



Portfolio Manager Training Guide

Date Created: 7/14/2021

Date Updated: 4/8/2021

Contents

About..... 3

Step-by-Step Instructions..... 3

 Create Subproject 3

 Enter Subproject Details 4

 Update Subproject Details 7

 Finalize Subproject..... 8

 Review and Pin Sign Subproject – CM PM 9

 Review and Pin Sign Subproject – Director of Operations..... 9

 Review and Pin Sign Subproject – CPO 9

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.

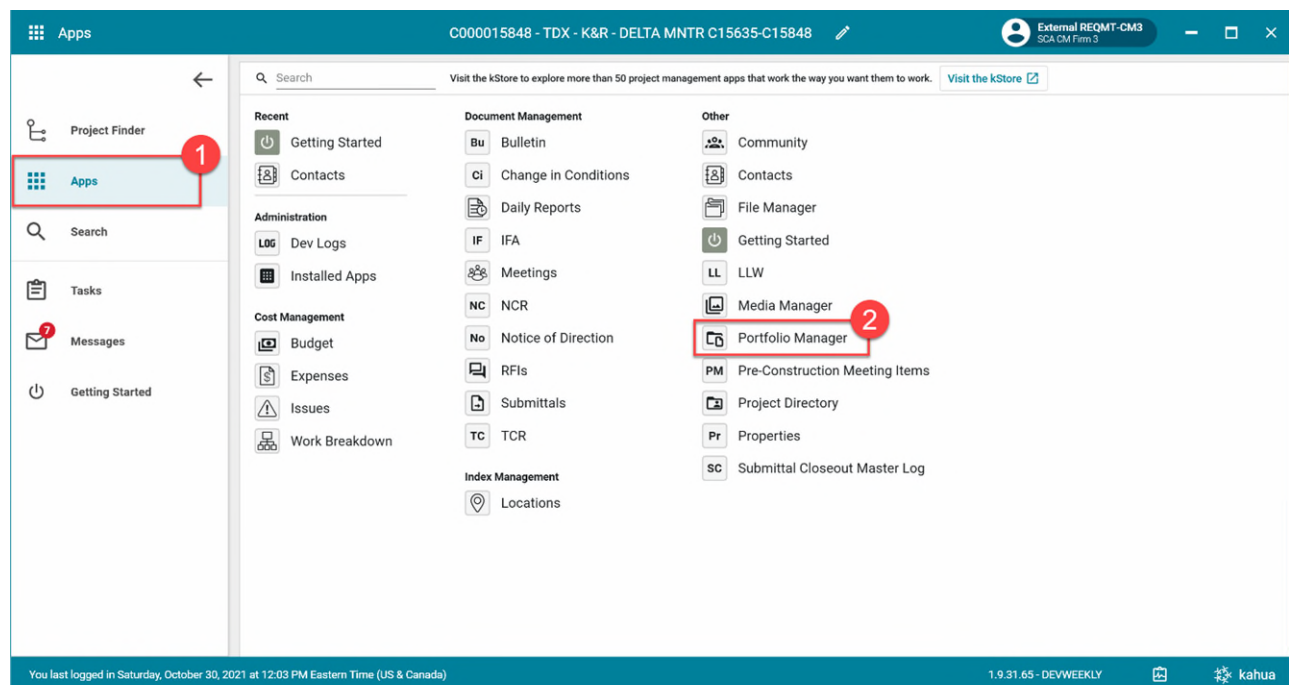
Step-by-Step Instructions

Create Subproject

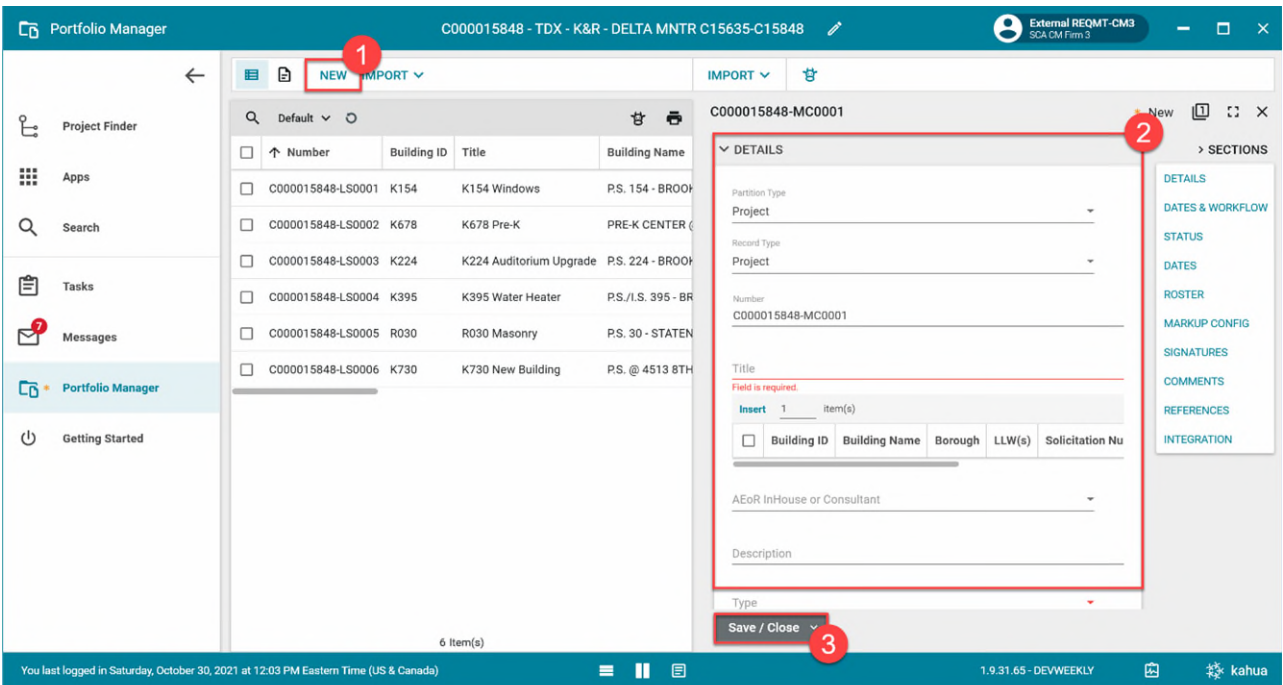
Role	Preceding Steps	Outcome
CM Firm	→ Subproject information is known.	→ Subproject is created.

Steps

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



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



Enter Subproject Details

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

Steps

1. Partition Type: 'Subproject'
2. Record Type: 'Project'
3. Number: The Number is automatically generated
4. Title: 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. Building/LLW Table: Press 'Insert' to add a new building/LLW
 - Building ID: Select a Building ID (can type to search by Building ID)
 - LLW(s): 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

▼ DETAILS

Partition Type

Subproject

1

Record Type

Project

2

Number

C000015848-MC0001

3

Title

4

Field is required.

5

Insert 1 item(s)

☐	Building ID	Building Name	Borough	LLW(s)	Solicitation Number	Design Number / Package Number	District
☐							

AEoR InHouse or Consultant

6

Description

Type

7

Field is required.

Phase

Construction

\$ Construction Award Amount

8

\$ Liquidated Damages Per Calendar Day

Field is required.

Oracle Vendor Code 3791

Contract NTP Issued No

Finalized No

9

▼ DATES

Solicitation Date



Field is required.

Contract Award Date



Notice To Proceed



Duration (days)

Substantial Completion

Final Completion

Revised Substantial Completion

Actual Substantial Completion



▼ ROSTER

General Contractor (CM on Behalf of GC)



CM Firm (CM Project Manager)



