

Master Agreement Application - Quick Reference Guide

June 2018



Prepared for the Mayo Clinic Enterprise Kahua Deployment

MASTER AGREEMENT APPLICATION OVERVIEW



The Master Agreement application allows users with correct permission levels (typically a site administrator) to enter relevant information around Master Terms for Agreement Between Owner and Contractor or Standard Terms for Agreement Between Owner and Design Professional that have been executed by Mayo Clinic (henceforth referred to as a Master Agreement). This ensures that when contracts are entered in the system, each contract can be tied back to the appropriate Master Agreement for reference and the system has an accurate log of all active, expired, and terminated agreements related to the projects managed in Kahua.

Note that the Mayo Enterprise solution is not intended to initiate creation or execution of the Master Agreement (MA) within Kahua, but rather store a log of the MAs for use throughout Mayo Enterprise applications. The process of the execution of MAs will remain outside of Kahua. Kahua will maintain a log of MAs that are executed and allow users to reference the MAs as appropriate when creating Construction and Design Contracts on projects. The signed MAs will be stored as a reference file in the Kahua Master Agreement application.

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Getting Started	Catalogs	CSI Codes	
Projects	Expenses	O Locations	
Funding	Funding	SM Site Management	
Work Breakdown	MA Master Agreement	SC Supplemental Codes	
MA Master Agreement	Work Breakdown	Other	
Administration	Document Management	Community	
Company Profiles	Communications	(a) Contacts	
Configuration	Daily Reports	File Manager	
Dev Logs	Field Observations	O Getting Started	
Domain Settings	Issues	Left Groups	
Installed Apps	Material Tracking	PD Project Directory	
KCreator	AB Meetings	Projects	
Licenses	Packaged Submittals	RB Recycle Bin	
PT Project Tasks	Punch Lists		
Share Manager	D RFIs		
Users	Sub RFIs		
You last logged in yesterday at 11:40	AM Eastern Time (US & Canada)		kahua

The Master Agreement application is in the Cost Management applications suite.

ADDING A MASTER AGREEMENT

To add a Master Agreement (MA):

1. Select the Application Launcher



- 2. Select the Master Agreement application in the Cost Management section.
- 3. Select *New* to add an MA.



A New Master Agreement Item window appears in the Detail Pane.

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4. Fill out the Details section.

Number	0002
Company	Newman Construction ×
Location	Arizona X Florida X Rochester X
Date Executed	6/19/2018
Date of Expiration	6/19/2023
Notes	this is where I write notes

Number –auto-populated when a new Master Service Agreement is added. The number increments by 1 with each new MA.

Company - select the company to add. The company must be previously entered in the Company Contact through the Contacts application.

Location - select the location(s) from the drop-down list. The list looks to the Sites in the Site Management application. This will indicate with which region(s) the company has a Master Service Agreement. Multiple sites can be entered.

Note: Some Master Agreement are national agreements, and some will be site specific.

Location		
	Arizona	
Date Executed	Florida	
Date of Expiration	MCHS-NWWI	
Date of Expiration	MCHS-SEMN	
Notes	MCHS-SWMN	
	MCHS-SWWI	
	Rochester	

Note: In order for a contract to reference the Master Agreement, the following conditions must be true (reference Section 3 of this document below):

- The Site field in the Location section of the Project Properties must match a location indicated on the Master Agreement
- The Agreement Type field in the Agreement Details section of the Contract must be "Master Terms & Conditions".

Date Executed/Date of Expiration – Enter the appropriate dates from the Master Agreement signed with the Business Partner.

Notes – Add any necessary notes.

5. In the References section, add documents from your computer by selecting *Upload* or from your Kahua File Manager by selecting *Add Kahua Doc*.

▼ REFERENCES					
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6. Select the Save button when done.

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The new Master Agreement appears now in the log with the information about that agreement in the Detail Pane on the right.

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If information needs to be changed, select **EDIT** then select **SAVE** to save the record.

THE MASTER AGREEMENT IN THE CONTRACT APPLICATION

To create a contract that references a Master Agreement, select *Master Terms & Conditions* in the Agreement Type field in the AGREEMENT DETAILS section while creating a new contract in the Expense>Contract application. This exposes the Master Terms & Conditions selector. The drop-down will list all Master Service Agreements where the **Site** field in the **Location** section of the **Project Properties** matches a **Location** on the Master Agreement. Select the appropriate Master Service Agreement.

Construction	contract:
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▼ AGREEMENT DETAILS	
Туре	Construction •
Agreement Type	Master Terms & Conditions
Master Terms & Conditions	
Delivery Method	0003 - Kearney Electric
L	Kahua-JMH - [Date]

Design contract:

▼ AGREEMENT DETAILS	
Туре	Design -
Agreement Type	Master Terms & Conditions 🔹
Master Terms & Conditions	
Compensation Type	Kahua-JMH - [Date]
	Newman Construction - [Date]