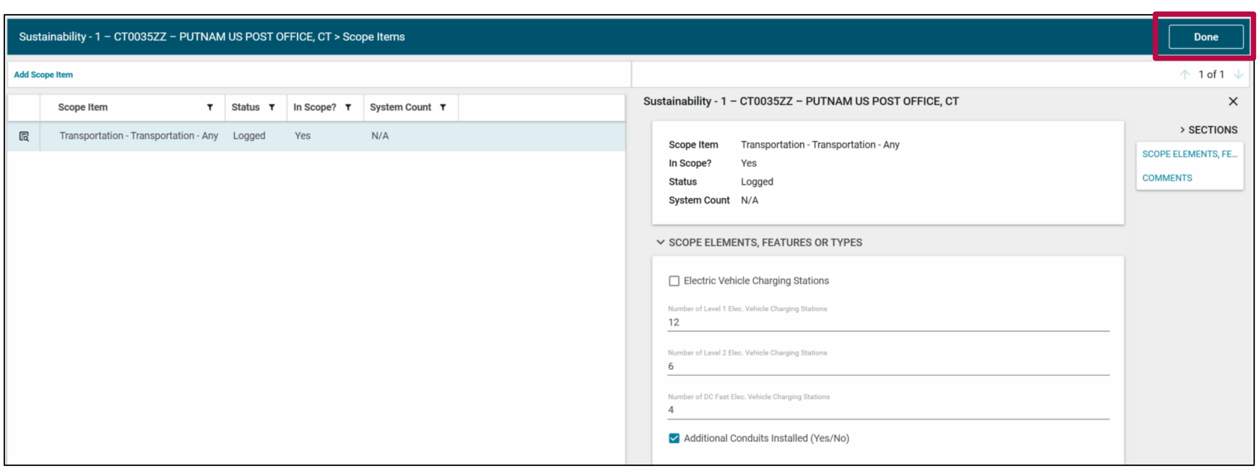
Each Scope Item has its own set of details. Open the More Details window to enter the applicable information for each item.

7. If not already in the edit screen, click on **Edit** at the top of the record.

8. Click the fly-out icon to the left of the Transportation scope item to open the **Scope Elements, Features, or Types window**.
    a. Put a checkmark in the **Electric Vehicle Charging Stations** box.
    b. Enter the **Number of Level 1 Electric Vehicle Charging Stations**.
    c. Enter the **Number of Level 2 Electric Vehicle Charging Stations**.
    d. Enter the **Number of DC Fast Electric Vehicle Charging Stations**.
    e. If applicable, click the box for **Additional Conduits Installed**.



9. Click **Done** in the top right corner to close the item pane.



10. Click the **Save/Close** button to commit the changes to the Sustainability record.

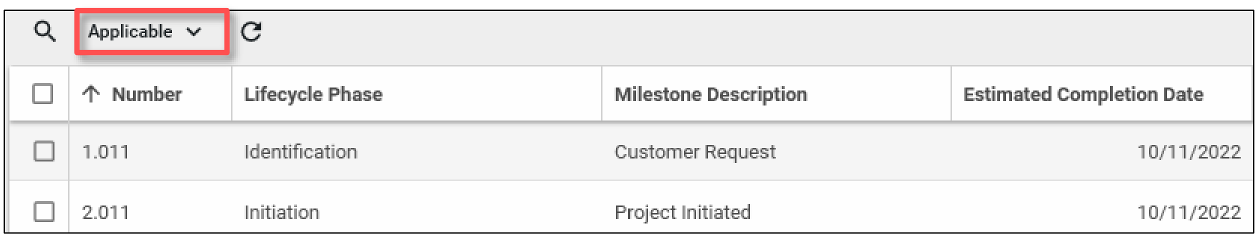
Milestones App Updates [For Owned - Projects (Below $50k) and Owned - Projects ($50k - $250k)

Applicable milestones are loaded into a project depending on the Project Type and Subtype that were selected when the project was created. Projects created with the following Project Type and Subtype combinations can edit milestones directly in the Milestones app.

