

# Kahua Quick Reference Guide

## Milestones

### Project Lifecycle Applicability



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The Milestones application tracks a project's progress using a log of Milestones. There are three ways Milestones are loaded into a project. Milestones can be:

- Loaded and updated into the project from G-REX,
- Made available from the Project Template where milestones are determined by the project type and subtype, or
- Imported from a schedule within the Scheduling application.

### Important Note

Applicable milestones are loaded into the project depending on the Project Type and Subtype that were selected when the project was created. To edit an applicable milestone, follow the steps in the [Edit a Milestone](#) section. To create a custom milestone, follow the steps in the [Create a Custom Milestone](#) section.




### 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"/>	↑ 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 > SECTIONS

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	

[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

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Custom Milestone

Lifecycle Phase  
**Identification** ▼

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Milestone Description  
**Customer Request** ▼

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Contractor Company  
▼

---

Agency Bureau

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Notes

Sync'd From GREX?

Show on Project Dashboard

Applicable

Show in Baseline Obligations

▼ DATES

Estimated Completion Date  
10/11/2022

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Actual Completion Date  
10/11/2022

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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.

### Create a Custom Milestone

1. Navigate to the appropriate project.
2. Access the **Milestones** app from the App Launcher under the **Schedule Management** section.
3. Click **New** to create a new Milestone.
4. Click the drop-down list to select the appropriate **Lifecycle Phase**.
5. Click the drop-down list to select the appropriate **Milestone Description**.

**Note:** When creating a custom milestone, avoid using the name of an existing standard milestone. If you have multiple phases and need to use the same description, delineate the description with the phase info. For example, use **CMa Award Phase 2** instead of **CMa Award**.

6. Click the drop-down list to select the appropriate **Contractor Company**.
7. Click the drop-down list to select the appropriate **Agency Bureau**.
8. Enter **Notes**, if applicable.

9. If applicable, put a checkmark in the **Sync'd From GREX** box if the milestone was preloaded from the Project Template.
10. If applicable, put a checkmark in the **Show on Project Dashboard**. If checked, the milestone will be displayed on the Project Dashboard
11. Put a check mark in the **Not Applicable** box if the milestone does not apply to the project.
12. Checkboxes will be selected or can be deselected as appropriate to the project.
13. In the **Dates** section, enter the **Estimate Completion Date**.
14. In the References section, to add a document that exists within the project, click the **Add Kahua Doc** button.
15. To add a document that does not exist within the project, click the **Upload** button. Multiple documents may be uploaded at one time.
16. Click the **Save/Close** button.

## Baseline Milestones

1. Navigate to the Milestones Log.
2. Select the Milestone that you would like to baseline.

**Note:** Only Milestones with an entered Estimated Completion Date may be baselined.

3. Click the **Baseline Milestone** button.

## Baseline Multiple Milestones

1. Open the desired Milestones log view.
2. Click the checkbox next to the Milestones that you would like to Baseline. You may also use the checkbox at the top left to select all milestones.
3. Click the **Baseline** button.
4. Click the **Continue** button in the **Baseline Milestones?** pop up window.
5. Baseline Milestones results will show Completed. Click the **Close** button.

<span>☰</span> <span>📄</span> MULTI EDIT VISUALIZE <b>BASELINE</b> NEW MORE ▾					
🔍 Applicable ▾ ↻					
<input type="checkbox"/>	↑ Number	Lifecycle Phase	Milestone Description	Estimated Completion Date	Actual Completion Date
<input checked="" type="checkbox"/>	1.011	Identification	Customer Request	10/11/2022	10/11/2022
<input checked="" type="checkbox"/>	2.011	Initiation	Project Initiated	10/11/2022	10/11/2022
<input checked="" type="checkbox"/>	3.061	Planning	Pre-Design/Study Award		

## Re-Baselining Milestones

1. Within the appropriate project, navigate to the milestone that needs to be re-baselined.
2. Click on the milestone and select **Revise Baseline**.
3. Fill in the required fields by selecting the **Baseline Change Reason** and entering in the **Baseline Change Details**.
4. Click **Continue** and notice the Baseline History section will populate with the new information.

×

Are you sure you want to Baseline the Milestone(s)?

Baseline Change Reason

OPD Approved Adjustment ▾

Baseline Change Details

Field is required.

Continue
Cancel

▼ BASELINE HISTORY				
Baseline End Date	Baseline Set On	Baseline Set By	Change Reason	Change Details
2/8/2023	8/25/2023	Cillisha Knights - GSA	OPD Approved Adjustment	required to re-baseline

▼ REFERENCES

☰ 📄 DOWNLOAD

<input type="checkbox"/>	TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	MARKUP?	INCLUDE ON SEND	INCLUDE MARKUP ON SEND
<span style="border: 1px solid #ccc; padding: 2px 5px;">Revise Baseline</span>								

## 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 QRGs

[Scheduling](#)