

MAYO CLINIC



Basic Navigation - Quick Reference Guide

June 2018

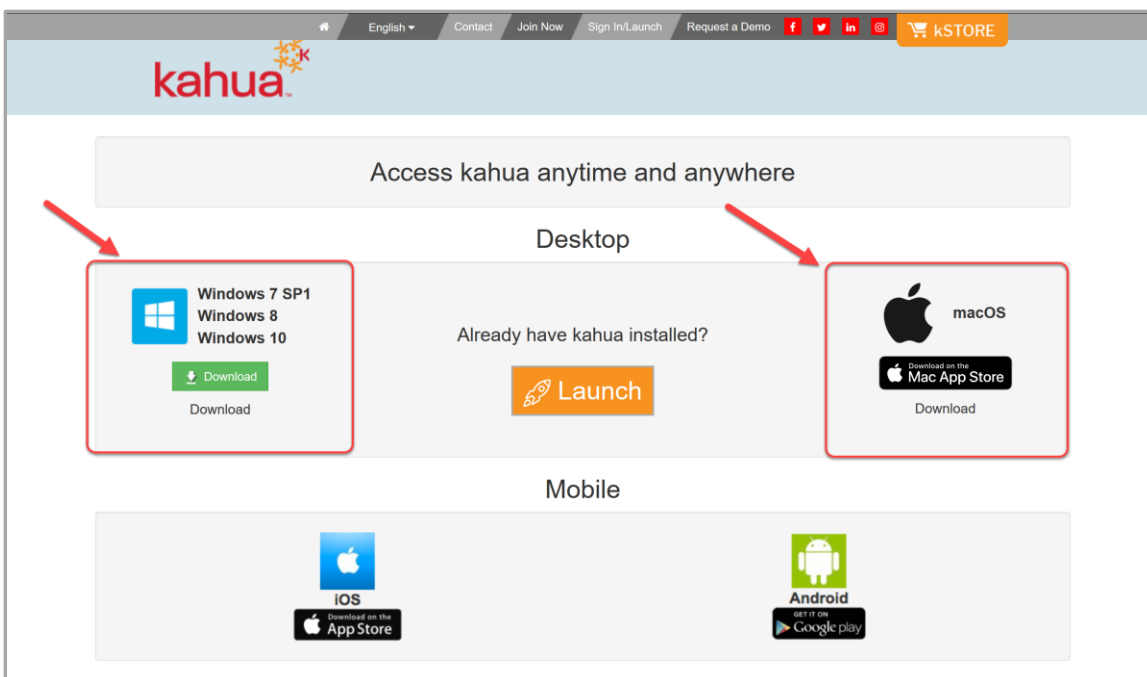


Prepared for the Mayo Clinic
Enterprise Kahua Deployment

DOWNLOADING KAHUA

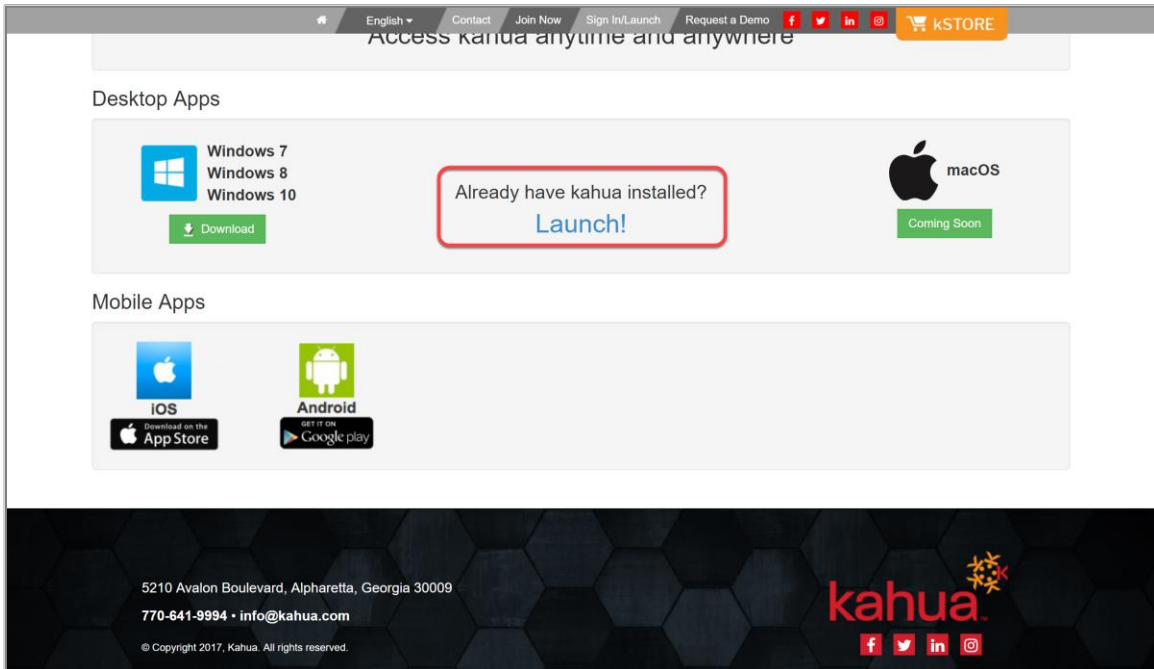
Navigate to www.kahua.com via your internet browser. Click the **Sign In/Launch** button on the top of the screen.

Kahua is available for Windows (7, SP1, 8 and 10) and for MacOS. Click on **Download** for your platform (Windows or macOS).



SIGN IN

Navigate to www.launch.kahua.com via your internet browser. Kahua should launch automatically. If it does not, click the **Sign In/Launch** button on the top of the screen and **Launch** on the page that comes up. Enter your email address and Kahua password to log in.



GENERAL NAVIGATION

Once signed in, the Getting Started app is opened by default. The Getting Started icon is blue in the selection bar at the top of the window (called the App Bar). The blue color of the icon indicates it's the current active app. The Getting Started app gives you links to important information such as tasks, messages, links for Help, updating your Profile and a large variety of video tutorials about Kahua.

