



Success Guide

Using Kahua for Project Initiation, Setup, and Governance

HOW TO MANAGE PROJECT INITIATION FOR CAPITAL PROGRAM PLANNING WITH MINISTRIES - PMSP

Learn how projects are initiated, set up, and governed using Kahua for all standard project delivery models including Capital programs, Ministry clients, as well as P3 and non-P3 projects.

This guide has been designed for internal and external use with non-P3 standard project delivery models (PMSP).

Looking for more learning resources or support? Reach out to itconnect@infrastructureontario.ca or call 1-888-558-5523.

Contents

Process overview 3

Context..... 5

Acronyms 6

Kahua Apps list..... 7

Part 1 – How to create a new PIF record as a Ministry / Client 8

Part 2 – How to view a PIF project created by a Ministry / Client..... 9

Part 3 – How to modify a PIF project created by a Ministry / Client 10

Part 4 – How to modify an Urgent/Ad-Hoc PIF (UPIF) project created by a Ministry Client 12

Part 5 – How to approve a PIF Project Budget as an SDOA Approver 13

Part 6 – How to modify project information for an Urgent/Ad-Hoc PIF (UPIF) record as the Service Provider 14

Related topics..... 15

Key Fields 16

PIF App 16

Process overview

The Project Initiation Form (PIF) process creates a new project record in Kahua. This guide explains how to create a new PMSP project, funded by General Real Estate Portfolio (GREP) or non-GREP sources at Infrastructure Ontario (IO). Ministry clients use the Kahua **PIF App** to create a new PMSP PIF record for the IO Pre-Planning Team, who modify the PIF details as required. For GREP funding sources, the project information is automatically integrated with the IO Yardi system where it is managed by the IO GREP Finance team. For non-GREP funding sources, the IO Corporate Finance Team enters the required financial data in Kahua to activate the project in the IO Great Plains system.



Context

- There are three ways to create a new PIF project record:
 - Interim PJF Solution: after approval, project information is automatically uploaded to Kahua, where it is modified by the IO Project Team (or IO Pre-Planning team, depending on the project delivery model)
 - PIF App in Kahua by Ministry clients: the new PIF is sent to the IO Project Team or IO Pre-Planning Team (depending on the project delivery model) to modify project information
 - PIF App in Kahua for P3 projects: the new PIF is created in collaboration with Ministry clients and the IO Agency Governance / Partnership Research Insight (PRI) team, which is sent to the IO Capital Program Budgeting and Planning (CPBP) Team and IO Corporate Finance Team to modify project information
- When and how to use an Urgent / Ad-Hoc PIF (UPIF):
 - Only used on Capital or Ministry projects during unforeseen circumstances (may include political changes, unplanned lease expiries, forced relocations, and others; refer to IO policies on procurement methods for more details)
 - Skips the PJF step by creating a new PIF project using the Kahua PIF App and selecting the Urgent / Ad-Hoc PIF option which is submitted for approval
 - UPIF does not require an approved budget
 - UPIF does not include full details normally populated from the Interim PJF Solution, which will need to be added manually in the Kahua Portfolio Manager App
- Entry of detailed Project Budget for PMSP projects is optional until Chartering process. It is recommended to not enter a detailed Project Budget in the PIF App until a new project has been created and you are ready to Charter it. Preliminary budgetary amounts can be stored in the 'Order of Magnitude Estimate' fields immediately above the Project Budgets in the PIF App.
- Capital Program Planning: approach used by IO to assess and recommend multi-year repair, renewal, and reinvestment strategies for real-estate assets on behalf of Ministry clients, to support annual capital budget submissions
- IO enterprise financial systems:
 - Yardi – General Real Estate Portfolio (GREP) funding sources, system managed by the IO GREP Finance Team
 - Great Plains – Non-GREP funding sources, system managed by the IO Corporate Finance Team
- Approvals are required for **project budget initiation per policy KMS-LS-POL-001**.
 - Note: Kahua's internal approvals adhere to the dollar values of the Delegation of Authority only (referred to as a Simplified Delegation of Authority or sDOA). Additional context provided in the notes of the DoA policy may not be automatically enforced in Kahua and it is the responsibility of the approvers to ensure all provisions of the policy are adhered to. This includes Senior Vice Presidents (SVPs) ensuring any additional approvals beyond their authority level are obtained outside of Kahua and uploaded as project records within Kahua.

Acronyms

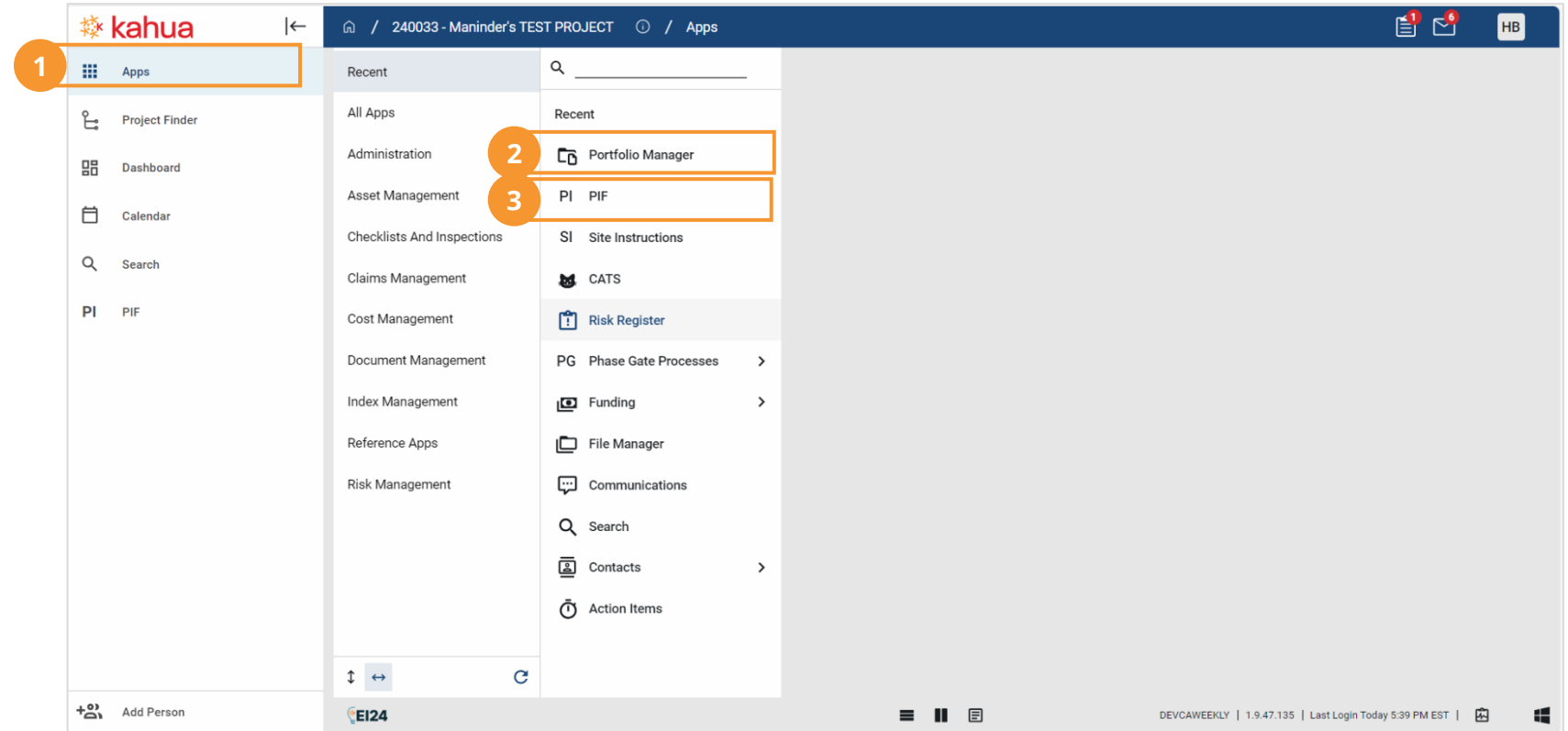
- **ARM:** Active Risk Management system used at IO, or a client's system
- **ARM:** Asset Renewal Management team (members of IO Project Team and Corporate Functions & Shared Services)
- **CPBP:** Capital Program Budgeting & Planning group at IO within Corporate Functions and Shared Services
- **P3:** Public-Private Partnership project delivery model at IO
- **PDSC:** Project Delivery Steering Committee at IO
- **PIF:** Project Initiation Form
- **PIN:** 4-digit Personal Identification Number that can be changed in your Kahua Profile (top right) > My Settings > Signature
- **PJF:** Project Justification Form
- **PMSP:** Project Management Service Provider project delivery model
- **PREM:** Portfolio Real Estate Manager at IO
- **RPS:** Realty Property Services team at IO
- **SDOA:** Simplified Delegation of Authority for approvals at IO
- **UPIF:** Urgent / Ad-Hoc Project Initiation Form

