MAYO CLINIC

Construction Industry Partner Onboarding Guide		
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MAYO CONSTRUCTION INDUSTRY PARTNER ONBOARDING

DOMAIN ADMIN GUIDE

There are a few basic functions that you will need to be familiar with to collaborate with Mayo and there are additional steps you may take to further organize and manage your company's Kahua domain. The first section of this document will walk you thru setting up your company's Kahua domain. Then we will review how to accept shares from a Mayo project. It is highly suggested that you review the entire document to further customize or learn about what your company may do in Kahua.

Should you choose to setup your domain with custom settings, you will have the ability to better organize projects, initiate new projects, manage project data and documentation and create custom settings for your company within each application.

SETTING UP YOUR DOMAIN

The setup functions in this document must be done by your company's Domain Administrator. If you initiated your domain from the Kahua website and are the first person to join from your company, you are the default Domain Administrator. If not, you must contact your company's Domain Administrator. If you are new to Kahua, you may also read the Basic Navigation QRG to become familiar with terms used in this document.

As Domain Administrator, you have access to several additional functions to setup, organize and administer your company's Kahua account. Listed below are the functions that will be reviewed in this document:

- Setting up Company Profile
- Configuring Domain Settings
- Authentications: Registration Authentication and Password Requirements
- Domain Defaults
- Setting up Navigation Structure/Hierarchy
- Purchasing, Installing and Managing Licenses
- Managing Users
- Managing Installed Apps
- Managing Outbound Shares with External Parties
- Configuring Application Default Values, Field Labels and Lookup Values

SETTING UP COMPANY PROFILE

When a domain is set up and registered in Kahua, basic information about the company is collected during registration. However, Domain Administrators can add, edit or update information about a Company at any time. This information may be shared with other Kahua users when they engage your company to collaborate in Kahua. See below for instructions on how to update Company information:
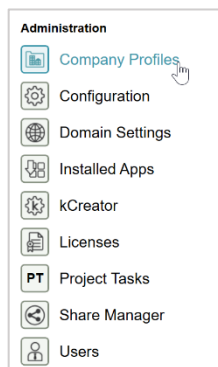

1. Open the App menu and click **Company Profiles**

2. Select your Company from the lLog – there should only be 1 company listed.
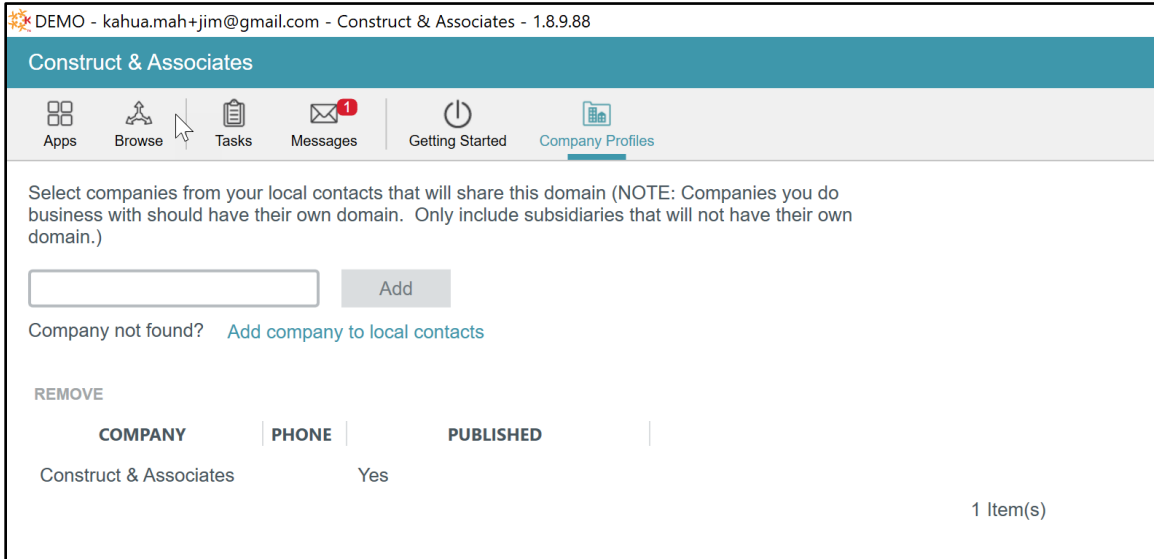

Upon selecting your Company name, a right Detail pane will appear displaying relevant information about your Company.

3. Edit or add any information as desired – this information will appear in your company's profile when users engage with you to collaborate. Any updates you make to this information will also be updated within your profile in other companies' Contact application.

4. To add office locations, navigate to the Offices section of the form and add or edit the offices. Adding offices will allow you to tie a specific office location to an individual user's profile.
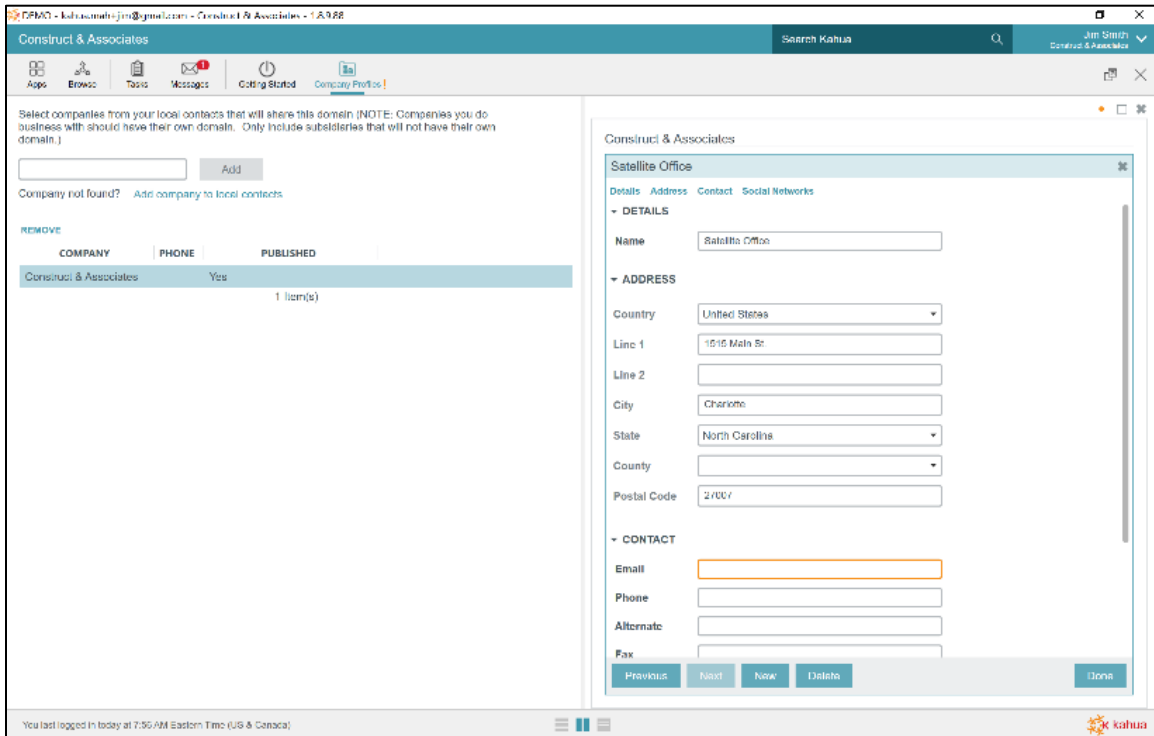
5. When complete, click **Save.**

6. To ensure the Save has finished, notice the '!' next to the app on the Open Application Bar will
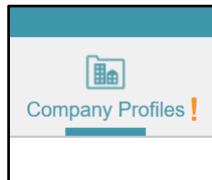
disappear. If the '!' still appears next to the application name, then you still have unsaved data.

LICENSE MANAGEMENT – PURCHASING LICENSES

To manage your company's projects or to collaborate on projects with Mayo, your company's domain must have appropriate licenses. Licenses in Kahua are tied to a domain and then assigned to individuals within that domain. Licenses may be assigned and revoked by a Domain Administrator at any time and reassigned to other individuals. Note that depending on the nature of the Share (and your activities therein), you may or may not have to pay for your usage of Kahua (at the end of this section there is a table that provides an overview of this).

MAYO INITIATED LICENSES

Mayo provides all Construction Industry Partners with all of the app licenses needed to collaborate on Mayo Projects. Before you can work on a Mayo project, you must first have a registered Kahua Domain for your company. Then you may contact Mayo to have the licenses installed on your Domain.

You may also visit the Kahua kStore to find other useful apps that you can install and begin to use immediately on your site. Visit https://www.kahua.com in your browser and then click on the kStore icon in the upper right corner.

MAYO LICENSE PACKAGE:

The following Licenses will be installed by Mayo in your domain:

- Platform
    - Tasks & Messages
    - File Manager
- Document Management
    - Communications
    - RFIs
    - Submittals
    - Daily Reports
    - Punch Lists
- Cost Management
    - Contracts
    - Change Requests
    - Change Orders
    - Pay Requests

COMPANIES, CONTACTS & THE KAHUA COMMUNITY

Kahua is a collaborative platform which allows users to work together to effectively manage project delivery. The Kahua network is facilitated by the Contacts application, which in turn has three sub-applications, to manage your interaction with other users: People, Companies and Community. Each sub-application serves a unique purpose:

1. People: Domain-specific (Company-wide) list of contacts – may be users or non-users; represents all contacts that your company engages with to complete project activity.

2. Companies: Domain-specific (Company-wide) list of companies – may be companies with or without domains; represents the companies that your company engages with to complete project activity.