Mayo Beta Search Kahua Yann Bouzerand Mayo Beta

Apps Browse Tasks Messages File Manager Getting Started

Hi, Yann. Welcome to The Kahua Network, the world's only collaborative network for construction project management.
 Select one of the links below to start configuring your Kahua site.
 Please note you are currently a site (domain) administrator.

Recent Tasks

FROM	SUBJECT	DUE
Brian Ellsworth	RFI 0003 submitted on Yann Bouzerand Project	5/16/2018
Paul Newman	RFI 0001 submitted on Yann Bouzerand Project	4/27/2018

You have 2 open task(s). [View All](#)

Recent Messages

FROM	SUBJECT	RECEIVED
Paul Newman	Sharing invitation has been accepted	5/10/2018
Brian Ellsworth	RFI 0003 submitted on Yann Bouzerand Project	5/9/2018
Brian Ellsworth	RFI 0002 submitted on Yann Bouzerand Project	5/9/2018
Paul Newman	Sharing invitation has been accepted	5/4/2018

You have 5 message(s). [View All](#)

Tasks by App

RFIs

Overdue Due today Due in 1-7 days > 7 days No due date

Open Tasks

Overdue Due today Due in 1-7 days > 7 days No due date

You have 2 open task(s). [View All](#)

Recent Projects

Mayo Beta

- PXCB1870010 Mayo Beta/App Testing Projects/Kaloo Trum Project
- Mayo Beta/App Testing Projects/Yann Bouzerand Project
- ROBB1870010 Mayo Beta/MidWest/Rochester/Projects/Blakeley Building Jim
- Mayo Beta/MidWest/Rochester
- Mayo Beta/MidWest/Rochester/Projects

[Browse All](#)

Take A Tour
Learn how to navigate and use Kahua's unique features.

Get Productive
Discover how to increase productivity using Kahua.

Complete Your Profile
Be a team player by personalizing your information.

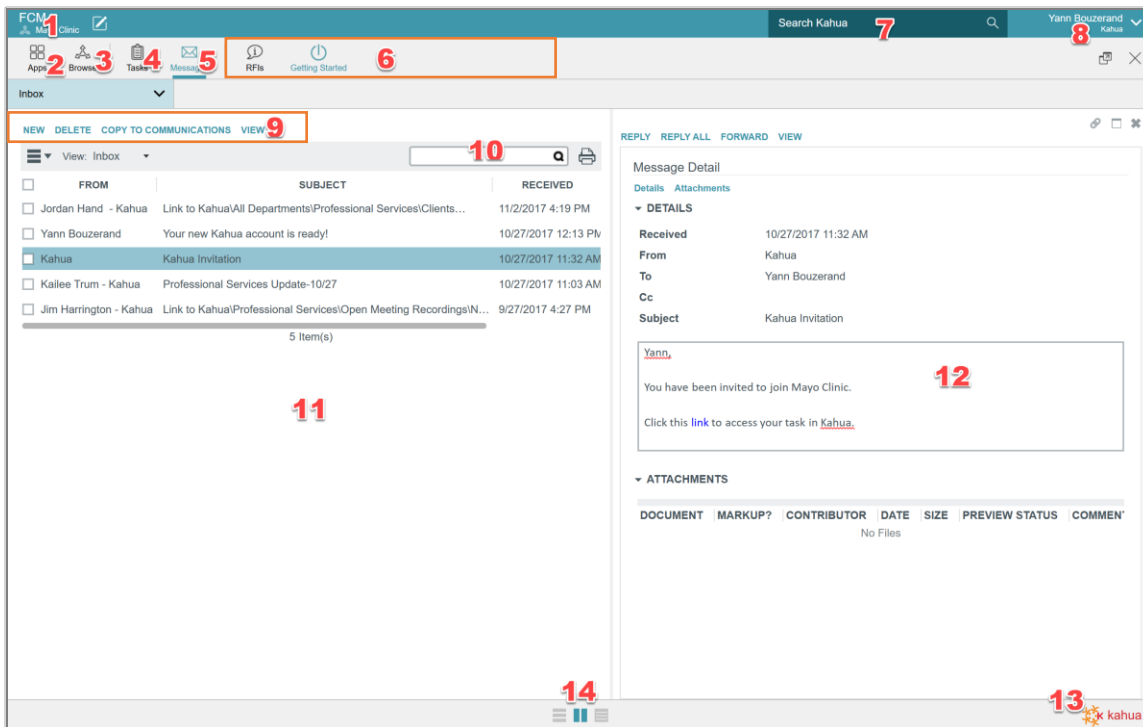
Help Center
Let us help you.

[Configure Your Site](#)

You last logged in today at 5:40 PM Eastern Time (US & Canada)

kahua

This diagram shows the main navigation areas and icons within the Kahua application. Items 1 through 8 and 13 and 14 appear on all views. Items 9 thru 12 appear within most apps.