Kahua Apps list

The Kahua Apps flagged with numbers are required for tasks outlined in this guide, which has been developed with the web browser application.

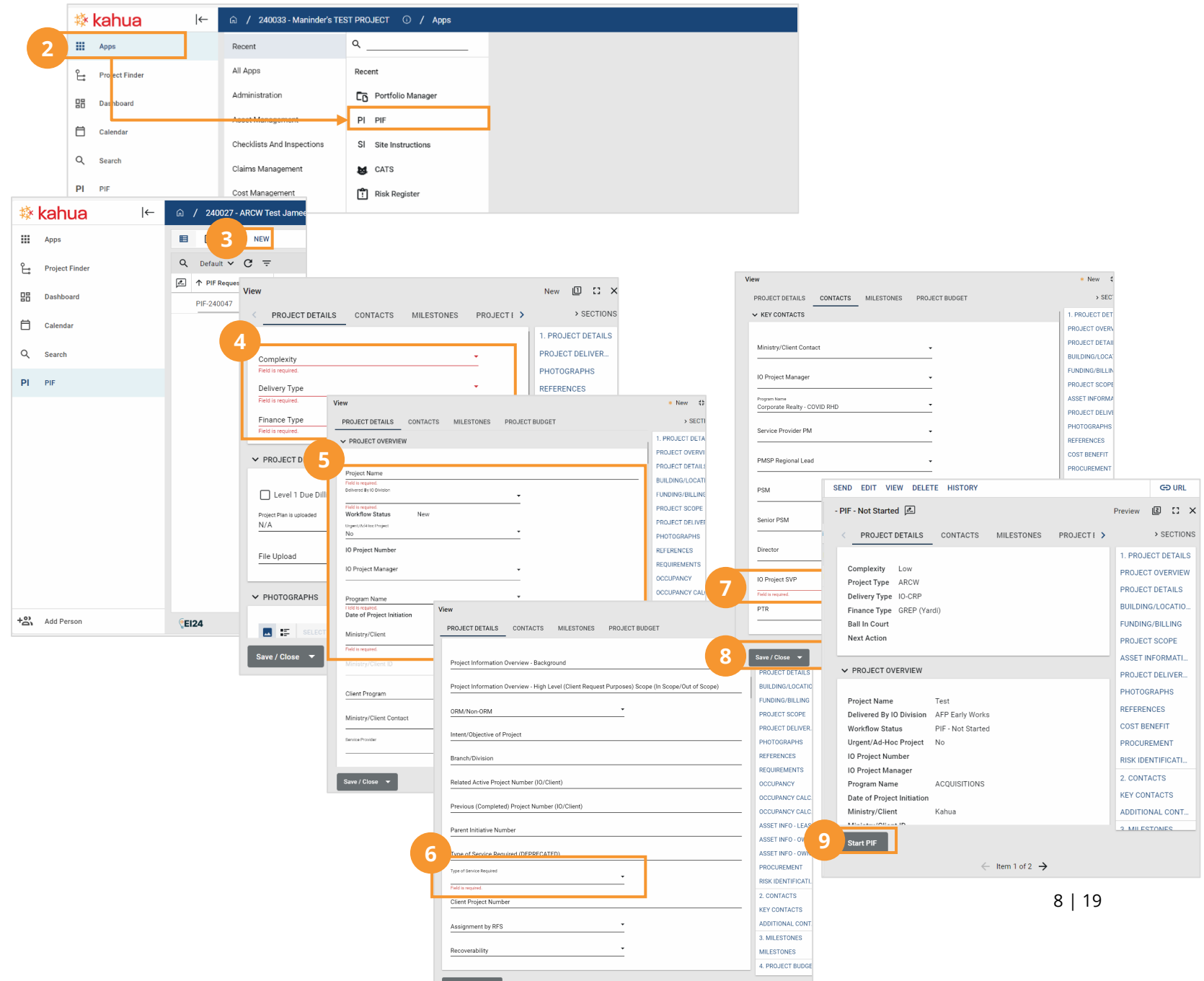
Your screen may look different, depending on your access level and your project delivery model.

Note: There is a list of Key Fields for these Kahua Apps at the end of the QRG.



