Kahua Quick Reference Guide
Risk Management Tools Utilization Report

Project Lifecycle Applicability

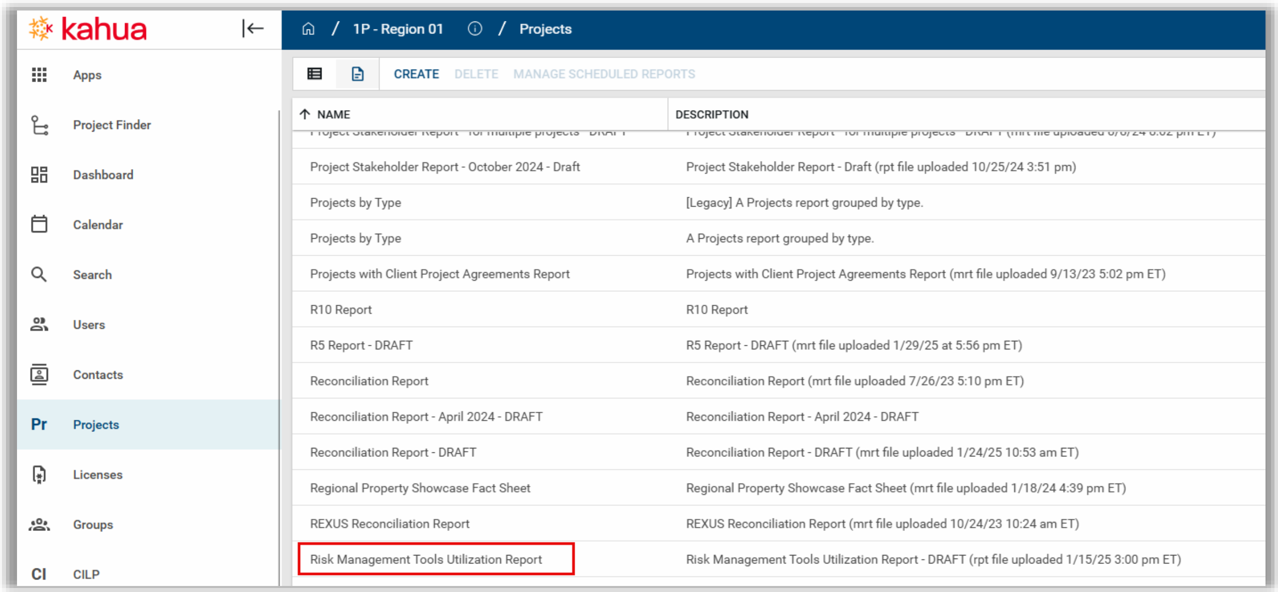
About the Risk Management Tools Utilization Report

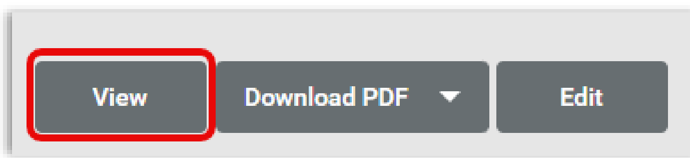
This Quick Reference Guide (QRG) covers the process for running the Risk Management Tools Utilization Report in Kahua. The report pulls from several Kahua apps. For more detailed information on using each app, please refer to the linked QRG.

Editing a Project QRG
Milestones QRG
Scheduling QRG
Risk Register QRG
File Manager

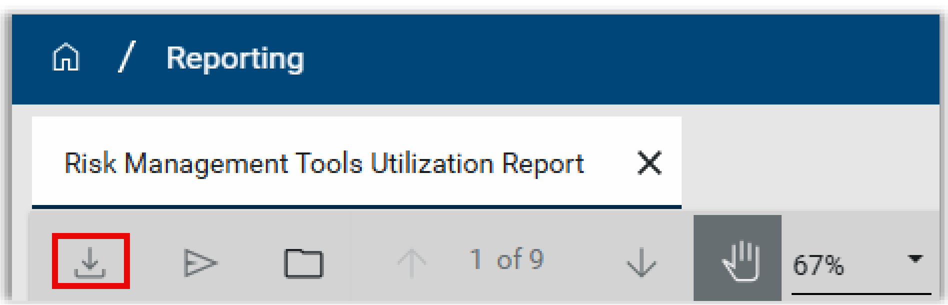
Run the Risk Management Tools Utilization Report

