



Emergency  
Portfolio Manager User Guide  
(Create a Subproject)

January 2025

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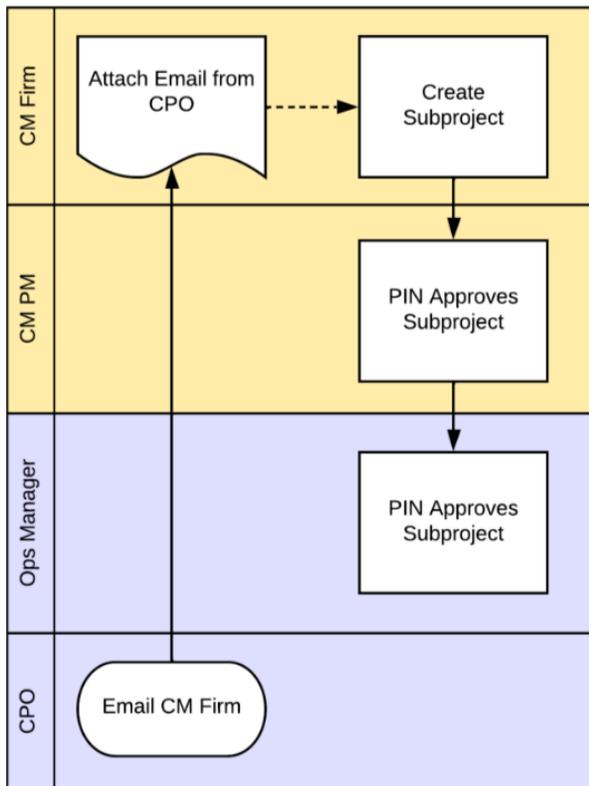
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## About This Document

The Portfolio Management application within Kahua is where you can (with appropriate permissions) create new subprojects and update existing subprojects. Once all required information is entered, the subproject is finalized with the approval of the CM Program Manager followed by the SCA CPO.

**IMPORTANT:** After a Construction subproject is created, it is necessary to create the **C&M Subproject**. Remember to add your companies in the Project Directory. The hierarchy flows to the Emergency C&M folder, then to your company folder where you will see the **C&M Emergency Program**.