Part 1 – How to create a new PIF record as a Ministry / Client

1. Go to launch.kahua.com and click **Launch in Browser** to sign in
2. Click the **Apps** button (left menu) to open the **PIF** App
3. Click **New** (top menu)
4. Complete the required data fields that are highlighted in red at the top of the **PROJECT DETAILS** section:
 - Complexity
 - Delivery Type
 - Finance Type
5. Complete the required data fields that are highlighted in red in the **PROJECT OVERVIEW** section:
 - Project Name
 - Delivered By IO Division
 - Program Name
 - Ministry/Client
6. Complete the required data fields that are highlighted in red in the **CONTACTS** section:
 - Type of Service Required
7. Complete the required data fields that are highlighted in red in the **CONTACTS** section:
 - IO Project SVP
8. Click on **Save / Close** (bottom)
9. Click on **Start PIF** (bottom)

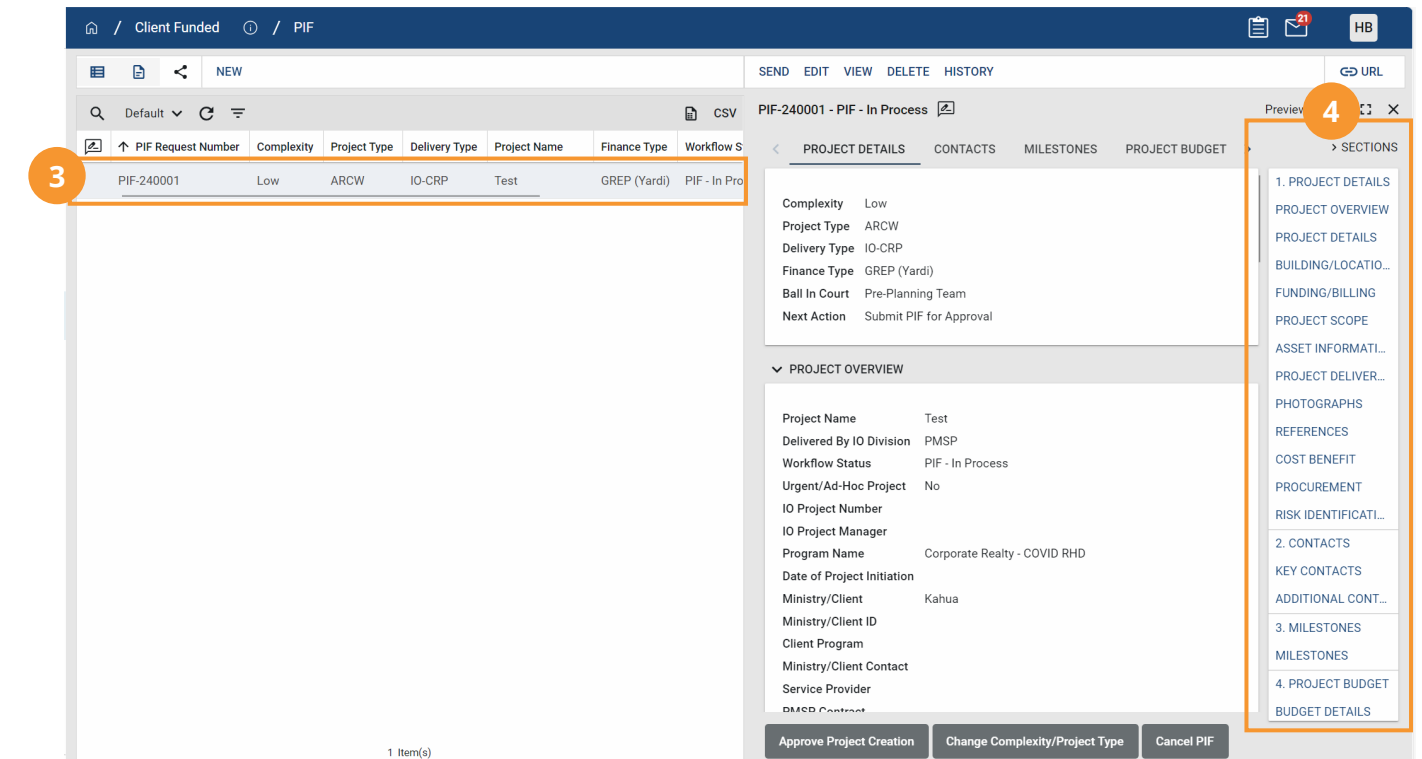
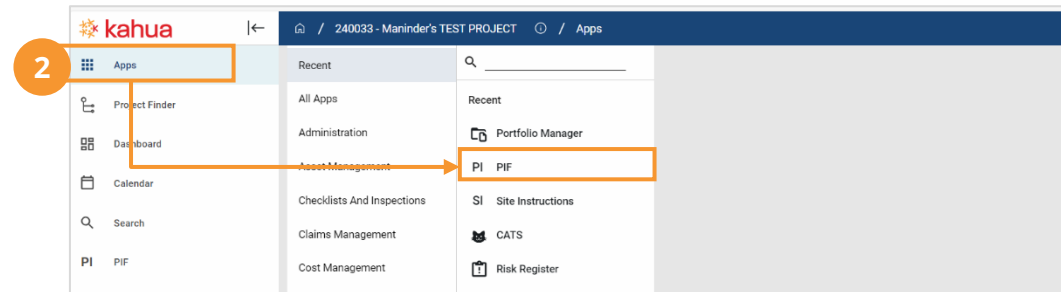


The screenshots illustrate the following steps in the Kahua application:

- Step 2:** The 'Apps' button is highlighted in the left-hand navigation menu.
- Step 3:** The 'NEW' button is highlighted in the top navigation bar.
- Step 4:** The 'PROJECT DETAILS' section is shown with 'Complexity', 'Delivery Type', and 'Finance Type' fields highlighted in red.
- Step 5:** The 'PROJECT OVERVIEW' section is shown with 'Project Name', 'Delivered By IO Division', 'Program Name', and 'Ministry/Client' fields highlighted in red.
- Step 6:** The 'CONTACTS' section is shown with the 'Type of Service Required' field highlighted in red.
- Step 7:** The 'CONTACTS' section is shown with the 'IO Project SVP' field highlighted in red.
- Step 8:** The 'Save / Close' button is highlighted at the bottom of the form.
- Step 9:** The 'Start PIF' button is highlighted at the bottom of the form.