3. Community: Collection of all profiles of companies and users with active logins within Kahua, regardless of whether your company has engaged with them in project work. Allows your company to identify companies and users you will engage with and add to your domain's People or Company application.
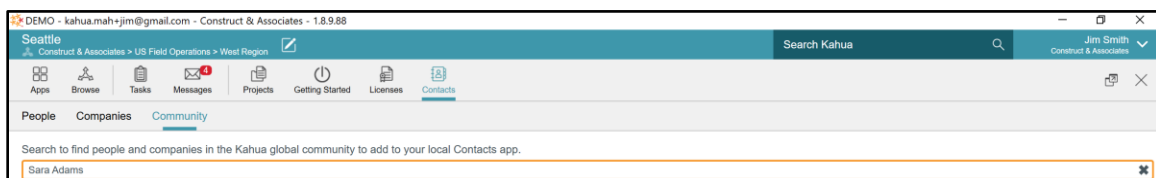
CONTACTS, COMMUNITY AND COMPANY APPLICATIONS

The Community is a unique feature of Kahua not offered by any other platform. When you sign up for a Kahua account, you are given access to all Kahua users, across all companies, cities, and countries. If a contact is actively using Kahua, you have the benefit of updated contact information and the ability to share, and collaborate, on projects (given proper permissions and a sharing set-up).

ADDING SOMEONE FROM THE COMMUNITY TO YOUR LOCAL CONTACTS

The **Community** sub-application is a central repository of all existing Kahua users, regardless of whether or not they are in your company's contact list. The benefit of adding a person to your contact list from the community is that you will now be able to collaborate with that contact (send/receive emails and tasks, invite them to share information on a project, etc.). Before adding a new contact in Kahua, you should first search the Community to make sure they don't already have an account. If a user exists in the Community, add them to your company's contacts by following the steps below:

1. Open the **Contacts** app.

2. Click on the **Community** tab.

3. Click in the search field and enter the person's name you are trying to find.

4. If that person exists in the community and not in your local contacts, you can click the **Add to Contacts** button on the right side of your screen.

5. If the person does not exist, navigate to the People sub-application to add them by clicking **Add.**

ADDING A CONTACT AND COMPANY

When adding a contact, you will need to associate that person with a company. Before adding a company or a contact, it's very important to search and make sure that the company and/or contact doesn't already exist (to prevent duplicates in the system). In the case that the individual or company does not yet exist in the Community, you will need to add them as a Contact and Company before inviting them to join Kahua. See below for steps to complete this process:

1. Click on the **People** tab to begin adding the new contact.

2. Click **New** and enter the appropriate information.

   Please note that it's very important that you enter the person's email address. This is used for all collaboration. It's also required to invite a person to join Kahua, which will be discussed in a later section.
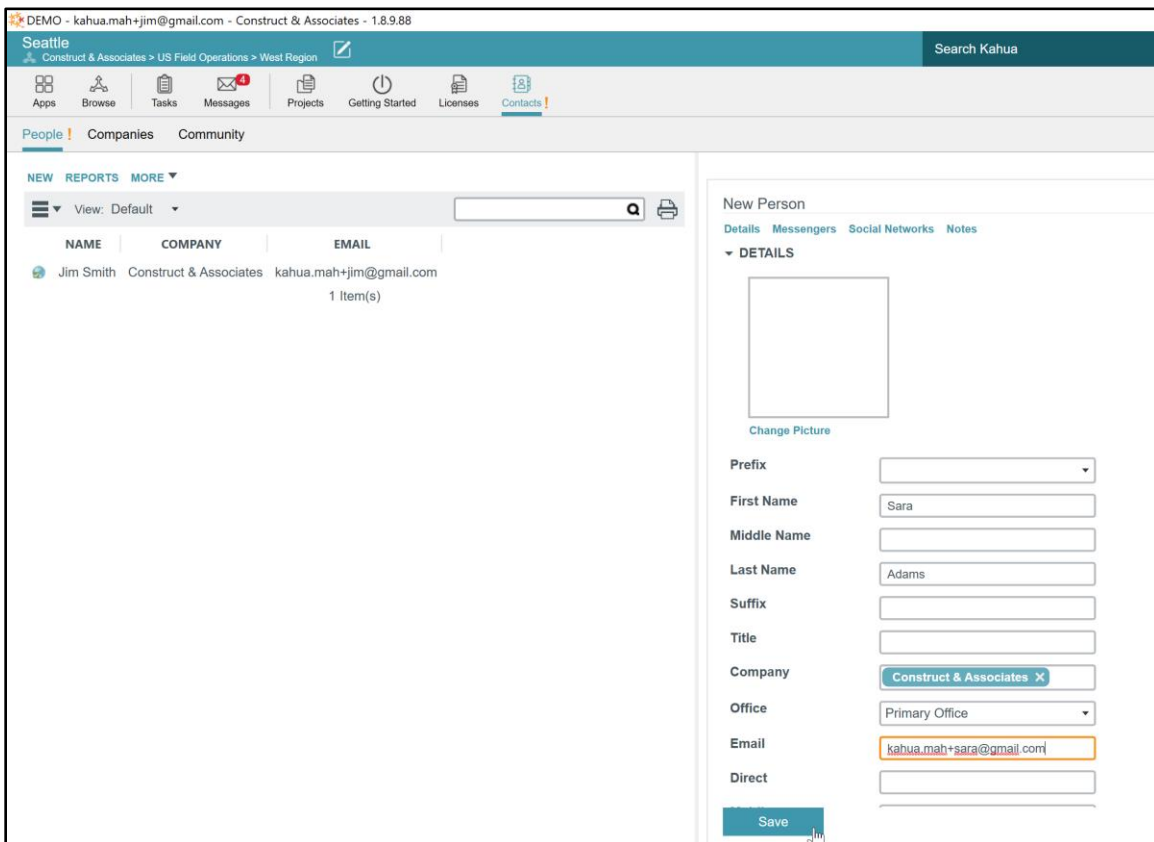
3. Click in the **Company** field and select the appropriate company from the list that appears (hint: you can start typing part or all of the name to shorten the list of choices).

4. Click **Save** to add the person as a contact. To invite a contact to join Kahua, click 'Invite to Kahua' at the top of the contact profile record. Remember, you should only invite to Kahua if the user will need to engage in project activity or view information in Kahua. See below around how to invite a contact to create a Kahua account.

INVITING A CONTACT TO KAHUA

When a contact has been added, Domain Administrators may choose to invite the individual to join Kahua. If the user does not yet have a login to Kahua, follow the below instructions:

1. Click on the contact profile of the user you wish to invite.

2. Click on 'Invite to Kahua' in the upper left corner of the profile.
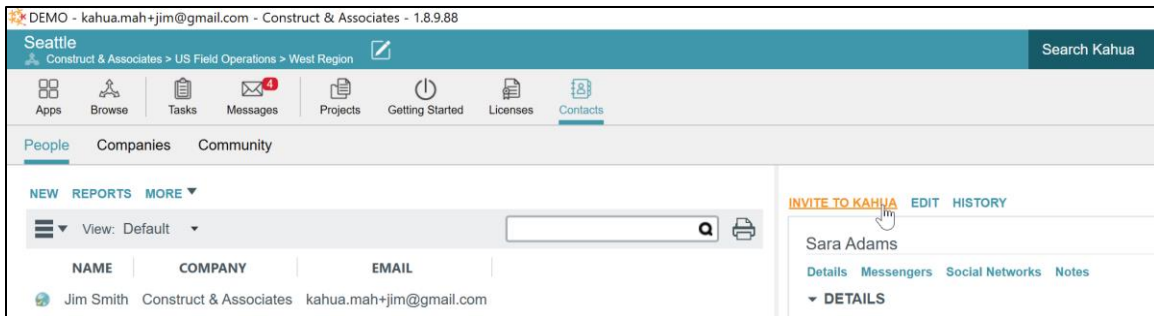
3. This will initiate an email to the contact – which will contain a unique registration link to set up an account.
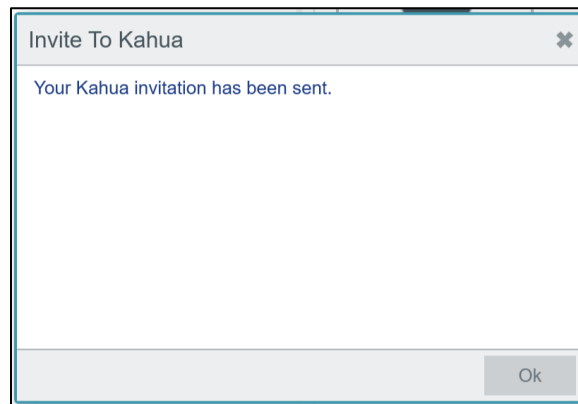

4. When the user joins Kahua, the Domain Admin may have to accept their request to join in which case a task will appear in the Domain Admin's Task application. The Domain Admin will click 'Accept' and the new user will now have an active Kahua account.
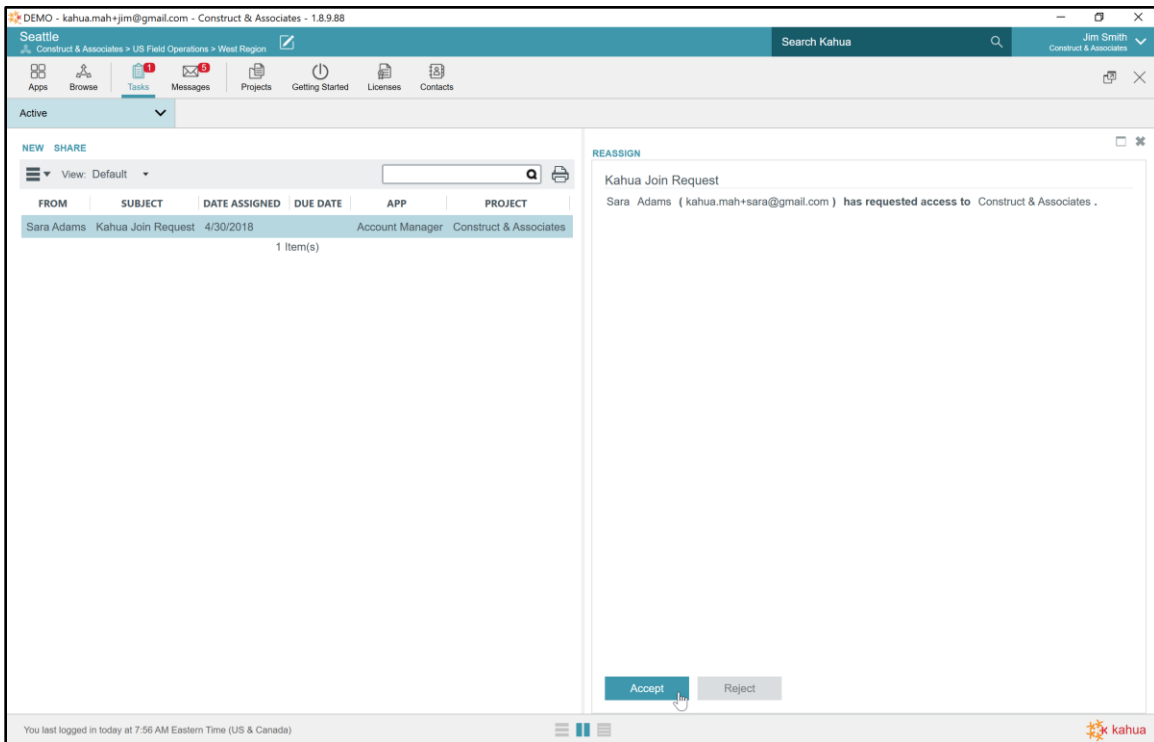
When a user joins Kahua, a green globe will appear by their name in the Contacts app – this indicates that the contact is an active user.

