Construction Contract Creation Quick Reference Guide		
November 2019		Prepared for the Mayo Clinic Enterprise Kahua Deployment

CONTRACTS APP OVERVIEW

The Contracts app will allow users to create Construction, Design, and CM at Risk / Design Build type contracts and route them through approvals by all parties. A contract is tied to a project and a project may have many contracts. A contract can be created by processing a proposal from the bidding app into a contract in the expense app or a user can click **New** in the Contracts app.

Mayo contracts have three basic workflows:

1. A Contract, complete with a detailed Cost Item Grid is created by processing an awarded Proposal from the Bid Management App. In this case, the Contract is sent through workflow for CIP signature, and then for review by Mayo approvers.

2. A Contract is created by a Mayo user in the Contracts app then sent to the CIP to provide a proposal. In this workflow, the CIP completes the Items Grid in detail then sends the contract for review and approval by Mayo approvers.

3. A Contract is created to record an agreement outside of Kahua. In this workflow, a contract is created outside of Kahua and signed PDF is attached to a contract record and the record is locked without going through workflow.

The approval workflow supports returning contracts for updates/changes before final sign off. When a contract has been signed and finalized, the contract is locked in the Contracts app and a PDF version complete with all legal contract language and signatures is rendered. This PDF version, referred to as the Contract View, serves as the executed legal contract and is tied to the contract record. Each party involved manages the review, approval, or rejection of the Contract through actionable tasks in Kahua.

WHAT YOU WILL LEARN FROM THIS DOCUMENT

This document is written from the perspective of the second workflow described above: creating a new contract in Kahua. This approach provides for documenting all sections of the contract. The information applies to any contract even if the workflow you use does not require manual completion of all sections of the contract.
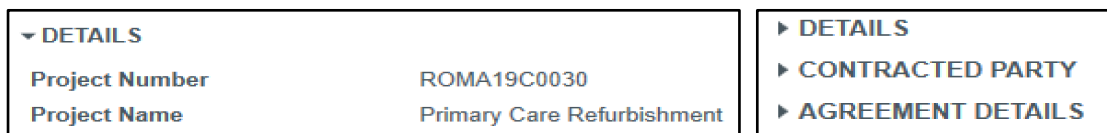
ABOUT CONSTRUCTION CONTRACTS

The Contracts app is a sub-application of the Expenses app in the Cost Management group.
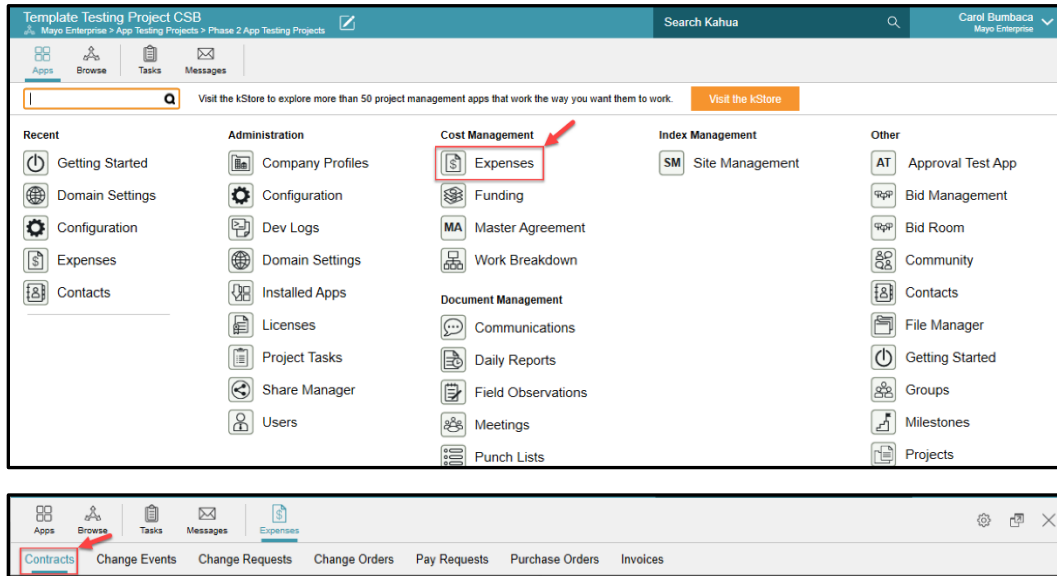
When you create a new contract, notice the top line in blue that displays clickable links to the sections of the contract:

Scroll down a contract record and note that the sections names are displayed in all caps with a downward triangle next to the name. Click the arrow to collapse/hide the fields of that section; click again to expand:

There are nine types of construction contracts for the different agreement types and delivery methods. Most of the contract form is standard for all nine types but there are variations in the Agreement Details and Construction sections depending on the type of contract. This document will describe each section in order and within a section describe the variations by specific contract type.

Note that there are these types of fields on all contracts:

System fields –the data in the field is populated from information within the system such as:

> Address information comes from the Contacts App when you selected a company name
> Project information (number, name, etc.) comes from the parent project

User fields – these are input fields of different types. Examples:

Text input fields
Drop down select fields

CREATE A NEW CONSTRUCTION CONTRACT

To create a Construction type contract, navigate to the Project for the contract. Open the Expenses App, select **Contracts**, then **New**. The contract form opens in the right pane. Right away you'll notice there are system fields (e.g. Project Name that comes from the Project) and user fields (Additional Location Information and Date).

All construction contracts have these sections listed in order of appearance on the form:

Section Title	Fields by Contract Type	Who Edits
Details	Minor field differences per contract type	Mayo User
Contracted Party	Same fields on all contract types	Mayo User
Agreement Details (Start Here)	Minor differences per type	Mayo User
Construction	Varies per Master vs Standalone	Mayo User
Arizona Tax Exemption Info	Same fields on all contract types	Mayo User
Review	Same fields on all contract types	System driven
Items	Same fields on all contract types	Mayo User and/or CIP
Signatures	Same fields on all contract types	System driven
References	Same fields on all contract types	Mayo User and/or CIP

NOTE: An asterisk ✳ indicates a field that must be completed in order to save the document.

1. START WITH THE AGREEMENT DETAILS SECTION FIRST

Completing the Agreement Details section (not Details) **first** is important in two ways:

> Fields may be revealed or hidden based on entries in this section.

> The Type/Agreement Type/Delivery Method combination determines the Contract View.

Use the drop-down lists to specify the **Type, Agreement Type** and **Delivery Method** for this contract. Master Terms & Conditions contracts have an additional field, **Master Terms & Conditions**, to select the specific agreement that applies to this contract.

Work Retainage Rate - this rate will populate the Pay Request application as a default. The value does not appear on Contract Views for construction type contacts. For construction contracts the information will need to be shared with the CIP when establishing the relationship.

Due Date – Put in a date by which the CIP should complete and return the contract.

2. COMPLETE THE DETAILS SECTION AT THE TOP OF THE CONTRACT

After completing the Agreement Details section, return to the top of the form to complete the rest of the sections in order.

Project Number, Project Name, Project Description, Project Location – non-editable fields. Populated from the Project. Note that a blank field indicates that field is blank on the Project record.

Additional Location Information – optional field. The information appears on the Contract View along with the data in the Project as in this example:

Contract No – This editable field only appears on the Construction Standalone Short Form type contract. For this type contract, the contract number appears on the Contract View. You may keep the system generated contract number or type in a custom alphanumeric contract number.

For all other construction contract types, Contract No is system generated and not editable.

Date - Current date is displayed by default but may be changed.

Status – non-editable field. The initial status defaults to "Draft". This field is updated by workflow.

Note that if the contract is created through Kahua for a non-Kahua user, the creator of the contract will be allowed to change the status from ''Draft'' to ''Approved'' manually using a Lock function. The contract status will update to Approved. The Contract View will not have signatures on it but a PDF of a Contract View signed outside of Kahua can be attached to the contract record.

