

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.

00000019 - DC - WASHINGTON - LYNDON B. JOHNSON FEDERAL BLDG - Dept of Ed Prospectus Consolidation



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.

▼ INTERNAL STATUS

New Internal Status Comment

A phasing plan has been developed for the currently available funds. The second phase work will be dependent upon additional project funds and will be

	Comment	Created By	Creation Date
<input checked="" type="checkbox"/>	* Initial design funding in Presidents FY06 budget. D/B Contract & CMA Contract awarded 3/30/10. The Final Concept Design was presented to the Commissioner on 8/30/10 and was	Cillisha Knights	1/28/2022 9:41 AM
<input checked="" type="checkbox"/>	* The contractor has begun the framing and is currently on schedule. All utilities have been disconnected and temporary power and	Loretta Maine	8/31/2022 4:28 PM

▼ CLIENT STATUS

New Client Status Comment

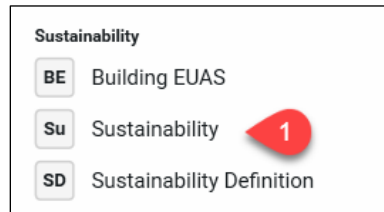
	Comment	Created By	Creation Date
<input checked="" type="checkbox"/>	* The contractor has begun the interior framing and is currently on schedule for an early April completion. All utilities have been disconnected and temporary power and	Loretta Maine	8/31/2022 4:29 PM

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

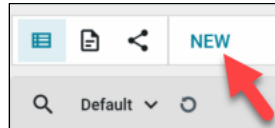
Add Charging Stations and Ports Information in the Sustainability App

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.



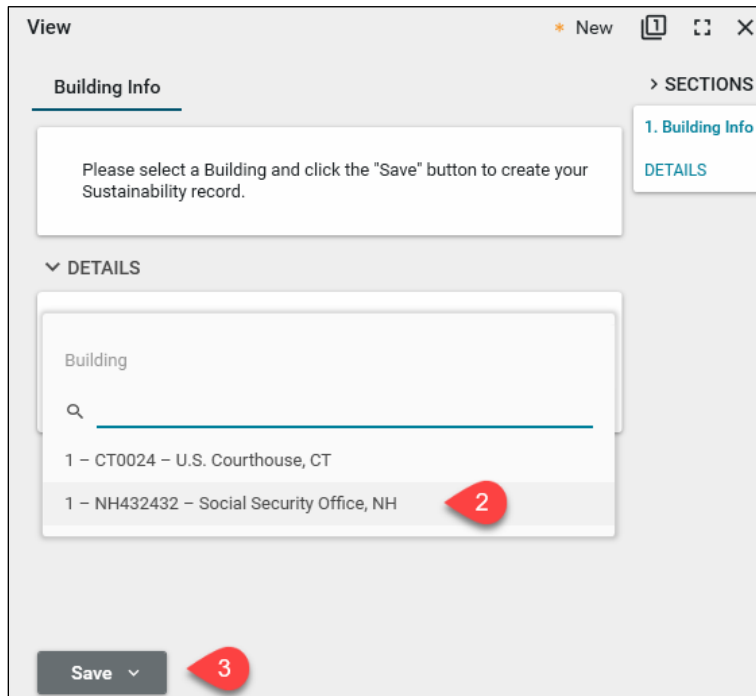
3. Click on **New** at the top of the page to create a new Sustainability record.



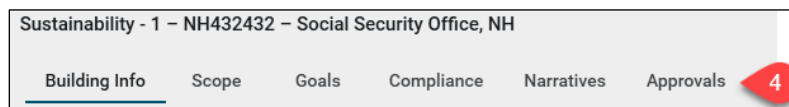
4. Select the building in the **Building Info** pane. The options in this list come from the Buildings that are selected in the **Buildings** section of the Projects app.

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

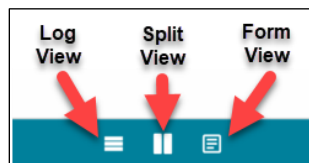
5. Click the **Save/Close** button.



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.

▼ DETAILS

Building Name	1 - NH432432 - Social Security Office, NH
Facility Code	
Region Code	1
Building GSF	
Building RU	
Building RSF	
Building USF	
Field Office Code	
Completion Date	
Address	2313 Back St Concord, NH 54354

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.

SEND
EDIT
VIEW
DELETE
HISTORY
↔ URL

Sustainability - 1 - NH 432 - Social Security Office, NH

Building Info
Scope
Goals
Compliance
Narratives
Approvals

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.