### EDITING COMPANY AND CONTACT INFORMATION FOR AN EXISTING RECORD

The Community sub-application is a listing of all Kahua users, and you can add any of these users to your local contact list. If the contact in your People list has a green globe next to their name, it means that they are a Kahua user and that they are published in the Community. If you see a green tag, this means that the data in your contact profile is in sync with what has been published by the user in the community.
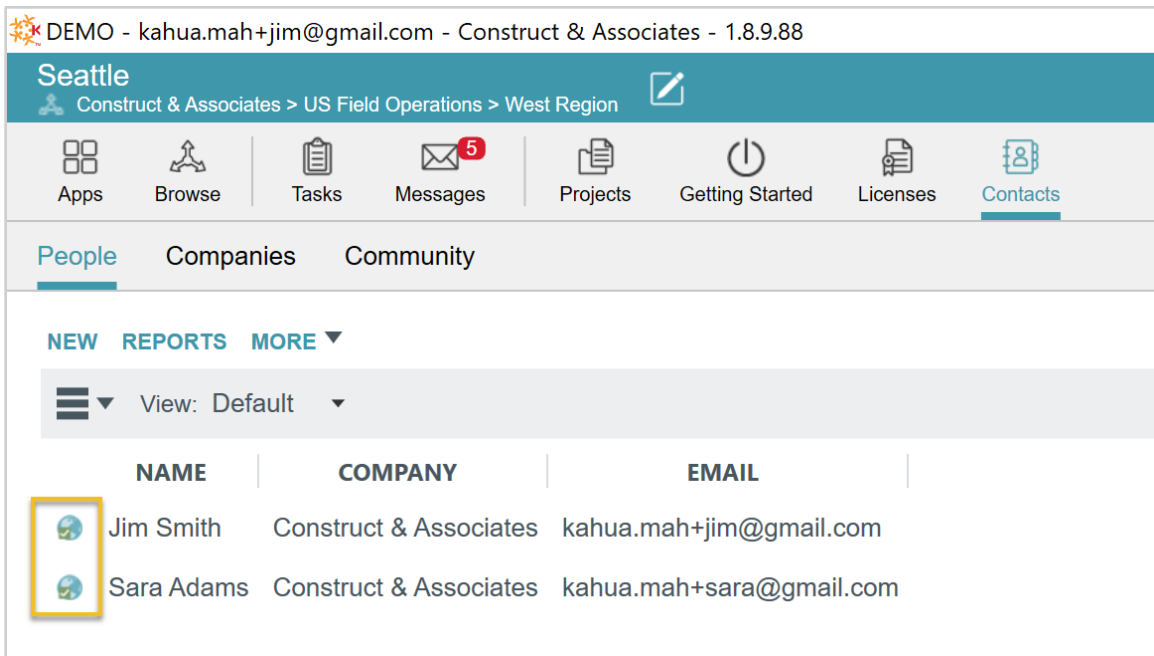
You can choose to add or edit the contact, but this will cause the contact to be out of sync with the record in the community. Best practice is to leave the synced information intact, but there may be situations in which you decide to update the contact in your local contact list. If company or contact information needs to be updated, please follow the steps below:

1. Open the **Contacts** app if not already opened.

2. Navigate to the **People** sub-application and search for the contact you wish to modify.

3. Highlight the contact and click **Edit.**

    You will receive a warning message detailing that the contact will be out of sync if you make edit. If you make the change and save, the green flag on the globe will turn to red as an indicator that the contact information is out of sync from the community contact.
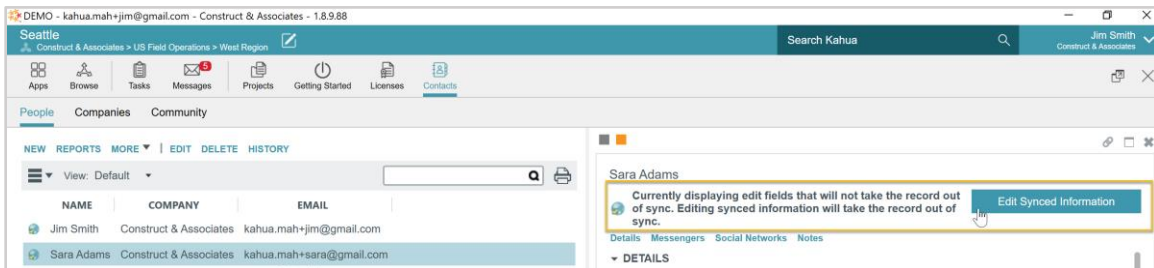
    Note: At any time, you can resync data with the community by clicking the 'Sync' icon near the globe icon. When you click the Sync button, you will receive a message indicating that the record information will sync with that in the Community. Any changes you have made will be overwritten by the Community information for that profile.

USER AND PERMISSION MANAGEMENT

The section below will walk you thru additional functions related to user management. These functions are necessary to understand as you build out your Kahua platform and begin to use to manager your company's portfolio.

ADDING ADDITIONAL DOMAIN ADMINISTRATORS

You may find it useful to add additional users to the Domain Admin group to help you administer your company's domain.

The steps below will walk you thru the process to add users to this group:

1. Open the **Groups** app – ensure you have navigated to the root (your Navigation Bar will say 'Company Name' rather than a project name).

2. Select the Domain Administrator group from the Log. The Domain Administrator group information displays in the Detail pane on the right and is defaulted to the Members tab.

3. To add an existing user to the group, click in the box pictured below and select the users name that you would like to **Add.** You may add one or more users to the group at a time.
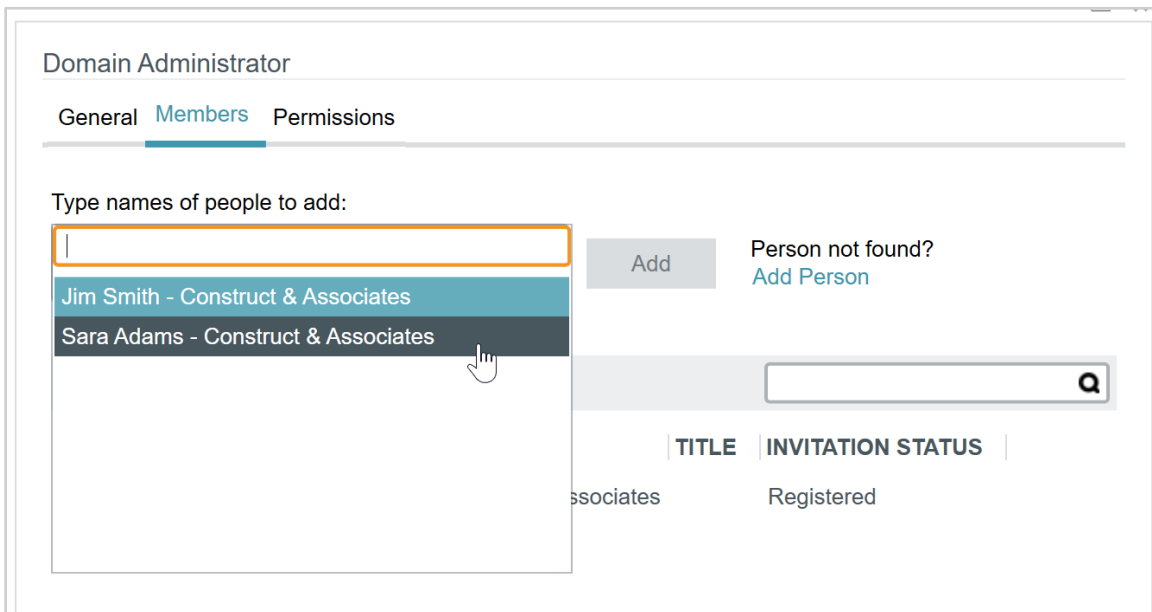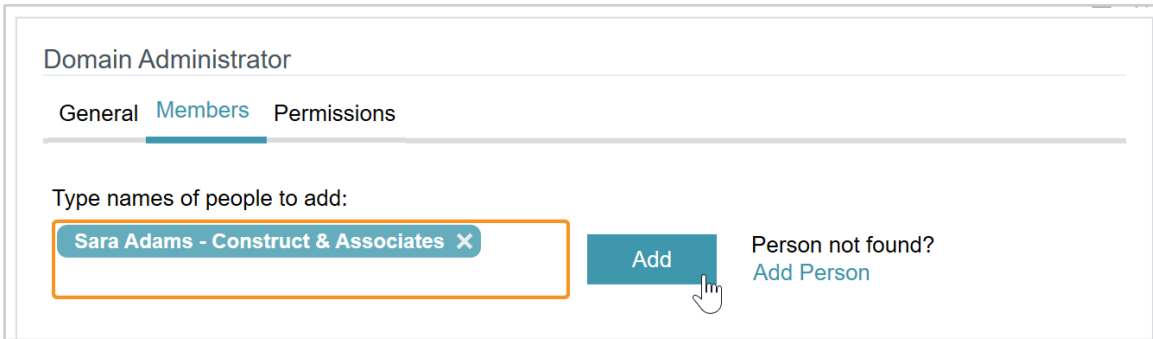
4. To add a brand new user to the group, click the **Add Person** link. Type in the person's email address in the input box and click **Search.**
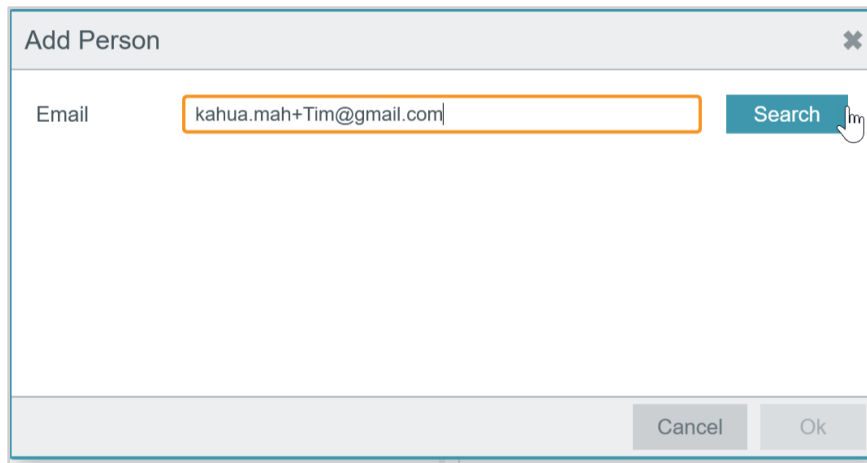
If no results are returned, you will be able to Enter their basic information as prompted and click **Ok**

Check the box to send an auto-generated email inviting them to join Kahua

Click **Add** to add that person to the selected Group. Remember, the individual will not be able to see applications until they register and have licenses.