## Emergency Portfolio Manager Workflow



## Related Documents

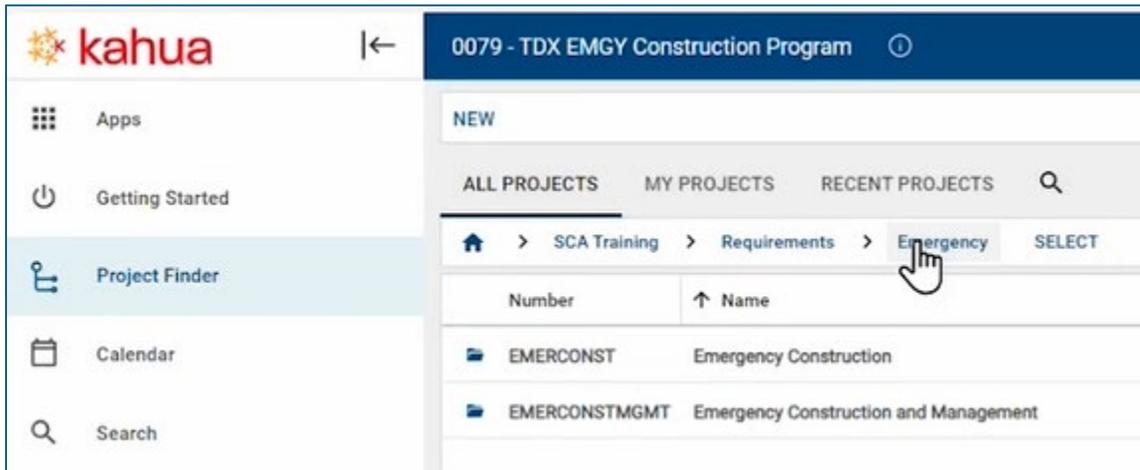
**C&M Work Breakdown**

**Create Expense Contract**

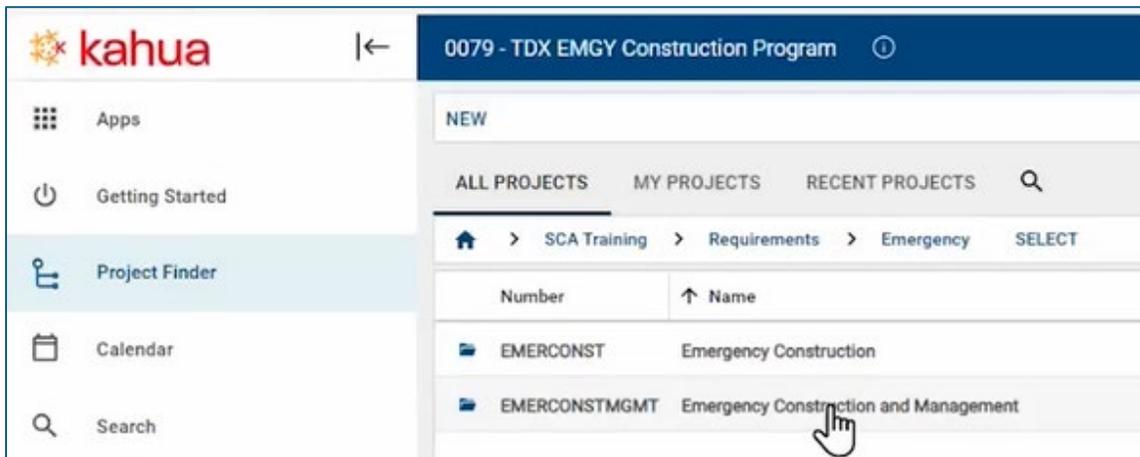
## CM Creates an Emergency C&M Subproject

The subproject is created under the Emergency **Program** for the CM Firm.

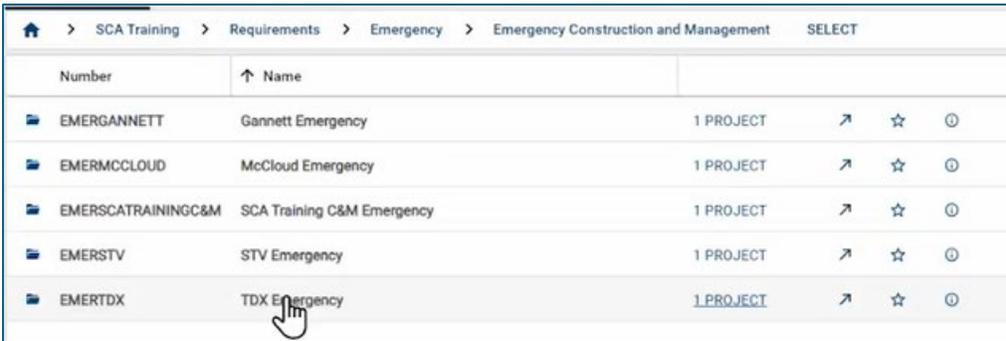
1. Navigate to **Project Finder**> **Requirements** >**Emergency**.



2. Click **Emergency Construction and Management**.



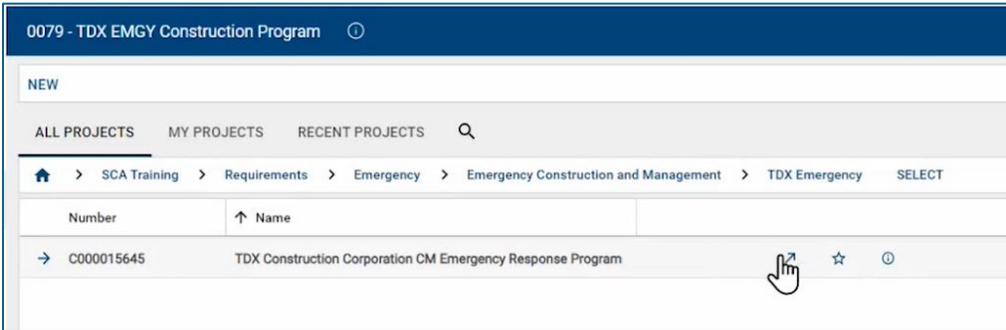
3. Select the construction company that contains the Program (ex: **TDX Emergency**).