Mayo Project Manager, Quality Reviewer – non-editable. Populated from the Project. Note that a blank field indicates that field is blank on the Project record.

Owner - Select the name of the legal Mayo Clinic corporate entity company for this contract. The Owner Address field will populate from the Contacts app based on your selection.

Owner's Representative(s) – This field is used to name Owner's Representatives with contractual authority in addition to the Project Manager role. The name will appear in the contract and will have a role in the approvals process if this person has been included in that setup.

3. **FILL OUT THE CONTRACTED PARTY SECTION**

Company - Select the name of the company of the contracted party.

Contact - Click in the field to see a list of contacts for this company and select a name. This person will receive the contract in workflow.

Contract Signatory - Click in the field to see a list of contacts for this company and select a name. This person will receive the contract in workflow. Note: The Contracted Party contact may add a Contract Signatory if necessary in the CIP Signature workflow step.

Contract Phone/ Fax/ Address/ Vendor Number – These fields are non-editable and auto-populated. The data is related to the contact entered in the Company field. If data does not appear in a field, it means that field is empty in the company record.

4. COMPLETE THE CONSTRUCTION SECTION

The fields in the construction contract depend on the Agreement Type and Delivery Method selected in the Agreement Details section. Refer to the section below that applies to the contract you're creating.

CONSTRUCTION SECTION – STANDALONE CONTRACTOR AGREEMENT SHORT FORM

When **Contractor Agreement Short Form** delivery method is selected, these fields in the Construction section of the contract display:

Commencement Date: the date that work is expected to begin on the contract services.

Final Completion: the date that work is expected to be completed on the contract services.

Scope of Contractor Services Requested: this is a free text field used to specify the work that the contractor needs to provide.

Payment Terms: this is a free text field in which you should identify two specific pieces of information:

- o payment terms such as "stipulated sum," "cost plus a fee," or hourly."

- o Invoicing expectations such as "monthly" or "at completion of service."

- o Users should also ensure that CIP understands how to submit pay requests if they are not a Kahua user. Typically, it would be a Finance support person or email address dedicated to facilities finance. If it is not readily known by the CIP, this field is the location to provide that direction in addition to the other information.

CONSTRUCTION SECTION – STANDALONE AGREEMENTS (EXCEPT SHORT FORM)

This section applies to Construction Standalone contracts when the delivery method is one of these:

Stipulated Sum

Cost of Work Plus Fixed Fee (w/ or w/out GMP)

Stipulated Labor & Fee w/Material at Cost

Cost of Labor Plus Fixed Fee w/GMP & Materials at Cost:

Design Professional - select the Design Professional company from the drop-down list. The Design Professional Address field will populate from the Contacts app based on your selection.

Substantial Completion – enter a date.

Conditions - This field will populate the field titled "Supplemental, Special, and Other Conditions" on the standalone contract. (Article 11 or 12 depending on contract type)

Trade Category –select the trade category for this contractor company from the drop-down list.

Contractor is Lead Contractor – check the checkbox if this applies to the contract.

Lien and claim waivers required - check the checkbox if this applies to the contract.

Bonds required - check the checkbox if this applies to the contract.

Contacts(s) Authorized to Bind Parties: Name & Title – This is a text field for entering the name and title of the individual. (Example: Jane Doe (Vice President)). This name will appear in Article 5 of the Contract View and may be included in the approvals process if configured for that.

Scope of Contractor Services Requested – this is a text field used to specify the work that the contractor needs to provide a response to. It will appear on the task sent to the contractor and will appear on the final contract document.

CONSTRUCTION SECTION – MASTER TERMS & CONDITIONS AGREEMENTS

This section applies to Construction Master Ts & Cs type contracts and these delivery methods:

Stipulated Sum

Cost of Work Plus Fixed Fee

Stipulated Labor & Fee w/Material at Cost

Cost of Labor Plus Fixed Fee w/GMP and Materials at Cost:

Design Professional - select the Design Professional company from the drop-down list. The Design Professional Address field will populate from the Contacts app based on your selection.

Substantial Completion - enter a date.

Conditions - This field will populate the field titled "Supplemental, Special, and Other Conditions" on the standalone contract. (Article 11 or 12 depending on contract type)

Trade Category –select the trade category for this contractor company from the drop-down list.

Cost Summary Section

When a contract is saved, an additional section appears at the top of the contract record. The Cost Summary section sits above the DETAILS section and is highlighted in gray. Using information in the items grid, the contract cost items are summarized in this section. Values will be empty if no cost items have been entered yet.

Labor	$50,000.00
Construction Subcontracted	$50,000.00
Subtotal Labor + Construction Subcontracted	$100,000.00
Material	$5,000.00
Construction Fee	$500.00
Tax	$50.00
Other Construction Reimbursables	$1,111.00
Total	$106,661.00

When you edit/change items in the items grid and save the contract, this section is updated. The calculations in this section are used for populating values in the Contract View document.

COMPLETING A CONSTRUCTION CONTRACT (ALL TYPES)

The remaining sections of the Construction contract form are the same for all construction contract types.

ARIZONA TAX EXEMPTION INFO Section

This section concerns the Mayo Clinic Arizona users only Fill out the ARIZONA TAX EXEMPTION INFO section if applicable to the contract.

> **Tax Exemption Type** – Select one of the entries in the drop-down list: **Prime Contractor** and **MRRA**.

> **Tax Detail Prime Contractor**- Select one of the two entries in the drop-down list: **Materials Exempt** and **Standard TPT Rules Apply**.
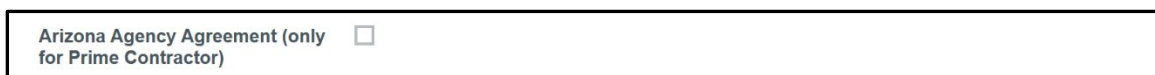

> **Arizona Agency Agreement** – Check the box if this is applicable to the current contract.

REVIEW Section

This section shows information captured as the contract goes through workflow. Only the Comment field is available for input. Author, date and comment will be captured for each entry.

ITEMS SECTION – COST ITEM GRID

This section is for Mayo and for Construction Industry Partners.

The ITEMS section is also called the Items Grid or Cost Item Grid. When and by whom the Cost Item Grid is filled depends on how the contract is created:

Create a New Contract: open the Expense App and click **New** to create a new contract with an empty Cost Item Grid. When a contract is created this way, it may be sent to a CIP using the **Request Proposal** action. In this case, the CIP completes the Cost Item Grid. The grid may also be filled out by the Mayo creator of the contract, for example when an agreement made outside the Kahua system needs to be recorded.

Process an Awarded Proposal into a Contract: With a Bid Management process, when a proposal is awarded, the Mayo user opens the awarded proposal and uses the **Process** button to create a contract record from the proposal. The Cost Item Grid on the new contract is populated from the Bid Sheet in the awarded proposal record.

The Cost Item Grid documents all cost items associated with this contract and identifies the Account Category (e.g. Architectural, Plumbing, Permits, etc.) and the Item Type (Labor, Materials, Taxes, etc.). The Cost Item Grid data is used throughout the lifecycle of this contract – in the contract, in pay requests, and in potential change orders.

This is an example of a Cost Item Grid with each of the six Item Types.

You can leave the Cost Item Grid blank if you are sending the contract to the CIP to request a proposal. When you send a Proposal task, the Cost Item Grid is editable and filled in by the CIP. When you send a CIP an Approval task, the Cost Item Grid is not editable and you should have at least one entry in the Cost Item Grid.

Click the icon to display a detailed form view of each Item.

No. – sequential system generated field.

Desc – editable text field used to describe the item. If you select the Account Category first, this field wil populate with default text that you can keep or override.