Note: At any time, you can visit this same location to remove users from groups. This is especially important if at any time you want to reduce the level of permissions for a specific person.

ADDING/REMOVING USERS FROM GROUPS

When a user registers, they are defaulted to the Domain User group for the entire domain. It's important that you review the permissions that currently exist in this group to ensure new users can perform the functions you would expect them to. If you determine that users need to be added and/or removed from groups based on role, please follow the steps below to add/remove contact from groups.

1. Review the Navigation bar – recall that Groups adhere to inheritance model. If you add a user from a group at a location in the hierarchy, that permission will be inherited down the hierarchy unless

overridden. Check that you are in the level of heirarchy that's appropriate for this person's permissions.

2. Open the **Groups** app at the proper partition or location in the hierarchy.

3. In the Log on the left side of the screen, select the group that you would like to add/remove a user from.

4. In the Detail pane on the right side of the screen, you will see a user list for that group,

5. To add a person to this group, click in the field titled 'Type names of people to add:' and select the user's name from the drop-down menu,

6. Please note that the user you are trying to add must be a registered Kahua user. If they aren't, you will need to invite them to Kahua and go thru the steps to add a new contact/user in Kahua before this can be done.

7. Once the contact's name has been selected, click the **Add** button to the right of their name.

8. To remove a user from the group, select the contact's name from the list of users.

9. Click **Remove** and confirm in the 'Remove Member' pop-up.

CHANGING PERMISSIONS FOR A GROUP

To change permissions within an existing group, navigate to the root (Company Name should display in the Navigation bar). You will make changes to the group's permission within the Permissions sub-tab in the Group's record:

1. Open the **Groups** app at the root (where Navigation bar states 'Company Name') and click on the group that you want to edit. In most cases, companies will use the Domain User group to manage permissions.

2. Within the group record, click on the Permissions sub-tab.
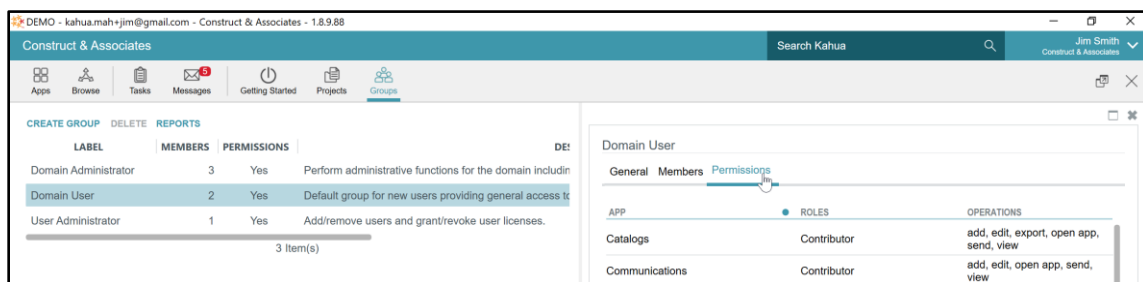
3. Click **Edit** at the bottom of the record.
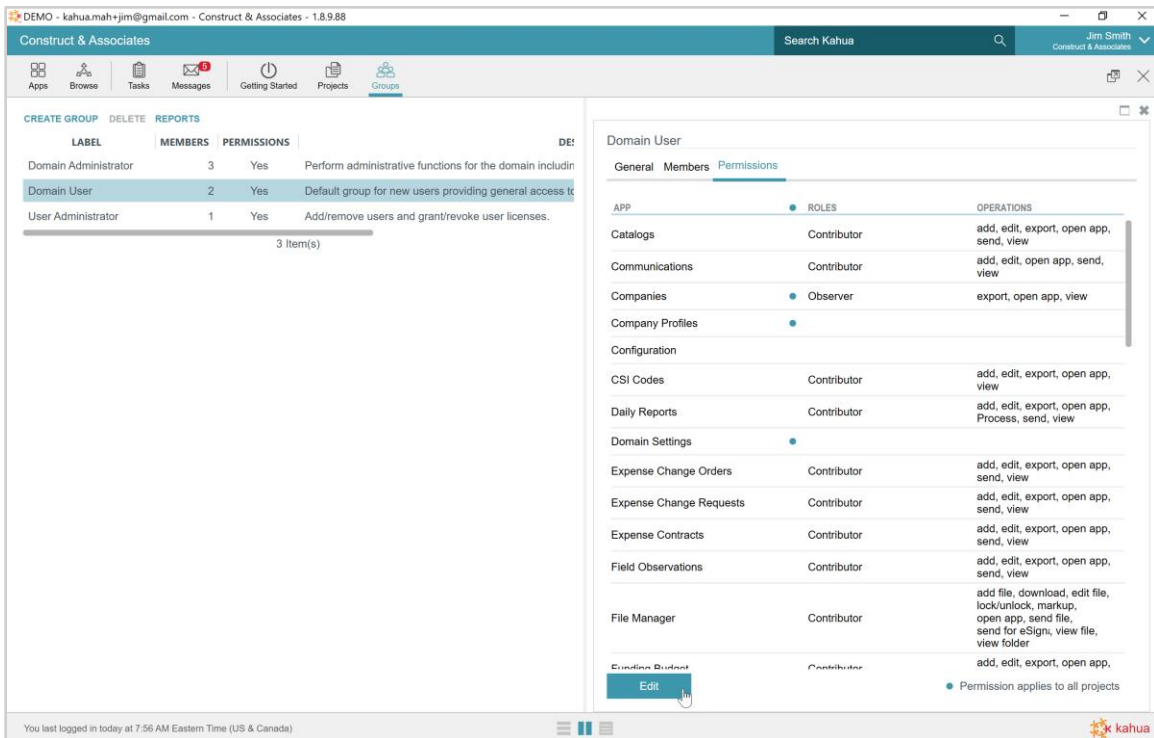
4. You may choose to change permission for an application by clicking the carrot to the left of the app name and selecting the proper permission level. Recall that users will not have this access until granted proper licenses.

    Actions associated with each permission level are indicated in parentheses to the right of each permission level.

5. Click **Save** to save the permissions for the group.

CREATING NEW GROUPS

In most situations, companies will be satisfied utilizing the groups that are defined 'out of the box' on the Kahua platform. In certain circumstances, you may find that it will serve your company better to define 1, 2 or even more additional groups with different permission levels. The steps below will walk you thru the process of setting up a new group:

1. Open the **Groups** app at the root (where Navigation bar states 'Company Name') and click **Create Group.**
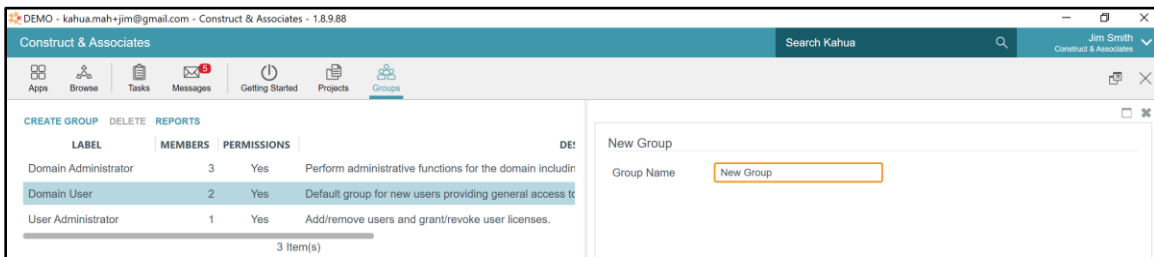
2. Enter a name in the **Group Name** field on the right side of your screen and click **Save.**

3. Click on the **Permissions** sub-app on the right side of your screen and click **Edit** at the bottom of the screen.

4. Customize the permissions for this new group as you see fit by clicking the down arrow to the left of the App name.

5. Click **Save** to save the permissions in your new group.

6. Click on the **Members** sub-tab and follow the steps above to add users to the new group. Recall that you should navigate to the proper partition in the Navigation Bar before adding or removing users to a group.

MANAGING LICENSES

As a Domain Administrator, you can assign and/or revoke licenses for users. Licenses that have been assigned can be revoked and reassigned to other users if a user no longer requires a license. To apply licenses, the recipient must have completed registration for a Kahua account. If the user does not yet have a Kahua account, please see above sections around how to setup a user. The steps below will walk you thru the process of managing licenses for your company's domain:

1. Open the **Licenses** app – this application will be in the Administration section of your App menu.
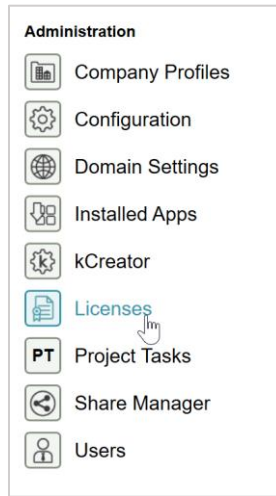
2. Select the license type that you would like to assign – each license type purchased will appear in this application. The application will detail how many licenses have been purchased, as well as the number that have been assigned or remain to assign.