A screenshot of a web application showing a list of projects. The breadcrumb navigation at the top reads: Home > SCA Training > Requirements > Emergency > Emergency Construction and Management. The table has columns for 'Number', 'Name', and '1 PROJECT'. A hand cursor is pointing to the 'EMERTDX' row.

Number	Name	1 PROJECT
EMERGANNETT	Gannett Emergency	1 PROJECT
EMERMCCLOUD	McCloud Emergency	1 PROJECT
EMERSCATRainingC&M	SCA Training C&M Emergency	1 PROJECT
EMERSTV	STV Emergency	1 PROJECT
EMERTDX	TDX Emergency	1 PROJECT

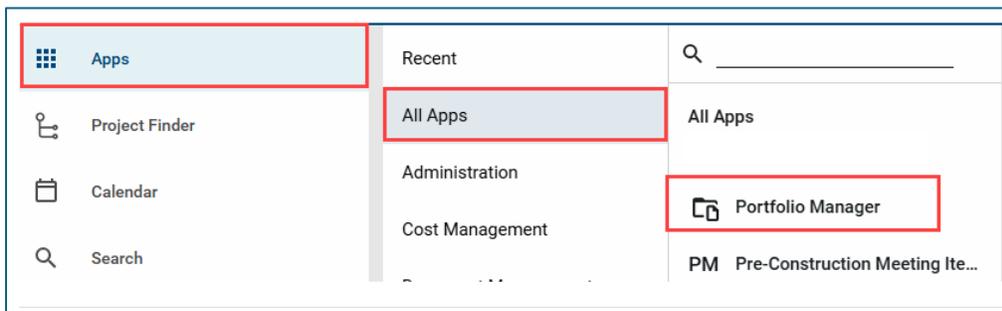
4. Click the arrow next to the program **to open**. Notice the name of the program at the top left of your screen.



A screenshot of the '0079 - TDX EMGY Construction Program' page. The breadcrumb navigation is: Home > SCA Training > Requirements > Emergency > Emergency Construction and Management > TDX Emergency. The table shows a single project with ID 'C000015645' and name 'TDX Construction Corporation CM Emergency Response Program'. A hand cursor is pointing to the right arrow icon next to the project name.

Number	Name	Icons
C000015645	TDX Construction Corporation CM Emergency Response Program	→ ☆ ⌵

5. Go to **Apps > Portfolio Manager**, which is where you create projects.



A screenshot of the 'Apps' menu. The 'Apps' menu item is highlighted with a red box. Below it, 'All Apps' is also highlighted with a red box. In the 'All Apps' list, 'Portfolio Manager' is highlighted with a red box. Other visible items include 'Project Finder', 'Calendar', 'Search', 'Recent', 'Administration', 'Cost Management', and 'PM Pre-Construction Meeting Ite...'. A search bar is visible at the top right.

6. Click **New**. Notice *some* required fields are in **Red**, but you must fill out all **fill out all fields**.



**DETAILS**

Partition Type  
Subproject

Record Type  
Project

**Number**

**Title**  
*Field is required.*

Insert 1 item(s)

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

**Description**

**Type**  
*Field is required.*

Cost Type  
*Field is required.*

**\$ Construction Award Amount**

Contract NTP Issued No

Finalized No

7. Under **Details:**

- **Partition Type:** This should automatically say **Subproject**, but if not, choose that from the dropdown menu.
- **Record Type:** Project (Auto-selected by default).
- **Number:** This will populate once you save the project.
- **Title:** Be sure to include the **LLW** ex: **LLW#136086 C&M RED DOT - FIRE DAMAGE REMEDIATION**. You might also add **“C&M”** to the title

▼ DETAILS

Partition Type  
Subproject

Record Type  
Project

**Number**

Title  
LLW#136086 C&M RED DOT FIRE DAMAGE REMEDIATION

Insert 1 item(s)

<input type="checkbox"/>	Building ID	Building Name	Borough	LLW(s)	Solicitation Nur
--------------------------	-------------	---------------	---------	--------	------------------

- Click the **Insert** button. A new line will become visible.
- Select the Building from the **Building ID** drop down:

