



Portfolio Manager Training Guide

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About

The Portfolio Management application within Kahua is where you can (with appropriate permissions) create new projects (also accessible from Project Finder) and update existing projects. There is no finalization process that Mentor subprojects have. CM PM has been removed and PO is kept.

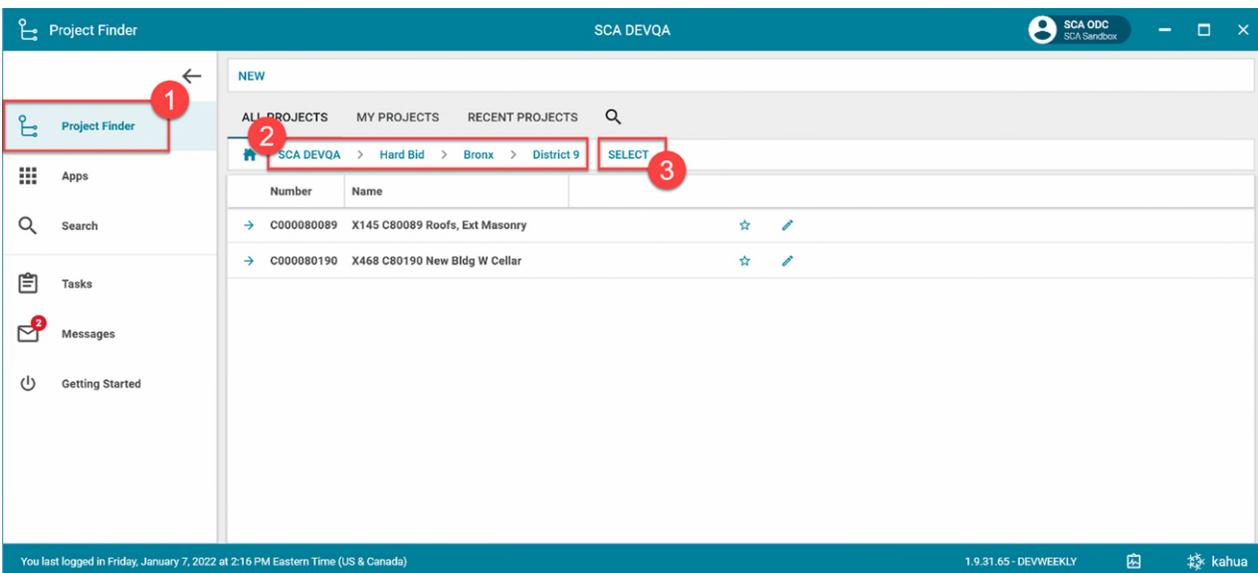
Step-by-Step Instructions

Create Project

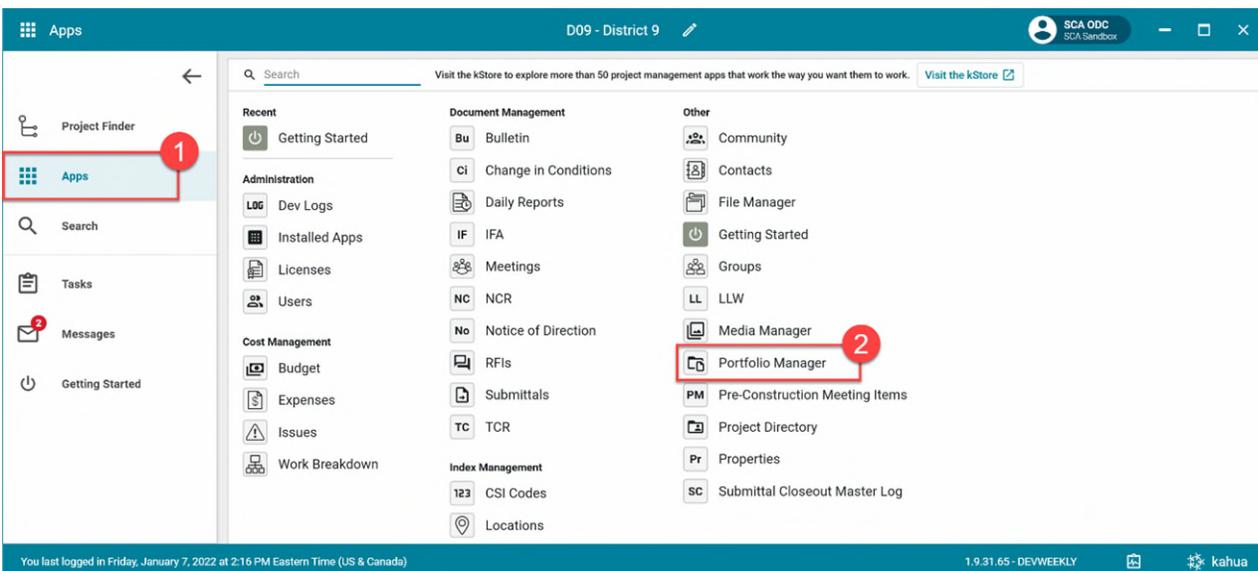
Role	Preceding Steps	Outcome
ODC	→ Project information is known.	→ Project is created.