1. Click the **Project Finder** in the launch bar to navigate to a region.
2. Once in the desired region, click the apps launcher in the launch bar.
3. Click the **Projects** app.
4. Click the Reports link above the log view to access the reports.
5. Select the **Risk Management Tools Utilization Report** in the list, and click the **View** button at the bottom of the window to launch the report.





6. To download the report once it has launched, click the down arrow in the report toolbar.



Clicking the arrow opens the report in a new browser window with options to print the report or download to your local computer.

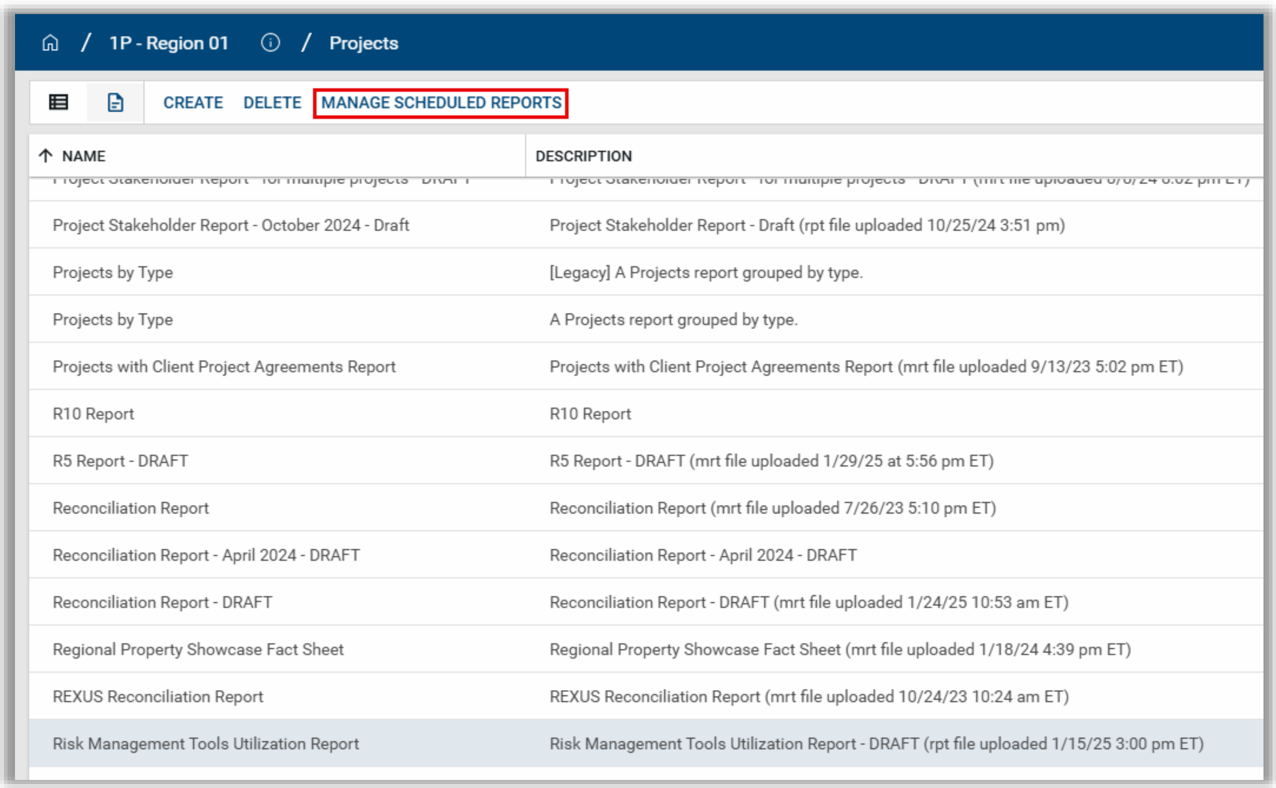
Note: It is recommended to download the report in Excel in order to preserve cell formatting.