**Number**

Title  
LLW#136086 C&M RED DOT FIRE DAMAGE REMEDIATION

**Insert** item(s)

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

X423

Descript  
LLW# X423 - JAMES MONROE HS CAMPUS ANNEX - BRONX

- Select the LLW from the **LLW(s)** drop-down :

LLW(s)	Solicitation Number	Design Number / Package Num
<input type="text" value=""/>		
021516	CONSTRUCT A NEW SCHOOL AS AN ADDITION TO MONROE HS COMPLEX. TH	
041006	NEW SCHOOL ANNEX	
136086	RED DOT FIRE DAMAGE REMEDIATION	

- **Description:** Re-enter the **Title** (ex: LLW#136086 C&M Red Dot - Fire Damage Remediation).
- **Type:** Select the project type (ex-**Emergency**) from the drop-down.
- **Cost Type:** Select from the drop-down (Lump Sum or Time and Materials)  
**NOTE:** Lump Sum requires Submittals to be uploaded and approved.
- **Construction Award Amount:** Enter **Construction Award Amount** (ex: \$100,000.)

Description	LLW#136086 C&M RED DOT FIRE DAMAGE REMEDIATION
Type	Emergency ▼
Cost Type	Time & Materials ▼
Construction Award Amount	\$ 100000 ✕

8. **Status Section (Optional)**, no entry is required.
9. **Roster Section:** Fill each field using the dropdown menus. This is where you establish who in CAMP will receive approval/actionable tasks for each role.

The screenshot shows two columns of dropdown menus for assigning users to roles. The left column includes:

- General Contractor:** Jordan External Contractor A - JE Construction
- CM Firm (CM Project Manager):** Esmé External REQMT-CM2 - SCA CM Firm 2
- CM Program Manager:** Fred External REQMT-CM2-PM - SCA CM Firm 2
- AEO:** Search bar with results: Adam SCA In House AE AEO - NYC SCA (selected), Caitlyn SCA User ID C - NYC SCA

The right column includes:

- COU Director:** Sean SCA COU Sr Director - NYC SCA
- COU Senior Director:** Sean SCA COU Sr Director - NYC SCA
- Finance:** William SCA Finance - NYC SCA
- IEH:** Search bar with result: Yasmine SCA IEH - NYC SCA (selected)

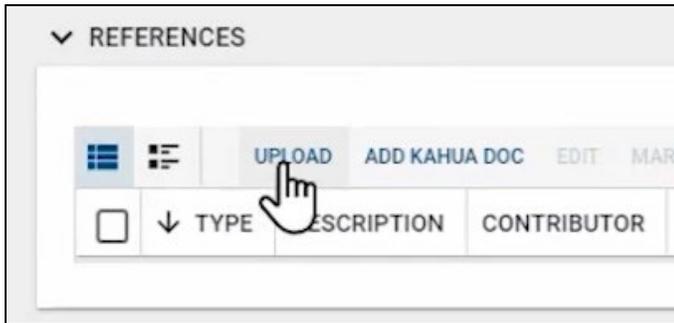
10. **MARKUP CONFIG (Required):** enter the number of items to insert for each Work type (ex: 3), then click **Insert** to create the (3) lines.
11. Complete the fields for each line (See example below):  
**Note:** If there is no markup for an item, enter as .0 (Point-Zero)

MARKUP CONFIG

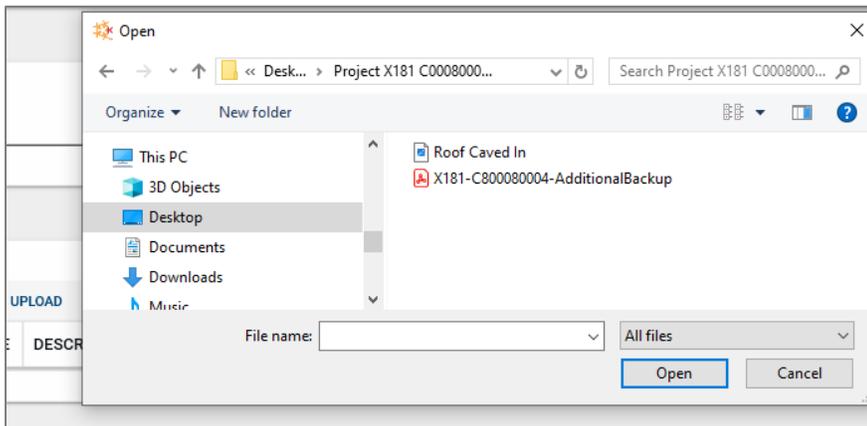
Insert 3 item(s)

