

MAYO CLINIC



Project Creation Quick Reference Guide

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Prepared for the Mayo Clinic
Enterprise Kahua Deployment

PROJECTS IN KAHUA

Kahua is designed to effectively manage the organization of, and data within, your projects. The Projects app is where the user initiates new projects and records project information, including identifying detail such as project name, number, and location. The Projects app documents high level project scope, relevant roles, the parties assigned to those roles, and significant project dates as well. In a sense, the Projects app serves as a profile for the project being initiated.

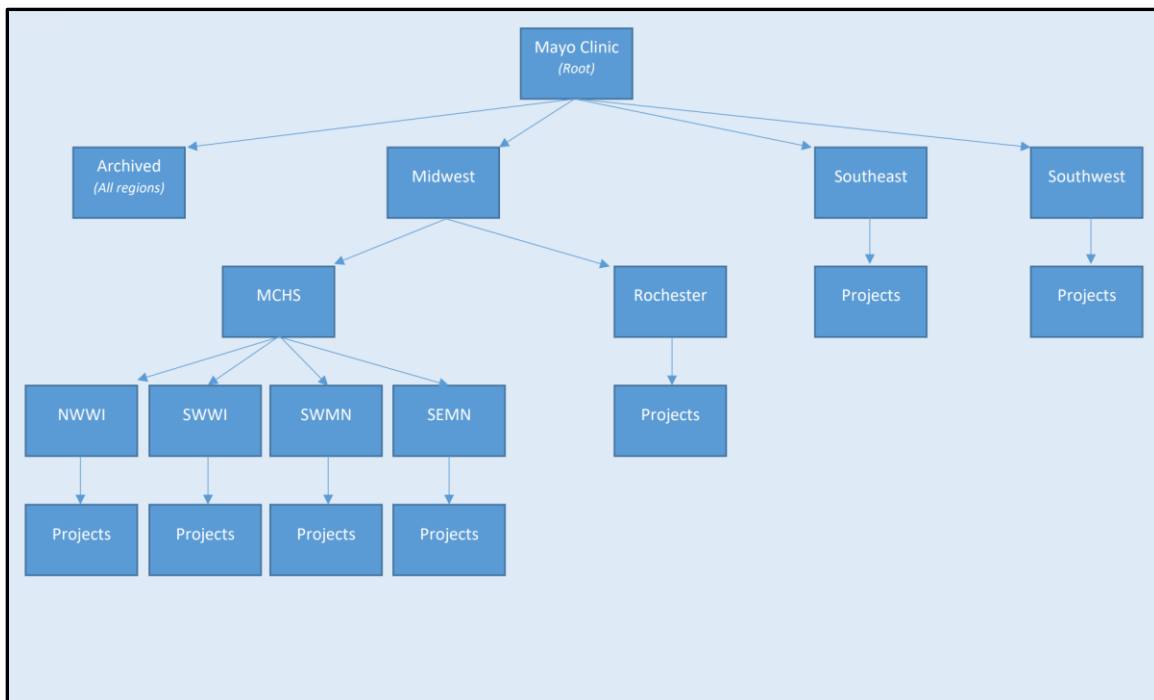
Mayo has designed the Projects app to calculate the project name and number based upon specific attributes within the project. Thus, information entered into the project will be used to create the name and number.

Once a project is initiated, all other documentation (Cost documents such as Budget detail, Invoices, Contracts, File structure, etc.) sit within the project and are managed by other apps available to users. The other apps will be reviewed in additional Quick Reference Guides.

Before reviewing the specific steps to initiate a new project, it is important to note that new projects will be initiated by copying template projects. These template projects have certain elements defaulted to avoid repetitive setup activity for the user. Each template project will have an imported set of account category codes, the standard file structure, standard milestone records, and a blank budget template ready for a user to begin populating.

PARTITION HIERARCHY

When initiating a project, the location of the project will be important. Mayo Projects will be initiated in partitions based upon region. This diagram depicts the structure of the Mayo Enterprise hierarchy in Kahua:



PROJECT TEMPLATES

Creating a project in Kahua will be done by copying a project template to serve as a starting point for end users. The template includes:

- Defaulted basic project information (Projects app)
- Standard Mayo folder structure (File Manager app)
- Account category codes for the Work Breakdown and the cost apps
- A blank budget template (Funding app)
- Standard milestone records (Milestones app)

The goal of using templates is to ensure consistency across Mayo’s Kahua environment and to minimize setup time for end users. This saves time and ensures consistency in reporting, data analysis, and user experience across all projects.