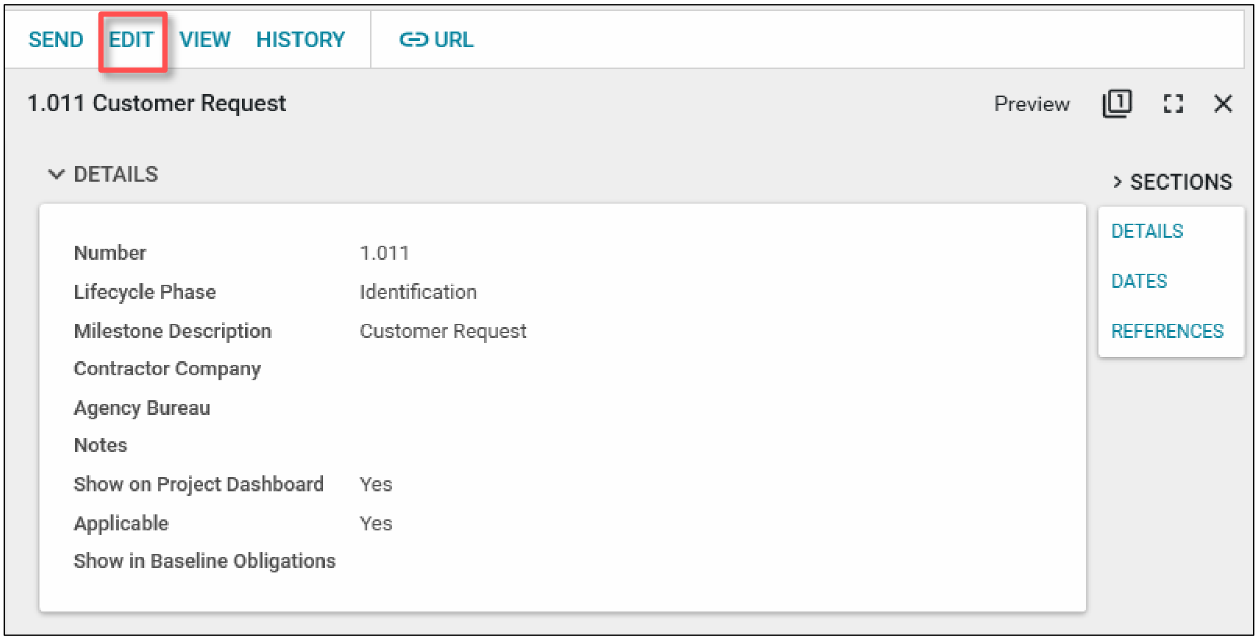
Type	Subtype
Owned – Below Prospectus	Below $50k
Owned – Below Prospectus	$50k - $250k
Lease – Below Prospectus	Lease Alteration
Lease Acquisition	Lease Acquisitions Above Prospectus
Lease Acquisition	Lease Acquisitions Below Prospectus
Other	Special Programs Division (SPD) Services
Other	Non-Space Projects

Edit a Milestone

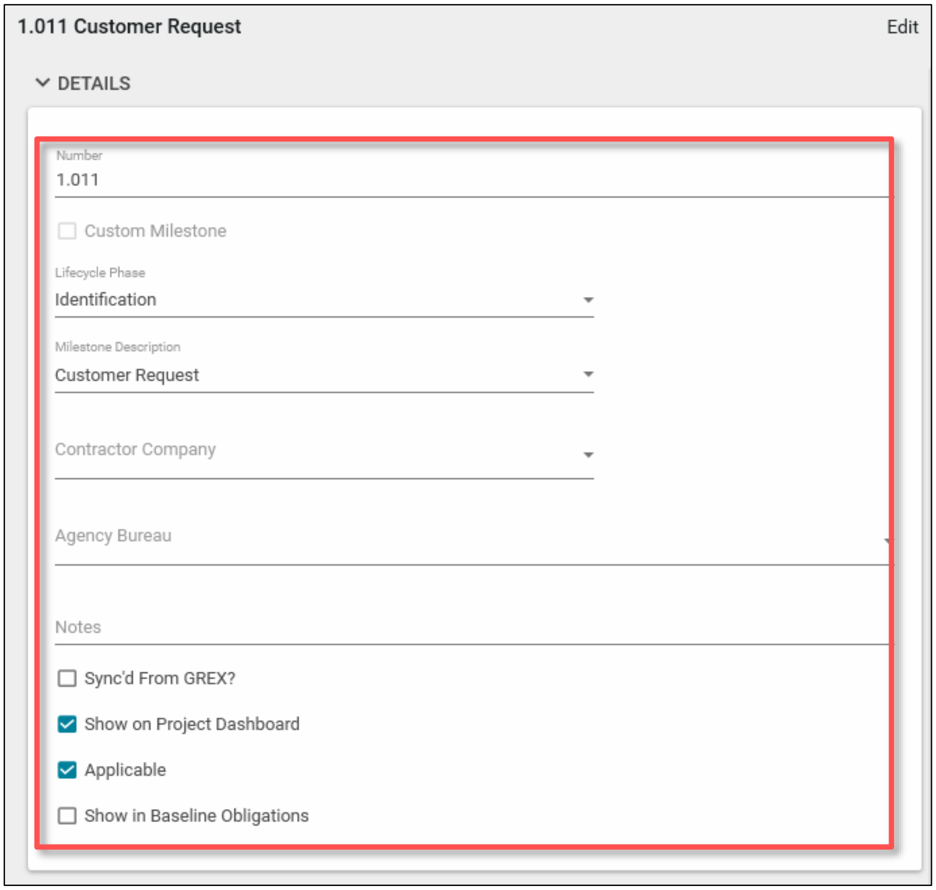
1. Navigate to the appropriate project.
2. Open the **Milestones** app from the App Launcher under the **Schedule Management** section.
3. If not displayed already, change the Log View to **Applicable** by clicking the down arrow in the Log View list.