Steps

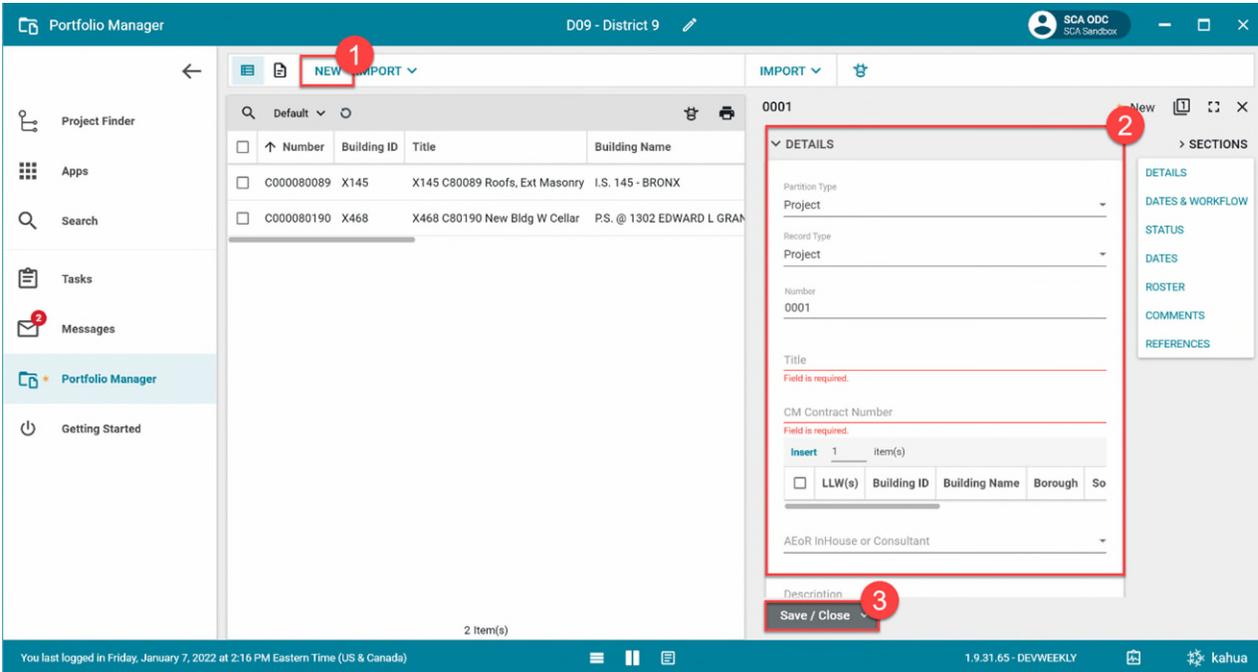
1. Go to 'Project Finder' > Navigate to the desired district > Click 'Select'



2. Go to 'Apps' > Select 'Portfolio Manager' app



3. Select 'New' > Enter required and supporting fields (see 'Enter Project Details' below for specific data entry details) > Click 'Save / Close'



Enter Project Details

Role	Preceding Steps	Outcome
ODC	→ New Subproject is created and Subproject information is known.	→ Subproject details are entered.

Steps

1. Partition Type: 'Project'
2. Record Type: 'Project'
3. Number: Enter the contract number
4. Title: Enter the Building ID followed by the project title. Any additional information can be added in parentheses. **Example**: Q485 (Grover Cleveland HS Q) New 4 Story Annex
5. CM Contract Number: Enter the contract number
6. LLW Table: Press 'Insert' to add a new LLW
LLW(s): Select an LLW (can type to search by LLW number)
7. AEoR InHouse or Consultant: Select 'InHouse' or 'Consultant' from the dropdown
8. Project Type: Select 'CIP' or 'Capacity' from the dropdown
9. Construction Award Amount: Enter the contract award amount (Note: Only used for reporting)
10. Dates: Enter the 'Contract Award Date' and 'Notice to Proceed Date'
11. Roster: Select the known project roles in the Roster using the dropdowns

▼ DETAILS

Partition Type

Project

1

Record Type

Project

2

Number

C000018920

3

Title

Field is required.