3. A user must have a Platform license before applying any other licenses. Click on 'Kahua Platform License'.

4. On the right side of the screen, click the **Assign** button located at the top of the detail pane.

5. In the **Assign To** field, select the users name that you would like to grant a license – recall that only individuals in your Contact application will appear here. If an individual is not present in the drop down, ensure that they have not already been assigned a license or refer to the 'Creating and Using Contacts, Community' section before proceeding.

6. Click **Assign** at the bottom of the screen.

   Complete the same exercise for any other licenses required by the individual you are setting up.
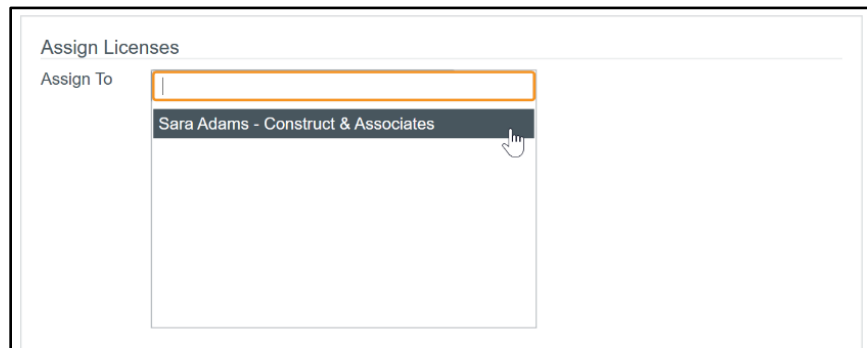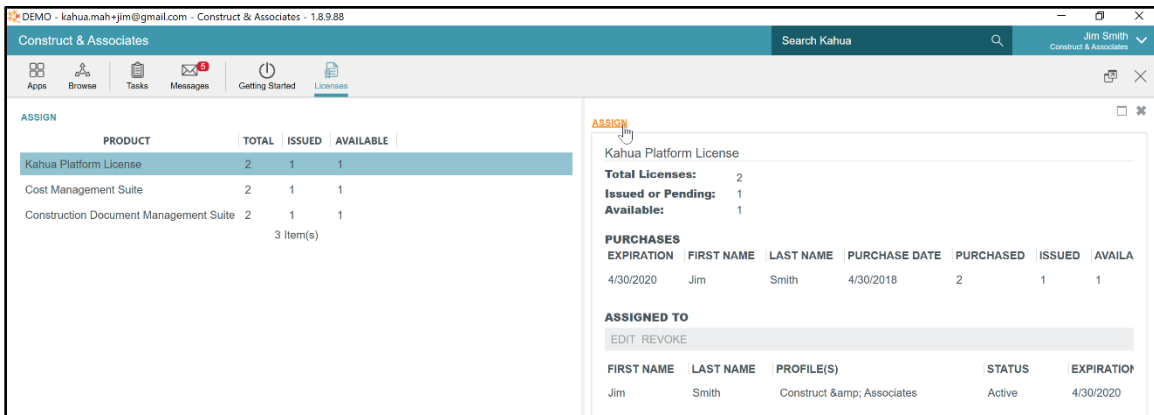
When the user logs in, their app menu will now include additional applications based upon licenses applied and permissions granted in the Groups app.

Note: At any time, you can visit this same location to revoke licenses from users. To do so, click on the license you want to revoke, then click on the user's name in the log and click 'Revoke'.

WORKING WITH MAYO: SHARE INVITATIONS

ACCEPTING A SHARE – ACCEPTING A SHARE REQUEST

Mayo will share applications with your company to collaborate on projects. These sharing opportunities are specific to a project and to an application, so a unique share will be setup with specific permissions on a project and within a certain application. When Mayo or another company initiates a share, the user will receive a Task in Kahua and an email indicating that an application has been shared for a specific project. There are two options for accepting the share: 1) you can accept into an existing project that already resides in your company's domain, or 2) you can create a new project to 'house' this share. One important thing to note is that you should accept all share requests for a single project into the same project on your domain. This will ensure that you don't end up with information for one project in multiple locations. There is not a way to 'move' a share from one project to another once accepted.

When Mayo initiates a share request, you will receive a task in Kahua titled **Kahua Sharing Invitation**. Navigate to the task and follow the steps below:

Click on the task

1. Select or Create the corresponding project.

2. If a corresponding project does not exist on your domain, click on the **Create New Project** link, and click **Save** to create the project.

3. If the project already exists on your domain, select the corresponding project from the drop-down menu.
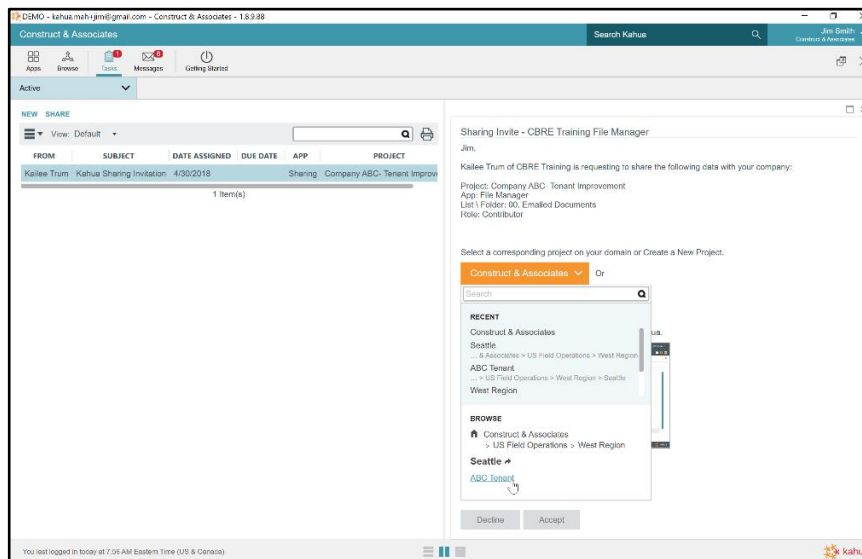
4. Click **Accept** to accept the share - When you click Accept, the task is completed and closes.

5. If you received multiple sharing requests, you will repeat this process to either accept the share into an existing project, or into a newly created project.

6. To interact with the shared application, navigate to the project that you accepted the share for in the Navigation Bar.

7. Once the project is displayed in the teal Navigation Bar, open the application in the App menu corresponding to the accepted share.

8. In the upper left corner, you will see a drop down. When you click the drop down, you will be able to toggle between your domain's instance of that app and the shared instance. Any active shares will be indicated by an orange icon.
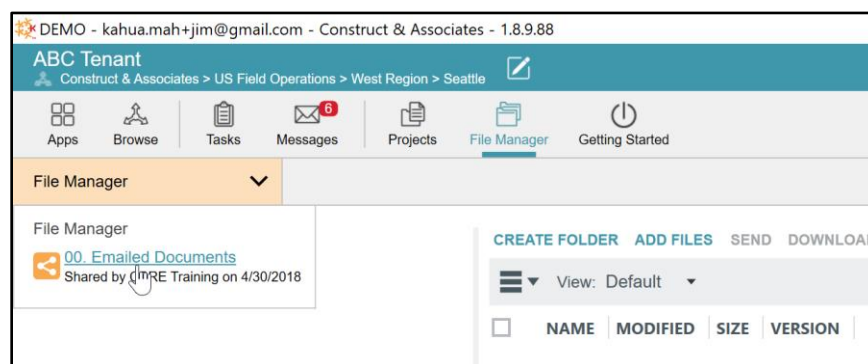
9. When you click into that instance, you are viewing the Mayo version of that application with permissions as designated by Mayo.

   If the orange icon turns grey, this means that Mayo has terminated the share and your view will be read-only (maintain a copy of the static data at time of termination).

   When you accept a share into an existing project, you cannot 'move' the share. It is important to ensure that you select the correct project, or create a new project if necessary, prior to accepting the share.

   Sharing requests can also come via email. To accept using the email, simply click the email titled New Kahua Message: Kahua Sharing Invitation and follow the steps. Please note that if you already have Kahua opened, the email link may not work. The simplest method for accepting a share is to follow the steps above for accepting a share using the assigned task in Kahua.

REVIEWING ACTIVE SHARES: SHARE MANAGER

To review and manage active shares within a domain, Domain Administrators can access an application called Share Manager. Share Manager allows visibility into both incoming and outgoing shares within your company's domain.

INBOUND SHARES

Shares are set up (and accepted) into specific applications for each project – the Share Manager will provide information for **Inbound shares** including:

Source Company – which company has initiated the share (in this case, Mayo will be the source company sharing application with your company for specific projects).

Source Project – the project that the share is for.

Destination – the project on your company's domain that you are accepting the share into (recall you may choose what project you accept the share into – or may create a new project to tie it to).

Application – what application is being shared with you.

List \ Folder – If sharing a specific list or folder within the application, will be listed here.
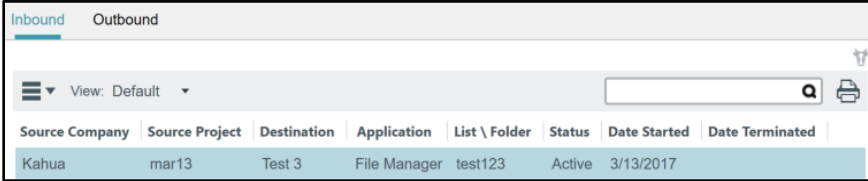
Status – Indicates whether the share is:

Terminated – no longer active; indicates that the share cannot be accessed; in some cases, users will be able to reference a static copy of the share at the time of termination in the application, but the share will no longer allow your company to edit, move or manage the records in the application.

Pending – share has been initiated by the Source Company and is awaiting acceptance by your company.

Active – share has been accepted and can be accessed by those with proper permission within the Destination project and specified application.

Pertinent Dates – the Date Started and Date Terminated refer to the dates that the share became Active (accepted by your company) and the date (if applicable) that the share was terminated by the Source Company.

TROUBLESHOOTING

If a user cannot open the application that was shared, check that the user has proper licenses to access that application in the Licenses application (an Administrative function).

