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

Project Lifecycle Applicability

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 a formal PMP that can be printed as a PDF document. There are three PMP types available: Full (Detailed), Condensed, and CapPMP (Modern Version).

PMP Type	Applicable Project Types
PMP	Construction, Alteration or RWA [$250K (SAT) through Prospectus] Construction, Alteration or RWA [$50 through $250K (SAT)]
Condensed	Construction, Alteration or RWA projects [$0 through $50K] Lease Acquisition - Low Risk [Less than 10k sq. ft. or less than SLAT] Beyond-space projects

CapPMP (Modern Version)	Shorter version of the PMP that includes a Project Duration Gantt chart. This version is not suitable for Capital Investment and Leasing Program submissions.

PMP Tip

Enter Data Into a Text Field

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

Navigate to the Charter and PMP App

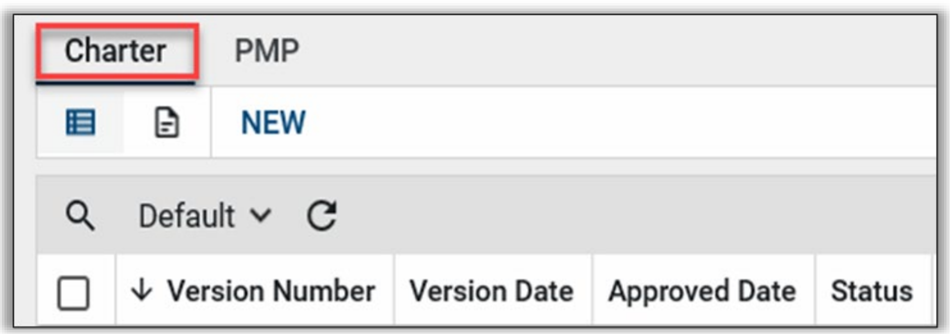
1. Open the project using Project Finder in the Launch Bar.
2. Select **Charter and PMP** from the Apps Launcher. This can also be found under the **Project Identification, Initiation and Planning** sub-section.

Process a Charter into a PMP

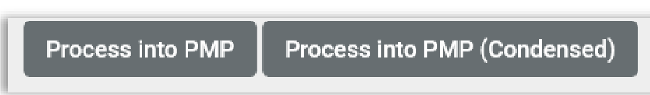
This activity is typically completed by the following role: **PM/COR** and **EXT-PM**.

Signed Charters can be processed into a PMP so that data relevant to both documents transfers to the appropriate sections of the PMP.

1. Open the **Charter** sub-app.



2. Click **Process to PMP** or **Process to PMP (Condensed)** at the bottom action bar of the Approved Charter.



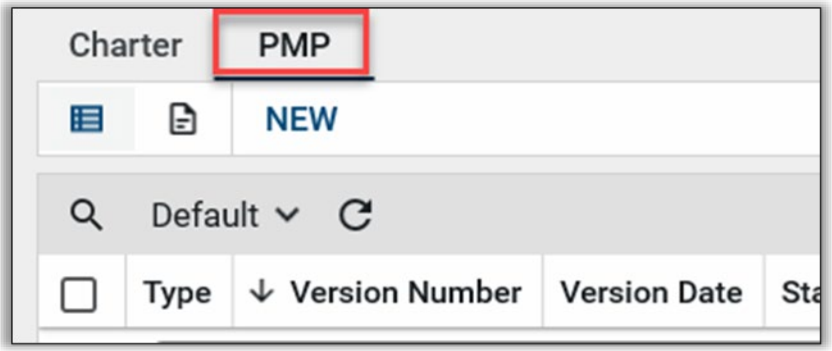
3. The new PMP record will open in Edit mode with data entered from the Charter already filled out.

Create a New PMP (Condensed or Full)

This action is typically created by the following roles: **PM/COR** and **EXT-PM**.

> **Note**: Go to the [Create a CapPMP (Modern Version)]() section of this QRG for instructions on creating a CapPMP (Modern Version).

