

# Kahua Quick Reference Guide

## Editing a Project in the Projects App

### Project Lifecycle Applicability



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The Project record houses details that are used for reporting, template selection, integration links, and basic project information. After a project has been created, changes can be made to any of the existing data, and fields that were initially left blank can be completed from the **Project** form.

### Edit a Project in the Projects App

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 the Project Type and Subtype

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.

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

4. Update the **Project Type** and/or the **Sub Project** type in the **Details** section.
5. Click the **Save/Close** button.
6. Click the **Apply Template** button at the bottom of the read-only Project form to update the template used for the project. The **Template Last Applied** date will update.

Project Type Owned - Above Prospectus

Project Subtype \$3.2M - \$10M

Project Attributes

Status Active

Delegation Status Comment

Scope Indicators

Design Funding FY

Construction Funding FY

Acquisition Method

Delivery Method

PROJECT SETTINGS

Template 0002 - Owned - Above Prospectus - \$3.2M-\$10M

Milestone Configuration Schedule Driven

Allow Milestone Baselining Yes

Template Last Applied 8/19/2022

Apply Template Complete Project Cancel Project Hold Project

7. To close the form, click the **X** in the top right corner.

### Enable Baselining of Milestones

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. Check the **Allow Milestone Baselining** box in the **Project Setting** section.

PROJECT SETTINGS

Template 0002 - Owned - Above Prospectus - \$3.2M-\$10M

Milestone Configuration

Schedule Driven

Allow Milestone Baselining

Template Last Applied 8/31/2022

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

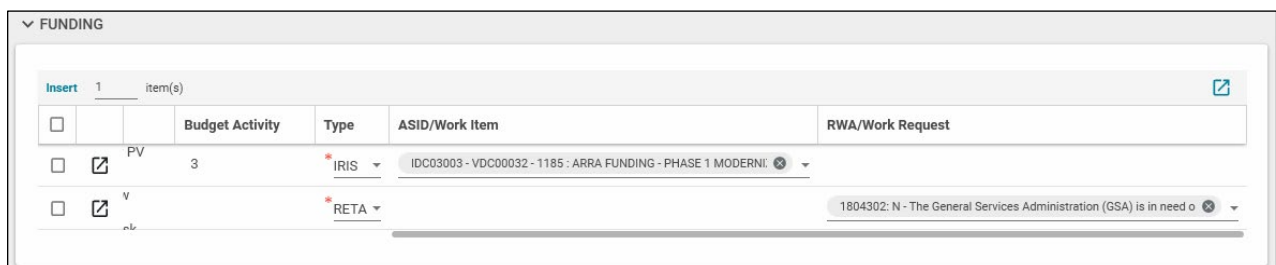
### Update IRIS Work Items or RETA Work Requests

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 integrations with IRIS or RETA 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.

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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.

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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.

▼ ROSTER

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Project Manager

Ashley White - GSA ✕

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Contracting Officer

Loretta Maine - GSA ✕

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Property/Facility Manager

Wayne Frias - GSA ✕

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Project Executive/Sponsor

Susan Mills - GSA ✕

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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, Client Status, Dates, Additional Scope or Sustainability

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.

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.

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

### Internal Status and Client Status

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.

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).

- a. 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 9/29/10 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

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

### Additional Scope

The **Additional Scope** section is used to enter the number of occupants, parking space, and square footage information.

a. Enter values in the appropriate fields.

ADDITIONAL SCOPE

Number of Occupants	247
Inside Parking Spaces	85
Outside Parking Spaces	100
Gross SF	243000
Rentable SF	205000
Usable SF	227000
Inside Parking SF	15000
Unique Features	Waterfall
LPOE Port Size	Medium
LPOE Yearly Border Crossings - POV's	27000
LPOE Yearly Border Crossings - Buses	25000
LPOE Yearly Border Crossings - Trucks	130000
LPOE Yearly Border Crossings - Pedestrians	9800
LPOE Number of Lanes - POV's	35
LPOE Number of Lanes - Pedestrians	5

- b. Click the **Save/Close** button.

### Sustainability Financials

The **Sustainability Financials** section is where the PM or Sustainability Administrator can track the sustainability financial information for the project. This section is not linked to the Sustainability app, and all financial information must be added on this Project form.

- a. Enter values in the appropriate fields.

▼ SUSTAINABILITY FINANCIALS (ENERGY/WATER/FINANCED PROJECTS)

Proposed Annual Cost Savings (\$/Year)

Savings-to-Investment Ratio (SIR)

Total Project Simple Payback (Years)

OFM: Current BA55 or BA63 Allowance Request (\$)

OFM: Prior BA55 or BA63 Allowance Request (\$)

Amount of rebate from utility company, if any, received by GSA (\$)

Source of utility company rebate

ESPC/ UESC Performance Period Length (years)

ESPC (Energy Savings Performance Contract) investment amount (\$)

UESC (Utility Energy Service Contract) investment amount (\$)

Was this project identified in an energy study or investment-grade audit (IGA)?