Account Category – this is a look up field tied to the Work Breakdown Structure. Click in the field to get a list of categories or start typing a category name to find it.

Item Type – use the drop-down list to select one of the six available item types. There may be multiple cost items that have the same item type.

Cost/Status – there are six cost statuses: draft, projected, submitted, approved, rejected or superseded. The status of a new item is "draft" by default and is updated as the document goes through workflow.

Total – enter the dollar total of the line item.

Upon saving a contract that has items in the Cost Item Grid, the summary section at the top of the contract populates with costs. Blanks in the summary section indicate that grid item type was not used.

REFERENCES SECTION

Add any necessary documents. Use **UPLOAD** to add a file from local storage. Use **ADD KAHUA DOC** to attach a file that is in the Kahua File Manager. The **ADD COMPOSITE** allows you to specify existing documents and views to combine into one file to attach.

SENDING THE CONTRACT INTO WORKFLOW AS A MAYO USER

Select **SAVE** to save the record and come back to work on it later before sending it to the contractor.

After you've saved a contract, a set of action buttons become available at the bottom of the contract:

Request Proposal	Send For CIP Signature	Mark CIP Signature Rec'd	Lock

Request Proposal – sends a task to the contact named in the Contracted Party section where the Contractor can complete the cost item grid, then route it for review and approval.

Send for CIP Signature – sends a task to the contact name in the Contracted Party section where the Contractor can sign the contract, identify another signatory or send the task back to Mayo. There is a guard on this action to insure there is at least one item in the Cost Item Grid.

Mark CIP Signature Rec'd – this is used when agreement / sign off has been reached with the CIP outside of the workflow – for example for a CIP that does not have Kahua. This action skips the CIP Signature workflow, sets the CIP signature received date and advances the workflow to the Mayo approvers can review and approve. A PDF or image of the signed agreement should be attached to the contract record prior to selecting this option. There is a guard on this action to insure there is at least one item in the Cost Item Grid.

Lock – often used for a CIP that does not use Kahua but where you want to record a contracted agreement. This action skips all approvals workflow, sets status to Approved and locks the contract. A PDF or image of the signed agreement should be attached to the contract record prior to selecting this option. There is a guard on this action to insure there is at least one item in the Cost Item Grid.

RESPONDING TO A TASK AS A CONSTRUCTION INDUSTRY PARTNER (CIP)

Note: This section has instruction for Mayo CIPs. These steps do not apply to the Mayo Clinic users.

The named contact for the CIP in a contract document can receive two types of tasks:

Request for Proposal – the CIP receives a task to create a proposal for review and approval by Mayo.

Request for Contract Approval – the CIP receives a task for their signature only. This process will be used when Mayo completes the cost items grid, such as when processed from a bid proposal. In this task, the CIP will not be able to edit the cost items grid.

The CIP is notified of a task in three ways:

A message:

> Please review and approve the Contract for Portable View Testing Project using Kahua.
>
> Click this link to access your task in Kahua.

A task:

FROM	SUBJECT	DATE ASSIGNED	DUE DATE	APP
Carol Bumbaca	Please review the Contract for Portable View Testing Project	11/6/2019	11/13/2019	Contracts

A screen prompt:

> **New Task Notification!**
>
> **Kahua Jim Harrington**   11/6/2019 3:40 PM
> Please review the Contract for Portable View Testing Project

The Task icon increments for new, unresponded tasks:

Access a task in one of these ways:

1. Click on the task icon to open the Tasks app and then open the task.

2. Open the Tasks app then open the task.

3. Open the notification message and use the link to open the task.

ACTING ON A CONTRACT APPROVAL TASK

During the approval workflow, multiple people will receive approval tasks based on how the approvals for this project and this contract type and amount have been configured. All approvers will be able to view a PDF rendition of the contract approval document.
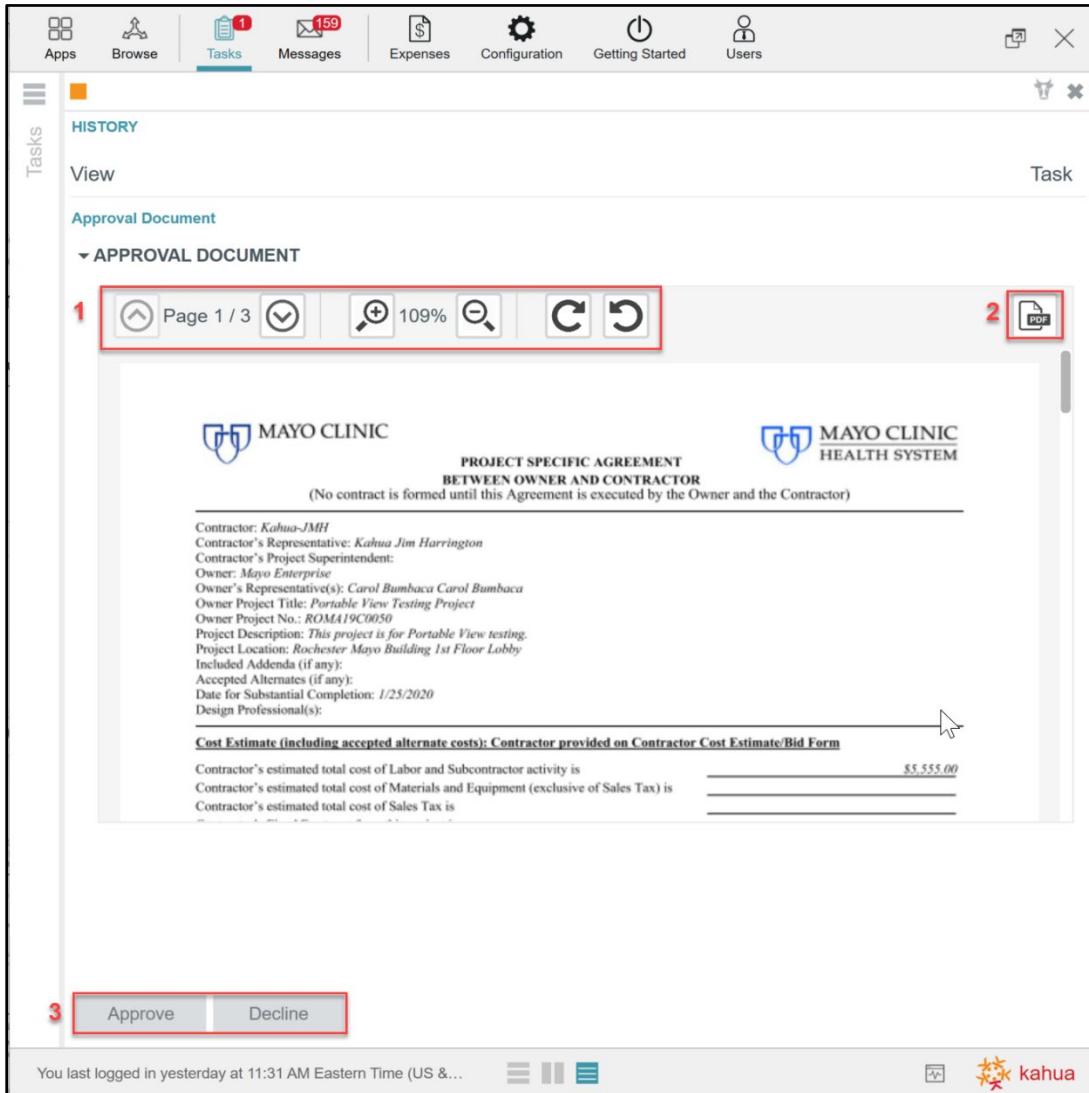
Note the parts of the Approval Task:

1. Use the page and zoom controls to move around and view the document.

2. Click the PDF button to open the full PDF in a separate view file.

3. Approve or decline to approve the contract.

    Approve prompts for your account pin then sends the document further in workflow.