<input type="checkbox"/>		Number	Description	Work Type	Markup Percent
<input type="checkbox"/>	<input checked="" type="checkbox"/>	01	C&M	2120	10
<input type="checkbox"/>	<input checked="" type="checkbox"/>	02	GC	2125	0
<input type="checkbox"/>	<input checked="" type="checkbox"/>	03	CM FEES	2129	0

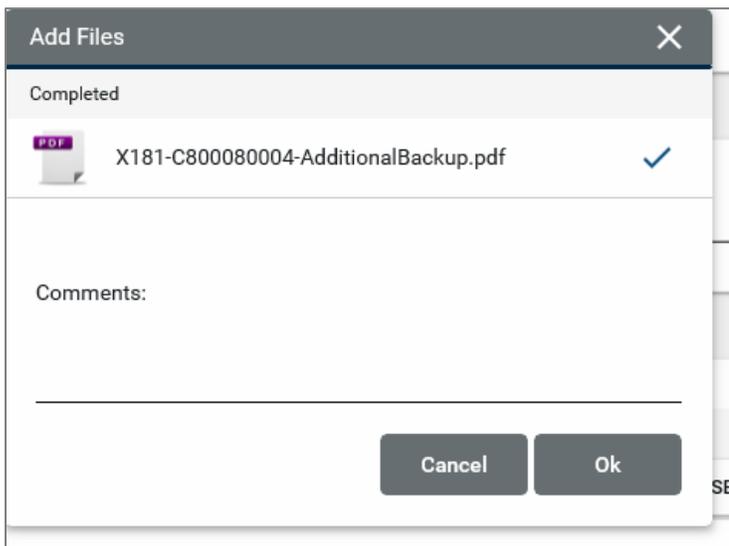
12. In the **References** section, click **Upload** to attach any backing documents. . (NOTE: *This could be an email from your CPO.*)



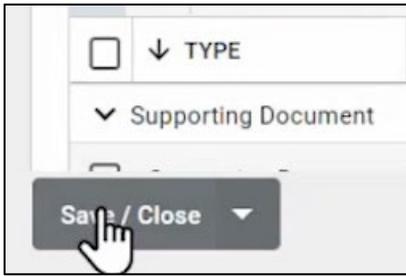
13. Select the file(s) and click **Open**.



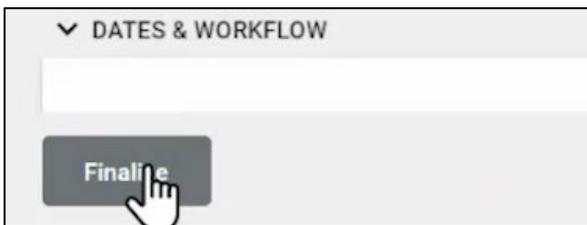
14. When the file(s) has loaded in the **Add Files** window, click **OK**. The window closes.



15. Click **Save/Close**.



16. Click **Finalize** at the bottom.



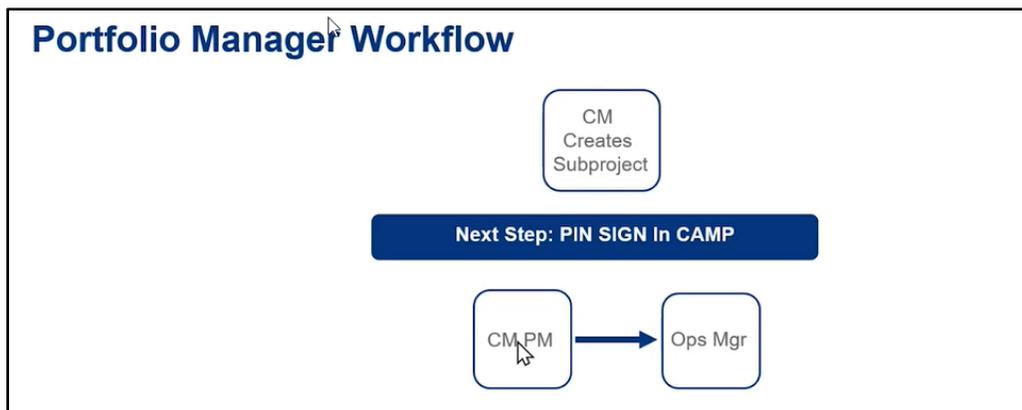
### Recall Option

a) Click **Recall** if you have made a mistake and need to edit the subproject .



