



Project Creation Training Document

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Overview

The Data in Kahua is organized using a 'Partition' structure. Any configurations or security settings done at the top level inherit down to lower levels until that inheritance is broken by different configurations or security at a lower level.

Kahua provides Administrators the permissions to create Projects in the University of Illinois System Domain across different Partitions. A few key terms to know prior to creating a project:

Domain - A domain within Kahua is your University's 'site' i.e. University of Illinois System Domain. All universities & projects sit in one domain, and all internal users of your University are users within the Domain.

Partition - A partition is a division within the domain. Multiple partitions are created in the domain, namely the universities along with the system partition & training partition. Partitions are used to compartmentalize the University's projects in Kahua. Please note that partitions also may be used to ensure users only receive permission to view or manage projects within a certain 'partition' - primarily siloing the users to their university.

Project - A project is an entity in the hierarchy and is usually nested within a university. All Users external to the University of Illinois, across the universities, will only be added to their respective Projects.

Template - Project templates allow Administrators to quickly replicate project details such as File Manager folder structure, Milestones, etc. when creating new projects. Currently templates have been created for each university along with a system template as well.

Partition Type - Allows the Administrator to determine whether this partition is for Navigation (ex. East, Central, West), Program, Subprogram, Project, or Subproject.



Record Type – Enables the Administrator to select what this specific project is for. The options available are Project, Node, Template, Test, and Training.

Creating a New Project

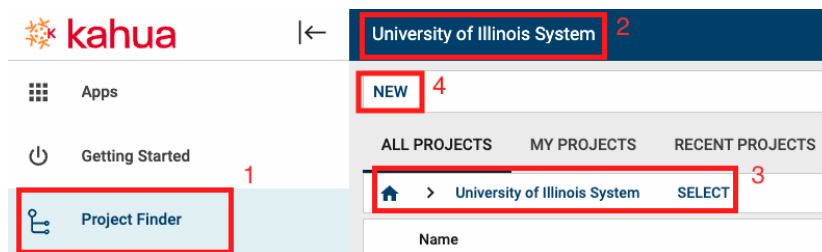
The following Groups have permissions to create a project in Kahua:

1. Domain Administrator - Can create projects across the entire Domain
2. System Administrator - Can create projects within their own university

These permissions are provided through the Groups Application in Kahua where permissions are provided at an Application level at the Domain.

Using Project Finder to create a New Project

1. Click Project Finder in the left navigation pane as show in the image below (1)
2. The name at the top (2) and in the horizontal tree structure (3) show your current location. In the screenshot below we are at the root i.e. Domain



3. Click NEW (4) from the top toolbar to open the Create a Project window



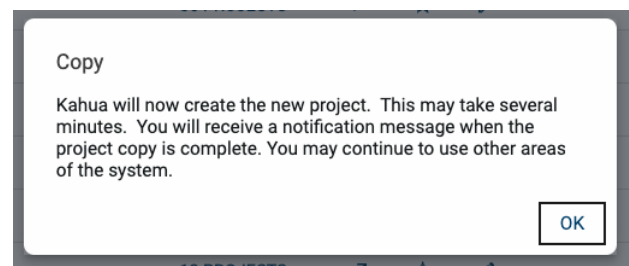
4. Select the appropriate university in which you would like to create the Project and click Next
 - a. In case you not located at the Domain are within a particular project, please use the arrow below Project Location to navigate to the Domain

5. At the next screen please select the Create from Template option, enter the name of the Project, and click on one of the four templates to replicate

- a. Please ensure the Include Folders & Include Files are selected as per the screenshot
 - b. The template selection and selections will ensure the correct Folder structure is being replicated in the new project

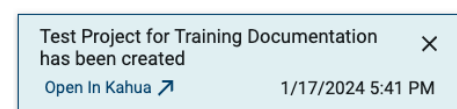
6. Once the Project Name has been entered and the template has been selected, please click on the Save button

- a. This will start the process to create the project and replicate the project template
 - b. It will take a couple of minutes to complete this process