If the user is not seeing the share within an application, ensure they are navigating to the proper project in the Navigation Bar – the share was accepted to a specific project. The name of the project may not necessarily be the same as the name of that same project on Mayo's domain. The user who accepted the share chose where to specific drop the share (whether it was to create a new project or to tie to an existing project).

If the user is still having issues accessing the share, please ensure the user has permission to that application in the Groups application.

CONTINUING KAHUA SETUP TO MANAGE YOUR OWN PROJECTS

CONFIGURING DOMAIN SETTINGS

Kahua will allow Domain Administrators to configure certain domain settings, including authentication requirements, domain defaults and adding a logo that will display in the Getting Started page upon login for your users.

To setup your Domain Settings, navigate to your app menu and click 'Domain Settings'. This application has a variety of sub-applications. The primary applications to set up include:

Authentication: Set password requirements and identify specific email domains that may setup/register for an account on your domain without having to submit a request to the Domain Administrator to join the site.

Domain Defaults: Set time zone for your domain.

Getting Started Settings: Upload photo to be displayed on Getting Started page upon login (generally your logo).
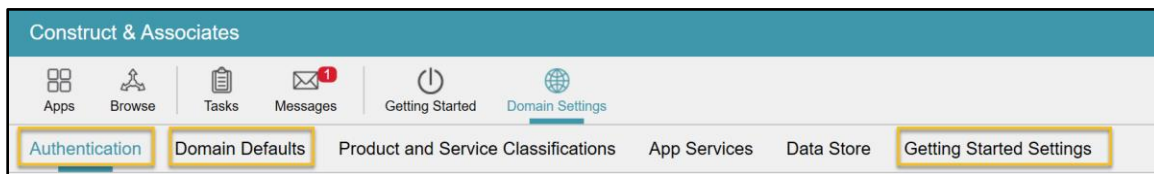
AUTHENTICATION: REGISTRATION AUTHENTICATION AND PASSWORD REQUIREMENTS

The Authentication app allows you to identify email domains that will bypass approval when a user requests an account on your domain. For instance, you may type 'construct+associates.com' in the text box below. Anytime an individual with an email address '@construct+associates.com' tries to register for an account on your site, they will be allowed to join without a Domain Admin approving their request.

Regardless of whether approval is required or not, the Domain Administrator will need to apply licenses and place in the proper permissions group before the user can utilize the domain.

DOMAIN DEFAULTS

In Domain Defaults, set the time zone for your domain. Consider making the time zone indicative of where the company is based or headquartered.

Users may set a personal time zone within their Account Settings.

ADDING A COMPANY LOGO TO THE GETTING STARTED PAGE

In the 'Getting Started Settings' tab in the Domain Settings app, a company logo may be uploaded. This logo will display on the Getting Started Page for all users in the company's domain. The logo may also be used to brand specific record PDF summaries.
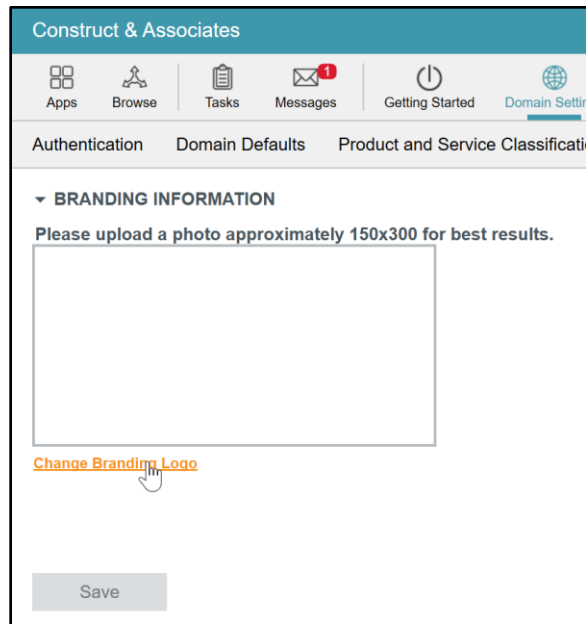
SETTING UP NAVIGATION STRUCTURE/HIERARCHY

Kahua allows you to structure your domain in the same way that your organization is structured. For example, if your company is organized by region, then you can setup different regional partitions in Kahua to organize and categorize your projects. Maybe your company is organized by different lines of business as well. Kahua's flexible platform allows you to organize your domain to best fit your company's needs.

```
ABC Company
US Field Operations
├─ West Region
│  ├─ Seattle
│  │  ├─ Project A
│  │  └─ Project B
│  └─ Los Angeles
│     └─ Project A
├─ Central Region
│  ├─ Dallas
│  │  └─ Project A
│  └─ Chicago
│     ├─ Project A
│     └─ Project B
└─ East Region
   ├─ New Jersey
   │  └─ Project A
   └─ Miami
      ├─ Project A
      └─ Project B
```
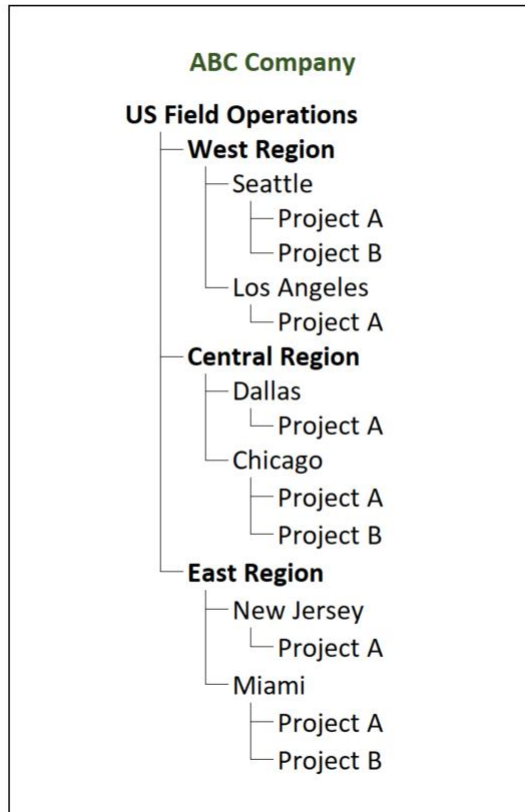
Before we start building your company's hierarchy, let's walk thru some common terminology that you will see throughout this document.
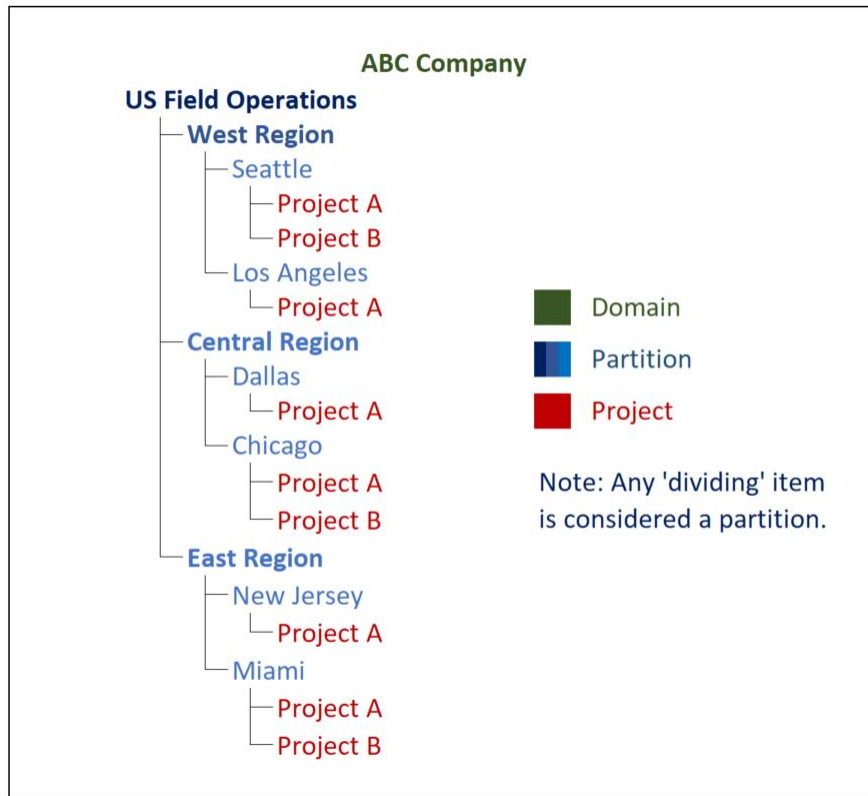
Domain – A domain within Kahua is your company's 'site' within Kahua. Users are tied to your company's domain and you will set up your company's hierarchy and project structure within your domain.

Partition – A partition is a division within your domain. You can have multiple partitions as well as partitions at a few (or many) levels. In the structure below, each region would be a partition. The branches (or cities) below each region are still defined as a partition.   Partitions are used to compartmentalize your organization within Kahua. Partitions can also be used to segment permissions for users and to configure applications to meet specific partition needs.

Project – A project is a single entity in the hierarchy, a project may also be referred to as a node.

Kahua's design allow companies to organize projects in a hierarchical manner and also manage permissions and configuration based upon the project structure. Kahua adheres to an inheritance model – this is an important concept that may impact how you want to design your company's partition structure.

The inheritance model means that you may set up any of the following features at a specific level in your structure and all projects below that partition will inherit the configuration of the parent unless otherwise overridden. This applies to:

Permissions

Settings (make specific fields required, etc.)

