

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	\rightarrow	Project information is known.	\rightarrow	Project is created.

Steps

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

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

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

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Enter Project Details

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

Steps

- 1. <u>Partition Type:</u> 'Project'
- 2. <u>Record Type:</u> 'Project'
- 3. Number: Enter the contract number
- 4. <u>Title:</u> 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. <u>CM Contract Number:</u> Enter the contract number
- 6. <u>LLW Table:</u> Press 'Insert' to add a new LLW
 - <u>LLW(s)</u>: Select an LLW (can type to search by LLW number)
- 7. AEoR InHouse or Consultant: Select 'InHouse' or 'Consultant' from the dropdown
- 8. <u>Project Type:</u> 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

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Revised Substantial Completion

Actual Substantial Completion

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AEoR	
Project Officer	*
Additional PO	*
Senior Project Officer	•
Chief Project Officer	*

Update Project Details				
Role	_	Preceding Steps	_	Outcome
ODC	\rightarrow	An existing project is available.	\rightarrow	Project settings are updated.

Steps

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

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

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

Step

Select the project to finalize > Select 'Finalize'

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Unlock Project



Step

Select the project to unlock > Select 'Unlock'

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Role Preceding Steps Outcome ODC, CM Facilitator, CAMP An existing project is unlocked. Project is modified and finalized again

Step

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

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3. Select 'Finalize'