CM PM



AEoR

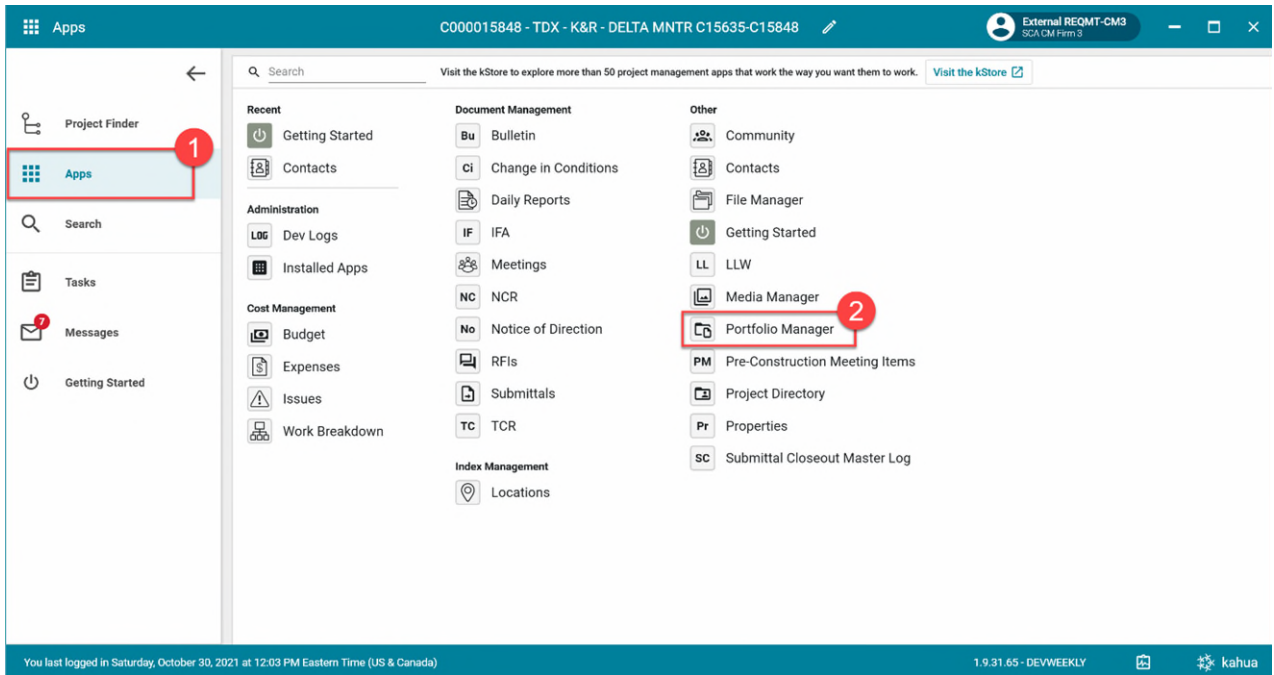


Update Subproject Details

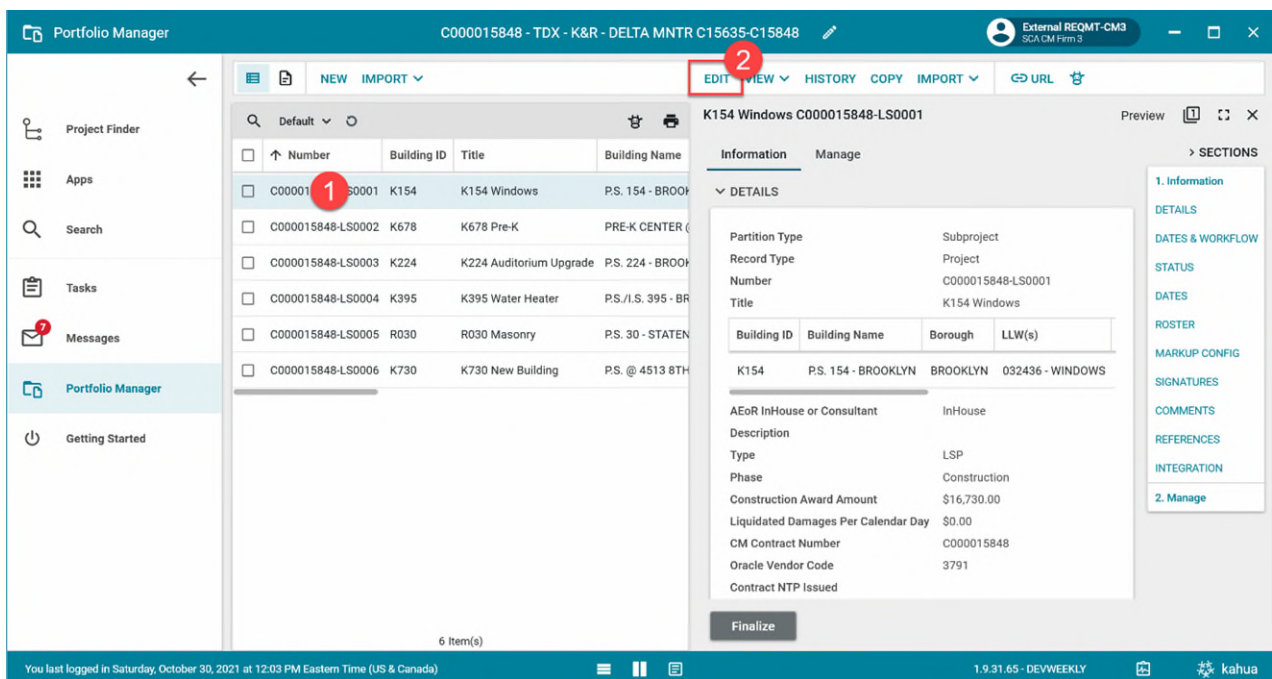
Role	Preceding Steps	Outcome
CM Firm	An existing subproject is available.	Subproject information is updated.