Add Scope Item

<input type="checkbox"/>	↑ Category	↑ Sub-Category	↑ Scope Item	Full Description	Has System Detail?
<input type="checkbox"/>	Renewable Energy	Photovoltaic	New Installation or Arrays	Renewable Energy - Photovoltaic - New Installation or Arrays	Yes
<input type="checkbox"/>	Renewable Energy	Photovoltaic	Repairs or Alterations	Renewable Energy - Photovoltaic - Repairs or Alterations	No
<input type="checkbox"/>	Renewable Energy	Solar Thermal	New Solar Thermal Installation	Renewable Energy - Solar Thermal - New Solar Thermal Installation	Yes
<input type="checkbox"/>	Renewable Energy	Solar Thermal	Passive Solar Heating Ventilation	Renewable Energy - Solar Thermal - Passive Solar Heating Ventilation	No
<input type="checkbox"/>	Renewable Energy	Solar Thermal	Repairs or Alterations	Renewable Energy - Solar Thermal - Repairs or Alterations	No
<input type="checkbox"/>	Renewable Energy	Wind	New Installation or Turbines	Renewable Energy - Wind - New Installation or Turbines	Yes
<input type="checkbox"/>	Renewable Energy	Wind	Repairs or Alterations	Renewable Energy - Wind - Repairs or Alterations	No
<input checked="" type="checkbox"/>	Transportation	Transportation	Any	Transportation - Transportation - Any	No
<input type="checkbox"/>	Water	Indoor Water Conservation	Fixture Replacement with Low Flow	Water - Indoor Water Conservation - Fixture Replacement with Low Flow	No
<input type="checkbox"/>	Water	Indoor Water Conservation	New Low-Flow Fixtures	Water - Indoor Water Conservation - New Low-Flow Fixtures	No
<input type="checkbox"/>	Water	Indoor Water Conservation	Process Equipment Reduction Measures	Water - Indoor Water Conservation - Process Equipment Reduction Measures	No
<input type="checkbox"/>	Water	Outdoor Water Conservation	Onsite Sewage Treatment Systems	Water - Outdoor Water Conservation - Onsite Sewage Treatment Systems	No
<input type="checkbox"/>	Water	Outdoor Water Conservation	Stormwater Management	Water - Outdoor Water Conservation - Stormwater Management	No
<input type="checkbox"/>	Water	Outdoor Water Conservation	Water Efficient Irrigation and Landscaping	Water - Outdoor Water Conservation - Water Efficient Irrigation and Landscaping	No
<input type="checkbox"/>	Water	Outdoor Water Conservation	Water Harvesting and/or Reuse	Water - Outdoor Water Conservation - Water Harvesting and/or Reuse	No

59 Item(s)

Select Cancel

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

Sustainability - 1 - CT0035ZZ - PUTNAM US POST OFFICE, CT

Building Info Scope Goals Compliance Narratives Approvals

Please add or update all equipment or components being installed or upgraded at the selected building, including all high-performance building features. The Sustainability App's Scope tracking enables GSA to efficiently track, analyze, and report our projects' sustainable features.

▼ SCOPE ITEMS

	Scope Item	Status	In Scope?	System Count
	Transportation - Transportation - Any	Logged	Yes	N/A

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**.

Sustainability - 1 - CT0035ZZ - PUTNAM US POST OFFICE, CT

Scope Item	Transportation - Transportation - Any
In Scope?	Yes
Status	Logged
System Count	N/A

▼ SCOPE ELEMENTS, FEATURES OR TYPES

Electric Vehicle Charging Stations

Number of Level 1 Elec. Vehicle Charging Stations

Number of Level 2 Elec. Vehicle Charging Stations

Number of DC Fast Elec. Vehicle Charging Stations

Additional Conduits Installed (Yes/No)

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

Sustainability - 1 - CT0035ZZ - PUTNAM US POST OFFICE, CT > Scope Items
Done

Scope Item	Status	In Scope?	System Count	
Transportation - Transportation - Any	Logged	Yes	N/A	Sustainability - 1 - CT0035ZZ - PUTNAM US POST OFFICE, CT X > SECTIONS SCOPE ELEMENTS, FE... COMMENTS

▼ SCOPE ELEMENTS, FEATURES OR TYPES

Electric Vehicle Charging Stations

Number of Level 1 Elec. Vehicle Charging Stations
12

Number of Level 2 Elec. Vehicle Charging Stations
6

Number of DC Fast Elec. Vehicle Charging Stations
4

Additional Conduits Installed (Yes/No)

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.

<input type="checkbox"/> Applicable ▾ <input type="checkbox"/>				
<input type="checkbox"/>	↑ Number	Lifecycle Phase	Milestone Description	Estimated Completion Date
<input type="checkbox"/>	1.011	Identification	Customer Request	10/11/2022
<input type="checkbox"/>	2.011	Initiation	Project Initiated	10/11/2022

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

SEND EDIT VIEW HISTORY URL

1.011 Customer Request Preview

DETAILS

Number	1.011
Lifecycle Phase	Identification
Milestone Description	Customer Request
Contractor Company	
Agency Bureau	
Notes	
Show on Project Dashboard	Yes
Applicable	Yes
Show in Baseline Obligations	

SECTIONS

- DETAILS
- DATES
- REFERENCES

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).

1.011 Customer Request Edit

▼ DETAILS

Number
1.011

Custom Milestone

Lifecycle Phase
Identification

Milestone Description
Customer Request

Contractor Company

Agency Bureau

Notes

Sync'd From GREX?

Show on Project Dashboard

Applicable

Show in Baseline Obligations

▼ DATES

Estimated Completion Date
10/11/2022

Actual Completion Date
10/11/2022

Last Baselined On

Baseline End Date

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.