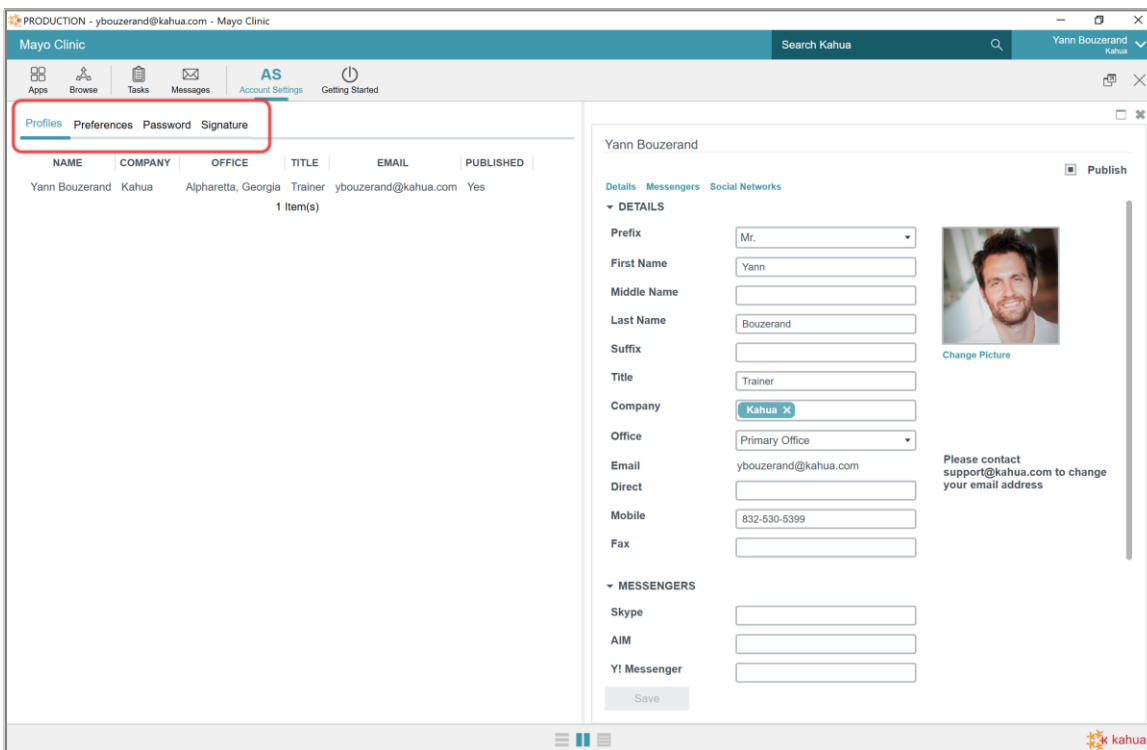
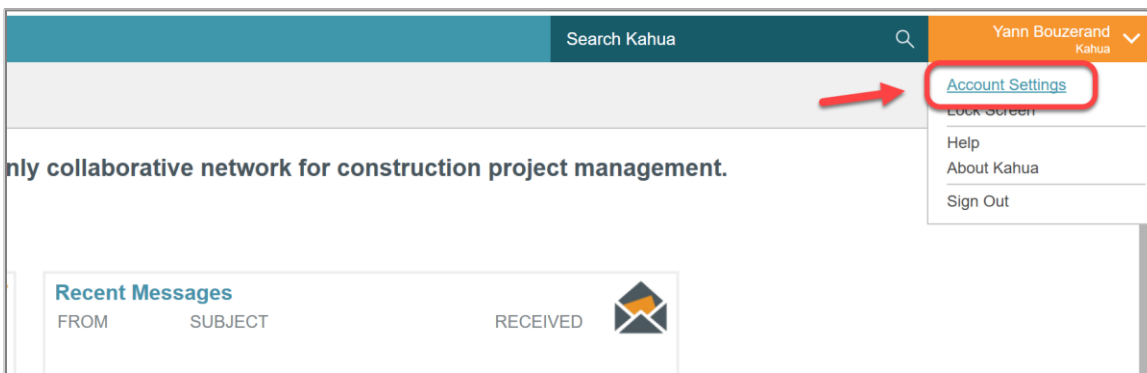
KEY TO NAVIGATION AREAS:

1. Project Navigator
2. App Launcher
3. Project Browser
4. Tasks App
5. Messages App
6. Open Apps Bar
7. Global Search
8. Account Settings/Help/Sign Out
9. Action Menu
10. Application Search
11. Log Frame
12. Details Frame
13. Progress Spinner
14. View Toggle (List only, Multi-frame / Detail only)

ACCESSING AND UPDATING YOUR ACCOUNT SETTINGS

Your Kahua profile affects how you appear in the local Contacts app as well as the Kahua Community. Other Kahua users from other companies can see and copy their contact information to their own Kahua site. Users can un-publish their profile if they do not want to appear in the Community, however this may limit collaboration with outside parties.

Click on your name in the upper right corner, then select **Account Settings** to open to your settings.



Notice these parts of the Account Settings app:

- “AS” appears in the Open Apps Bar to show this as the current active app
- The Action menu populates with the four activities in this app with the current one in blue
- The user’s record shows in the Log Frame
- The user’s profile shows in the Detail Frame since the Profiles action is active

ACTIONS AVAILABLE IN ACCOUNT SETTINGS

There are four settings areas available on the Account Settings Action Bar; Profiles, Preferences, Password and Signature. New users should take time to fill out these sections as completely as possible as the information is used throughout the platform.

Profiles – there are three main sections: Details, Messengers and Social Networks. The users will be able to fill in important contact information. Basic info such as titles, phone numbers, social-media and messenger usernames can be entered. A photo can also be added. The Prefix field at the top of the form is a required field. If a user will be signing documents, it's important to fill out the Title and add a signature.

Note that a change to the email address must be requested by sending a message to Kahua Support at Support@Kahua.com.

Preferences – in this section, the users can adjust the application to their preferences: preferred way to be notified about tasks or communications, time zone, language and display of the project number in partition navigation, and apps that you want to appear in the Open Apps Bar upon login.

Password – The users will be able to change their Kahua login password. The new password must contain at least eight characters total, have at least one lowercase character, at least one number and at least one uppercase character.

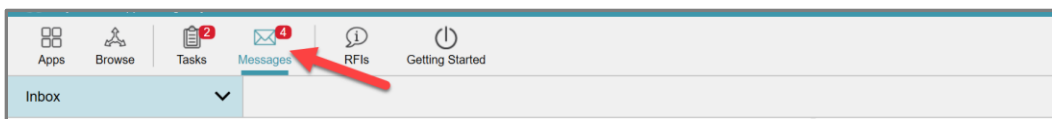
Signature – The users will be able to upload and determine what their signature will look like, as well as assign a secure pin to ensure they are the only one able to place the signature on any document.

This signature will be used where a signature authority is required of the user within Cost Applications where Delegation of Authority is used. This is not a signature block utilized in messaging or other forms of communication.