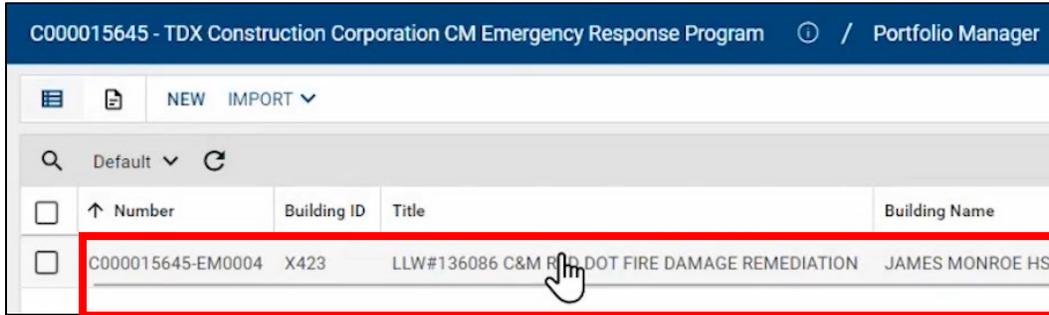
### CM PM and Ops Manager PIN Sign Approval

The subproject is created and must now be PIN signed by the **CM PM** and the **Ops Manager**.

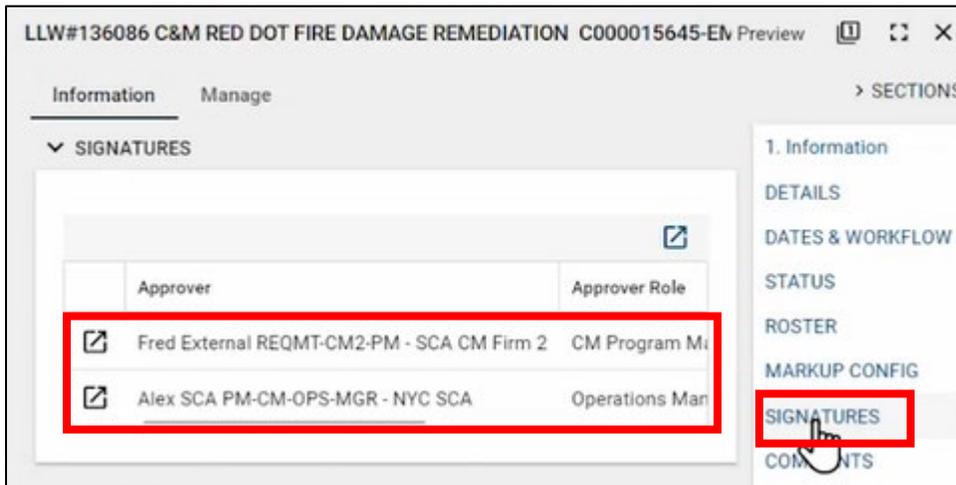


CM Verifies Signatures (Best Practice – not required)

17. Click on the subproject you created by clicking it from the list.



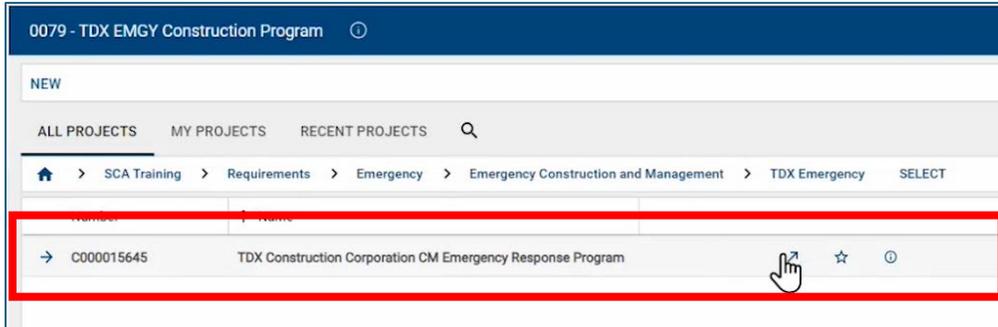
18. Under the **Information** tab, navigate to the **Signatures** section to verify that the PIN sign process is complete.