Part 2 – How to view a PIF project created by a Ministry / Client

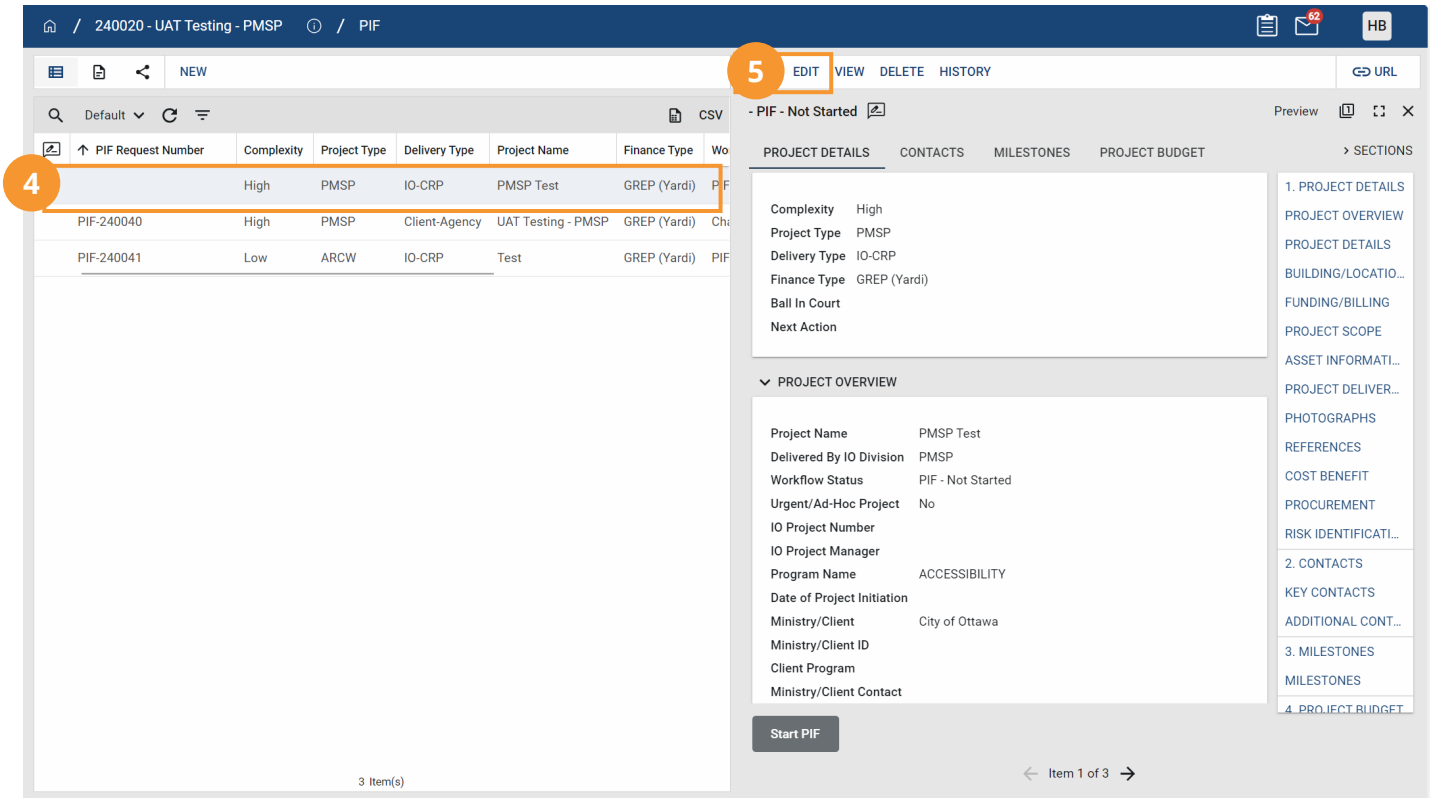
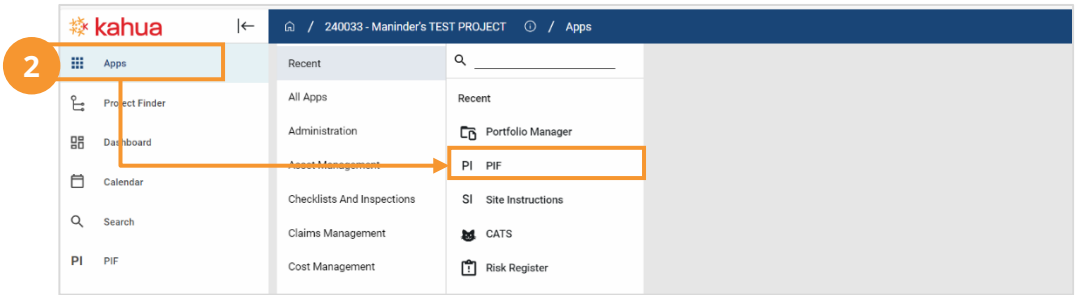
1. Go to launch.kahua.com and click **Launch in Browser** to sign in
2. Click the **Apps** button (left menu) to open the **PIF** App
3. Select a PIF record to view the **PIF details**
4. Review project information by navigating through the section tabs (right menu)



Part 3 – How to modify a PIF project created by a Ministry / Client

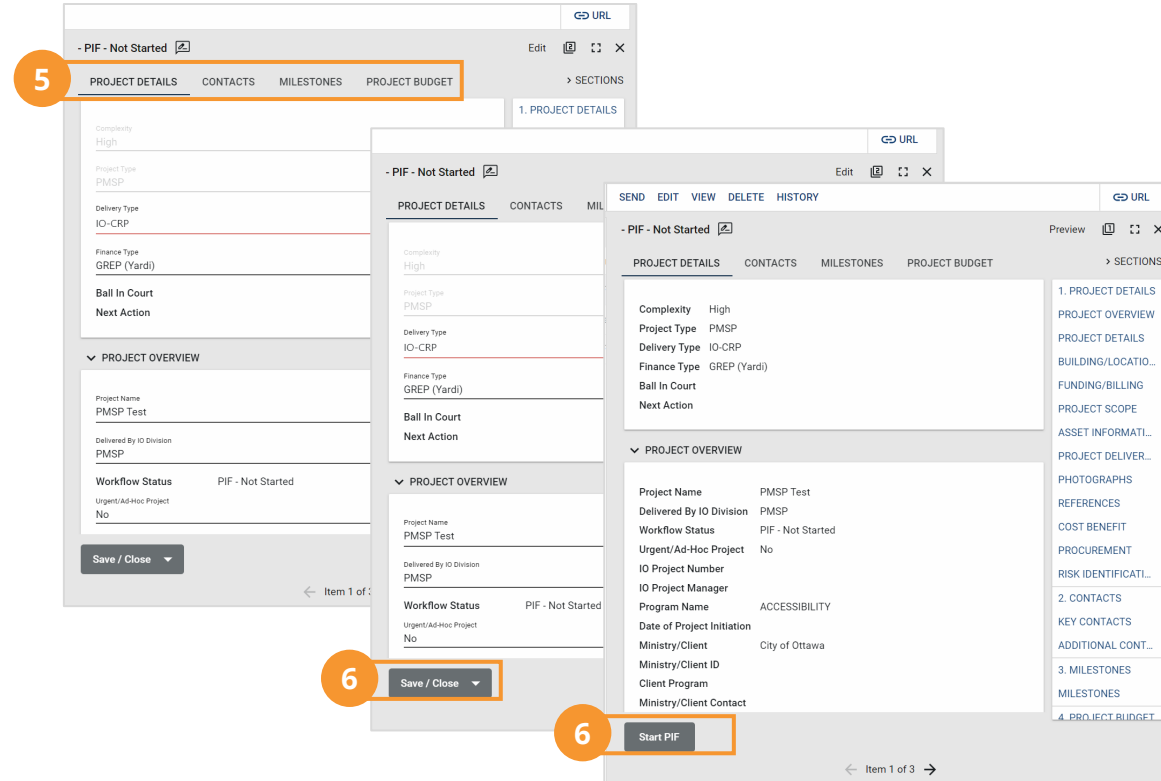
- 1. Go to launch.kahua.com and click **Launch in Browser** to sign in
- 2. Click the **Apps** button (left menu) to open the **PIF** App
- 3. Click on the **record created by the Ministry / Client**
- 4. Click **EDIT** (top)