4

CM Contract Number

Field is required.

5

Insert 1 item(s)

<input type="checkbox"/>	LLW(s)	Building ID	Building Name	Borough	Solicitation Number	Design Number / Package Number	District
<input type="checkbox"/>							

6

AEoR InHouse or Consultant

7

Description

Type

Field is required.

Phase

Construction

8

\$ Construction Award Amount

9

Finalized No

▼ DATES

Contract Award Date



10

Notice To Proceed



Substantial Completion



Revised Substantial Completion

Actual Substantial Completion



▼ ROSTER

11

General Contractor



AEoR



Project Officer



Additional PO



Senior Project Officer



Chief Project Officer

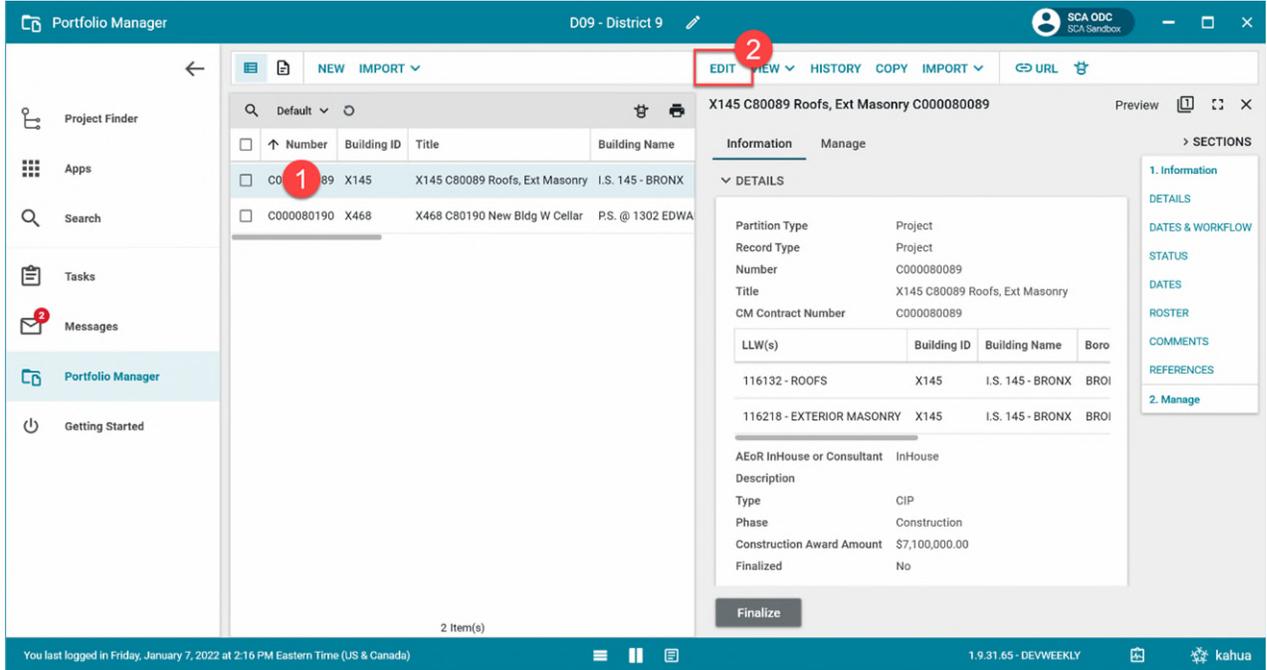


Update Project Details

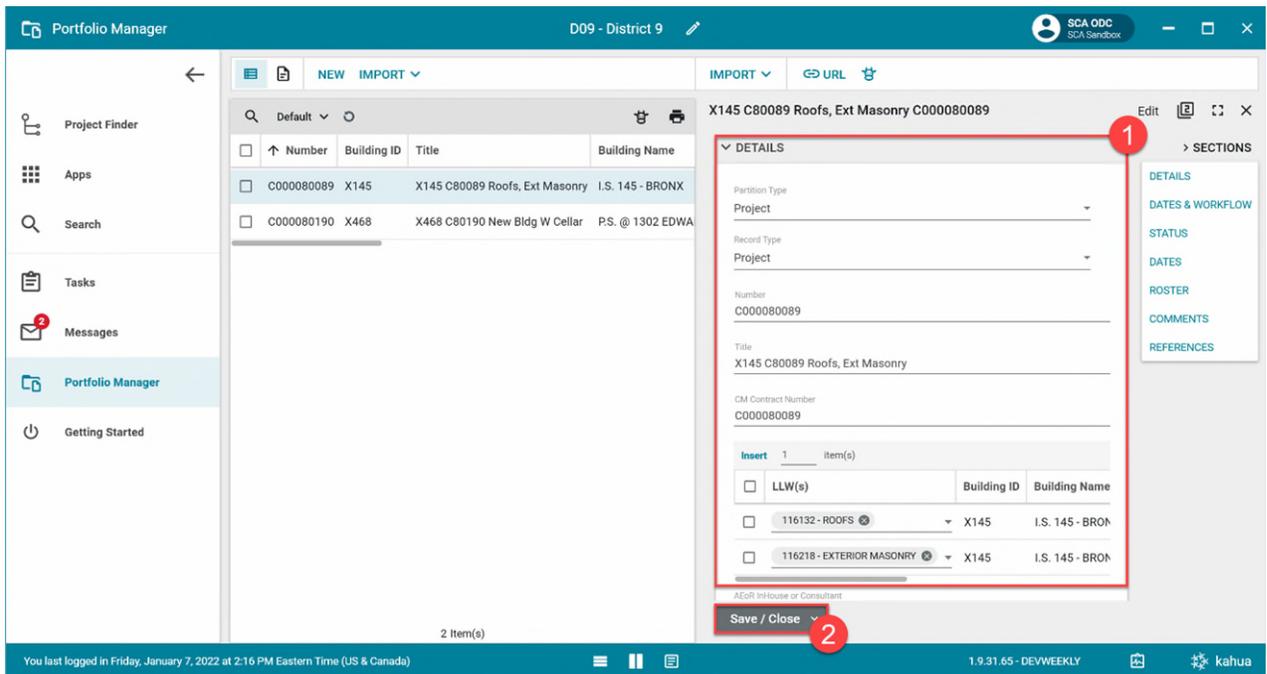
Role	Preceding Steps	Outcome
ODC	An existing project is available.	Project settings are updated.

Steps

1. Select the project requiring update > Select 'Edit'



2. Update fields (See 'Enter Project Details' step above) > Select 'Save/Close'



Finalize Project

Role	Preceding Steps	Outcome
ODC	An existing project is not finalized. →	Project is finalized and is no longer editable by the ODC. Required updates are made by the CM Facilitator or CAMP Admin.

Step

Select the project to finalize > Select 'Finalize'

The screenshot shows the Portfolio Manager interface for 'D09 - District 9'. The main view displays a list of projects with columns for Number, Building ID, Title, and Building Name. The first project, 'X145 C80089 Roofs, Ext Masonry', is selected and highlighted. A red circle with the number 1 is placed over the selection checkbox. The details panel on the right shows information for this project, including its title, CM Contract Number, and a table of LLW(s) items. A red circle with the number 2 is placed over the 'Finalize' button at the bottom of the details panel.

Number	Building ID	Title	Building Name
C000080089	X145	X145 C80089 Roofs, Ext Masonry	I.S. 145 - BRONX
C000080190	X468	X468 C80190 New Bldg W Cellar	P.S. @ 1302 EDWA

LLW(s)	Building ID	Building Name	Boro
116132 - ROOFS	X145	I.S. 145 - BRONX	BROI
116218 - EXTERIOR MASONRY	X145	I.S. 145 - BRONX	BROI

Unlock Project

Role	Preceding Steps	Outcome
CM Facilitator, CAMP Admin	An existing project is finalized.	Project is unlocked.