## Add LLWs to the Program

The LLW needs to be added to the **Program Level** as well.

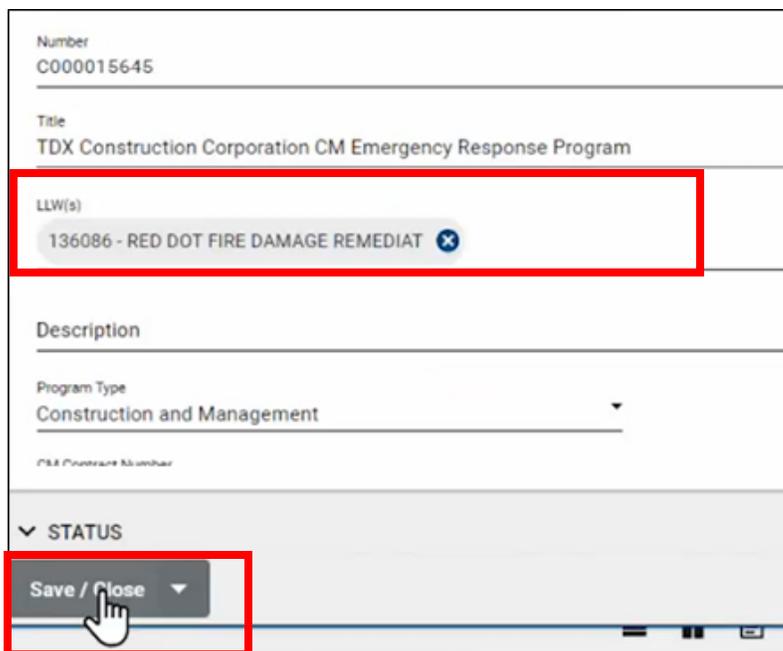
1. Navigate to the Program in the Project Finder and click the arrow to open.



2. Click the (I) button. This is where you view the completed subproject **information**.



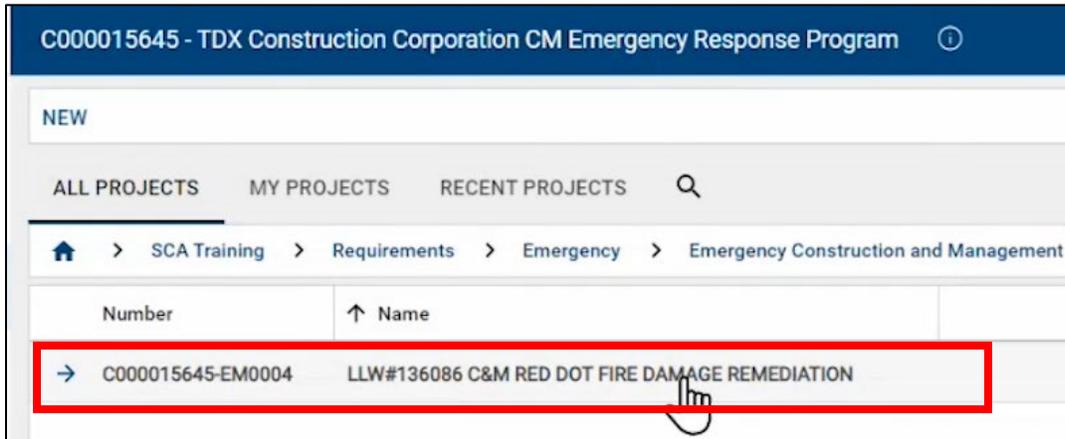
3. Click **Edit** at the top
4. Select the **LLW** from the drop-down menu
5. Click **Save/Close**.