(Continued on next page)



(...continued from previous page)

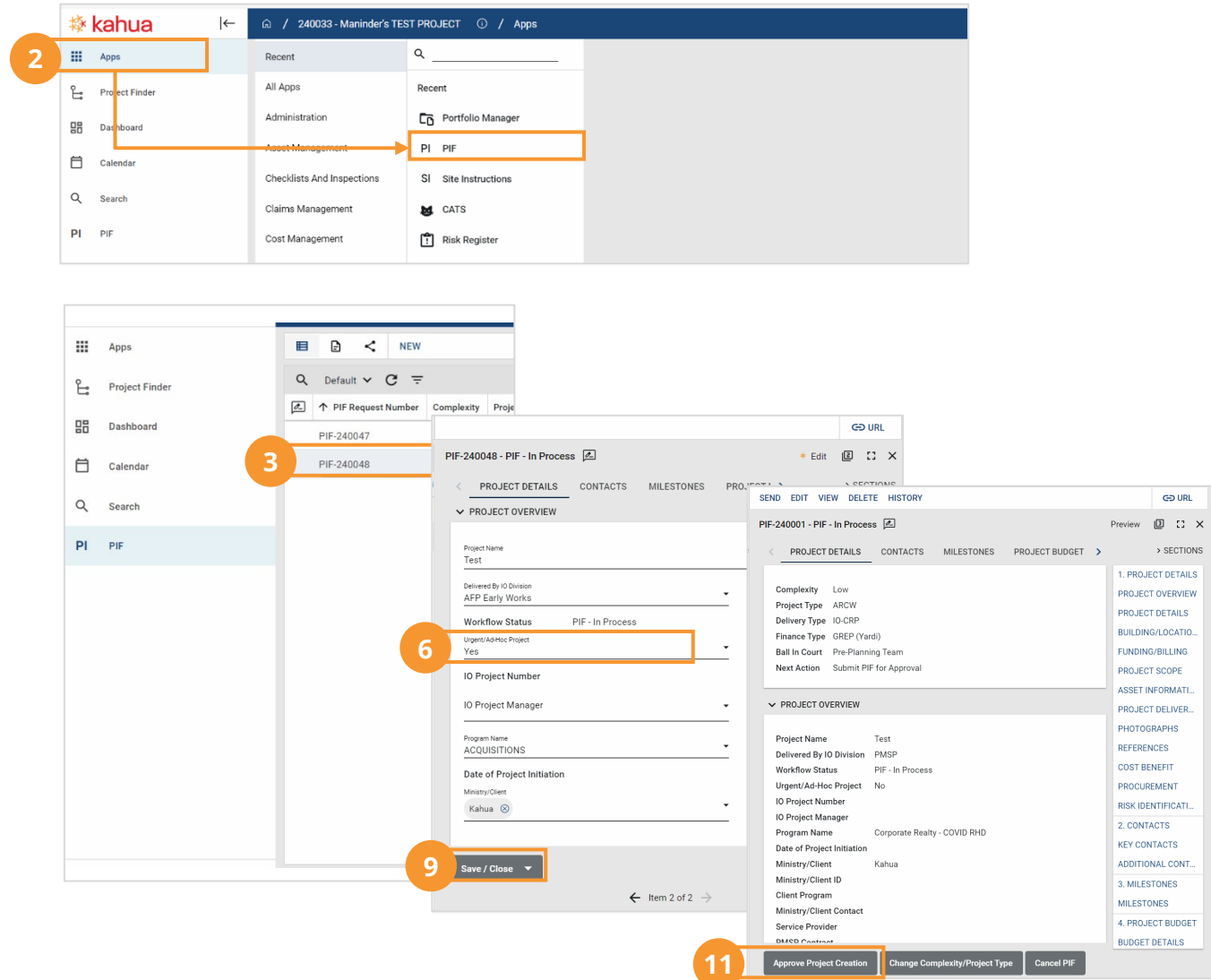
5. Complete the required data fields that are highlighted in red in each of the tabs (**PROJECT DETAILS, CONTACTS, MILESTONES**)
 - Note: a number of these fields may be pre-populated by the Ministry / Client
6. Click on **Save / Close** (bottom)
7. Click on **Start PIF** tab (bottom)



The image displays three overlapping screenshots of the Kahua project management interface, specifically the 'PIF - Not Started' form. The first screenshot (left) shows the 'PROJECT DETAILS' tab with fields for Complexity (High), Project Type (PMSP), Delivery Type (IO-CRP), Finance Type (GREP (Yardi)), Ball In Court, and Next Action. The second screenshot (middle) shows the 'CONTACTS' tab with a 'Save / Close' button highlighted by an orange box and a '6' in a circle. The third screenshot (right) shows the 'MILESTONES' tab with a 'Start PIF' button highlighted by an orange box and a '6' in a circle. All screenshots show a 'PROJECT OVERVIEW' section at the bottom with fields for Project Name, Delivered By IO Division, Urgent/Ad-Hoc Project, and Workflow Status.

