

Portfolio Manager Training Guide

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About

The Portfolio Management application within Kahua is where you can (with appropriate permissions) create new subprojects (also accessible from Project Finder) and update existing subprojects. Once all required information is entered, the subproject is finalized with the approval of the CM PM followed by the Director of Operations for Mentor subprojects and the CPO for JOC and Emergency subprojects.

Step-by-Step Instructions

Create Subproject

Role		Preceding Steps		Outcome
CM Firm	\rightarrow	Subproject information is known.	\rightarrow	Subproject is created.

Steps

1. Go to 'Apps' > Select 'Portfolio Manager'

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

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Enter Subproject Details

Role		Preceding Steps	_	Outcome
CM Firm	\rightarrow	New subproject is created and subproject information is known.	\rightarrow	Subproject details are entered.

Steps

- 1. <u>Partition Type:</u> 'Subproject'
- 2. <u>Record Type:</u> 'Project'
- 3. <u>Number:</u> The Number is automatically generated
- 4. <u>Title:</u> Enter the Building ID followed by the subproject title. Any additional information can be added in parentheses. **Example:** Q485 (Grover Cleveland HS Q) Reso A Cafeteria Upgrade
- 5. <u>Building/LLW Table:</u> Press 'Insert' to add a new building/LLW
 - Building ID: Select a Building ID (can type to search by Building ID)
 - <u>LLW(s)</u>: Select an LLW associated with the Building ID (can type to search by LLW number)
- 6. AEoR InHouse or Consultant: Select 'InHouse' or 'Consultant'
- 7. Project Type: Select the 'Mentor' or 'LSP'
- 8. Construction Award Amount: Enter the contract award amount
- 9. Liquidated Damages Per Calendar Day: Enter the liquidated damages per calendar day
- 10. Dates: Enter the 'Solicitation Date', 'Contract Award Date', and 'Notice to Proceed Date'
- 11. Roster: Select the known project roles using the dropdowns

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Update Subproject Details

Role		Preceding Steps		Outcome
CM Firm	\rightarrow	An existing subproject is available.	\rightarrow	Subproject information is updated.

Steps

1. Go to 'Apps' > Select 'Portfolio Manager'

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2. Select the subproject requiring update > Click 'Edit'

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3. Update required and additional fields as necessary (See 'Enter Subproject Details' above) > Click 'Save / Close'

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Finalize Subproject

Role		Preceding Steps		Outcome
CM Firm	\rightarrow	An existing subproject is available, and all required information is filled.	\rightarrow	Subproject is finalized.

Step

Select the subproject that needs to be finalized > Click 'Finalize'

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Review and Pin Sign Subproject – CM PM

Role		Preceding Steps		Outcome
СМРМ	\rightarrow	An existing subproject is submitted to be finalized.	\rightarrow	Subproject is finalized.

Step

Go to 'Tasks' > Select 'CM PM Signature Task' > Click 'Approve'

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Review and Pin Sign Subproject – Director of Operations

Role		Preceding Steps		Outcome
Director of Operations	\rightarrow	An existing Mentor subproject is submitted and signed by the CM PM.	\rightarrow	Subproject is finalized.

Step

Go to 'Tasks' > Select 'Director of Operations Signature Task' > Select 'Approve' (See 'Review and Pin Sign Subproject – CM PM' step)

Review and Pin Sign Subproject – CPO

Role		Preceding Steps		Outcome
СРО	\rightarrow	An existing JOC or Emergency subproject is submitted and signed by the CM PM.	\rightarrow	Subproject is finalized.

Step

Go to 'Tasks' > Select 'CPO Signature Task' > Select 'Approve' (See 'Review and Pin Sign Subproject – CM PM' step)