Step

Select the project to unlock > Select 'Unlock'

The screenshot shows the Portfolio Manager interface for 'D09 - District 9'. The left sidebar contains navigation options: Project Finder, Apps, Dashboard, Search, Tasks, Messages, Portfolio Manager (selected), and Getting Started. The main area displays a table of projects:

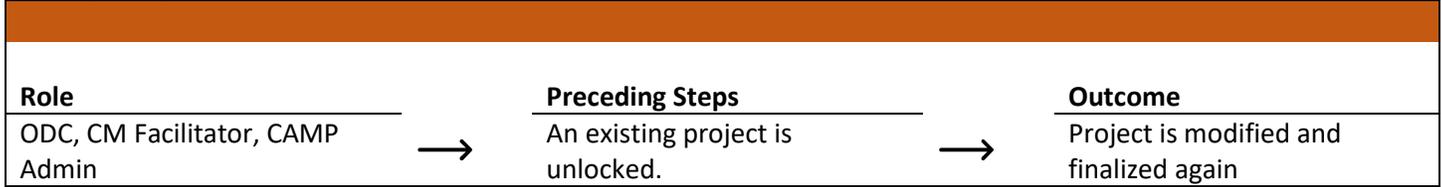
Number	Building ID	Title	Building Name
C000089	X145	X145 C80089 Roofs, Ext Masonry	I.S. 145 - BRONX
C000080190	X468	X468 C80190 New Bldg W Cellar	P.S. @ 1302 EDWARD L GRAN

The details panel for 'X145 C80089 Roofs, Ext Masonry C000080089' is open, showing the following information:

- Partition Type: Project
- Record Type: Project
- Number: C000080089
- Title: X145 C80089 Roofs, Ext Masonry
- CM Contract Number: C000080089
- LLW(s): 116132 - ROOFS, 116218 - EXTERIOR MASONRY
- Building ID: X145
- Building Name: I.S. 145 - BRO
- AEoR InHouse or Consultant: InHouse
- Description: Description
- Type: CIP
- Phase: Construction
- Construction Award Amount: \$7,100,000.00
- Finalized: Yes

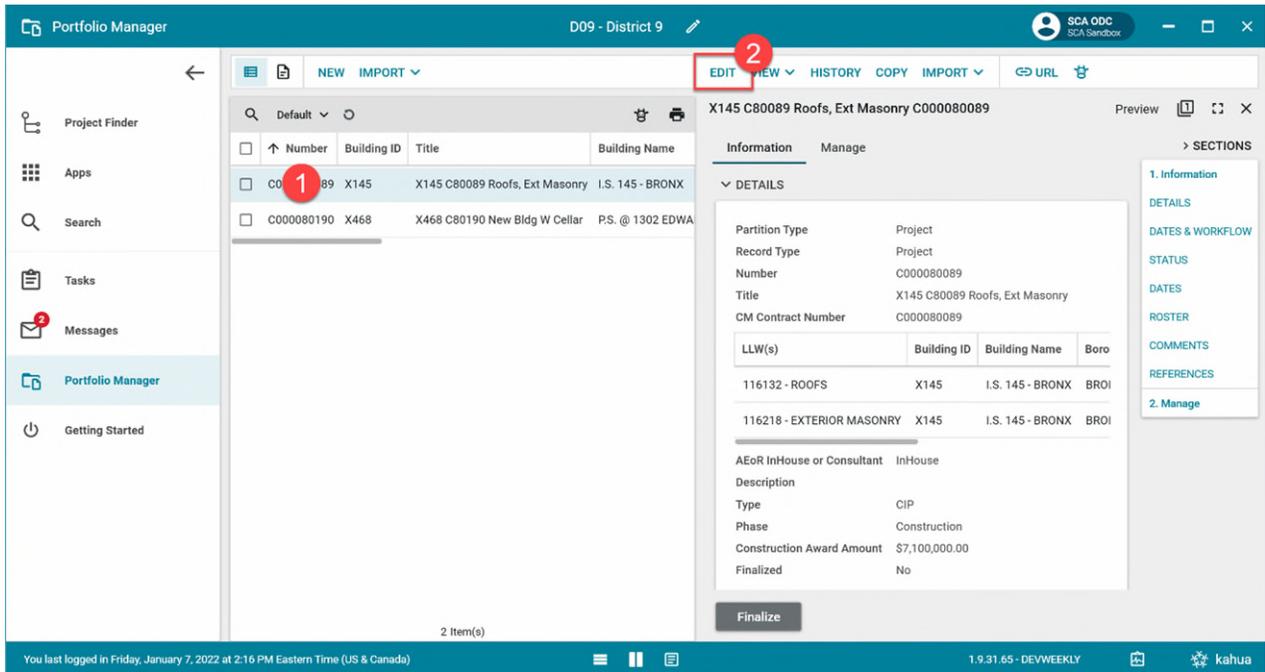
The 'Unlock' button is highlighted with a red circle containing the number 2.