Decline prompts for a reason then returns the contract to the originator stamped "rejected" curtailing the workflow.

COMPLETING A REQUEST FOR PROPOSAL TASK (CIP)

When the CIP receives a proposal task all the contract fields are visible but only a subset of them are editable and should be completed:

Contact – this field is populated with the name of the person receiving the task. This person can assign this to someone in the company by selecting a name from the drop-down list.

Contract Signatory – a contact field for filling in the name of the person with authority to sign this contract for your company if other than the current contact.

Contractor's Superintendent – a text field for identifying the Superintendent for this contract work.

Items Grid – insert item rows for each item that is part of this contract. Refer to Items Section – Cost Item Grid for information on completing this section.

References – upload or attach supporting documents that are part of your proposal.

THE APPROVAL PROCESS

During the Approval workflow, the contract is routed to Mayo users based on how the approvals for that project have been set up. The CIP / CIP Contract Signatory signs first. Then the contract is routed for Mayo signatures according to the approval limits and roles defined for the contract.

SENDING THE PROPOSAL TASK INTO WORKFLOW

When finished editing, select an action to take on the proposal request:

Save – saves the task with your current work so you may resume work on it later.

Submit for Contract Signatory Approval – sends an Approval Task to the person named in the Contract Signatory role so that person may review your entries and approve or reject the document. When you click this action, if the Contract Signatory field is blank you will be prompted to add an entry before this action button works.

Submit for Mayo approval – sends an Approval Task to the originator of the contract from Mayo.

When submitting the contract into workflow, an **Add Signature** window pops up. Enter the PIN you selected when you set up your Kahua contact record in Account Settings. This will record your signature and a time stamp to the contract record.
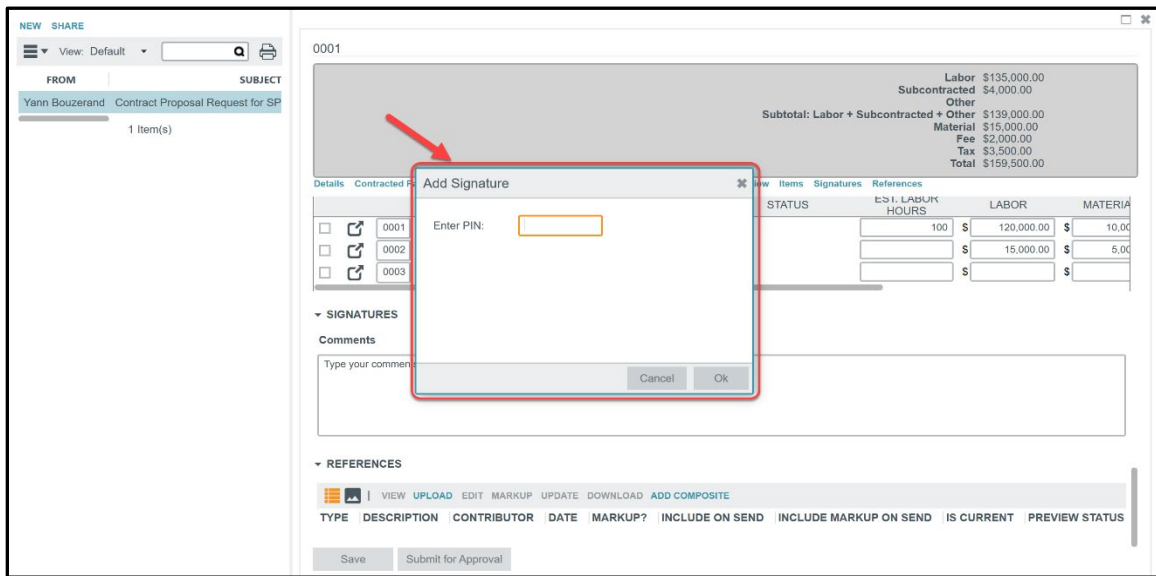
MAYO USER APPROVAL TASK

The approval task presents the PDF document with the ability to Approve or Decline. The last page of the contract document has the schedule of values for reference. If necessary, a Mayo user may also view the data record in the Contracts app, click on the contract record and use the **View original record** button to see the contract record in full detail.
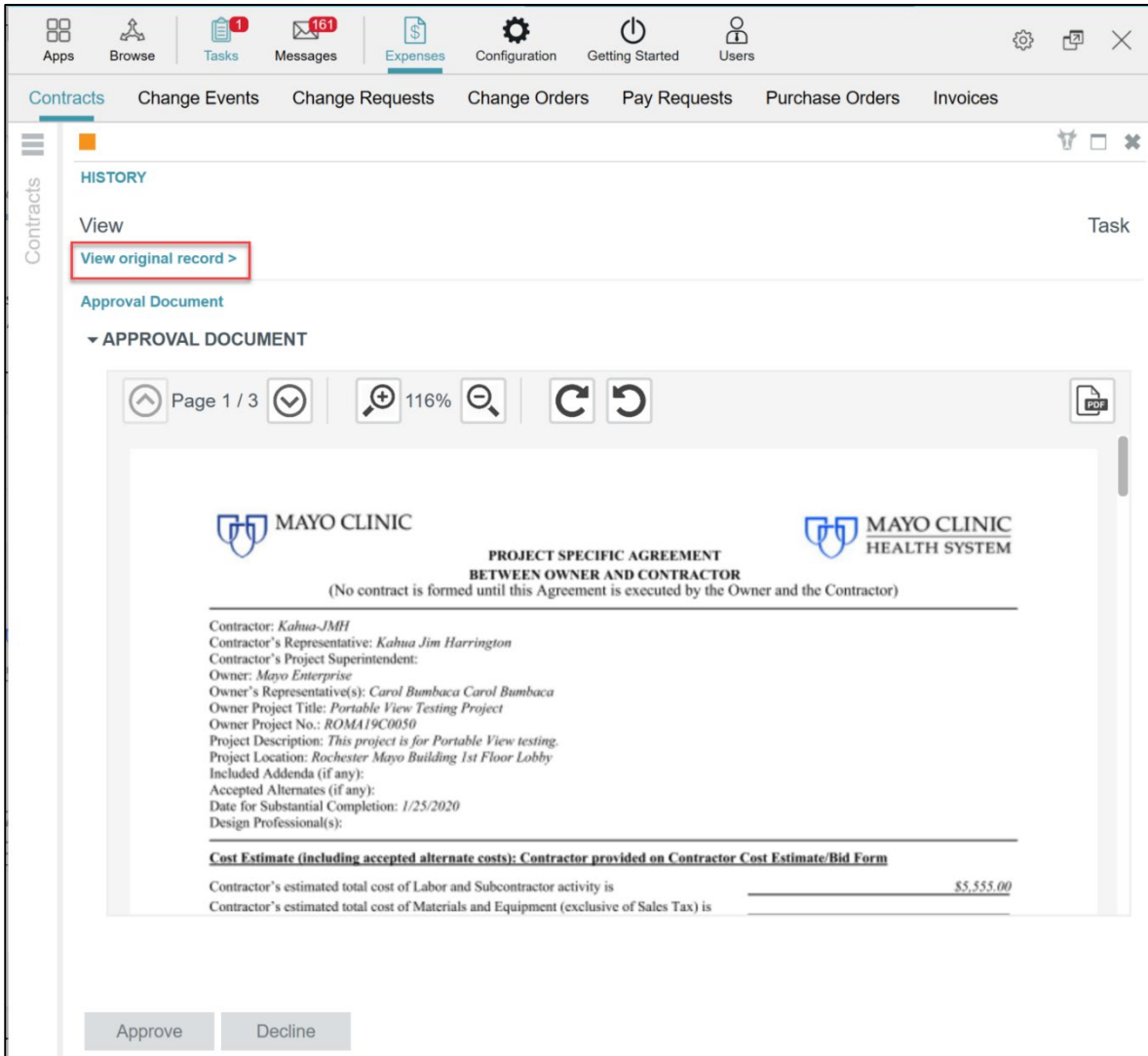
As a contract document goes through the approval process, each role has the option to approve the contract or to decline to sign (reject) the contract. When a contract is approved, the next configured approver receives a task and that continues until all required signatures for this contract and contract amount are completed or until the contract is rejected which halts the approval workflow process.
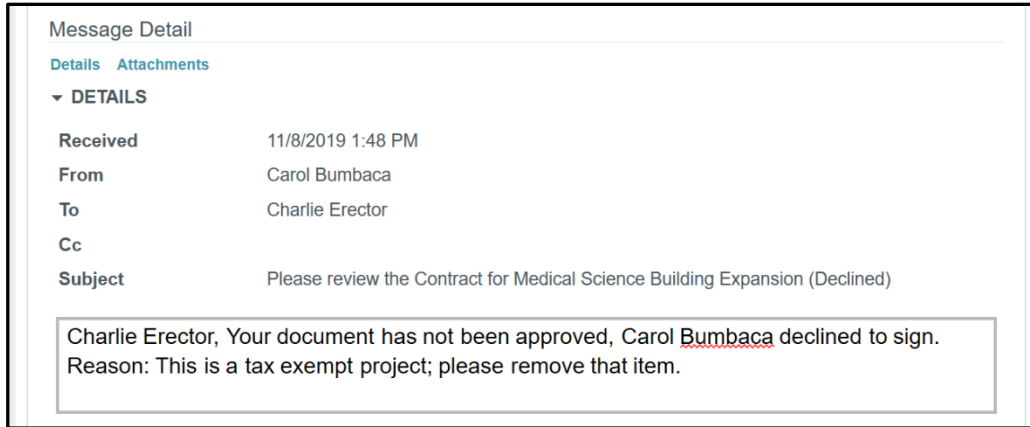
NOTIFICATION OF AN APPROVED CONTRACT