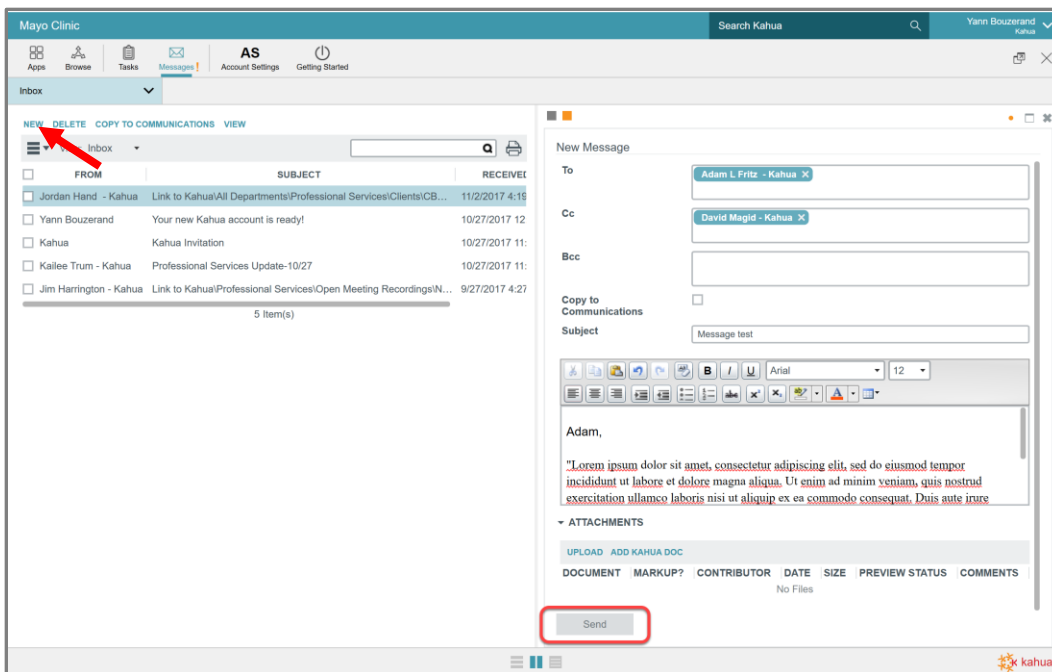
SENDING A MESSAGE

All Messages, both sent and received, will be available in your Messages application. Messages are specific to your account and shows all notifications and messages across projects and partitions. You can send a message through an application by selecting the **Send** action button or you can do it through the Messages application. In both cases, the input is similar.

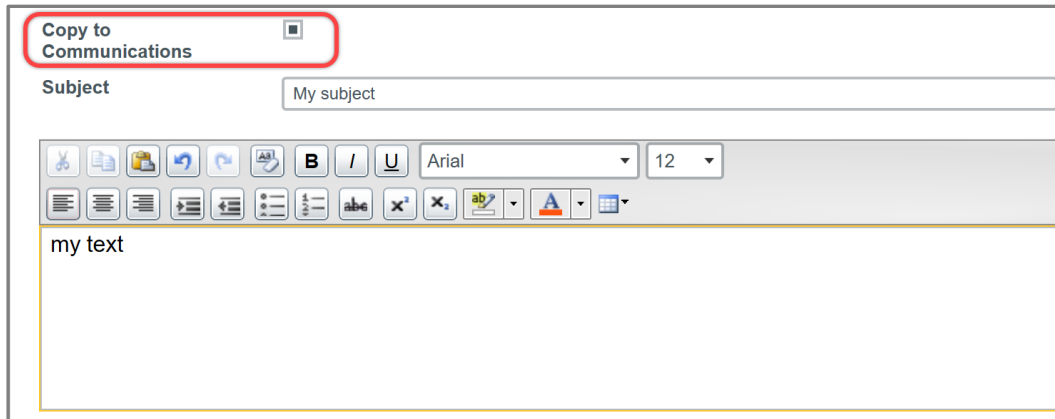
1. Click on the **Messages** icon in the Apps Bar then select **New** from the Action Bar. There is a Send option on the Action Bar in some Apps that will bring up the same screen as Messages.



2. Enter the recipient(s) in the appropriate fields using the drop downs that list your Contacts.
3. Type the text and body of the message.



4. Check the 'Copy to Communications' to allow the user to save a copy of a message to the Communications application in your current project in the Project Navigator.



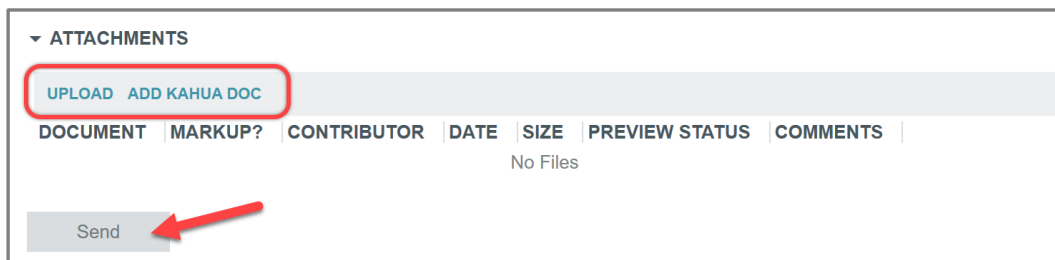
Copy to Communications

Subject My subject

Rich text editor toolbar: Bold, Italic, Underline, Font Color, Background Color, Font Family (Arial), Font Size (12), Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Link, Unlink, Image, Table, Video, Embed, Source Code, Full Screen, Print, Help.

my text

5. Upload any attachments in the References section of the message. You may choose to upload from your computer OR from the File Manager application by clicking **Add Kahua Doc**.