Modify Project

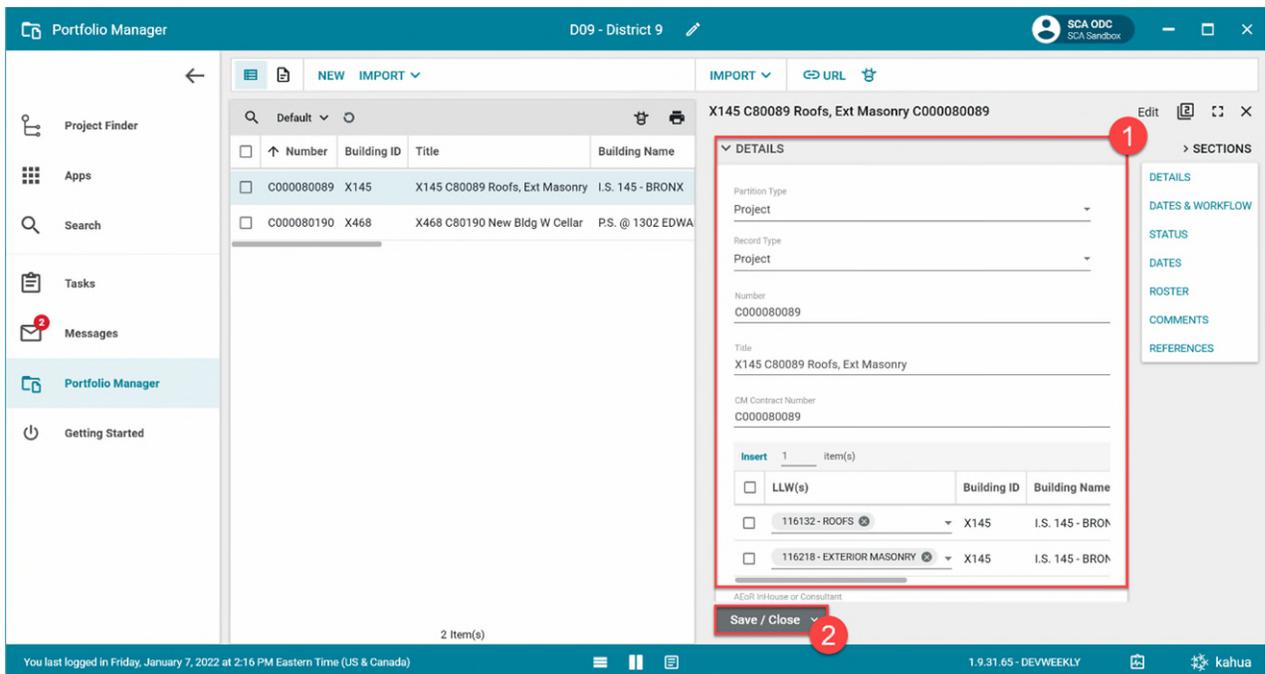


Step

1. Select the project requiring update > Select 'Edit'



2. Update fields > Select 'Save/Close'



3. Select 'Finalize'

The screenshot displays the Portfolio Manager application interface. The top navigation bar includes 'Portfolio Manager', 'D09 - District 9', and user information 'SCA ODC SCA Sandbox'. The left sidebar contains navigation options: Project Finder, Apps, Search, Tasks, Messages, Portfolio Manager (selected), and Getting Started. The main content area shows a list of projects with columns for Number, Building ID, Title, and Building Name. Two items are listed:

Number	Building ID	Title	Building Name
C000080089	X145	X145 C80089 Roofs, Ext Masonry	I.S. 145 - BRONX
C000080190	X468	X468 C80190 New Bldg W Cellar	P.S. @ 1302 EDWA

The details panel for the selected project 'X145 C80089 Roofs, Ext Masonry C000080089' is open, showing the following information:

- Partition Type: Project
- Record Type: Project
- Number: C000080089
- Title: X145 C80089 Roofs, Ext Masonry
- CM Contract Number: C000080089
- LLW(s): 116132 - ROOFS, 116218 - EXTERIOR MASONRY
- Building ID: X145
- Building Name: I.S. 145 - BRONX
- Boro: BROI
- AEoR InHouse or Consultant: InHouse
- Description: Type: CIP, Phase: Construction
- Construction Award Amount: \$7,100,000.00
- Finalized: No

A red circle with the number '1' highlights the 'Finalize' button at the bottom of the details panel. The bottom status bar shows the login time 'You last logged in Friday, January 7, 2022 at 2:16 PM Eastern Time (US & Canada)', version '1.9.31.65 - DEVWEEKLY', and the 'kahua' logo.