Part 4 – How to modify an Urgent/Ad-Hoc PIF (UPIF) project created by a Ministry Client

1. Go to launch.kahua.com and click **Launch in Browser** to sign in
2. Click the **Apps** button (left menu) to open the **PIF** App
3. Click on the **record created by the Ministry / Client**
4. Click **EDIT** (top)
5. Scroll down to the **Project Overview** section
6. Select **YES** in the Urgent/Ad-Hoc Project field
7. Complete the required data fields that are highlighted in red in each of the tabs (**PROJECT DETAILS, CONTACTS, MILESTONES**)
 - Note: A number of these fields may be pre-populated by the Ministry / Client
8. Click **Save / Close** (bottom)
9. Click **Approve Project Creation** (bottom) to change status of the PIF record to **PIF-Approved, Pending Financial Activation**

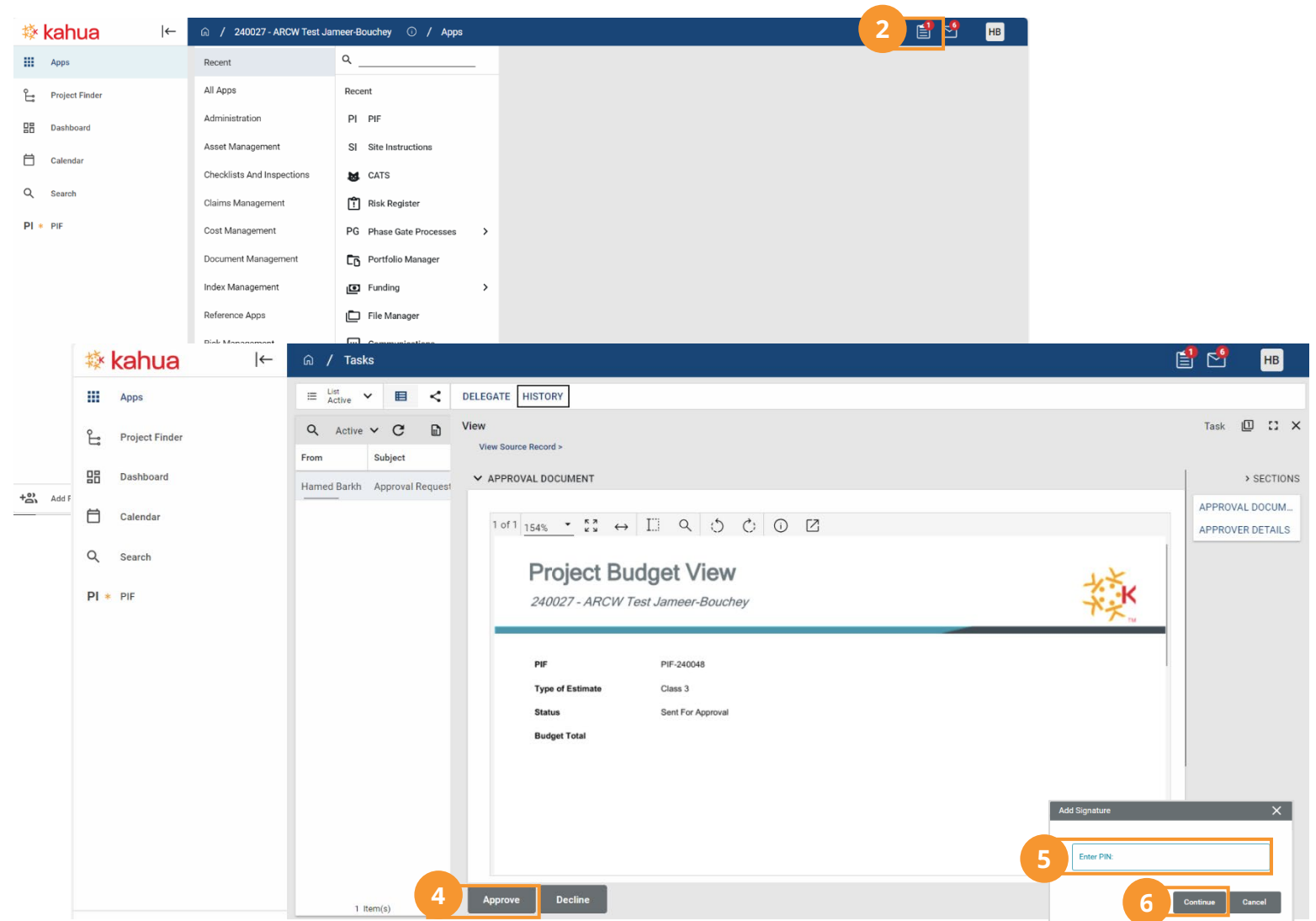


The screenshots illustrate the process of modifying a PIF project in the Kahua system:

- Screenshot 1:** The 'Apps' menu is open, and the 'PI PIF' option is selected under the 'Recent' section.
- Screenshot 2:** A list of PIF records is displayed. The record 'PIF-240048' is selected.
- Screenshot 3:** The 'PROJECT DETAILS' tab is active. The 'Urgent/Ad-Hoc Project' field is set to 'Yes'.
- Screenshot 4:** The bottom of the form is shown, with the 'Approve Project Creation' button highlighted.

Part 5 – How to approve a PIF Project Budget as an SDOA Approver

1. Go to launch.kahua.com and click **Launch in Browser** to sign in
2. Click the **Tasks App** (top menu)
3. Click on the assigned **PIF Task**
4. Click **Approve** (bottom)
5. If required: enter your **4-digit PIN** (found in your Kahua Profile, top right, under My Settings > Signature) to provide a signature
6. Click **Continue**



The image displays two screenshots of the Kahua application interface, illustrating the steps to approve a PIF Project Budget as an SDOA Approver.

Top Screenshot: The 'Apps' menu is open, showing various application categories. The 'PI PIF' option is highlighted under the 'Reference Apps' section. A red circle with the number '2' is placed over the 'PI PIF' option.