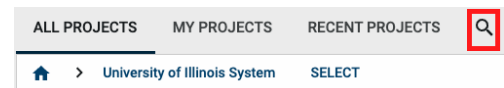
7. When the project has been created a notification will be shown at the bottom right of the screen similar to this image

8. You can click on the Open in Kahua to be navigated to the newly created project





- a. You can also use the Project Finder to Navigate to the project by
 - i. Clicking on Project Finder in the left side Navigation
 - ii. Selecting the university in which the Project was created
 - iii. Clicking on the Project that was newly created
- b. You can also use the Search functionality in the Project Finder to locate your project by
 - i. Clicking on Project Finder in the left side Navigation
 - ii. Clicking on the Magnifying Glass icon next to Recent Projects, as shown in the image below
 - iii. Type out the Project Name and click on the Project



Editing the New Project Details

1. Once you are at the newly created Project, you will see the name of the project in the blue bar at the top
 - a. In case you clicked Get Started in the left side navigation after navigating to the project you will see the University of Illinois System
 - b. If so, please click on the Apps menu and see if the name changes back to the Project Name
 - c. This happens as certain Kahua applications are “Global” and whenever these applications are selected it will show the name at the top as the Domain name to indicate you are at a “Global” application
2. To edit the Project Details, please click on the Icon next to the Project Name, highlighted in Red in the image below



Test Project for Training Documentation



/ Apps



3. This will open a pop-up screen which will contain the Project Details. Please click on the EDIT Button to edit the details of the Project



- a. There are three other buttons next to the Edit Button:
 - i. DELETE - Used to Delete the Project
 - ii. HISTORY - Used to load the History of the Project Details only
 - iii. MOVE - Used to Move the project to another location
- b. There is also a URL button to the right side of the bar which will copy the URL of the project to your clipboard

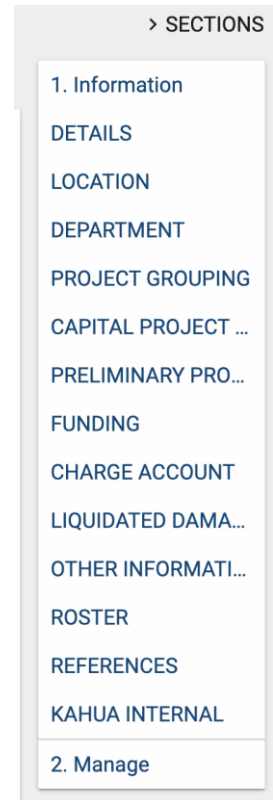
4. Once the EDIT button is clicked, the fields of the Project will be editable.

Please enter the following information:

- a. University - Dropdown that allows the user to select the university & System
- b. Project Template - Dropdown that allows the user to confirm the Template. Please select the same template that was used at the creation of the Project



- c. Project Number - Auto populated by default but can be edited so as to match to the Project Numbering in the internal system
5. As an Administrator, if there is any other information that you know across the different sections please go ahead and fill those out
 - a. On the Right side of the Project details screen there are quick navigation links that can be used to navigate between sections
 - b. In the reference section, attach Exhibits or any other supporting documentation needed at project creation.
6. After all the known information has been filled out, please click on the URL button on the top right and then click on Save/Close located at the bottom





New Project - Team Communication

Once the URL has been copied and the Project details have been Saved & Closed it is time to inform the team so that they can update the rest of the details as well as start working in the Project.

To keep the communication inside Kahua, please go through the following steps:

1. Click on Apps located in the left side navigation

2. Using the Search box type in Messages as shown in the screenshot

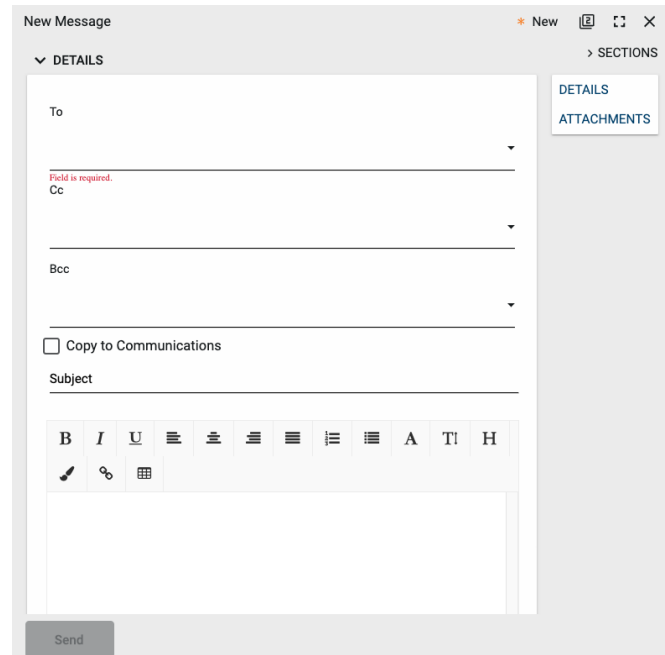
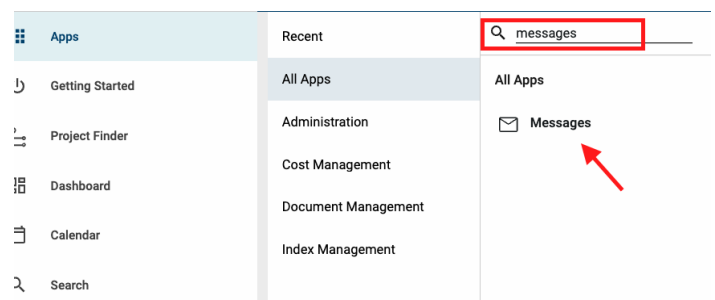
3. Select the Messages application that shows up in the result

4. Once the Messages application is open click on New, this will then open a panel on the right side of the screen which will resemble an email

5. Similar to the email in the To line and add the:

- a. Project Manager
- b. Financial Manager
- c. “Anyone else Internally” who needs to be informed about the Project
 - i. Note: Only Kahua

users will be shown in the field, and you can search for users using their First or Last Names





6. In the Subject Line please enter “Project [Project Number and Name of the Project] has been created in Kahua” and in the Body of the email go ahead enter the details similar to how you would in an email and paste the Project URL that is on the clipboard from the Project Details

a. In case you need to copy the URL again:

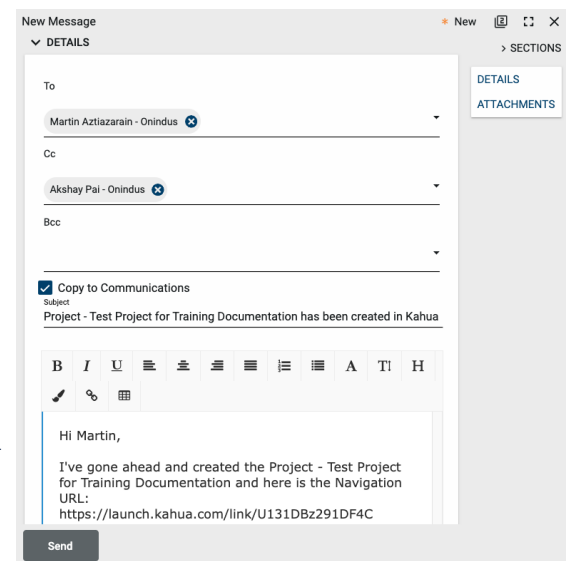
- i. Please click on the text Messages located at the top, this will take you back to the Project
- ii. Then click on the Icon at the top, next to the Project Name and click on URL to copy it

iii. To return to the Message, click on the Message

icon located at the top right as highlighted in the image above



7. Click on the check box “Copy to Communications” to store a record of it in the Communications application
8. Click on Send to send the message to the recipients which will send them an email as well as a message in Kahua
9. The recipients can then use the URL in the email to directly navigate to the Kahua Login Screen



Resources

For additional help with Kahua applications please reach out to the Technical team of the University with any questions

Submit a [Support Request](#) or email at servicedesk@uillinois.edu