Energy Study/ IGA identifier

Total Financing Cost (if applicable for ESPC or UESC) (\$)

Total M&V Costs (\$)

Total O&M Costs (\$)

Notes

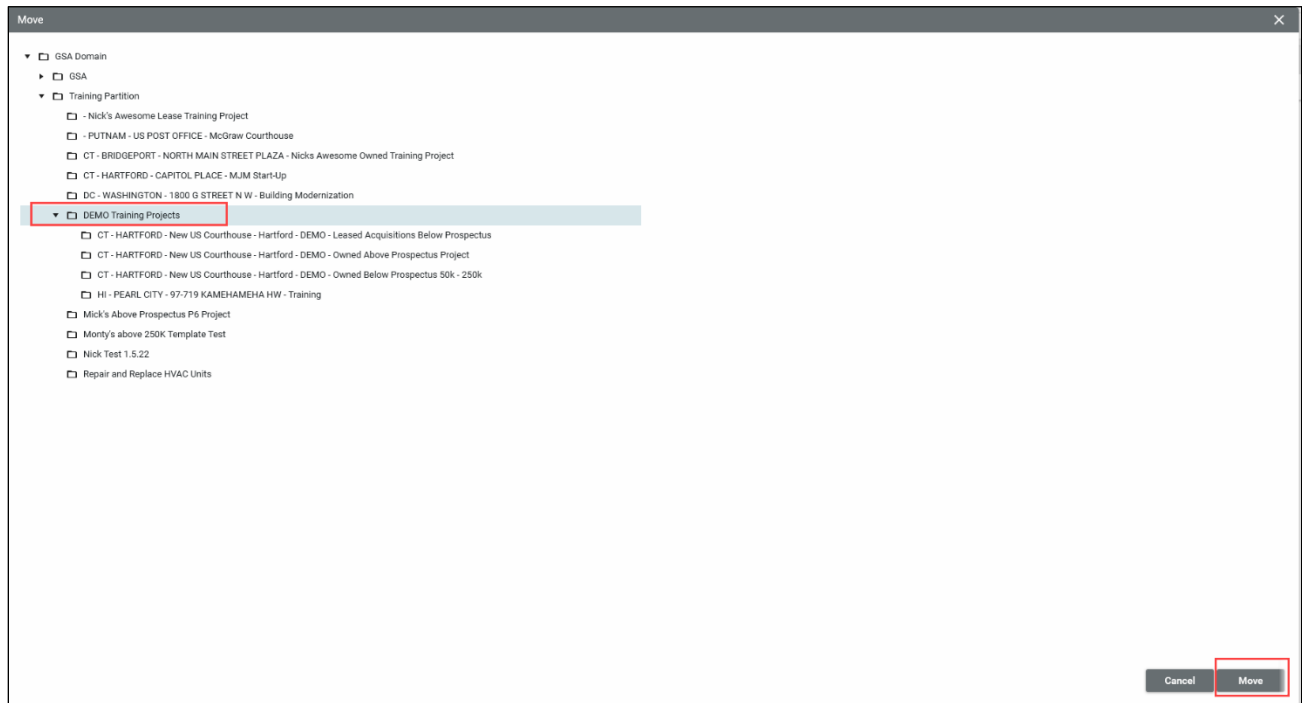
- b. Click the **Save/Close** button.

### Move a Project

The following roles have permission to perform this activity: **GSA-Regional KPM**.

If a project was added to the incorrect location, it can be moved to the correct location.

1. Click the **Move** button on the top toolbar of the Project Details.
2. Click the arrow beside **GSA Domain** and continue drilling down to the correct partition.
3. Click the Move button located on the bottom right corner of the window.



### Project Properties Form History

1. To view the historical changes made to the project properties form, click the **History** button on the top toolbar.
2. To view a specific edit, click the **View Edit** link located to the right of the history reference.

Nick Gicale	Apply Template		1/6/2022 10:20:56 AM
Nick Gicale	Edited	<a href="#">view edit</a>	12/15/2021 9:54:54 AM
Nick Gicale	Save / Close	<a href="#">view edit</a>	12/8/2021 4:37:54 PM
Nick Gicale	Active	<a href="#">view edit</a>	12/8/2021 4:36:48 PM

[View Complete History](#)

3. To close the form, click the **X** in the top right corner.



## Integration and Lookup Fields

The table below summarizes information in the Projects app that comes from other Kahua apps or from other GSA applications.

Section	Field	Source System(s) or Kahua App
Dates	Start Date	Milestones, Scheduling
	End Date	Milestones, Scheduling
	Current Milestone	Milestones, Scheduling
	Current Milestone Estimated Completion	Milestones, Scheduling
	Milestone Modified Date	Milestones, Scheduling
Funding	ASID/Work Item	IRIS
	RWA/Work Request	RETA
Agency Bureau	Agency Bureau	OA Tool, FMIS
Client Project Agreements	Client Project Agreement	Kahua Client Project Agreement app
Occupancy Agreements	Occupancy Agreement	OA Tool
Leases	Leases	REXUS

## Resources

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

## Related QRGs

- [Creating a Project](#)
- [Project Auto-Creation](#)
- [Project Directory](#)
- [Milestones](#)
- [Sustainability](#)
- [Reporting](#)