ATTACHMENTS

UPLOAD ADD KAHUA DOC

DOCUMENT	MARKUP?	CONTRIBUTOR	DATE	SIZE	PREVIEW STATUS	COMMENTS
No Files						

Send

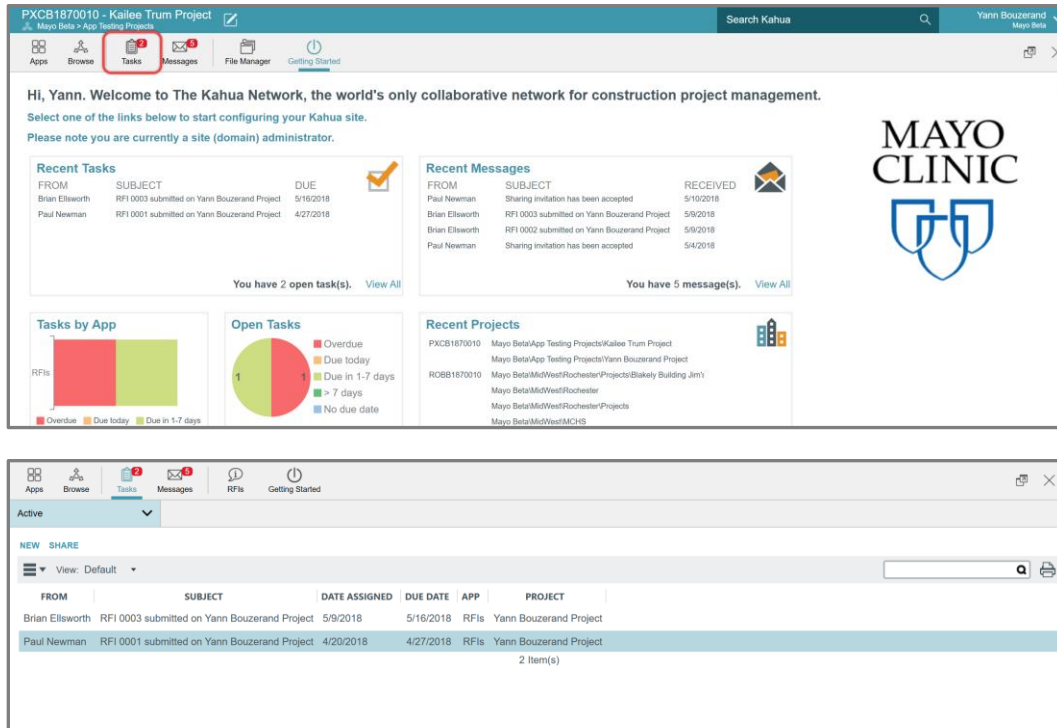
7. When you're done composing the message, click **Send**. Recipients will receive the message and message notifications accordingly.

RESPONDING TO TASKS

The users will receive tasks from a variety of applications in Kahua. The task icon at the top of Kahua shows how many open tasks you have. The users can also access the Task application from the App Launcher icon.

The Tasks application is specific to the user's account and shows all notifications and tasks across projects and partitions.

1. Click on the Task icon.
2. Select the task to act on.



- Each task is different and will have a different input form. Take the appropriate action from the buttons at the bottom of the form.

The screenshot displays the Kahua software interface. At the top, the header shows 'PXCB1870010 - Kailee Trum Project' and 'Mayo Beta - App Testing Projects'. The user is logged in as 'Yann Bouzerand - Mayo Beta'. The main area is divided into two sections. On the left, there is a table with columns: FROM, SUBJECT, DATE ASSIGNED, DUE DATE, APP, and I. The table contains two rows of data, with the second row highlighted. Below the table, it says '2 Item(s)'. On the right, there is a 'REASSIGN HISTORY' section titled 'Official Responder Task View'. This section has tabs for 'Details', 'Response', and 'References'. Under 'DETAILS', there are fields for Project, No., Date, Subject, Status, Author, CSI Code, Location, Reason, Cost Effect, Time Effect, Sheet Detail, Question, Clarification Comment, Clarification Comments History, and Proposed Solution. Under 'RESPONSE', there is a field for 'Official Responder' and a 'Mayo Responders' field. At the bottom of the response section, there are four buttons: 'Send To Other Responders', 'Submit Response', 'Save', and 'Send Update'. A red box highlights these buttons. At the bottom of the interface, there is a status bar that says 'You last logged in today at 3:16 PM Eastern Time (US & Canada)' and the Kahua logo.

FROM	SUBJECT	DATE ASSIGNED	DUE DATE	APP	I
Brian Ellsworth	RFI 0003 submitted on Yann Bouzerand Project	5/9/2018	5/16/2018	RFIs	Yann B
Paul Newman	RFI 0001 submitted on Yann Bouzerand Project	4/20/2018	4/27/2018	RFIs	Yann B

2 Item(s)

Official Responder Task View

Details Response References

DETAILS

Project: Yann Bouzerand Project
No.: 0001
Date: 4/20/2018
Subject: my subject
Status: Open
Author: Paul Newman - Newman Construction
CSI Code:
Location:
Reason: Insufficient information
Cost Effect: None
Time Effect: None
Sheet Detail:
Question: My question
Clarification Comment:
Clarification Comments History:
Proposed Solution: My proposed solution

RESPONSE

Official Responder: Yann Bouzerand - Mayo Beta
Mayo Responders:

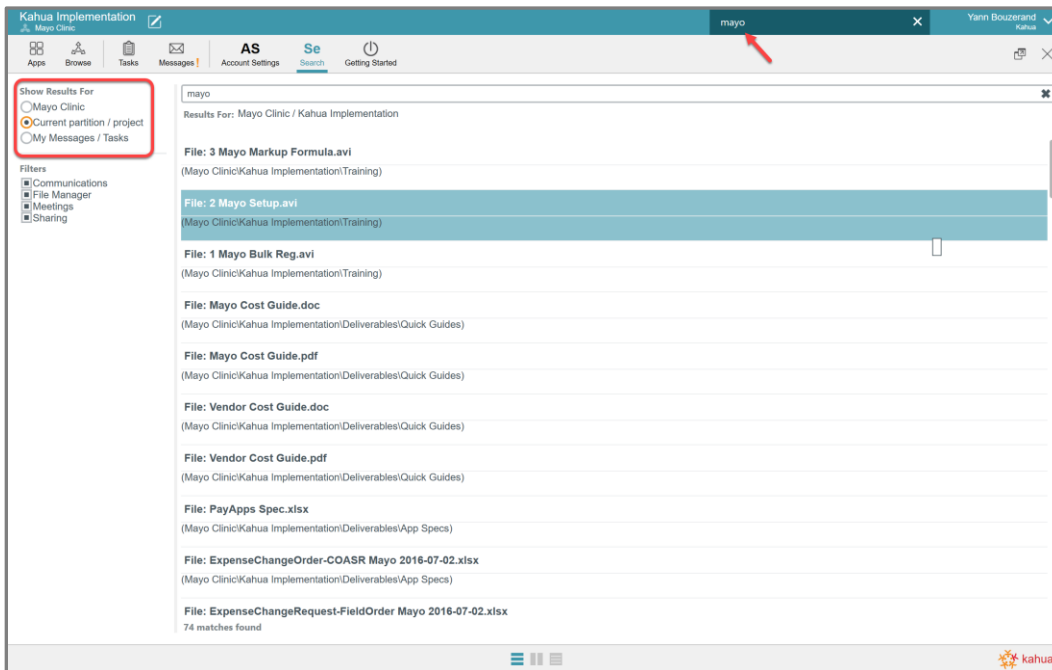
Send To Other Responders Submit Response Save Send Update

You last logged in today at 3:16 PM Eastern Time (US & Canada)

SEARCHING IN KAHUA

Kahua provides you with the ability to search across the entire system or a specific project. The system will search all forms and uploaded content, including the content of uploaded files.