Reporting (if custom reports created) – ability to report at higher level in hierarchy

SETTING UP YOUR DOMAIN

Now it's time to setup your company's domain. Please follow the steps below to setup your hierarchy:

1. Open the **Projects** app

2. Click **New** to begin building out your domain structure
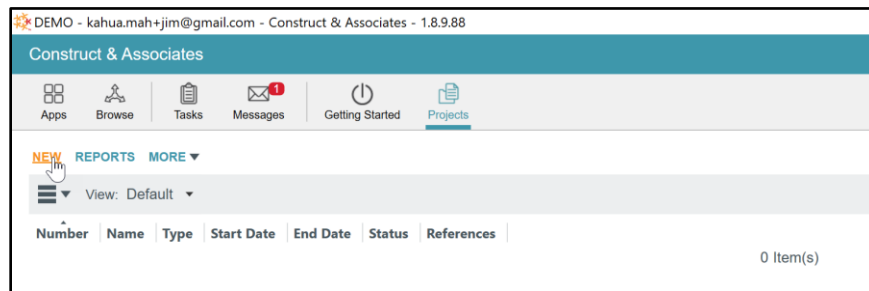
3. Begin by entering the highest level of your company's structure in the **Name** field

4. In our example above, you would enter 'US Field Operations'
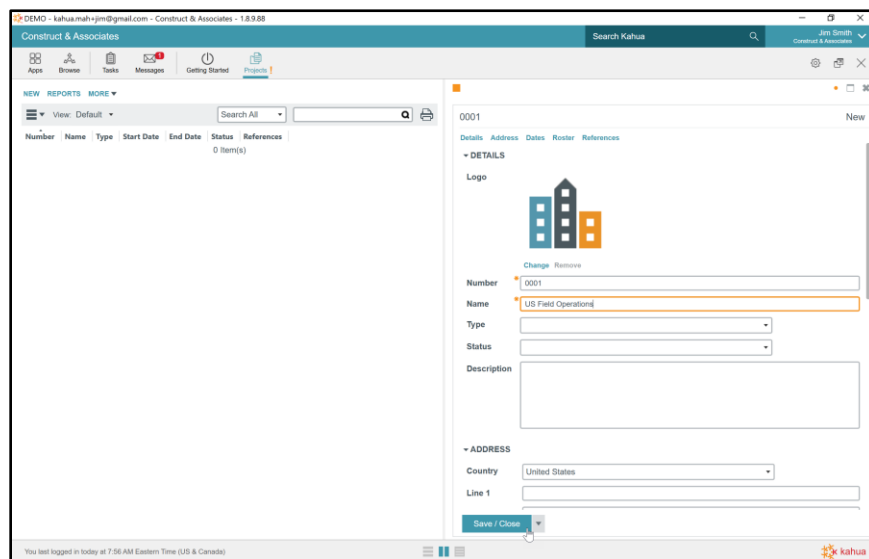
Continue by entering any additional information you feel is important, and click **Save/Close**

Please note that the required fields are denoted with an asterisk

Before we continue building out the company structure, let's stop and learn about a key component regarding navigation within Kahua.

Please skip to the section titled "Understanding Navigation and Location within Kahua" to learn about, and understand, how to navigate the partitions in Kahua. When you're done, click the link to return to this section to continue with setting up your domain.

SETTING UP YOUR DOMAIN (CONT)

5. Use the **Browse** button to navigate to the level you just created.

6. In the example above, you will navigate to 'US Field Operations' and continue building out the company structure.

7. With the **Projects** app open, click **New** and repeat steps 2 thru 4 above.

8. In the example above, you will create a 'West Region'.

9. The partition displayed in the teal Navigation Bar will be the parent of any projects created in the Projects app. To create an additional layer in your hierarchy, ensure the Navigation bar displays the parent of the new project or partition.

10. Repeat these steps to complete your company hierarchy in Kahua. Then skip to the configuration section.

UNDERSTANDING NAVIGATION AND LOCATION WITHIN KAHUA

As we move forward with creating our company structure in the domain, it's very important to understand how to navigate within the system, and how to identify where you are to ensure you are creating records in the right partitions. Your location within Kahua is always displayed in the teal bar at the top of the screen. Follow the steps below to navigate down to the next level in your structure:

1. Click the **Browse** app at the top left of the screen.

    You will see your company name, followed by the highest level in your hierarchy that we just created.
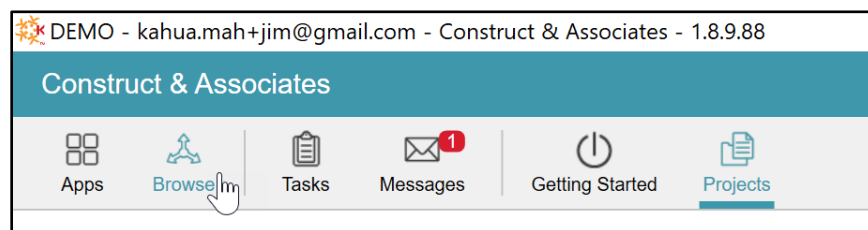
2. Click on the highest structure.

In our example above, you would click on the 'US Field Operations' link.
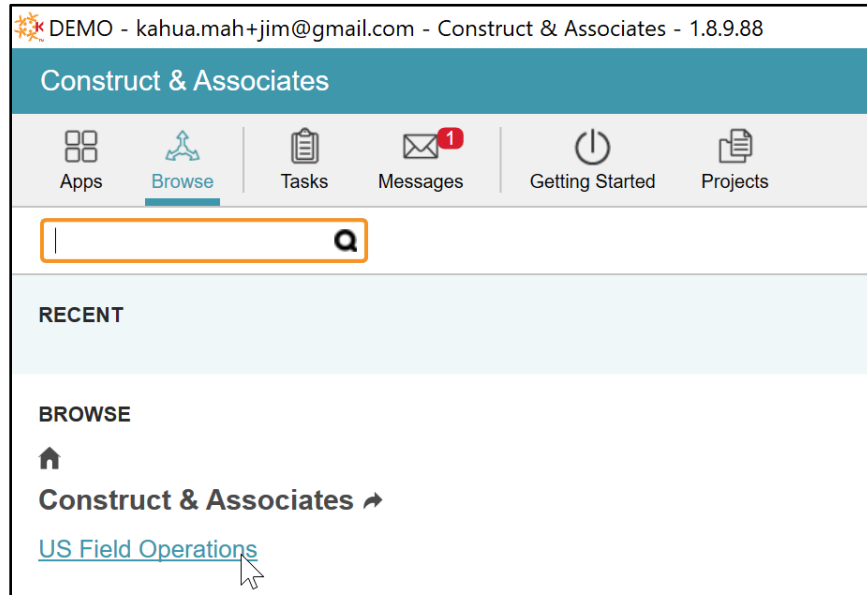
Note that in the teal bar, your location is now shown as the partition that you had just created. The system will display the path to that partition below the name. For instance, in this case our path is Construct & Associates / US Field Operations.

This means that you have successfully navigated down one level in your company hierarchy.
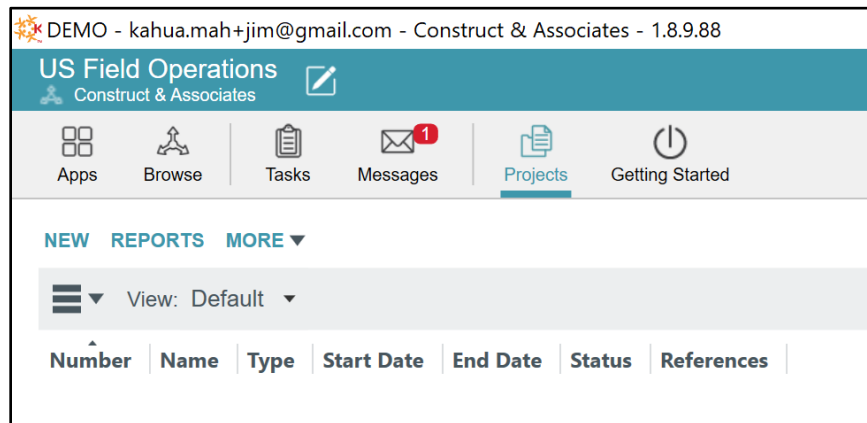
3. To navigate back up a hierarchy, click **Browse** and click on the house icon. This will take the user back to the root/top of the domain hierarchy. Click on the company name to take you to the company partition, or click on the red icon to the right of the company name to drill down one level.

    The number on the red icon demonstrates the number of projects or partitions within the parent partition.

Note: This is a very important function in Kahua that you will want to study and understand. It is essential to ensure that you are performing functions in the correct locations within your company structure.

Please click this link to bring you to the section that will walk you thru setting up the remainder of your company hierarchy.

CONFIGURATION OF APPLICATION FIELDS, DEFAULT VALUES AND LOOKUP VALUES

Within your company's domain, each application purchased will be installed 'out of the box.' One of the benefits of Kahua is that the out of the box applications can be configured by the customer to reflect elements of customization. Configuration follows the inheritance model, so applications can be configured at a specific location in the hierarchy and will inherit down (unless overridden). This allows for customization across the domain or in specific partitions of these elements:

Field Names/Labels

Setting required or visible fields

Lookup Values in dropdown fields

Numbering of records within the application

The below will demonstrate how each of these customization items will occur. Please recall that any applications shared with you (from Mayo) will NOT be configurable, as you are accessing a Mayo custom application. For any project information you enter directly into your domain, you will be able to configure the applications.

CHANGING A FIELD LABEL

In Kahua, you may change the label of a field. To add a field would require Development activity, but if your team will not utilize all fields, you may repurpose or re-label a field. To do so,

1. Navigate to the partition at which you want to configure the application – to configure for the entire domain, navigate to the root (top of the hierarchy). To configure at a point in the hierarchy (and inherit down), navigate to that point in the hierarchy in the Navigation Bar.
2. Click on the Apps Launcher and select the Configuration application.
3. Choose the application in the Log that you wish to configure.
4. A Detail pane opens on the right of the screen. Choose the sub-tab in the detail pane called 'Fields'.
5. Click 'Override'.

Notice that the field name and label for each field is listed. To change the label that a user sees in the record, clear out the text in the 'Label' column and replace with the label you would like the user to see.

6. Click Save. Any new records created in this application from this point in the hierarchy and down will now reflect this change.

SETTING REQUIRED OR VISIBLE FIELDS

In Kahua, you may indicate what fields are required and hide fields that may not be utilized. To do so,

1. Navigate to the partition at which you want to configure the application – to configure for the entire domain, navigate to the root (top of the hierarchy). To configure at a point in the hierarchy (and inherit down), navigate to that point in the hierarchy in the Navigation Bar.

2. Open the Configuration application.

3. Choose the application in the Log that you wish to configure.

4. The Detail pane will open on the right of the screen. Choose the sub-tab in the detail pane called 'Fields'.

5. Click 'Override'.

6. Click the 'Is Required' box next to each field that you want the user to be required to enter upon save; click 'Is Visible' for any fields that should be displayed in the record.

7. Click Save. Any new records created in this application from this point in the hierarchy and down will now reflect these changes.