4. Click the appropriate Milestone.
5. Click the **Edit** button.



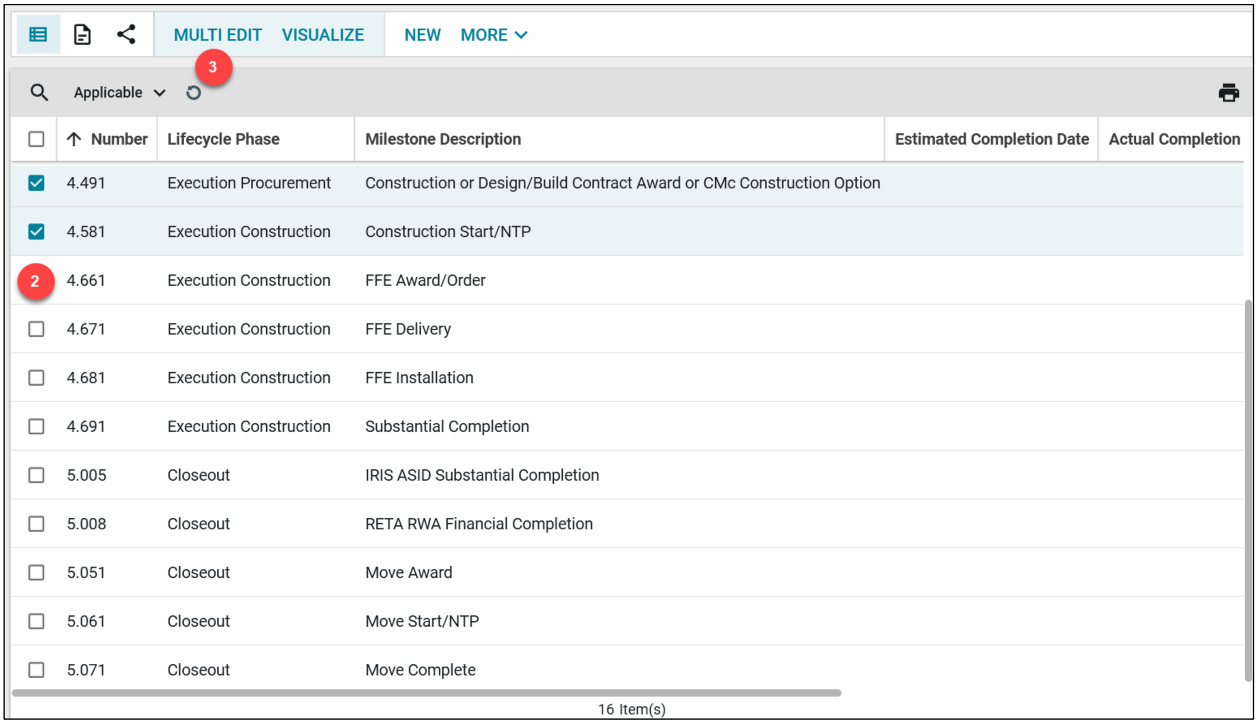
6. Make any updates within the Milestone document. Typically, this is used when entering the Estimated and Actual Completion Dates on Milestone Only Template projects (Below $250k).



