

Kahua Quick Reference Guide

Charter and PMP App: Project Charter

Project Lifecycle Applicability



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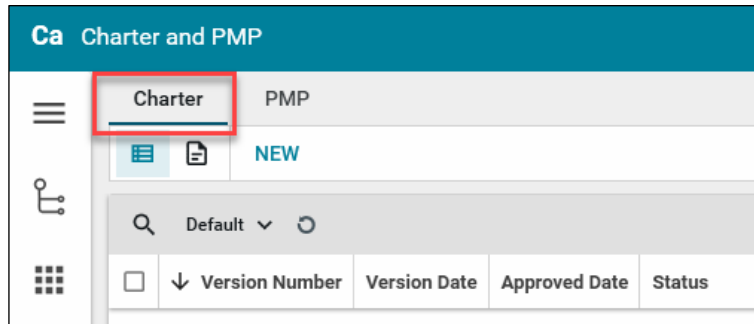
The Project Charter communicates the authorization and management approach to project participants and stakeholders. This Charter lays the groundwork for informed decisions and planning regarding project direction, outcomes, and delivery.

The Charter sub-app is used to create the formal Charter and includes an approval process that allows the Sponsor(s) to review and approve in the app or through a Kahua Task. An approved Charter can be processed into the PMP (Project Management Plan) sub-app.

Prior to creating a new charter, ensure that the information for **Agency Bureau, Building** and **Roster** sections of Projects Details entered in the Projects app.

Navigate to the Charter

1. Open the **project** using Project Finder on the left navigation pane.
2. Select **Charter and PMP** from the App Launcher. This can be found under the Project Identification, Initiation and Planning subsection.
3. Select the **Charter** sub-app. It will open in a log view, displaying any previous versions below.



Create a New Project Charter

This action is typically created by the following roles: **GSA-PM/COR** or **Regional Manager (Sponsor)**.

1. Click **NEW** to open the new Charter record.

Details

2. The **Version Number** auto populates to the next sequential number.
3. The **Version Date** auto populates with the current date, but it can be edited using the calendar icon.
4. Leave the **Approved Date** open. It will populate when the record has been approved.
5. The **Project Name, Project Number, Customer, Building, Address, Sponsor,** and **Project Manager** will auto populate from the Project Details.

Note: The Project Name, Project Number, Customer, Building, Address, Sponsor and Project Manager are not editable from the Charter app, changes must be made in the Project Details section of the Projects app.

6. The **Status** will start as Draft and will be updated as the Charter is routed through the approval process.
7. Select the **Region** from the dropdown list.
8. Enter the **Managing Organization**.

Some of the sections below have a flyout icon that will open the list so that the Description can be typed in a larger text field, and the arrows in the upper right corner allow for easily navigating through the list of items.

Insert		3	item(s)
<input type="checkbox"/>	No.	Description	
<input type="checkbox"/>	01	_____	
<input type="checkbox"/>	02	_____	
<input type="checkbox"/>	03	_____	

Overview

The **Overview** addresses who, what, when and where of the project, including the reason the project was created. This section should provide enough information so that someone reading only this part of the Charter would have a high-level understanding of the project.

8. Enter an **Overview** of the project.

Objectives

This section is used to describe what the project is intended to achieve and the target dates for completion. If known, include any major project deliverables that will be completed by the end of the project.

9. Click **Insert** to add 1 or more items.
10. Enter a **Description** for each item to outline objectives according to the SMART formula: Specific, Measurable, Achievable, Results-oriented, and Time-sensitive.

Scope

The **Scope** should indicate the boundaries, including what is to be done and what is not to be done.

11. Enter the **Scope** of the project.

Milestones, Risks, and Constraints

Include any **Milestones** or major activities that should occur in order for the project's objectives to be satisfied.

12. Click **Add Milestones**.
13. Check the box on the left side of each Milestone to be included.
14. Click **Select**.

Note: The list of available Milestones is managed in the Milestones app.

Identify major **Risks**.

15. Click on **Add Risks**.
16. Check the box on the left side of each Risk item to be included.
17. Click **Select**.

Note: The list of available Risks is managed in the Risk Register app.

Briefly describe any **Constraints** that may limit the team's options, such as a predefined budget, customer-imposed dates, contract limitations, or resource issues.

18. Click **Insert** to add 1 or more items.

19. Enter a **Description** for each Constraint.

Assumption

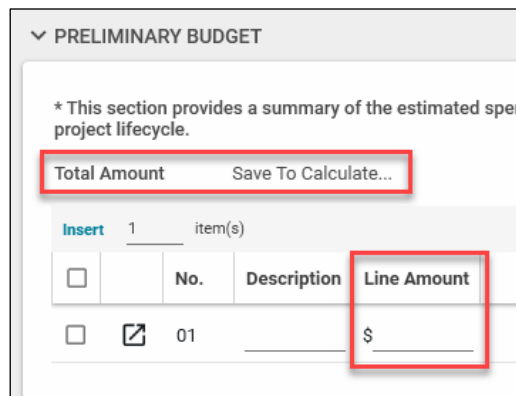
Summarize the **Assumptions** taken into consideration when developing the Charter. For example: “A major renovation is planned for a federal building. This assumes that funding for the renovation is or will be available.”

- 20. Click **Insert** to add 1 or more items.
- 21. Enter a **Description** for each Assumption.

Preliminary Budget

This section provides a summary of the estimated spending to meet the objectives of the project as described in this Charter. This summary is preliminary and reflects estimated costs for the entire project lifecycle.