If the contract has been approved by the Mayo Clinic Requestor, the Contractor receives an email notification, and a message in the Kahua Messages app.
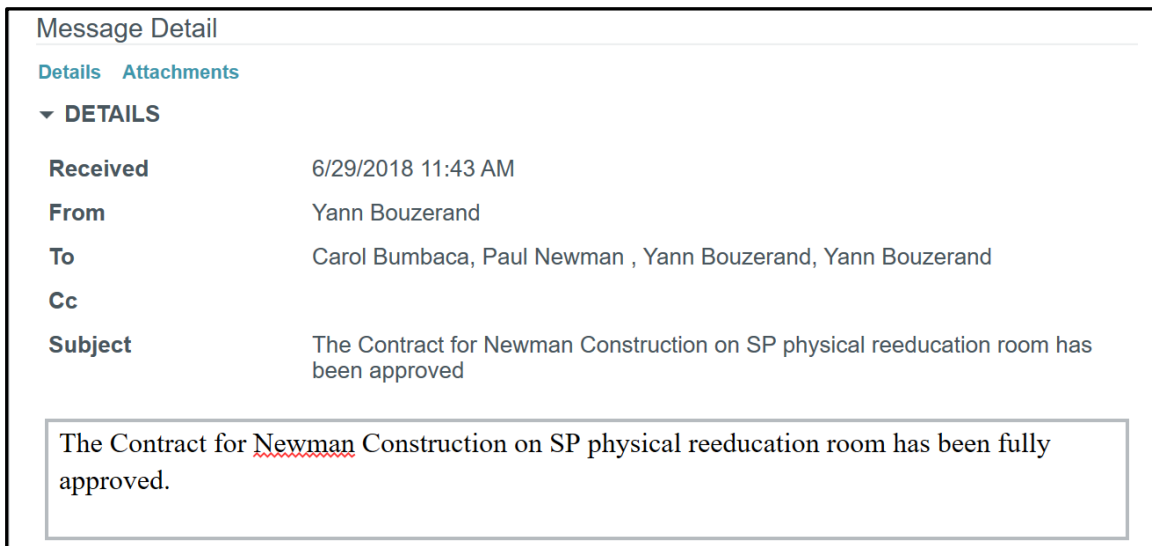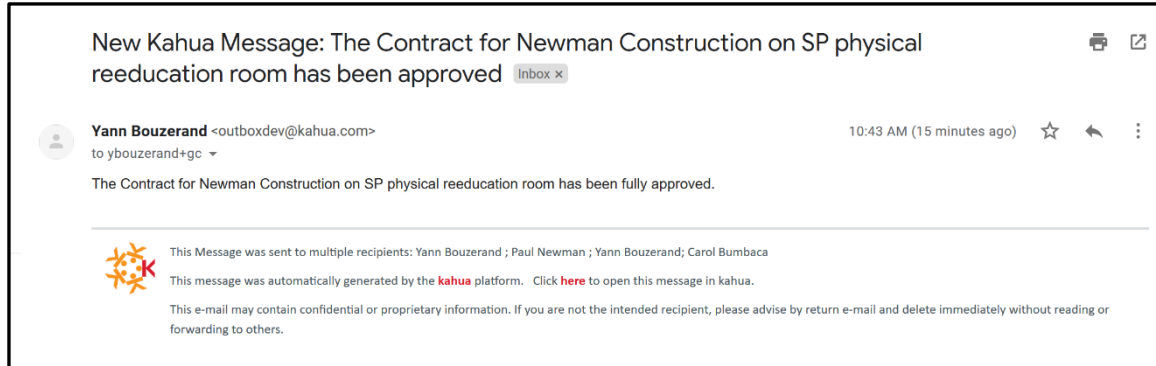
PROCESS FOR A REJECTED CONTRACT

If the Mayo originator of the proposal request rejects the proposal, the Contractor receives a message notification including a reason for the rejection:

Message Detail

Details Attachments

▾ DETAILS

Received	11/8/2019 1:48 PM
From	Carol Bumbaca
To	Charlie Erector
Cc	
Subject	Please review the Contract for Medical Science Building Expansion (Declined)

Charlie Erector, Your document has not been approved, Carol Bumbaca declined to sign.
Reason: This is a tax exempt project; please remove that item.

The contract is taken out of workflow; the status is set to **Rejected**, and the Mayo author has the option to void the proposal and either stop there or modify and resend the contract proposal request.

▾ REVIEW

Date Submitted	11/8/2019
Date Approved	
Date Returned to Vendor	
Comments	
Workflow Status	Rejected
Pending With	Carol Bumbaca

▸ ITEMS
▸ SIGNATURES
▸ REFERENCES

Void

The Contractor may unlock the contract then edit it and send it into workflow again.
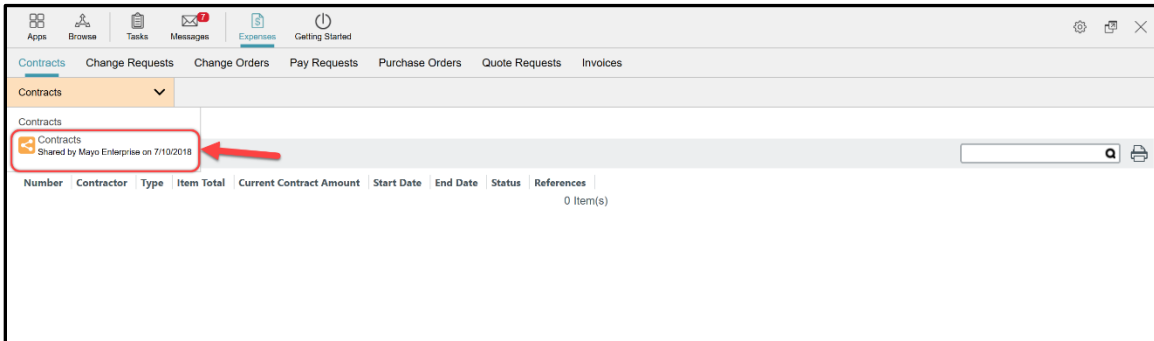
VIEWING THE CONTRACT IN THE CONTRACT APP SHARED BY MAYO CLINIC

Once the contract is approved, users may view the contract in the Contract log shared by Mayo Clinic.