CONFIGURING LOOKUP VALUES

In Kahua, you may specify the available selections in a look up list.. To do so,

1. Navigate to the partition at which you want to configure the application – to configure for the entire domain, navigate to the root (top of the hierarchy). To configure at a point in the hierarchy (and inherit down), navigate to that point in the hierarchy in the Navigation Bar.

2. Open the Configuration application.

3. Choose the application in the Log that you wish to configure.

4. The Detail pane will open on the right of the screen. Choose the sub-tab in the detail pane called 'Lookups'.

5. Click 'Override'.

6. Choose the field on the left that you are looking to configure lookup values for.

7. Edit the lookup values that exist for the field, change the order of the values using the arrows or add/remove lookup values as appropriate.

8. Click Save.

These lookup values will now be in place for new records from the point of configuration and downward in the hierarchy unless overridden at another point in the hierarchy.

NUMBERING CONFIGURATION OF RECORDS IN AN APP

In Kahua, you may configure your numbering system for records in an application. To do so,

1. Navigate to the partition at which you want to configure the application – to configure for the entire domain, navigate to the root (top of the hierarchy). To configure at a point in the hierarchy (and inherit down), navigate to that point in the hierarchy in the Navigation Bar.

2. Open the Configuration application.

3. Choose the application in the Log that you wish to configure.

4. The Detail pane will open on the right of the screen. Choose the sub-tab in the detail pane called 'Number'.

5. Click 'Override'.

6. Indicate in the 'Type' field whether you would like the system to:

   Auto – not editable by user, assign next number to record

   Auto-suggest – suggest next number, but allow editing by end user

   Manual – user will enter record number

7. Click pertinent settings, such as allowing or not allowing duplicates, whether the numbers should begin anew within each project or across the domain ('Share Numbering with Child Partitions', and any prefix or suffix desired.

8. Click Save.

INTERACTING WITH PROJECTS IN KAHUA

In this section, you will learn how to create projects within Kahua. Your company will be able to create project shells to accept Mayo application shares into. This way, you will be able to tie multiple shares across applications to one project.

If a project has not been created for a share, you may create the project upon acceptance of a share or create using the below steps. Creating a project shell as described in this section may be most useful if you intend to utilize the Kahua system to manage additional project information outside of collaboration with Mayo.

TIP: Domain Administrators will have access to all the below functions. Domain Users will not have access to complete the below functionality unless the Domain Administrator increments their group's permission for the Projects app. 'Out of the Box' Domain User permission will be view-only (Observer) to Projects application.

ADDING AND EDITING PROJECTS

There are many benefits to using Kahua outside of the collaboration on projects with Mayo. You can, very easily, setup your own projects in Kahua and use the robust tools for managing the projects. The steps below will walk you thru the steps require to setup a project in Kahua.

ADDING A PROJECT

Before you begin, make sure to navigate in your Navigation bar to the partition or project that you want to be the parent for the new project. If you want to create the project directly under a partition such as a region, ensure the region is displayed in the Navigation Bar.

1. Open the **Projects** app – the Log will display all projects directly underneath the parent partition you navigated to in the Navigation bar.

2. If this is where you'd like to create your project in your hierarchy, click **New** in the upper left of your screen.

3. If desired, change the project number in the **Number** field. Numbering can be configured to fit your company's needs through configuration. See the section titled "Numbering of Configuration Records in an App" for instructions.

4. Enter a project name in the **Name** field. This is the name that will show in the Navigation Bar when you work within the project.

5. Notice the orange asterisk beside both the Number and Name fields - - this signifies that these fields are required fields. This can be altered in the Configuration application by Domain Administrators if desired.

6. Continue by filling in all known project information. The project can be updated later with additional information.

7. When you have entered as much information as possible, click the **Save / Close** button at the bottom of the screen. Your project is now created and will be accessible in the Navigation bar at the top of your screen.

EDITING A PROJECT

1. Open the **Projects** app when you are at the parent partition in the Navigation Bar and click on the project on the left side of the screen that you wish to edit.

    Project details will populate the right side of the screen.

2. Click the **Edit** button on the top right or left of the screen to open the form for editing.

3. Edit existing details, or add additional details.

4. Click the **Save / Close** button at the bottom of the details screen to save your changes.

Recall that to enter budget or other relevant information within a project, you will need to navigate to the project in the Navigation Bar at the top of the screen and then navigate into the applications you wish to enter records into.

DELETING A PROJECT

1. Open the **Projects** app and click on the project on the left side of the screen that you wish to delete.

2. Click the **Delete** button on the top right or left of the screen.

3. A popup will appear to confirm your action to delete, click **Ok** to perform the function.

MOVING A PROJECT TO ANOTHER PARTITION

1. Open the **Projects** app and click on the project on the left side of the screen that you wish to move.

2. Click the **Move** button on the top right or left of the screen.

3. A window will pop up with your domain hierarchy, navigate to the location in the hierarchy where you would like to move the project and highlight the folder.

4. Click **Move** and the project will be moved to that location.

COPY A PROJECT

1. Open the **Projects** app and click on the project on the left side of the screen that you wish to copy.

2. Click the **Copy** button on the top right or left of the screen.

3. Enter a project name in the **Name** field in the popup.

4. Select the location within the folder structure where you would like the new project to reside.

5. On the right side of your screen, select the functions you would like to copy with your project.

   The system defaults with **Include folders** and **Include files** selected.

6. Check/un-check the desired boxes.

7. Click **Copy** at the bottom right of your screen.

   You will see a popup notification letting you know that it may take several minutes to complete the copy function - - Click **Ok** to copy.

VIEWING PROJECT HISTORY

1. Open the **Projects** app and click on the project on the left side of the screen that you wish to view history on.

2. Click on the **History** button at the top right or left of the screen.

   Full editing history is displayed.

To view records related to this project, click on the **View Related Records** button below the displayed history.

IMPORTING / EXPORTING OF PROJECTS LOG

There are several benefits to using the import / export functions in Projects. Using the export function will provide you with a quick Project Log for the partition that you are viewing. And using the import function provides you with a quick way to add projects in bulk. This is especially useful if you are in the beginning stages of setting up your domain and would like to use Excel to upload multiple projects at one time. The steps outlined below will walk you thru these functions:

To exporting a Project Log:

1. Open the **Projects** app.

2. On the left side of the screen, click on the **More** button to view the drop down.

3. Click on **Export**.

   A popup will appear asking if you want to include the lookups, it's best practice to leave this checked.

4. Click **Ok.**

5. Select the location on your computer where you would like the document saved.

6. Give the file a name and click **Save.**

IMPORTING PROJECTS

You must use an export file from Kahua to load projects in bulk - - if you haven't already done so, please follow the steps in **Exporting a Project Log** to get a clean file to be used for importing. This **must** be done immediately preceding an import to ensure the data will import correctly.

1. Navigate to where the Project Export file is stored in Windows.

2. Open the Project Export file with Microsoft Excel. Click on the **Project** worksheet tab.

3. Enter pertinent project information into the following columns:

   Number – this field is not required if you would like to let Kahua generate sequential project numbers for you.

   Name – enter project name, this field is required.

   Type – select type from the list of values.

   These are the included lookups that you were prompted to include on the export:

      Project Status – select status from the list of values.

      Address, **City**, **State**, **Zip** – enter address of project if known.

   **Description** – enter project description if desired.

4. Continue entering fields as required, the remaining fields are <u>not required</u> so it is at your discretion as to what you want to enter before importing.

5. When complete, save and close the file.

6. Open the **Projects** app in Kahua.

7. On the left side of the screen, click on the **More** button to view the drop down.

8. Click on **Import.**

9. Select the file and click open.

10. Kahua will import the file.

11. Click **Ok** and the projects will import.

      A popup will appear providing you with import details for the number of items saved as well as the number of items not saved (indicating an error with those records.

SHARING YOUR PROJECTS WITH OTHERS

OUTBOUND SHARES

Domain Administrators can also manage and create outbound shares with other third-party companies if relevant – to manage and review Outbound shares that your company may control and initiate, see the Outbound share tab:
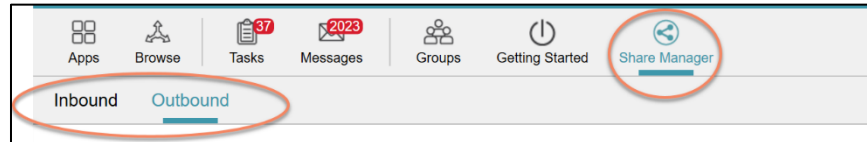
Within the **Outbound** share tab, you can initiate or review a log of current outbound shares.

Note that Mayo will initiate all shares in working with you (they will appear in the Inbound share list) – the below is applicable where your company would like to initiate a share from your domain with another third party.

 To initiate a share:

1. Navigate to the project that you are initiating a share for (in the Navigation Bar).

2. Click Add in the Outbound share tab in the Share Manager application.

3. Check that the 'Project' displays the proper project that you would like to share a record for.

4. Choose either a Company or a Group to share with – note the difference between these two options below:

    Company – choose a Company from your Companies application; the company must have a domain in Kahua (have active users). You will choose a contact from this Company to share with, and this individual will need to accept the share. At that point, any user in the company with permission to the project on their domain will be able to access that shared information.

    Group – choose a Group from your Groups application to share with. This may include individuals from multiple companies – you will need to choose at least 1 individual to share with within the group. When you choose that user, upon acceptance, anyone in their company within the Group selected may access the share. To send to multiple individuals in the group at once, choose multiple users (one from each company you wish to share with) in the group to send to. Each company must have 1 user accept the share before it is also shared with the others in that group from their company.

5. Choose whether to Allow Copy (if enabled for the application chosen) – this allows the third party to retain a copy of the records in the shared application upon termination of the share. Users will no longer be able to modify or add records but will be able to access a static copy of the records as they

were upon termination of the share. This is helpful so that third parties retain a copy of data when their role on the project is complete.

6. Create an appropriate filter for the data shared in the application – specific attributes can be utilized to filter the log of records shared in the application you are initiating a share for. This may be helpful to ensure the share only displays appropriate information for the third party to see.

7. When complete, click Send Invitation. The user(s) selected will receive a share invite and will need to follow the steps described in the section 'Accepting a Share Request'.