Template projects sit in region partitions. For example, the partition for a Rochester template project looks like this:

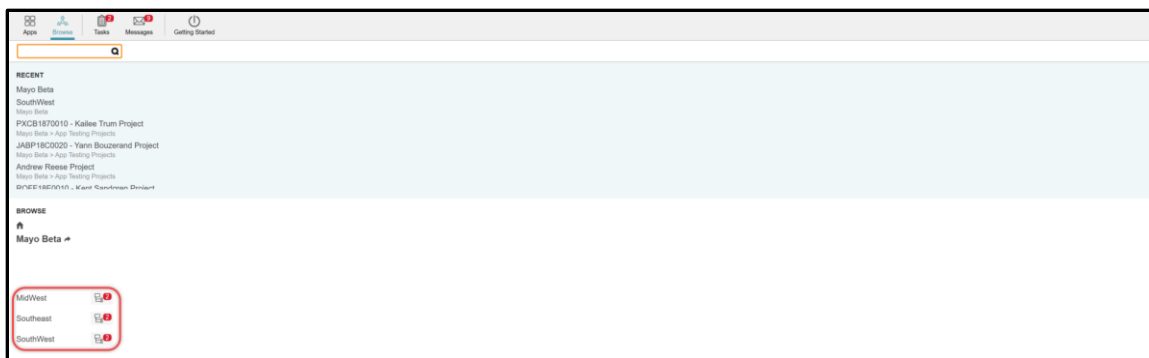
Mayo > Midwest > Rochester

There are three ways to get to the partition:

Navigate – use the Browse app available on the App bar to drill down into the hierarchy. By clicking on the name of a partition or project, the user will be taken to that partition and it will display in the Project Navigator bar at the top of the window.

Search – Click on the current partition name displayed in the Project Navigator bar at the top of the window. Enter part of or all of a partition name in the Search box. Click on the desired entry from the search results list.

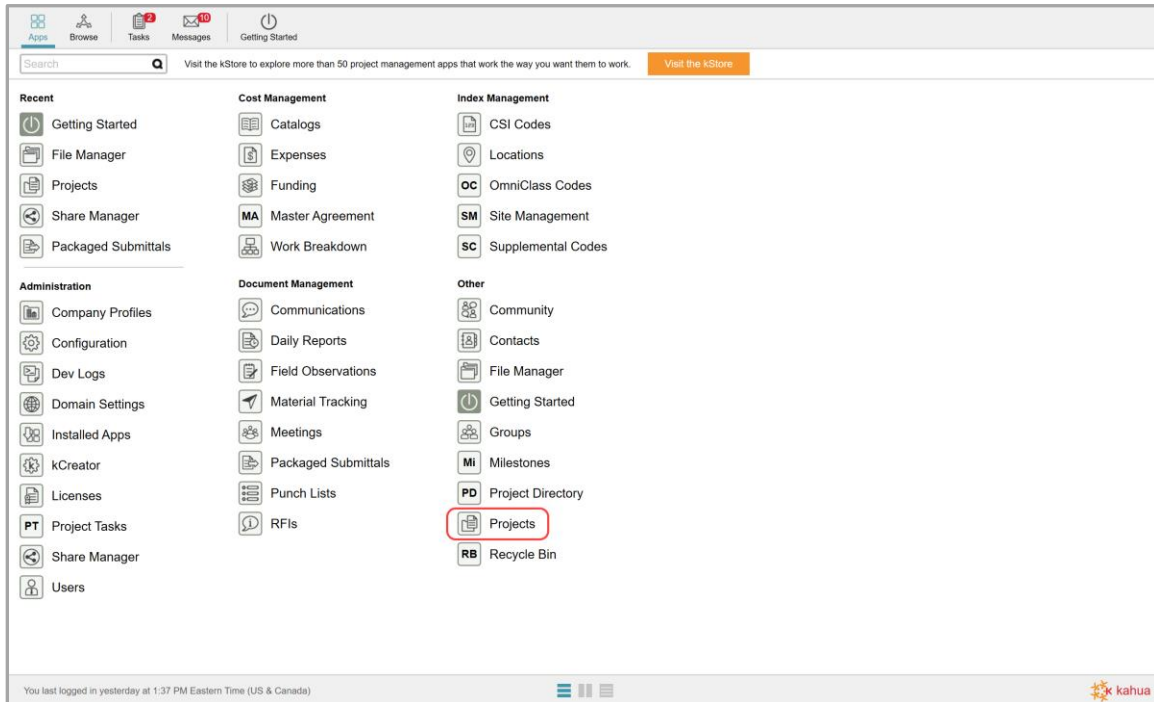
Select – Click on the current partition name displayed in the Project Navigator bar at the top of the window. Click on an entry from the list of recently accessed locations, which appears just below the Search window.



A template projects will start with TEMPLATE in the project name.

COPYING THE TEMPLATE PROJECT TO CREATE A NEW PROJECT

1. Navigate to the region partition level of the template project.
2. Open the Apps Launcher and select the Projects app in the Other group of apps.



When the Projects app opens, a list of projects will appear in the Log.

3. Find the template project which will have “TEMPLATE” in the project name. If the template project is not in the list, look to the Navigation bar and ensure you are in the partition **above** the template project.
4. Click on the template project name, highlighting the record in the log. Note that a new set of selections appears in the Action Bar.