1. Navigate to the project where Mayo Clinic is sharing the app.
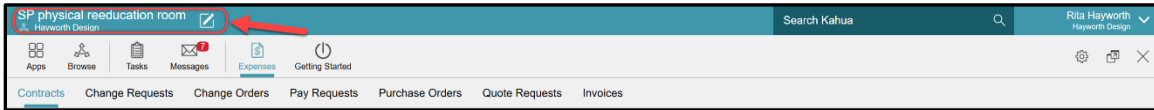
1. Using the Apps Launcher, open the Expenses app that is within the Cost Management group of apps. The Expense app opens with the Contracts sub application active.

2. Toggle in the tab to the Contracts App shared by Mayo Clinic Enterprise to get access to the Mayo Clinic Enterprise Contract app log.


3. Select the contract in the log then select **VIEW** from the menu in the detail pane to see the contract.

   Note that the log view is configurable. You may create one or many views and toggle between them. For example, you may make fields visible in the log like Contractor Company. You may apply filters to view only approved contracts. The screen shown is the default out of the box view.
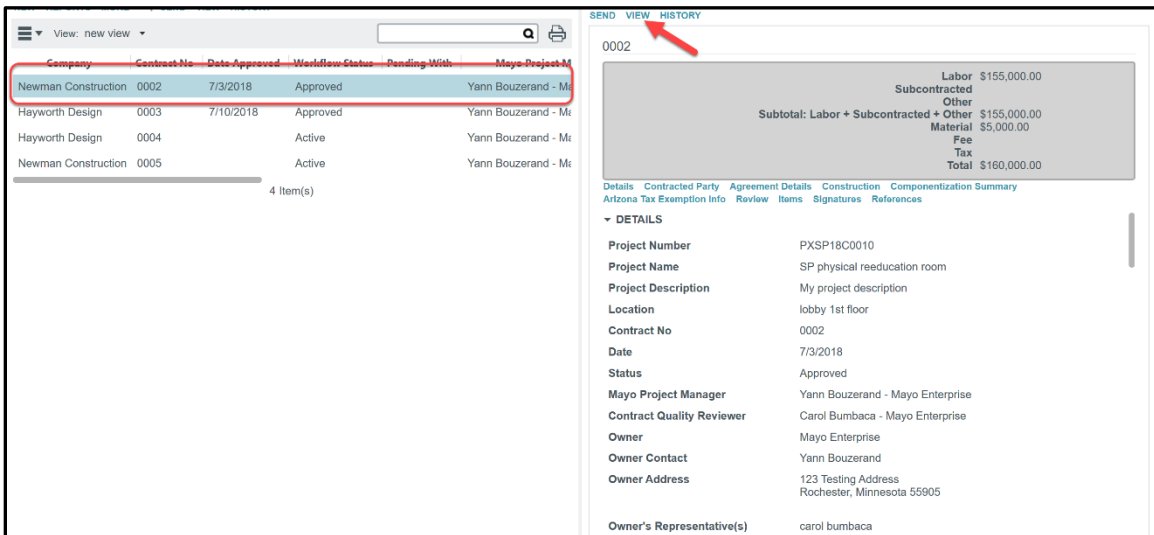
4. Select the icon to display the PDF version of the contract
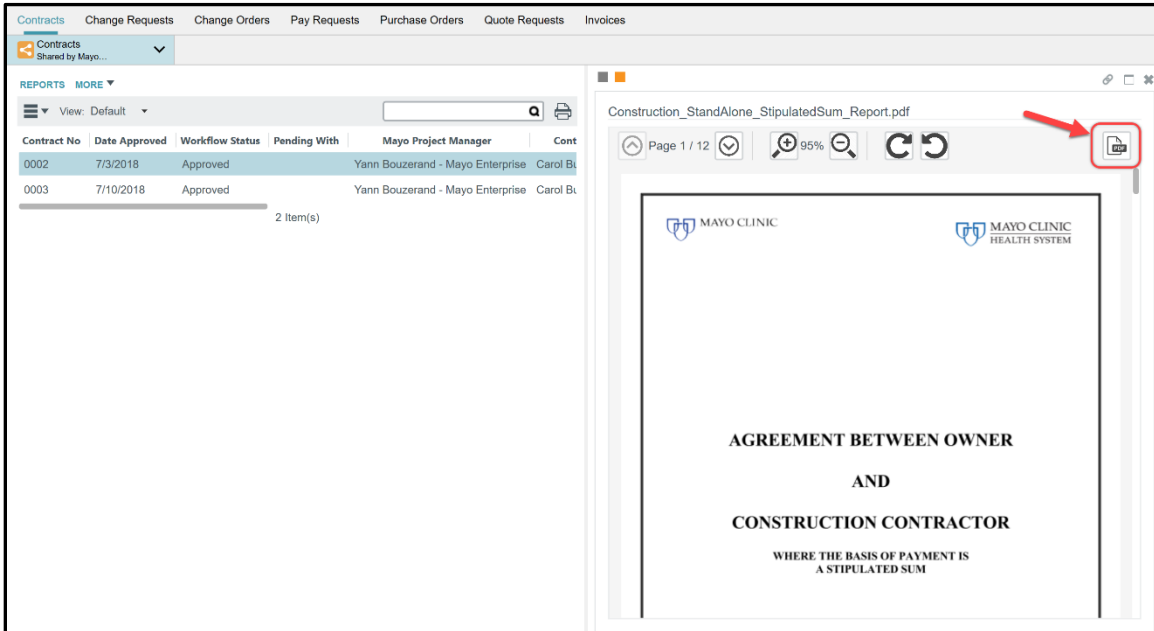
Note that as a Mayo Clinic Construction Industry Partner, the users will be able to view only their contract.

SHARING THE CONTRACTS APPLICATION WITH AN EXTERNAL PARTY

This chapter has information for Mayo Clinic users only.