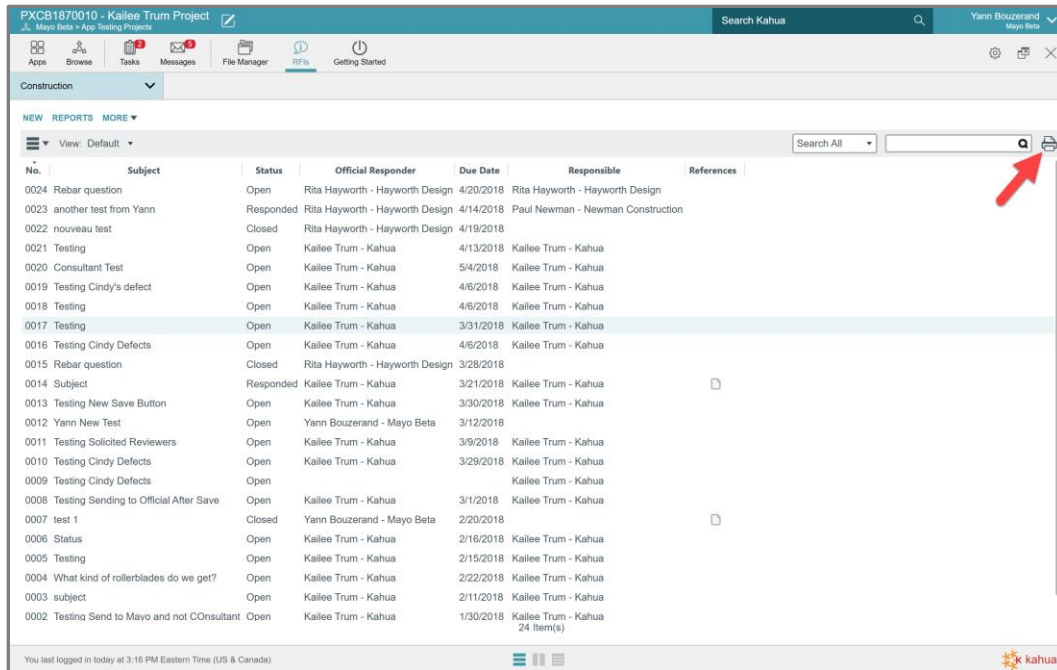
1. Enter a word or phrase in the Search field.
2. Click **Enter**.
3. Results will appear in the Log. Use the filter options on the left of the screen to define the scope of the search.



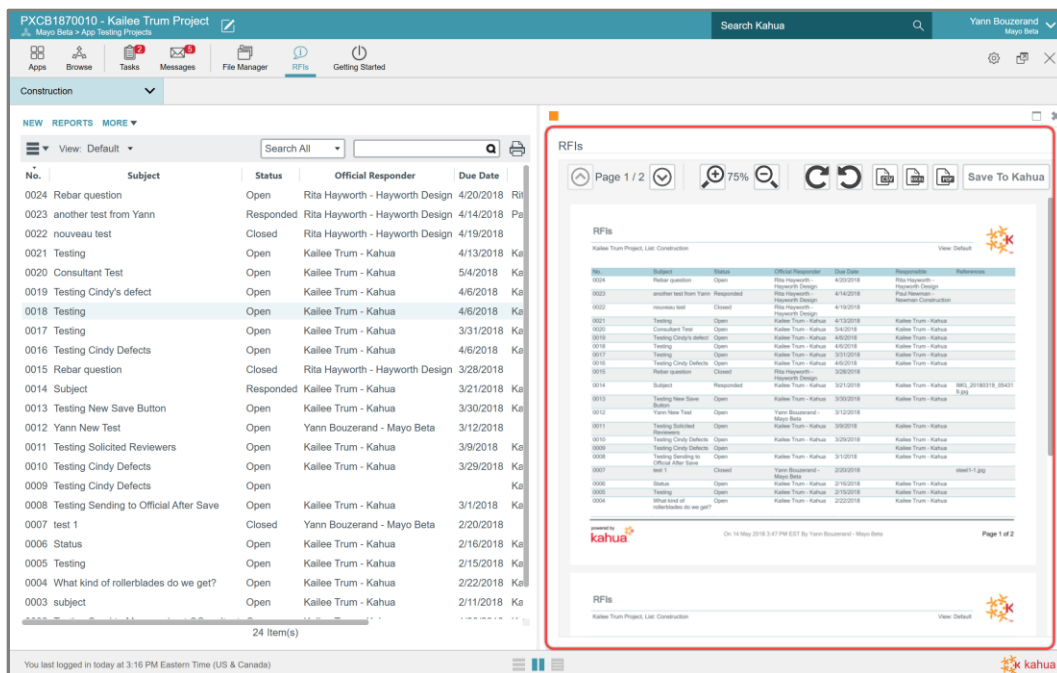
RUNNING A LOG REPORT

Reports are available in most applications in Kahua. There are standard reports and options to build custom reports. These steps provide an example of a standard Log report.