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. Use the drop-down list to select the Type: **PMP or PMP (Condensed)**.
5. The **Version Date** auto populates with the current date but can be edited.
6. The **Approved Date** will automatically populate once the PMP is approved.
7. Enter a **Start Date**.
8. The **Status** will begin as Draft and once completed will workflow into Published, Superseded, or Cancelled.
9. The **Project Name**, **Project Number**, **Customer**, **Building**, **Address**, **Sponsor**, and **Project Manager** will auto populate from the Project details.
10. Select the **Region**.
11. 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 Projects app. Refer to the [Editing a Project in the Projects App QRG]() for details.

Background

12. 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.
13. List overall goals of the project in the **Objectives** section.
14. List the **GSA Performance Measures Affected by this Project**.

15. List the everyday decision makers on your project in the **GSA Core Team** section.
16. 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.
17. (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

18. (Full PMP Only) List the **Internal Objectives** and any specific details surrounding the project, such as square footage, security requirements, IT specifications, etc.
19. (Full PMP Only) List **Customer Objectives** and specific details surrounding the project.
20. (Full PMP Only) Summarize how the project will support each of the current **Presidential Priorities**.
21. (Full PMP Only) Enter an outline of the **Strategy** to meet and balance the scope objectives.
22. (Full PMP Only) Enter an outline of the **Quality Plan** strategy.
23. (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.
24. (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.
25. (Condensed PMP Only) Enter the **Scope** of the work to be completed.

Schedule

26. List **Internal Objectives** and detail any guiding factors involving the schedule.
27. List **Customer Objectives** and detail any guiding factors involving the schedule.
28. 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.
29. (Full PMP Only) Enter the overall outline of the **Strategy** to manage the project schedule.
30. 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

31. List **Internal Objectives** and guiding factors involving goals to save as much money as possible.

32. List **Customer Objectives** and detail any guiding factors involving the budget.
33. (Full PMP Only) List all **Funding Sources** and quantities.
    a. The funding Total Amount will be calculated when you Save the record.
34. (Full PMP Only) Enter an outline of the **Strategy** to meet the project budget.
35. 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

36. Enter an **Internal Assessment** of the team's working relationships.
37. (Full PMP Only) Enter an **External Assessment** of the team's working relationship with outside partners and stakeholders.
38. (Full PMP Only) Enter the **Strategy** for managing project relationships.
39. (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

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

Resources (Full PMP Only)

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

Scope Feasibility (Full PMP Only)

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

Scope Feasibility and Implementation Strategy (Condensed PMP Only)

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

Change Control Process (Full PMP Only)

49. 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)

50. 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

51. List the items be completed and either kept on file within PBS or delivered to the customer for **Closeout Deliverables**.

Signatory Approvals

52. Add the list of Sponsors to approve the PMP in sequential order. The PMP will be routed for approval through Kahua tasks.
    a. Click **Insert** to add 1 or more items.
    b. Select a **Contact** and an **Approval Due Date** for each item.
    c. Leave the other fields blank. They will auto populate as the PMP moves through the approval process.

References

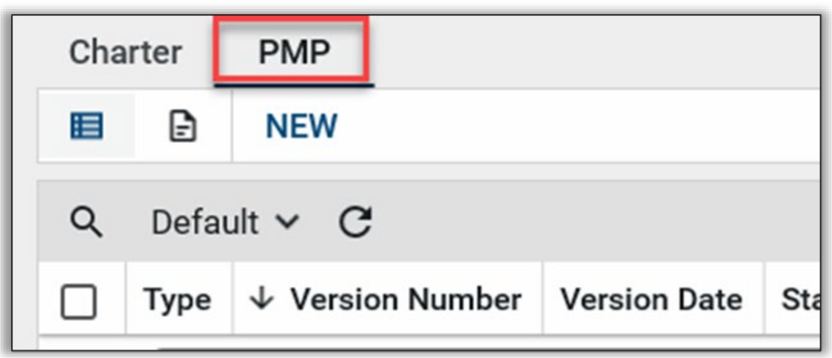
53. Upload and applicable documents to be stored in the PMP record in the **References** section.