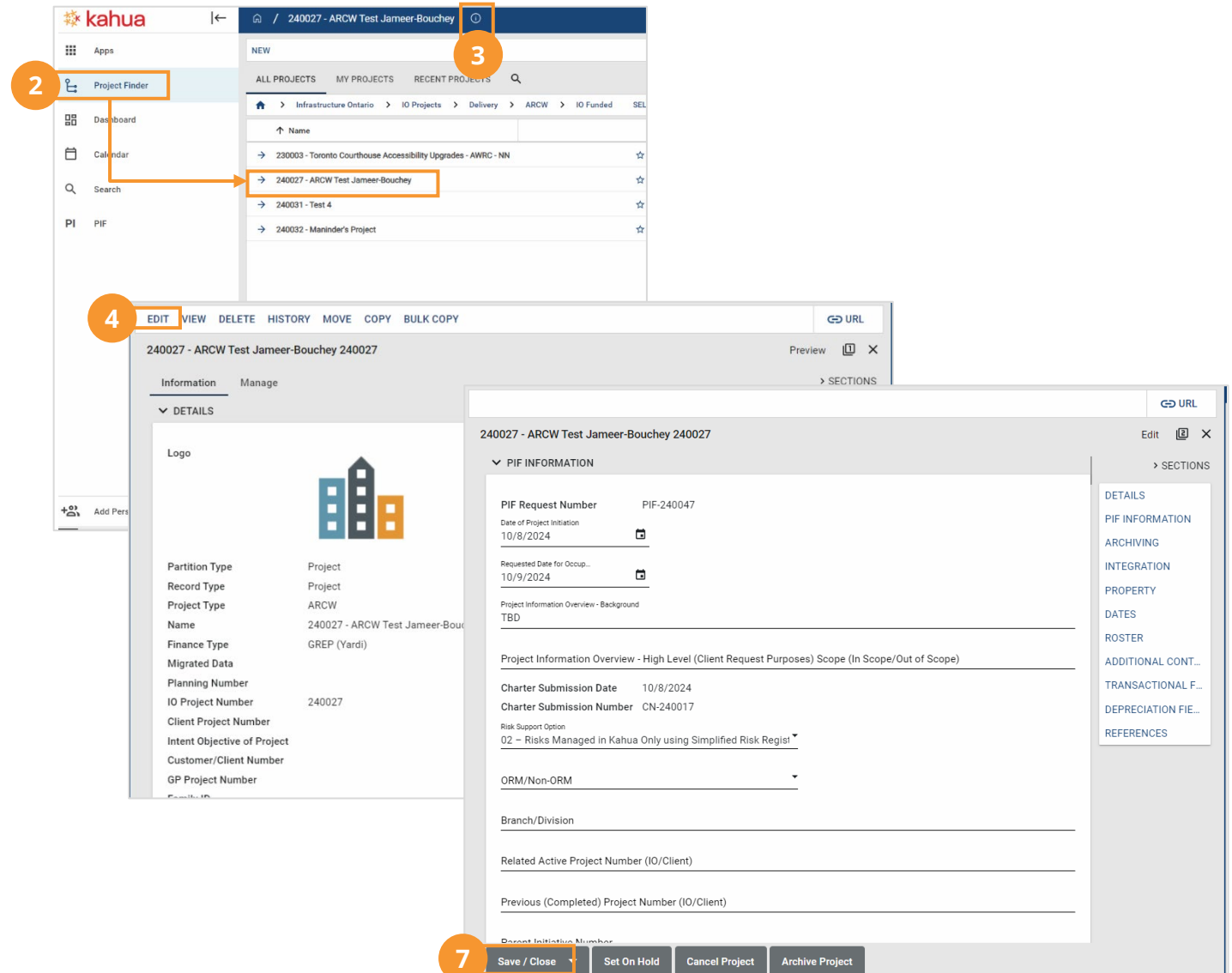
Bottom Screenshot: The 'Tasks' app is open, showing a list of tasks. The 'Approve' button is highlighted with a red circle and the number '4'. The 'Project Budget View' modal is displayed, showing the following details:

- PIF:** PIF-240048
- Type of Estimate:** Class 3
- Status:** Sent For Approval
- Budget Total:**

A red circle with the number '5' is placed over the 'Enter PIN:' input field in the 'Add Signature' dialog box. A red circle with the number '6' is placed over the 'Continue' button in the same dialog box.

Part 6 – How to modify project information for an Urgent/Ad-Hoc PIF (UPIF) record as the Service Provider

1. Go to launch.kahua.com and click **Launch in Browser** to sign in
2. Click the **Project Finder** App (left menu) and **select your project** from the list
3. Click the **information “i”** icon (top) to open the **Portfolio Manager** App
4. Click **EDIT** (top menu)
5. Click on the **PIF INFORMATION** tab
6. Complete the applicable data fields
7. Click **Save / Close** (bottom)



The screenshot illustrates the process of editing project information in the Kahua system. It shows the Project Finder app on the left, the main project list, and the Portfolio Manager app for project 240027 - ARCW Test Jameer-Bouchey. The PIF INFORMATION tab is selected, and the 'Save / Close' button is highlighted.

Project Finder App (Left Menu):

- Apps
- Project Finder (selected)
- Dashboard
- Calendar
- Search
- PI PIF

Project List:

ALL PROJECTS	MY PROJECTS	RECENT PROJECTS
Infrastructure Ontario > IO Projects > Delivery > ARCW > IO Funded		
Name		
→ 230003 - Toronto Courthouse Accessibility Upgrades - AWRC - NN		
→ 240027 - ARCW Test Jameer-Bouchey		
→ 240031 - Test 4		
→ 240032 - Maninder's Project		

Portfolio Manager App (240027 - ARCW Test Jameer-Bouchey 240027):

Information Manage

DETAILS

Logo

Partition Type Project

Record Type Project

Project Type ARCW

Name 240027 - ARCW Test Jameer-Bouchey

Finance Type GREP (Yardi)

Migrated Data

Planning Number

IO Project Number 240027

Client Project Number

Intent Objective of Project

Customer/Client Number

GP Project Number

PIF INFORMATION

PIF Request Number PIF-240047

Date of Project Initiation 10/8/2024

Requested Date for Occup... 10/9/2024

Project Information Overview - Background TBD

Project Information Overview - High Level (Client Request Purposes) Scope (In Scope/Out of Scope)

Charter Submission Date 10/8/2024

Charter Submission Number CN-240017

Risk Support Option 02 - Risks Managed in Kahua Only using Simplified Risk Register

ORM/Non-ORM

Branch/Division

Related Active Project Number (IO/Client)

Previous (Completed) Project Number (IO/Client)

Recent Initiative Number

Save / Close Set On Hold Cancel Project Archive Project

Related topics

Learn how to level up in minutes with more help in this series:

- QRG 300-5 - How to manage project initiation for Capital Program Planning – ARCW
- QRG 300-10 - How to manage the Project Charter for PMSP projects
- QRG 300-12 - How to use the Stage Gate Process for PMSP projects

Just getting started? Learn the basics in our Welcome and Quick Start series:

- QRG 100-1 - Welcome Guide for Clients - How to access and navigate the Kahua
- JA 100-3 - Welcome Guide for Clients - Cheat Sheet
- QRG 200-1 - Approvals made easy for Leaders

That's it! If you don't have the desktop app or mobile app installed, try downloading them from launch.kahua.com.

Looking for more learning resources or support? Reach out to itconnect@infrastructureontario.ca or call 1-888-558-5523.