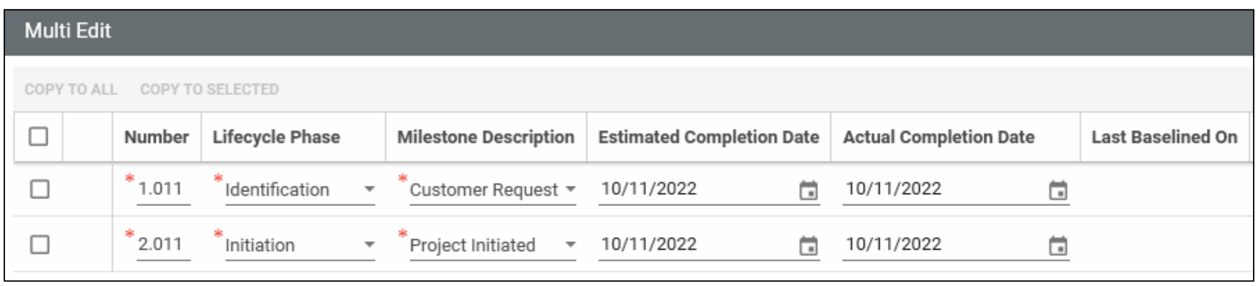
7. When edits are complete, click the **Save/Close** button.

Multi Edit Milestones

1. Navigate to the Milestones Log.
2. Click the checkbox next to multiple Milestones or the checkbox at the top left to select all milestones.
3. Click the **Multi Edit** button.



4. Make any updates within the Milestone documents that have been selected.



5. Click the **Save/Close** button.

Scheduling App Updates [For Above Prospectus - Owned, Leased, Owned - Projects (above $250k) and Prospectus Lease Post Occupancy Projects (Above $1.547M)]

Applicable milestones are loaded into a project depending on the Project Type and Subtype that were selected when the project was created. Projects created with the following Project Type and Subtype combinations must use the Scheduling app to import a Microsoft Project (*.mpp) schedule.

Type	Subtype
Owned – Above Prospectus	Above $10M
Owned – Above Prospectus	$3.2M - $10M
Lease Above Prospectus	Lease Alteration

Owned – Below Prospectus	Above $250k

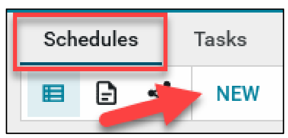
Access the MS Project Schedule Templates

1. Download the applicable template for your project from the MS Project Schedule Templates from Google Drive.
2. Open the schedule file on your computer and make updates using MS Project and save them locally to your computer, so they can be uploaded to Kahua. See Step 7, below.

Note: Take care when/if you delete tasks from the template schedule to ensure that doing so will not break any schedule logic for preceding or succeeding tasks. The file includes all the standard schedule tasks and appropriate coding to connect your schedule updates to the Milestones app in Kahua. You can add other tasks for any project specific tasks that you need to track.

Add the PM Schedule

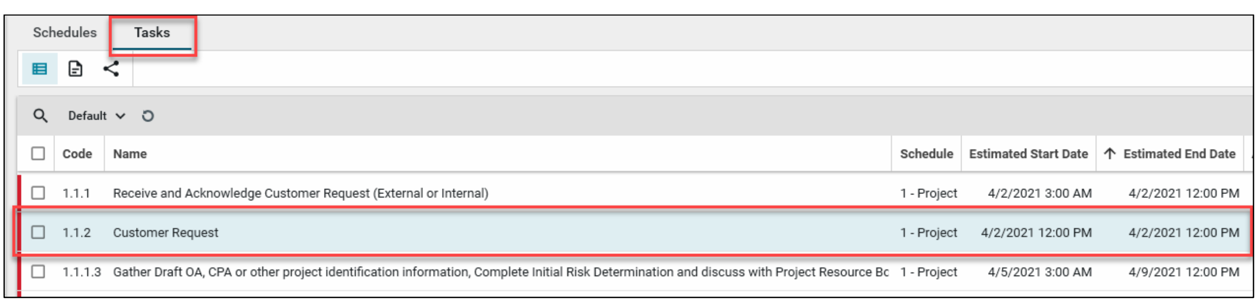
3. In the **Scheduling** app, open the **Schedules** sub-app from the top ribbon and click **NEW**.



4. Enter the **Name** of the schedule.
5. Click on **Select File**.
6. Click on the **Filename** field in the Upload File window.
7. Select the schedule you saved in Step 2 above.
8. Click **Upload** in the Upload File window.
9. Click **OK** on the Add Files window.
10. Enter a **Description** of the schedule.
11. **Save/Close** to save the file to the record.
12. Click on **Process** to pull in Scheduling Tasks and update the Milestones.