Steps

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



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



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

Portfolio Manager C000015848 - TDX - K&R - DELTA MNTR C15635-C15848 External REQMT-CM3 SCA CM Firm 3

NEW IMPORT

Project Finder

Apps

Search

Tasks

Messages

Portfolio Manager

Getting Started

6 Item(s)

DETAILS

Partition Type Subproject

Record Type Project

Number C000015848-LS0001

Title K154 Windows

Insert 1 Item(s)

Building ID Building Name Borough

K154 - P.S. 154 - BROOKLYN P.S. 154 - BROOKLYN BROOKLYN

AEoR InHouse or Consultant InHouse

Description

Save / Close

You last logged in Saturday, October 30, 2021 at 12:03 PM Eastern Time (US & Canada) 1.9.31.65 - DEVWEEKLY kahua

Finalize Subproject

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

Step

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

Portfolio Manager C000015848 - TDX - K&R - DELTA MNTR C15635-C15848 External REQMT-CM3 SCA CM Firm 3

NEW IMPORT

Project Finder

Apps

Search

Tasks

Messages

Portfolio Manager

Getting Started

6 Item(s)

K154 Windows C000015848-LS0001

Information Manage

DETAILS

Partition Type Subproject

Record Type Project

Number C000015848-LS0001

Title K154 Windows

Building ID Building Name Borough LLW(s)

K154 P.S. 154 - BROOKLYN BROOKLYN 032436 - WINDOWS

AEoR InHouse or Consultant InHouse

Description

Type LSP

Phase Construction

Construction Award Amount \$16,730.00

Liquidated Damages Per Calendar Day \$0.00

CM Contract Number C000015848

Oracle Vendor Code 3791

Contract NTP Issued

Finalize

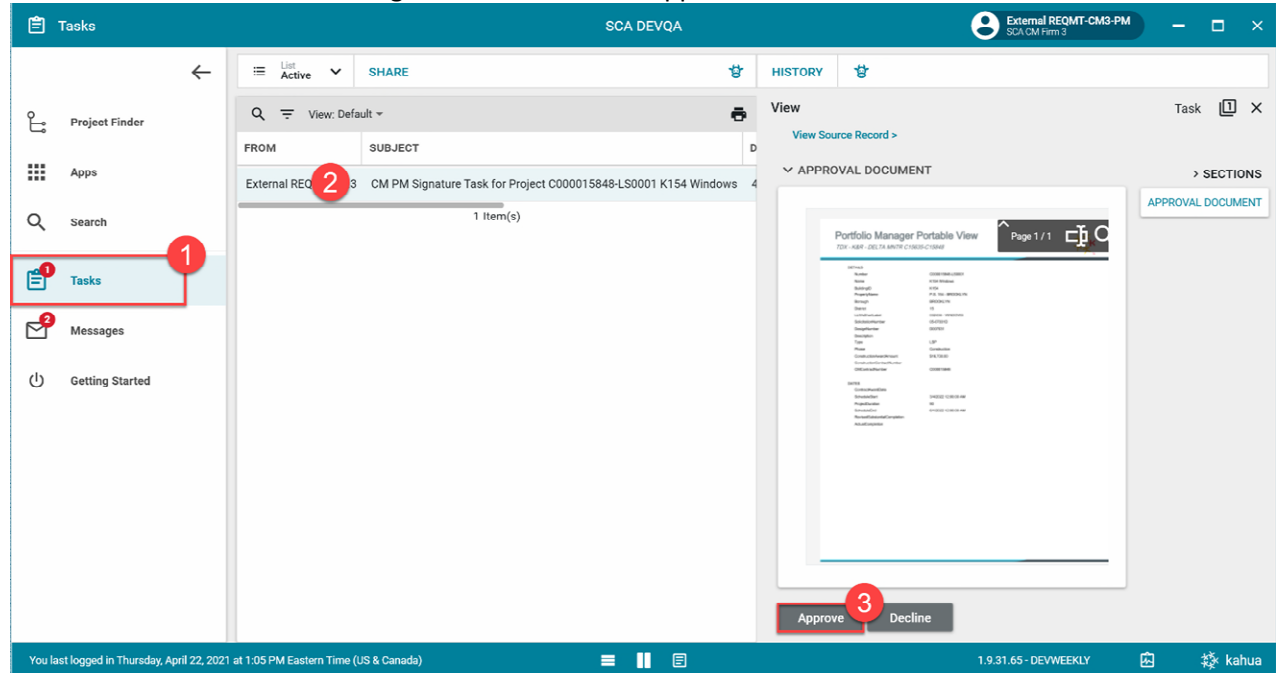
You last logged in Saturday, October 30, 2021 at 12:03 PM Eastern Time (US & Canada) 1.9.31.65 - DEVWEEKLY kahua

Review and Pin Sign Subproject – CM PM

Role	Preceding Steps	Outcome
CM PM	→ An existing subproject is submitted to be finalized.	→ Subproject is finalized.

Step

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



Review and Pin Sign Subproject – Director of Operations

Role	Preceding Steps	Outcome
Director of Operations	→ An existing Mentor subproject is submitted and signed by the CM PM.	→ 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
CPO	→ An existing JOC or Emergency subproject is submitted and signed by the CM PM.	→ Subproject is finalized.

Step

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