Key Fields

PIF App

Field Name	Notes
Complexity	<p>Allowance values of either Low, Medium, or High.</p> <ul style="list-style-type: none">• Selection of Low or Medium Complexity automatically assigns Project Type to ARCW Delivery Model• Selection of High Complexity allows additional selection of Project Types including PMSP, P3 and Traditional <p>This field can only be changed when the PIF is in process through a the ‘Change Complexity/Project Type’ workflow. Once the PIF is submitted for financial activation, it cannot be changed. If a change is required, in some cases, it may be easier to cancel and restart the PIF.</p>
Project Type	<p>Defines the Delivery Model to be used for this Project.</p> <ul style="list-style-type: none">• Available options are dictated by selection of Complexity field as described above• This determines the Template used to set up the project and what Partition it will be stored in• Selection of Project Type will enable or disable additional fields within the PIF <p>This field can only be changed when the PIF is in process through a the ‘Change Complexity/Project Type’ workflow. Once the PIF is submitted for financial activation, it cannot be changed. If a change is required, in some cases, it may be easier to cancel and restart the PIF.</p>
Delivery Type	<p>Defines the delivery type for this project. It will be auto populated based on how the project was initiated. Client-Agency and Client-Ministry projects will be initiated by the Client. IO-CRP and IO-Capital delivery types will be initiated via the PJF integration. The selected Delivery Type will also configure the appropriate approvals for capital planning and ministry projects.</p> <ul style="list-style-type: none">• IO-CRP• Client-Agency• Client-Ministry• IO-Capital• IO-P3 <p>This field can be changed when the PIF is in process. Once the PIF is submitted for financial activation, it cannot be changed.</p>
Finance Type	<p>Defines the financial system that the project will be integrated to:</p> <ul style="list-style-type: none">• Non-Grep > Great Plains• Grep > Yardi <p>This field can be changed when the PIF is in process. Once the PIF is submitted for financial activation, it cannot be changed.</p>
Project Name	<p>Title for the Project. This is used extensively throughout reporting, so please ensure it is adequately descriptive. Also, please avoid the use of nonstandard characters such as slashes or asterisks.</p>
Project Number	<p>Unique identifier for the project, used extensively throughout reporting.</p>

Urgent / Ad-Hoc Project	Defines if this PIF has followed the standard initiation process or if an expedited PIF was completed directly in Kahua.
IO Project Manager IO Project SVP IO Project Director	Defines the roles of typical Project Staff. Simplified Delegation of Authority will dictate who from this list approves which financial documents.
Ministry/Client ID/Contact	Name of the Ministry or Client for which IO is completing the project and the name of the principal contact.
PMSP Company / Contact	Name of the Project Management Service Provider (PMSP) or Real Estate Service Provider (RPS) providing Project Management services to IO for this project and the name of the principal contact. Leave blank for Project Delivery Models besides ARCW and PMSP.
PIF Request Number & PIF Submission Date	Unique Identifier for the PIF request record and the date this request was submitted. This number is assigned after the 'Start PIF' action is taken.
Risk Support Options	Defines if Risks will be managed directly in Kahua OR managed in an external Active Risk Manager (ARM) system and imported into Kahua. By default, P3 Projects use ARM to manage Risks, while other Delivery Models will use Kahua.
Capitalization Requirements	Defines how the Project will be capitalized: <ul style="list-style-type: none"> • CAP: Treated as a Capital Cost • OPR: Treated as an operational expense
PD Sector	Identifies the sector that this Project applies to. Options include: <ul style="list-style-type: none"> • Health • Public Works • Justice • Subways • LRT • Highways
Upcoming Stage Gate	Identifies what the next Stage Gate is for this project. A Project may be initiated at anywhere between Gate 1 and Gate 3 and this allows us to specify at what point in the Project Stage Gate process the project is being initiated.
Prior Stage Gate Requirements Complete	Confirms that if a Project is initialized in a later Stage Gate, that prior requirements have been complete. This is a Yes / No field.
Cost Estimate Details - Engaged By - Cost Consultant - Date of Estimate - Estimate Classification - DOAT Status - Procurement Option Analysis (POA) Status	Provides details around the Cost Estimate, including who created it, who engaged them and what Class of estimate it is. In addition, this identifies what tools were used to select the Delivery Model and contract type (i.e. POA or DOAT tools).
Project Deliverables	Identifies preliminary information around the Project Plan and confirmation that Level 1 Due Diligence has been completed.

- Level 1 Due Diligence Complete - Project Plan Uploaded - File Upload	File upload allows the upload of the Project Plan, if it has been identified that a Project Plan will be uploaded.
Risk Identification	<p>Allows the identification of known Risks and Opportunities at the Project Initiation stage.</p> <p>Following approval of PIF, these Risks and Opportunities are copied into the Risk Register App, where they can be managed throughout the project lifecycle.</p>
Contacts	<p>Identifies other Contacts to be associated with the Project and displayed on the Monthly Project Status Report (MPSR). This includes a field to identify if a Contact is a Key Stakeholder or not. This determines if they are displayed in the Key Stakeholders (first page) or Additional Stakeholder (last page) lists on the MPSR report.</p> <p>These Contacts are for <i>reporting purposes only</i> and do not affect Workflows (which are driven by contacts assigned to individual fields, such as IO Project Manager, IO Project Director or IO SVP).</p>
Milestones	<p>Identifies major project milestones known at the time of PIF.</p> <p>Following approval of PIF, these Milestones are copied in the Milestone App where they can be managed throughout the project lifecycle.</p>
Order of Magnitude Estimate – Client Order of Magnitude Estimate	<p>These are initial high-level estimates that are recorded at the time of PIF approval.</p> <p>These are for <i>informational purposes only</i> and are less important than the Project Budgets section which will become the basis of the Project’s detailed budget.</p>
Project Budget	<p>Allows the entry of one or more Budgets at the Project Initiation stage. Entry of multiple Budgets is to allow for importing history of prior Budget Iterations before the PIF process, for traceability and reporting. Each Budget is associated with a class of Estimate.</p> <p>Following approval of PIF, these Budget(s) are copied in the Funding Budget App where they can be managed throughout the project lifecycle. These are also shown in the Cost Breakdown App.</p>
Project Budget > Budget Code	<p>Represents the Rows in the Cost Breakdown App that will be used for the initial Budget.</p> <p>Note that standard Budget templates are used for Budget setup. Please reach out to Cost Control for any questions related to standard Budget templates.</p>
Project Budget > Total	This is the amount that will be displayed in the <i>Latest Approved Budget</i> column in the Cost Breakdown Structure App , following PIF approval.
Action Name	Action Description
Project Budget > Send for Approval	Submits the Project Budget for approval from the SDOA for the project
Start PIF	Starts the PIF and assigns a PIF Request Number
Submit for PM Approval	For Traditional Project workflows, submits the PIF to the assigned PM for approval
Submit for Financial Activation	Submits the PIF for financial activation with the selected finance system
Change Complexity/Project Type	Starts the workflow to change the complexity/project type of the project

Reject Project	Rejects an In Process PIF
Approval Notes	
<ul style="list-style-type: none">Depending on the Project Budget, approval workflows are sent to the appropriate SDOA for the project.	