MULTI EDIT VISUALIZE NEW MORE					
Applicable					
<input type="checkbox"/>	↑ Number	Lifecycle Phase	Milestone Description	Estimated Completion Date	Actual Completion
<input checked="" type="checkbox"/>	4.491	Execution Procurement	Construction or Design/Build Contract Award or CMC Construction Option		
<input checked="" type="checkbox"/>	4.581	Execution Construction	Construction Start/NTP		
<input checked="" type="checkbox"/>	4.661	Execution Construction	FFE Award/Order		
<input type="checkbox"/>	4.671	Execution Construction	FFE Delivery		
<input type="checkbox"/>	4.681	Execution Construction	FFE Installation		
<input type="checkbox"/>	4.691	Execution Construction	Substantial Completion		
<input type="checkbox"/>	5.005	Closeout	IRIS ASID Substantial Completion		
<input type="checkbox"/>	5.008	Closeout	RETA RWA Financial Completion		
<input type="checkbox"/>	5.051	Closeout	Move Award		
<input type="checkbox"/>	5.061	Closeout	Move Start/NTP		
<input type="checkbox"/>	5.071	Closeout	Move Complete		

16 Item(s)

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

Multi Edit							
COPY TO ALL COPY TO SELECTED							
<input type="checkbox"/>	Number	Lifecycle Phase	Milestone Description	Estimated Completion Date	Actual Completion Date	Last Baselined On	
<input type="checkbox"/>	* 1.011	* Identification	* Customer Request	10/11/2022	10/11/2022		
<input type="checkbox"/>	* 2.011	* Initiation	* Project Initiated	10/11/2022	10/11/2022		

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

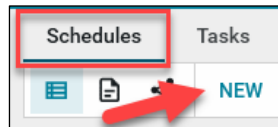
Access the MS Project Schedule Templates

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

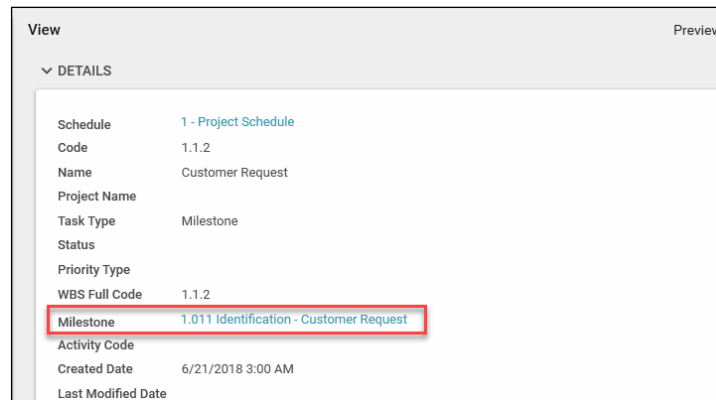
1. Click on the **Tasks** sub-app in the top ribbon.
2. Select the Tasks item to edit.

<input type="checkbox"/>	Code	Name	Schedule	Estimated Start Date	↑ Estimated End Date
<input type="checkbox"/>	1.1.1	Receive and Acknowledge Customer Request (External or Internal)	1 - Project	4/2/2021 3:00 AM	4/2/2021 12:00 PM
<input type="checkbox"/>	1.1.2	Customer Request	1 - Project	4/2/2021 12:00 PM	4/2/2021 12:00 PM
<input type="checkbox"/>	1.1.1.3	Gather Draft OA, CPA or other project identification information, Complete Initial Risk Determination and discuss with Project Resource Bc	1 - Project	4/5/2021 3:00 AM	4/9/2021 12:00 PM

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.

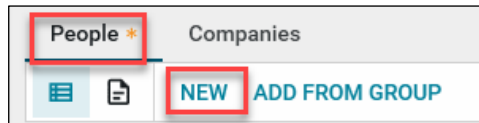
Revise a Schedule

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.

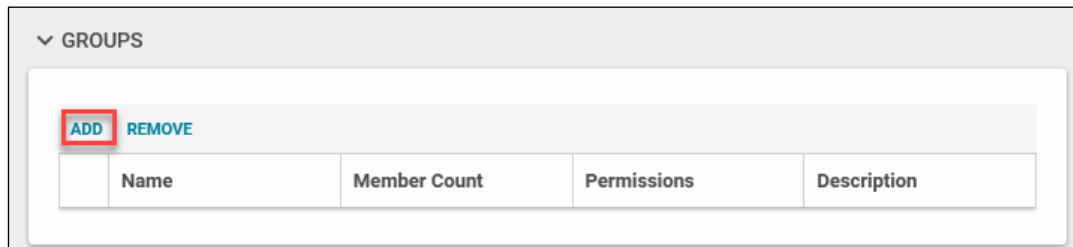
5. Select the **Contact Team Role**.
6. Select the contact's **Status on Project**.
7. Fill in the appropriate values for other fields, if needed.
8. Attach any supporting documentation to the **References** section.
9. Once all updates have been made to the Project Directory record, click the **Save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