7. Close the View using the **X** in the report toolbar.

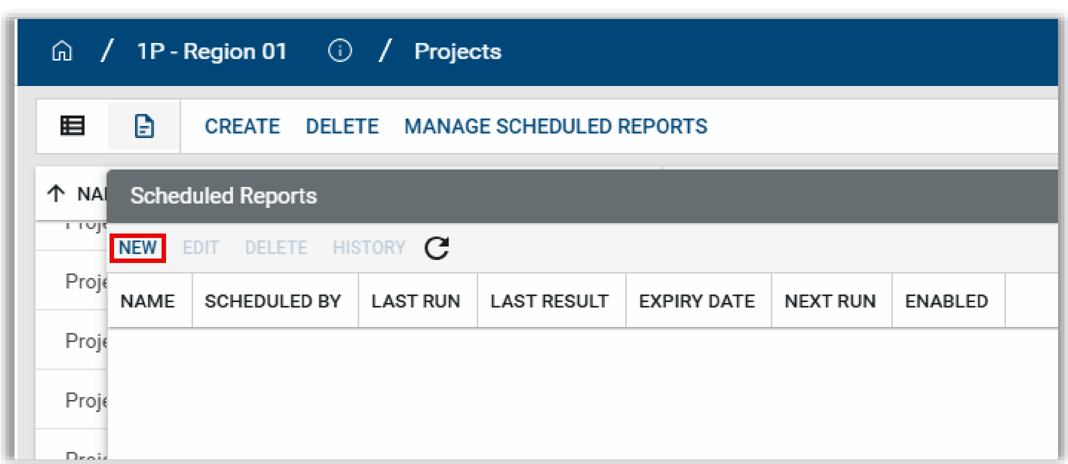
Schedule the Risk Management Tools Utilization Report

1. Navigate to a partition using **Project Finder** in the launch bar.

2. Once in the desired partition, click the apps launcher in the launch bar.
3. Click the **Projects** app.
4. Click the Reports link above the log view to access the reports.
5. Select the Risk Management Tools Utilization Report in the list, and click **Manage Scheduled Reports** in the toolbar.