Save the PMP

54. Click the **Save/Close** button in the bottom action bar.

Create a CapPMP (Modern Version)

1. Open the PMP sub-app.



2. Click NEW to open the new PMP record.

Details Section

3. Select **CapPMP Modern Version** in the Type drop-down list.
4. The new PMP record is opened in Edit mode.
5. The **Version Date** auto populates with the current date but can be edited.
6. The **Approved Date** will automatically populate once the PMP is approved.
7. Enter a **Start Date**.
8. The **Status** will begin as Draft and once completed will workflow into Published, Superseded, or Cancelled.
9. The **Project Name**, **Project Number**, **Customer**, **Building**, **Address**, **Sponsor**, and **Project Manager** will auto populate from the Project details.
10. Select the **Region**.
11. 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 Projects app. Refer to the Editing a Project in the Projects App QRG for details.

Criteria for Success

12. Enter the project's **Criteria for Success**, which provides an overall description of the project with key project drivers and objectives.

Funding Assumptions

13. Enter **Funding Assumptions** of all planned funding sources and amounts. Provide a detail estimate/funding history and all appropriate key costs.
    a. Click **Insert** to add 1 or more items.
    b. Enter a description and line amount.

Schedule Criteria

14. Enter **Schedule Criteria** of the project and identify key schedule milestones and schedule related assumptions. Identify the major milestones.
    a. Click **Add Milestones**.
    b. Check the box on the left side of each milestone from the Milestones app, to be included in the CapPMP.
    c. Click **Select** from the bottom of the window.

Services to Buy

15. Enter **Services To Buy** which provides an overview of all contracts/ services the will be procured in support of the project.

Key Risk Categories

16. Identify any risks into the **Key Risk Category** 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.

Linked Documents

17. Click the title of related project documents under **Linked Documents** to add to the CapPMP. A new window displaying File Manager will appear.

    Note: Reference the File Manager QRG for guidance.

Project Contacts

18. Use the drop-down list to add Project Contacts which are linked to the contact team function section of the Project Directory.

    Note: Refer the Project Directory QRG for guidance.

Signatory Approvals

19. Add the list of Sponsors to approve the PMP in sequential order. The PMP will be routed for approval through Kahua tasks.
    a. Click **Insert** to add 1 or more items.
    b. Select a **Contact** and an **Approval Due Date** for each item.
    c. Leave the other fields blank. They will auto populate as the PMP moves through the approval process.

Approval Process

Submit for Sponsor Approval(s)

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

1. Click the **Submit** button at the bottom of the record.

   Note: The PMP will route sequentially through the list in the Sponsor Approvals section.

Approve the PMP

This action is typically completed by the following roles: **Regional Manager** or other **Sponsors**.

The first Contact in the Signatory Approvals section will receive a Kahua Task notification.

1. Review the PMP.
2. Click **Approved** at the bottom of the task.
3. The next person in the Signatory Approvals list will receive a Kahua Task, and they will complete steps 2 and 3. This will continue until all Sponsors have approved the PMP.
4. The PMP will have an "Approved" Status and can no longer be edited by anyone.

Revise and Resubmit

5. If any of the Signatory Approvers select Revise and Resubmit, they will be required to

enter a comment with a Reason.

6. The PMP creator will receive an email notification that the PMP has not been approved.
7. Open the PMP.
8. Click New Version to copy the information from the previous version into a new version.

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 of the PMP

To make changes to a published PMP, you must create a new version.

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

Cancel a PMP

1. Open the record.
2. Click **Cancel** at the bottom of the details pane.
3. The **Status** will change to **Cancelled**.
    a. Click Reopen at the bottom of the cancelled PMP if you need to reopen it.

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

[Project Finder](#)
[Editing a Project in the Projects App](#)
[Charter](#)
[File Manager](#)
[Milestones](#)
[Project Directory](#)
[Risk Register](#)
[Tasks](#)