1. In the Log view, click the Printer Icon to generate the report.



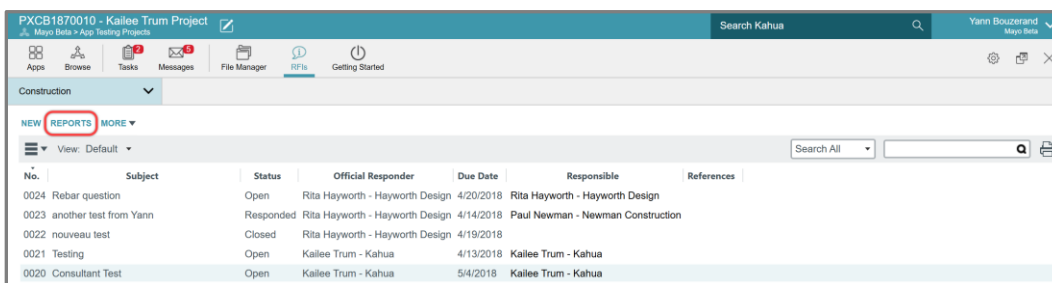
2. The report will be displayed in the Detail Frame on the right.



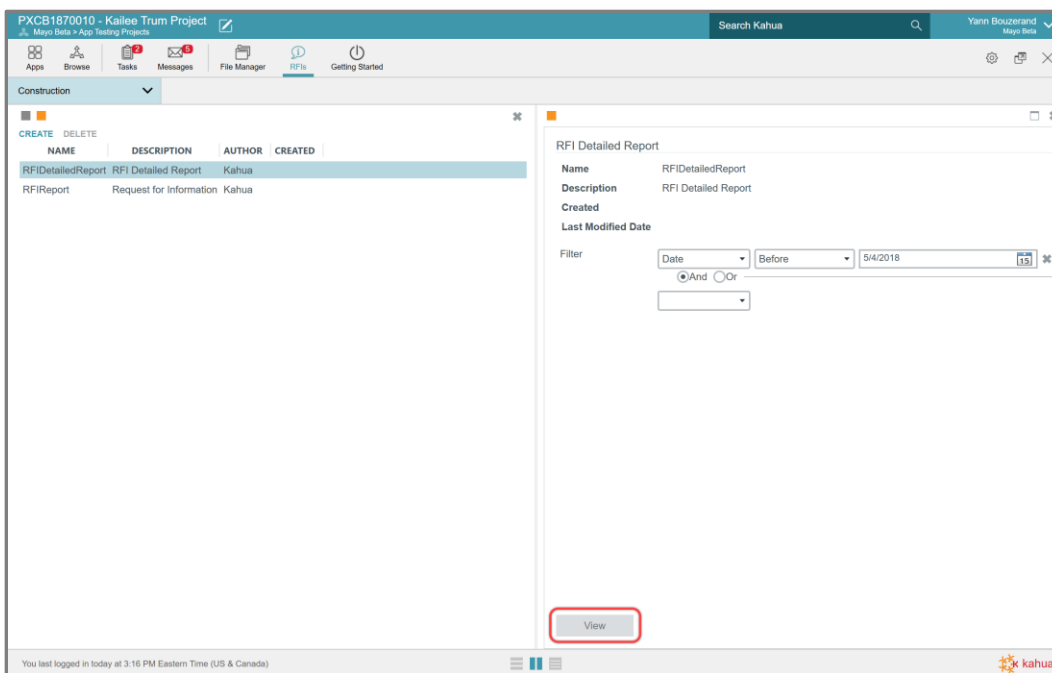
Kahua supports saving reports in three common formats (.CSV, .XSLX and .PDF). A report may also be saved in the Project's File Manager by selecting **Save to Kahua**.

RUNNING A CUSTOM REPORT

1. Click on **Reports** when you are in the Log Frame.



2. Select a report from the list presented. The Detail Frame displays the selected item. Select any filters to use on the report data.
3. Click **View**.



- The report displays in the Document Details frame on the right with options to save in different formats or to save it in the Kahua File Manager.

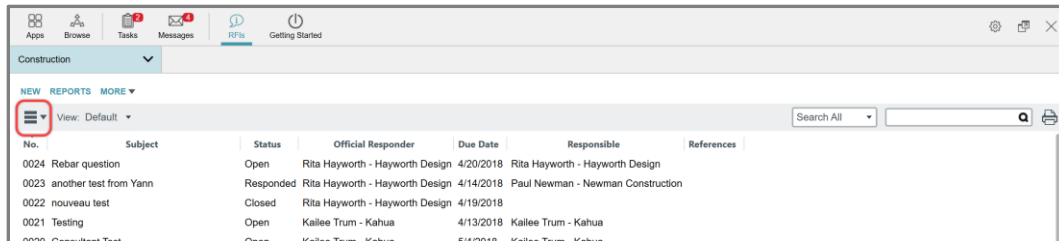
The screenshot displays the Kahua software interface for the 'PXCB1870010 - Kailee Trum Project'. The left sidebar shows a list of RFIs with columns for No., Subject, Status, Official Responder, and Due Date. The right pane shows a detailed view of an RFI report, which is highlighted with a red box. The report includes a table with columns for No., Subject, Status, Official Responder, Due Date, Reasonable, and References. The report also features navigation controls like 'Page 1 / 2', '75%', and 'Save To Kahua'.