- 22. **Insert** 1 or more items.
- 23. Enter a **Description** and **Line Amount** for each Budget Item. The Line Amounts for all items will be summed in the **Total Amount** field when the record is saved.



PRELIMINARY BUDGET

* This section provides a summary of the estimated spending for the project lifecycle.

Total Amount Save To Calculate...

Insert 1 item(s)

<input type="checkbox"/>	No.	Description	Line Amount
<input type="checkbox"/>	<input checked="" type="checkbox"/> 01		\$ _____

Project Manager Responsibility & Authority

There are 13 questions in this section. Each answer defaults to “**Yes**” - this is the Project Managers responsibility.

- 24. Review each question and if an item is someone else’s responsibility, change it to “**No.**”

Sponsor Approvals

Add the list of **Sponsors** to approve the charter in sequential order. The charter will be routed for approval through Kahua tasks.

- 25. Click **Insert** to add 1 or more items.
- 26. Select a **Contact** and an **Approval Due Date** for each item.
- 27. Leave the other fields blank. They will auto populate as the Charter moves through the

approval process.

Comments

28. Enter **Comments**, as needed.

References

29. **Upload** or **Add Kahua Documents** to be attached to the record, as needed.

Save the Record

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

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 Charter will route sequentially through the list in the **Sponsor Approvals** section.

Approve the Charter

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

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

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

Note: The Delegate option at the top of the task allows the Sponsor to forward the task to another Kahua user.

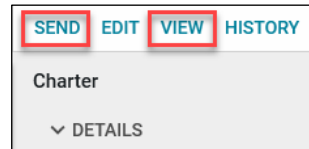
Revise and Resubmit

6. If any of the **Sponsor Approvers** select **Revise and Resubmit**, they will be required to enter a comment with a **Reason**.
7. The Charter creator will receive an email notification that the Charter has not been approved.
8. Open the **Charter**.
9. Click **New Version** to copy the information from the previous version into a new version

for revision.

Note: The previous version will still be in the list view with a status of Superseded.

Send and View Charter



Send – Opens the Send Wizard.

View – Opens a preview of the GSA’s Charter form and then a PDF of the document can be opened by clicking on the Open PDF icon.



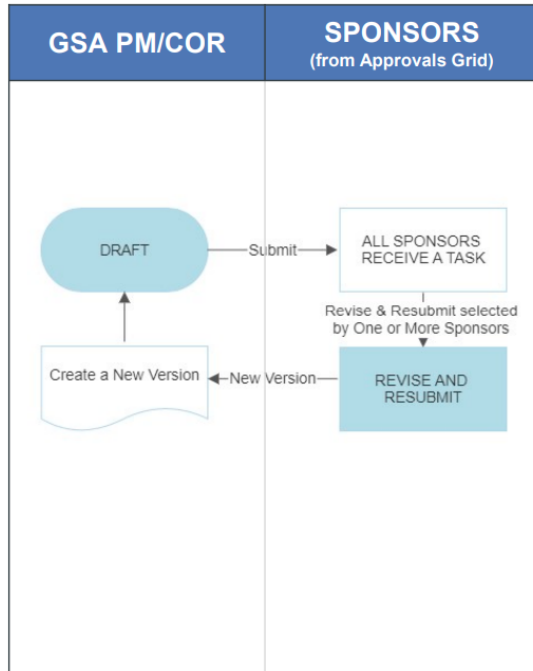
Process into the Project Management Plan (PMP)

Approved Charters can be processed into the PMP so that data that is relevant to both documents does not have to be entered twice.

1. With the approved record open, click **Process to PMP** or **Process to PMP (Condensed)**, whichever is applicable.
2. The new PMP record is opened in the PMP sub app with fields the data entered in the Charter already filled out.

Workflows

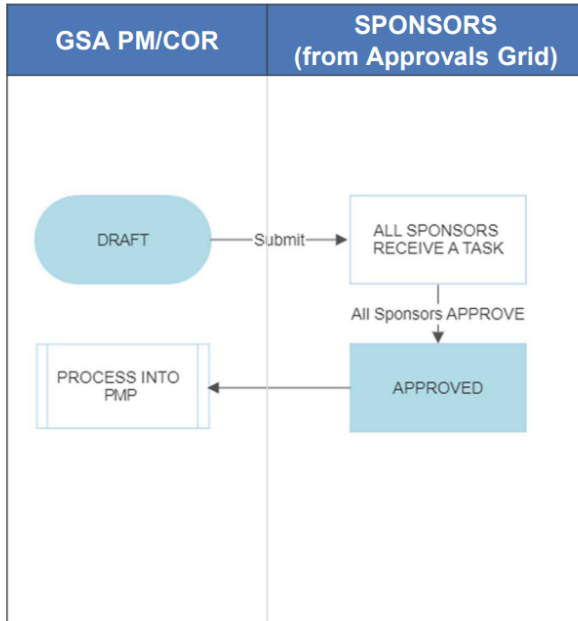
Revise and Resubmit Workflow



Charter Workflow– Revise and Resubmit

- **Submit** sends a Task to all of the *Sponsors* listed in the Approvals Grid
- If any of the *Sponsors* select **Revise and Resubmit**, it is sent back to the *GSA PM/COR* to create a **New Version**.

Approved by All Sponsors



Charter Workflow–
Approved by ALL Sponsors

- **Submit** sends a Task to all of the *Sponsors* listed in the Approvals Grid
- If all of the *Sponsors* select **Approve**, the **Status** is changed to Approved and can then be processed into a PMP.

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

- [Editing a Project](#)
- [Milestones](#)
- [PMP](#)
- [Risk Register](#)
- [Scheduling](#)