To work with Construction Industry Partners, Mayo Clinic must share the Contracts application. Sharing the application will let the contractors respond to the Mayo Clinic team when a contract has been created. Mayo shares with each CIP company so that CIPs see only the contracts from their company.
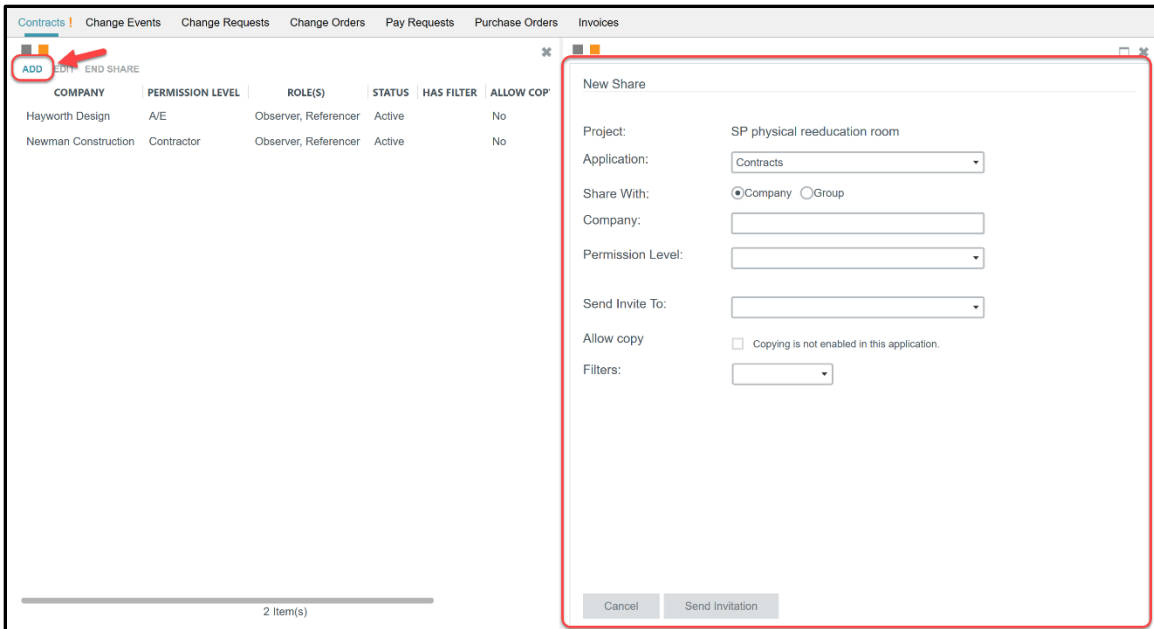
To share the application:

5. Click on the Project Navigator to navigate to the project level from which you will share.

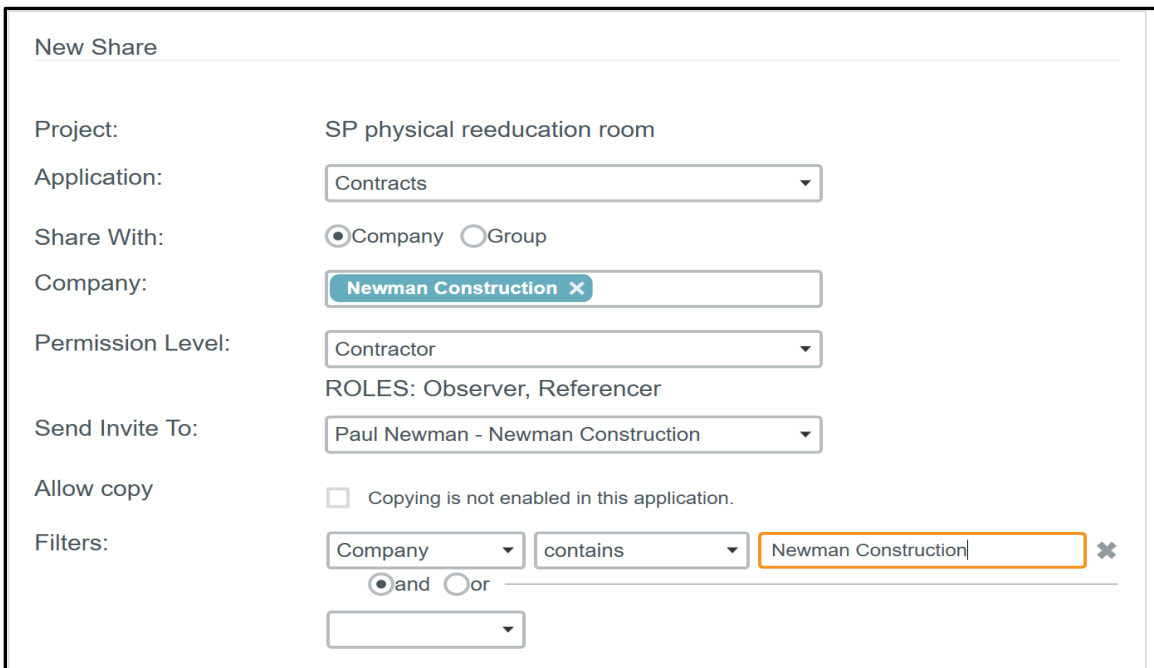6. Access the Contracts sub app located in the Expenses app.
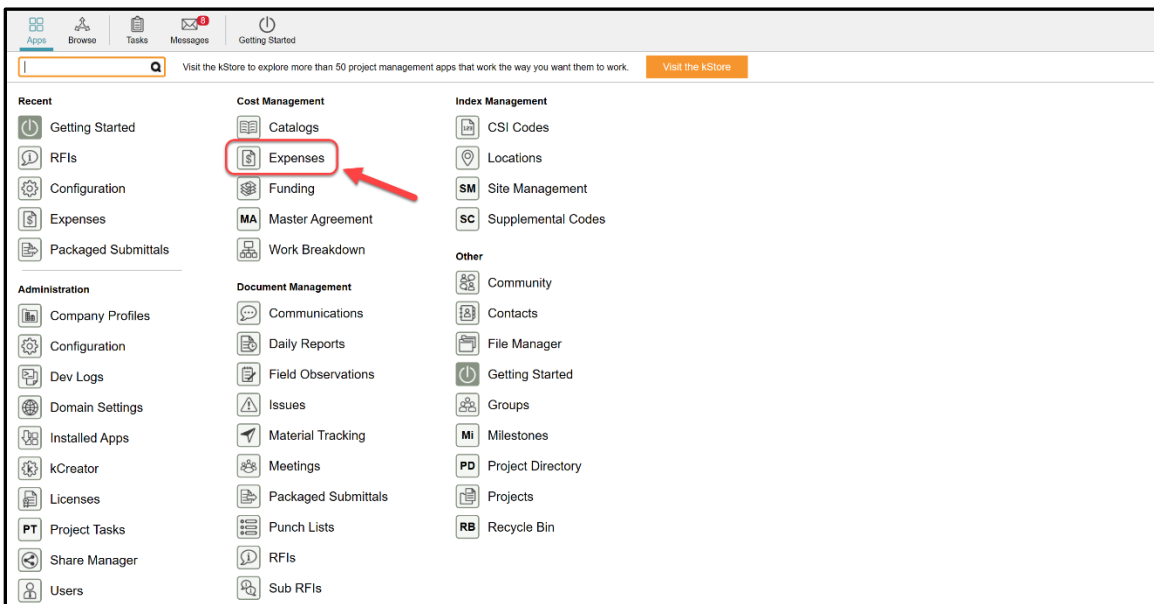
7. Click **MORE** to access the drop-down menu (SHARING is one action available as a subset of the MORE button), then click **SHARING** to share the app with the CIP.

8. Select **ADD**. The Detail pane displays the New Share window.

9. Fill out the fields in the form.

Project – This is a view-only field that shows the project's name.

Application – This is a drop-down list. By default, it displays the current application - Contracts.

Share With – This is a radio list with two choices: Company or Group. Note that Mayo will typically set up separate share with each CIP company.

Company- This is a drop-down list populated with companies in the Contact app. Select the CIP company for this share. If the desired Company name doesn't appear, add the company in the Contact app in the Company tab, then return to this app.

Permission Level- This is a drop-down list populated from the Groups app. Select a permission group by role that determines what visibility / actions the recipient of the share will have. For instance, a contractor will have the Contractor permission which supports the roles of Observer and Referencer.

Roles have been set by the Mayo Clinic and give specific permission to the external party users. In this case, the Contractor permission level will restrict the CIP user to "view-only" permissions on contracts in the roles of Observer and Referencer.

Send Invite To- This is a drop-down list populated with contacts from the selected Company. Select the external party user to whom the invitation to share will be sent. Choose one individual to receive the invite who will be responsible for accepting the share via a task in Kahua.

When choosing **Group** rather than **Company**, the available fields change to those appropriate to the selection. Recall that sharing with a group means that all users invited to the share will have the same permission – to filter a log when shared, use the Company option above.