No.	Subject	Status	Official Responder	Due Date	Reasonable	References
0023	Rebar question	Open	Rita Hayworth - Hayworth Design	4/20/2018	Rita Hayworth - Hayworth Design	
0023	another test from Yann	Responded	Rita Hayworth - Hayworth Design	4/14/2018	Rita Hayworth - Hayworth Design	
0022	nouveau test	Closed	Rita Hayworth - Hayworth Design	4/19/2018	Rita Hayworth - Hayworth Design	
0021	Testing	Open	Kailee Trum - Kahua	4/13/2018	Kailee Trum - Kahua	
0020	Consultant Test	Open	Kailee Trum - Kahua	5/4/2018	Kailee Trum - Kahua	
0019	Testing Cindy's defect	Open	Kailee Trum - Kahua	4/6/2018	Kailee Trum - Kahua	
0018	Testing	Open	Kailee Trum - Kahua	4/6/2018	Kailee Trum - Kahua	
0017	Testing	Open	Kailee Trum - Kahua	3/31/2018	Kailee Trum - Kahua	
0016	Testing Cindy Defects	Open	Kailee Trum - Kahua	4/6/2018	Kailee Trum - Kahua	
0015	Rebar question	Closed	Rita Hayworth - Hayworth Design	3/28/2018	Rita Hayworth - Hayworth Design	
0014	Subject	Responded	Kailee Trum - Kahua	3/21/2018	Kailee Trum - Kahua	001_20180319_054217.jpg
0013	Testing New Save Button	Open	Kailee Trum - Kahua	3/30/2018	Kailee Trum - Kahua	
0012	Yann New Test	Open	Yann Bouzerand - Mayo Beta	3/12/2018	Yann Bouzerand - Mayo Beta	
0011	Testing Solicited Reviewers	Open	Kailee Trum - Kahua	3/9/2018	Kailee Trum - Kahua	
0010	Testing Cindy Defects	Open	Kailee Trum - Kahua	3/29/2018	Kailee Trum - Kahua	
0009	Testing Cindy Defects	Open	Kailee Trum - Kahua	3/29/2018	Kailee Trum - Kahua	
0008	Testing Sending to Official After Save	Open	Kailee Trum - Kahua	3/1/2018	Kailee Trum - Kahua	
0007	test 1	Closed	Yann Bouzerand - Mayo Beta	2/20/2018	Yann Bouzerand - Mayo Beta	
0006	Status	Open	Kailee Trum - Kahua	2/16/2018	Kailee Trum - Kahua	
0005	Testing	Open	Kailee Trum - Kahua	2/15/2018	Kailee Trum - Kahua	
0004	What kind of rollerblades do we get?	Open	Kailee Trum - Kahua	2/22/2018	Kailee Trum - Kahua	
0003	subject	Open	Kailee Trum - Kahua	2/11/2018	Kailee Trum - Kahua	

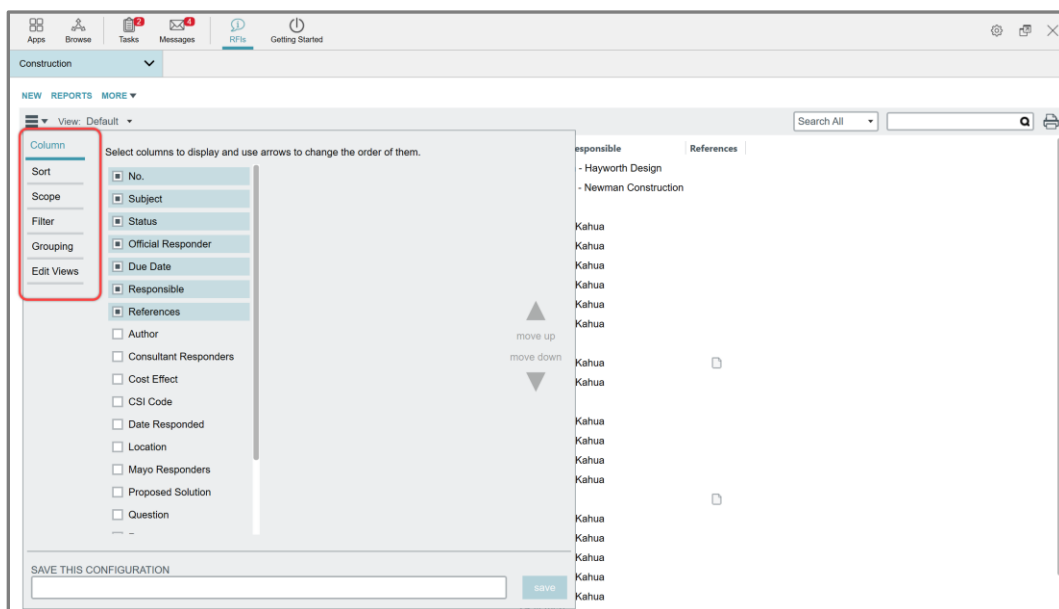
LOG VIEWS

There is a built-in standard Log View for each application that displays the most common columns for that application. Individual users can customize and save views within an application.

1. In an application log, select the Pancake icon – the picture of the three stacked bars.



2. A new window pops up displaying a list of options to personalize. The four standard options for all Logs system wide are documented here. Other options may appear on Logs where appropriate.



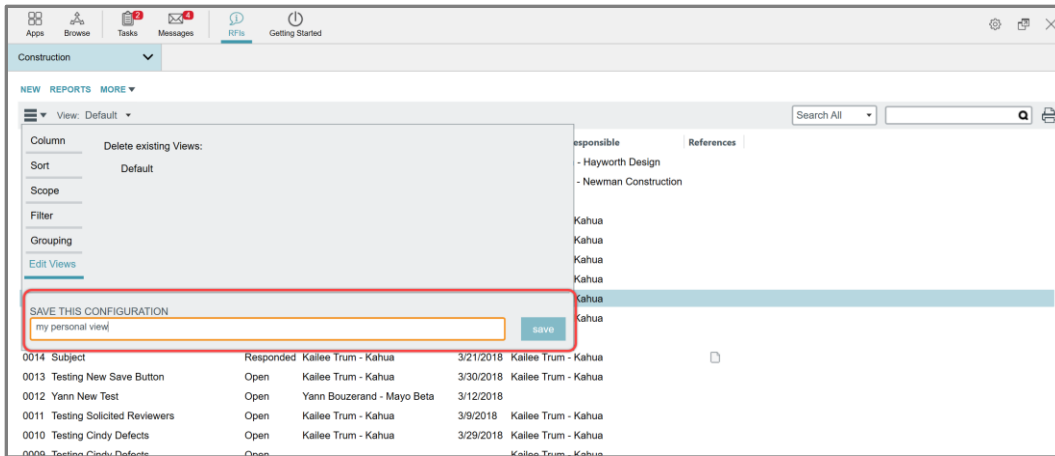
Column – Used to choose the columns and order of columns in the Log. Check or uncheck boxes next to the column name to display or suppress that column. Use the Up and Down arrows on the right of the panel to re-order appearance of the columns in the Log view.

Sort – Used to customize the sort order of items in the Log. Multiple sort keys can be specified in a user defined order.

Filter – Used to apply view filters based on a specific column and selected values in that column. Example: display only the contracts with the type equals Master Terms & Conditions.

Grouping – Used to group records based on a specific attribute.

- After filling out the custom view settings, give a name to the view in the Save This Configuration field and click **Save**.



- Saved views appear in the View drop down on the Log. Click on the black arrow to display the available views and select one to display.