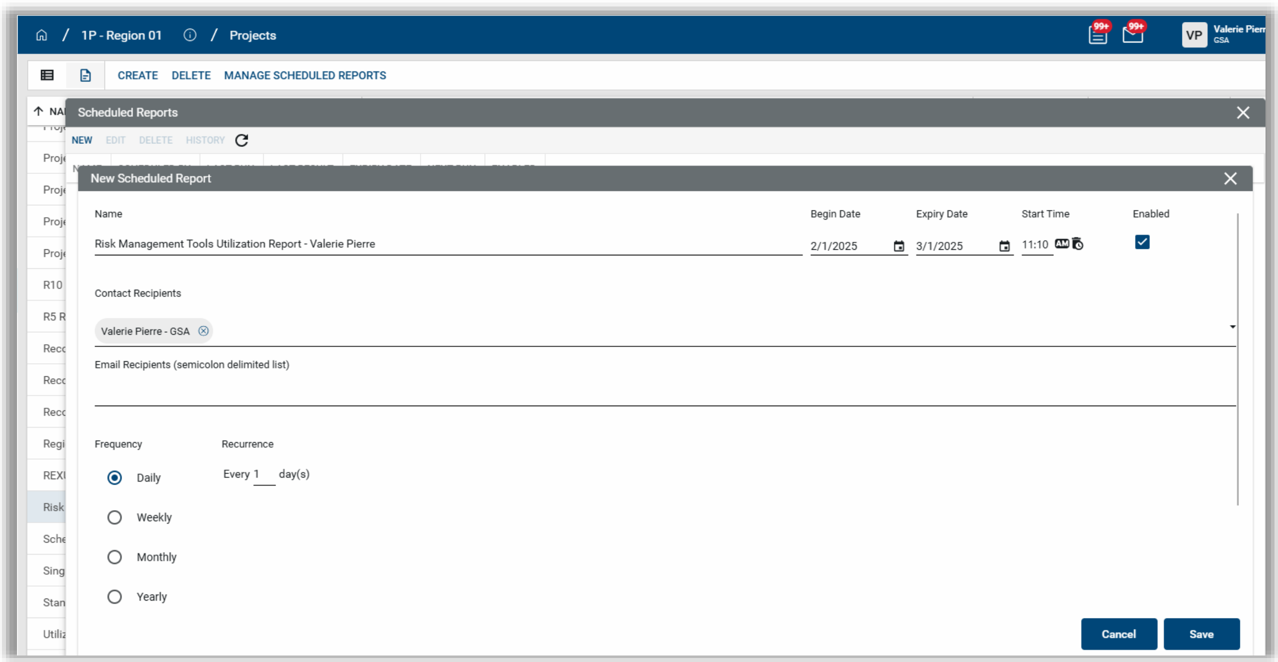


6. In the Scheduled Reports window that opens, click **New**.



7. In the **Scheduled Reports** window, enter in applicable information:

1. A name for the report
b. The range of dates and time to start and end the report generation
    i. **Note**: The “Start Time” corresponds to the user’s local time. Select a time that is appropriate for the users you are creating the scheduled report for. Your local time can be changed in your Kahua settings.
c. Select the **Contact Recipient** (list from Kahua contacts) and **Email Recipients** (user who do not have access to Kahua).
    ii. **Note**: Users in Kahua will receive an email and Kahua message. Users outside of Kahua will receive an email.
d. The report **Frequency** (i.e. daily, weekly, monthly) and recurrence.
e. The **Delivery Method**. It is recommended to choose Message with Attached File.
f. The **Delivery Format**. It is recommended to choose Excel for this report.



8. Click the **Save** button.

Notification: The report recipient receives a message with the subject: “[Report Name] – Auto-Generated at [DD-Month-YYYYY] [time].” The report is attached in its native format.

Report Scope and Calculations

1. The report only includes with a **Project Type** of Owned – Above Prospectus and a **Status** of Active.
2. In any Lifecycle Phase: If a project has not used the Risk Register app, and a Risk Register file was not found in the File Manager app, the **Description** column will have NONE in red.

3. In any execution Lifecycle Phase: If a project has used the Risk Register app, but the app has not been updated within the last 60 days, the **Risk Register App Updated in Last 60 Days** column will have NO in red.
4. In any Lifecycle Phase other than Execution: If a project has used the Risk Register app but the app has not been updated within the last 60 days, the Risk Register App Updated in Last 60 days column will have NO in black.
5. In any execution Lifecycle Phase: If a Risk Register file is found in the File Manager app, but that file was not updated within last 60 days, the Modified column will display the date (xx/xx/xx) of the file in red.
6. In any Lifecycle Phase: If a project does not have a PDRI or PDM tool in the File Manager app, the Description column will show "NONE - notify project PM" in blue.

Notes

1. Refer to the Projects app to determine a project's Current Lifecycle Phase.
2. All files (Risk Register, PDM, PDRI) should be uploaded to the 2.0 Initiation and Planning folder in the File Manager app.
3. The report assumes that project teams used the proper naming convention for documents uploaded into Kahua's File Manager app:
    a. PDM 70-80pct FS - CILP Submission
    b. PDRI 70-80pct FS - CILP Submission
    c. PDRI Concept Design - Commissioners Presentation
    d. Risk Register
4. When uploading files in the 2.0 Initiation and Planning folder in File Manager, PMs should enter a file description in the Description field.

Resources

For additional help with Kahua applications, you can access the instructor-led training calendar, self-paced videos, and Quick Reference Guides (QRGs) from this link: Training: Project Management tool | GSA

Related QRGs

Editing a Project QRG
Milestones QRG
Scheduling QRG
Risk Register QRG
File Manager
Reporting