Manage Tasks Items

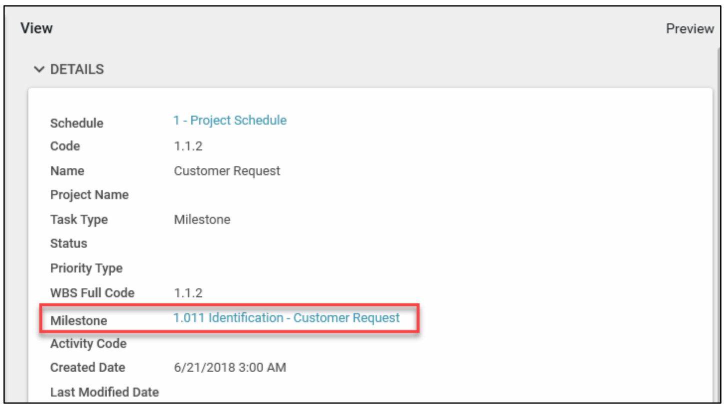
1. Click on the **Tasks** sub-app in the top ribbon.
2. Select the Tasks item to edit.



3. Click **Edit** from the top of the View pane.
4. Make changes to any editable field(s). Most fields need to be edited in the scheduling software and then uploaded to Kahua through the revision process.
5. Click **Save/Close** at the bottom.

Navigate to the Corresponding Milestone

1. With the **Tasks** sub-app open, select the Scheduling Task item.
2. Click on the **Milestone** name. The text is blue to indicate that it is a link to the Milestone.



3. The **Details** of the corresponding Milestone are open in the Milestones app.

Revise a Schedule

1. With the Schedules sub-app selected in the top ribbon, click **NEW** to open a new record.
2. Enter the **Name** of the schedule.
3. Enter the **Revision** number.
4. Click on **Select File**.
5. Click on the **Filename** field in the Upload File window.
6. Select the **revised schedule template file**.
7. Click **Upload** in the Upload File window.
8. Click **OK** on the Add Files window.
9. Enter a **Description** of the schedule.
10. **Save/Close** to save the file to the record.
11. Click on **Process** the file to show Scheduling Tasks and Revise the Milestones.

Add Team Members to the Project Directory

This action is typically executed by the following roles: **GSA-Regional Manager** or **GSA-PM/COR**.

1. Open the project using Project Finder in the left navigation pane.
2. Select **Project Directory** from the App Launcher.
3. Click **NEW** from the People sub-app.

4. Select the contact person in the **Name** field.

   Note: The contact must exist in the Kahua Contacts app prior to being added to the Project Directory.

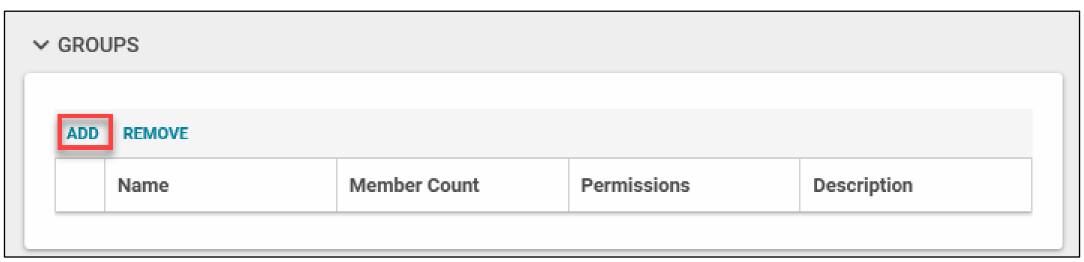
5. Select the **Contact Team Role**.
6. Select the contact's **Status on Project**.
7. Fill in the appropriate values for other fields, if needed.
8. Attach any supporting documentation to the **References** section.
9. Once all updates have been made to the Project Directory record, click the **Save / Close** button at the bottom of the form.

Assign Group Permissions

Once a user has been added that needs elevated access such as an additional PM, a COR, or an External User, the user should be added to the appropriate permission groups from the **Groups** section of the record in read-only mode.

Note: The Groups section does not appear when the record is in Edit mode.

10. Open the Contact's record in the People sub-app in read-only mode.
11. In the Groups section, click **ADD**.



12. Select the appropriate Group(s). If the group is not available, contact your Kahua Program Manager and request that it be added.
13. Click the **Add** button.

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 Guidance

Editing a Project in the Projects App QRG
Editing a Project in the Projects App Video
Milestones QRG
Milestones Video
Scheduling QRG
Schedule Video
Sustainability QRG
Sustainability Video