Project:	SP physical reeducation room			
Application:	Contracts ▼			
Share With:	○ Company ◉ Group			
Permission Level:	Contractor ▼			
	ROLES: Observer, Referencer			
Note: Each company needs to approve sharing to view the shared item. You can send invites to one or more individuals.:				
Send Invite To:				
Name	**Company**	**Company Status**	**Invitation Status**	
☐ Paul Newman	Newman Construction	Active	Invited	

Permission Level- Select the Permission Level in the drop-down list. Again, this refers to the Groups set up by Mayo with standard permission by role. Select the appropriate group and the permission assigned to that group will auto populate.
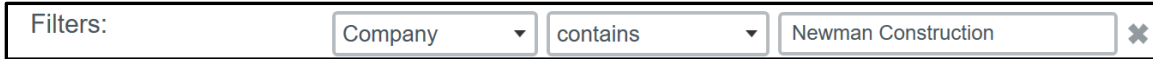
Once the Permission Level has been assigned, a list of users with their company, company status and invitation status will be displayed below the Send Invite To. Choose the users/companies to invite to the share. These users will receive a task to accept the share into their domain.

Send Invite To:			
Name	**Company**	**Company Status**	**Invitation Status**
☐ Domain Admin	Mayo Enterprise	Not Invited	Not Invited
☐ Mayo Role Test Project Manager	Mayo Enterprise	Not Invited	Not Invited
☐ Mayo Role Test Construction Manager	Mayo Enterprise	Not Invited	Not Invited
☐ Mayo Role Test Proponent	Mayo Enterprise	Not Invited	Not Invited
☐ Mayo Role Test Corporate Officer	Mayo Enterprise	Not Invited	Not Invited
☐ Mayo Role Test Facilities Head	Mayo Enterprise	Not Invited	Not Invited
☐ Mayo Role Test Project Lead	Mayo Enterprise	Not Invited	Not Invited
☐ Mayo Role Test Quality Lead	Mayo Enterprise	Not Invited	Not Invited

Filters- Allows the user to set a filter to limit what the external party will see in the log. This is commonly used in allowing a company to see solely the records that apply to their company for confidentiality reasons.

The filter should be set as follow:

Filters:	Company ▼	contains ▼	Newman Construction	✖

Company + Contains + company's name

or

Company + equals + company's name

Note that ''equals'' would be used if multiple companies with similar names are collaborating in one project. Kahua will display the contracts with the exact company's name.

10. Once all the fields have been populated and reviewed, select **Send Invitation** to send the invitation to share to the external parties. At this time, a task will be sent to the user(s) selected in the share. See below instructions to support third parties as they accept the share.

Send Invitation
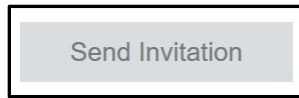
ACCEPTING A SHARED CHANGE REQUEST APPLICATION FROM MAYO ENTERPRISE AS AN EXTERNAL PARTY

This section has instructions for Construction Industry Partners (CIPs). These steps do not apply to Mayo users, but Mayo users should be familiar with them as they support and assist third parties in accepting shares.

To collaborate, Mayo Clinic will share their Contracts application with their CIPs. These are the steps the CIP executes when accepting a share:

1. The CIP will receive a sharing invitation in the Tasks application within their domain (not the Mayo domain).

2. Click on the **Tasks** icon to load all tasks into the List View window.

3. Click on the **Kahua Sharing Invitation** task to open the Detail View of that task. A right detail pane will appear to display information about the share.

   Note: The CIP will review the information to determine if there is already a project created in Kahua for this project or if they want to initiate a project directly from the task itself. The recommendation is to keep the project's name as is, but third parties may choose to name the project something other than what the project is called within Mayo's domain.

4. Within the task, use the Navigation Bar to navigate to the project that this share relates to or click on the **Create New Project** button. Indicate the project name in the window that appears or choose to leave 'as is' from the project name that Mayo uses. Verify the proper project name appears in the highlighted bar within the task. When complete, click **Accept** in the task window.
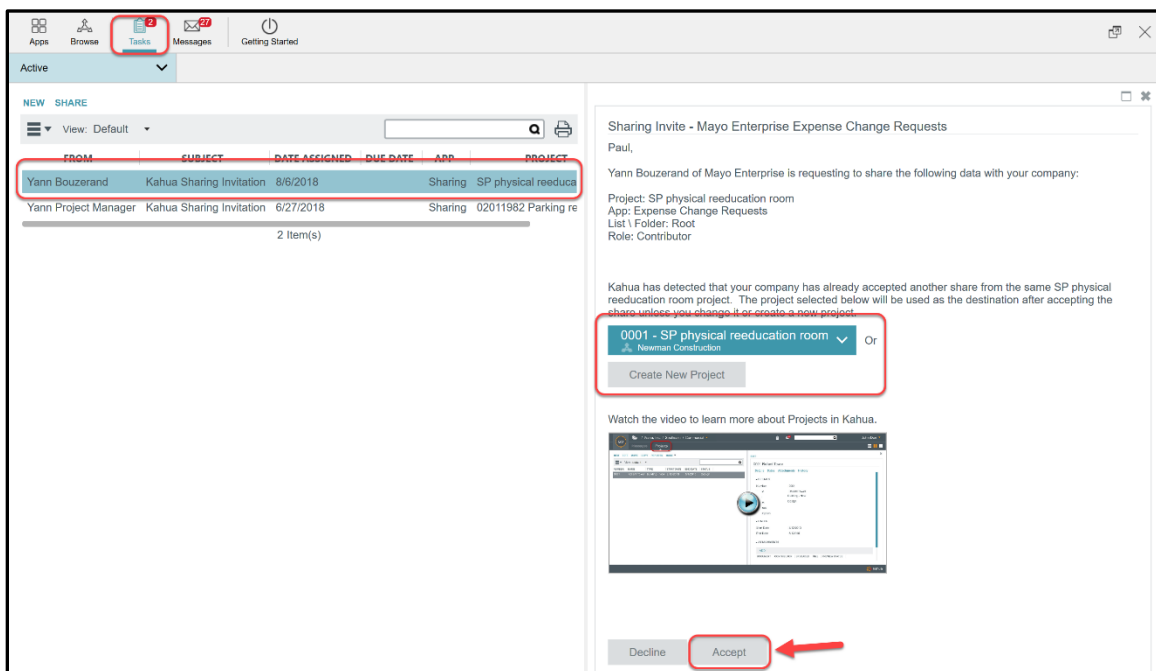
Once the share is accepted, the CIPs must be sure to be in the correct project to be able to use the Mayo Clinic applications. The project name will be at the top left of their Kahua domain in the Navigation Bar. A likely cause of being unable to view a shared list is that the user is not in the proper project to which the share was accepted.
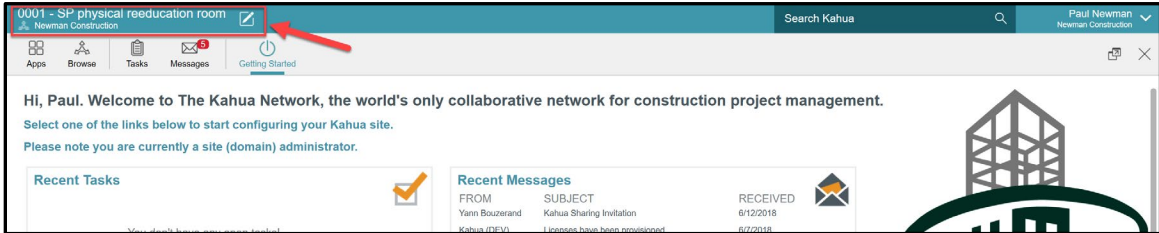
Recall that to view the Mayo Clinic shared log, the user must open the application that was shared then use the drop-down list under the App Bar to select the correct shared list.