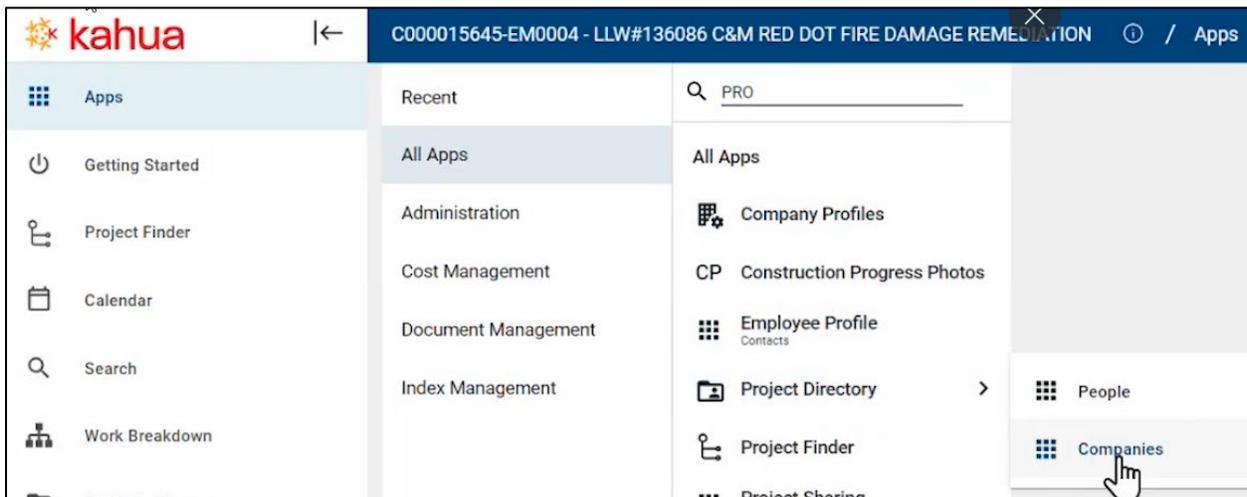
## Add CM Firm and Contractors to a Subproject Project Directory

**IMPORTANT:** Make sure that your CM Firm and Contractors are present in the Company Directory for that Subproject.

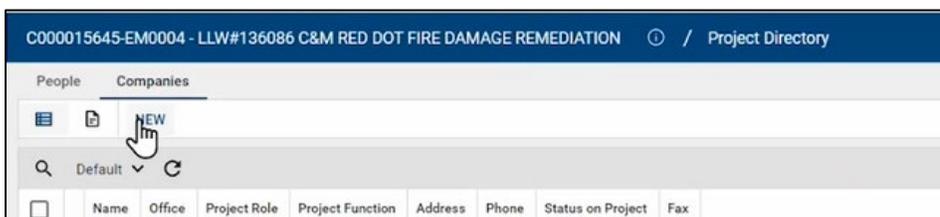
1. Navigate to the Subproject



3. Navigate to **Apps>All Apps>Project Directory** and click **Companies**.



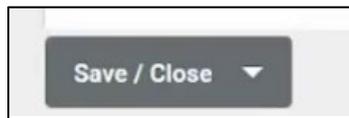
4. Click **New**.



5. Under **New Company**, select the company from the drop-down menu. The **Office** field auto-populates.

The screenshot shows a 'New Company' form with a 'DETAILS' section. The 'Name' field is a dropdown menu with 'JE Construction' selected. The 'Office' field is also a dropdown menu with 'Primary Office' selected. Below these fields, the 'Address' is displayed as '186 Place Avenue, Manhattan, NY 10451'.

6. Click **Save/Close**.



- Repeat the process until all the necessary companies have been added.

The screenshot shows a project page with a table of companies. The table has columns for Name, Office, Project Role, Project Function, and Address. Two companies are listed: 'SCA CM Firm 2' and 'JE Construction'. The table is highlighted with a red border.

	Name	Office	Project Role	Project Function	Address
<input type="checkbox"/>	SCA CM Firm 2	Primary Office			123 Main St New York, NY 100
<input type="checkbox"/>	JE Construction	Primary Office			186 Place Avenue Manhatta

**Portfolio Manager** is complete. Next, you must enter the Work Breakdown for this subproject AND Program.

**NOTE: [Insert link here to Work Breakdown User Guide.](#)**