5. Select **Copy** from the Action Bar.

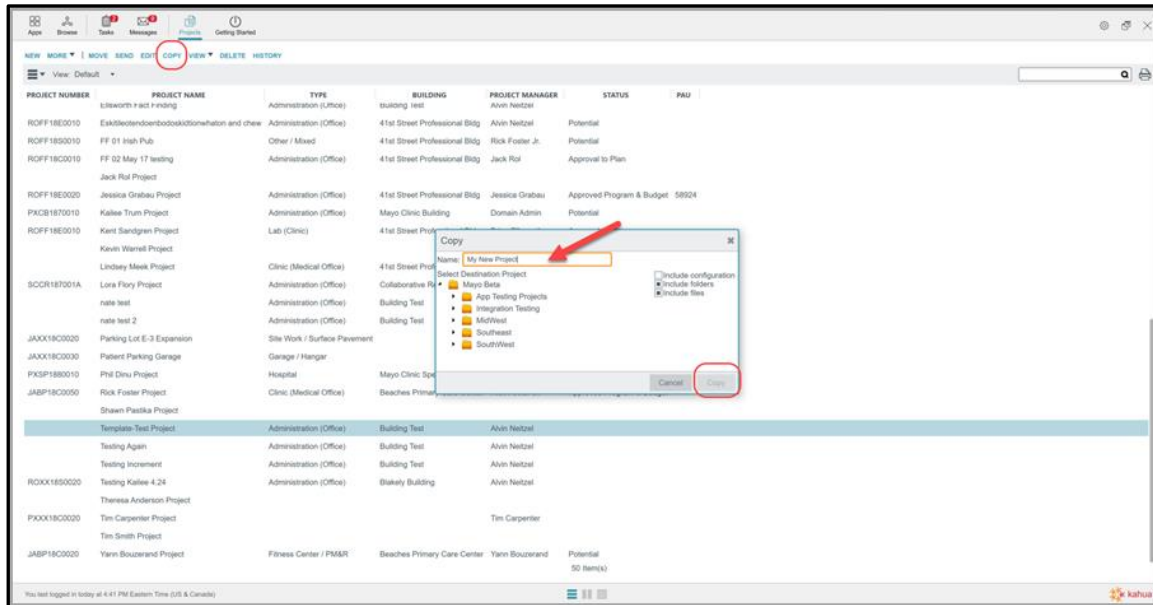
A pop-up window displays. The user is prompted to enter a name for the new project and to select the partition where the project will reside.

By default, the Include Configuration box is unchecked. Leave these settings as they are; do not check the Include Configuration box.

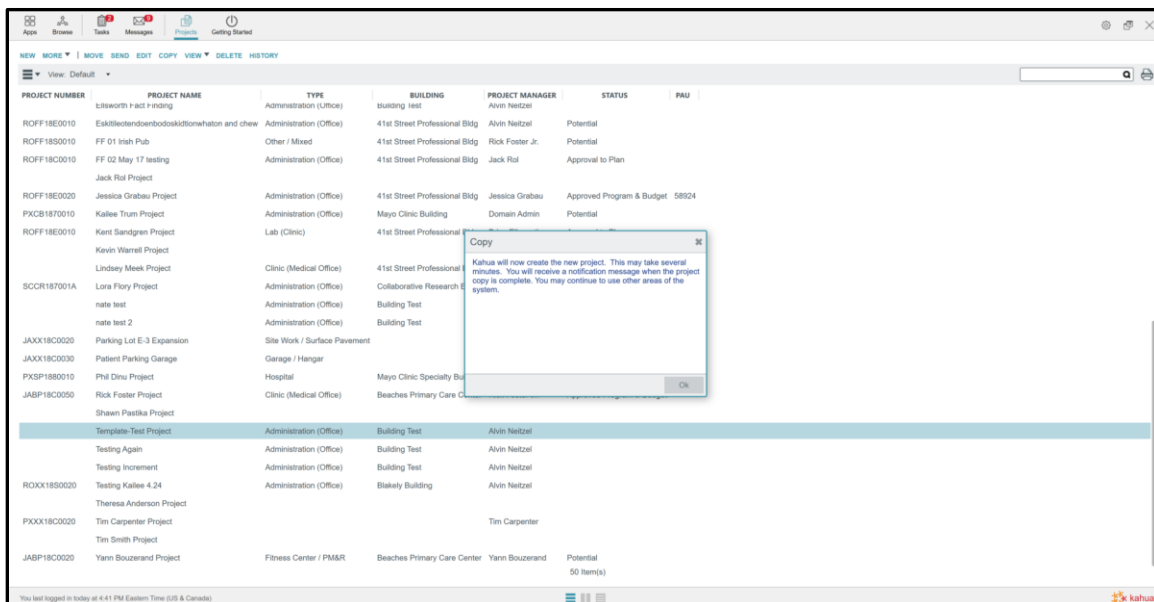
6. Enter a project name.

Note: The project name is temporary and should be a name that will allow you to identify the project in the navigation structure until a formal name is assigned in a further step. At a step further in the process, the project name will be automatically reassigned based on specific project attributes populated during setup.

7. Select a Destination Project – drill down to the parent partition where the new project will be created. For example, drill down through “Midwest” and click on “Rochester” if the project will reside under the Rochester partition.
8. Confirm the copy operation by clicking *Copy* in the lower right of the pop-up box.

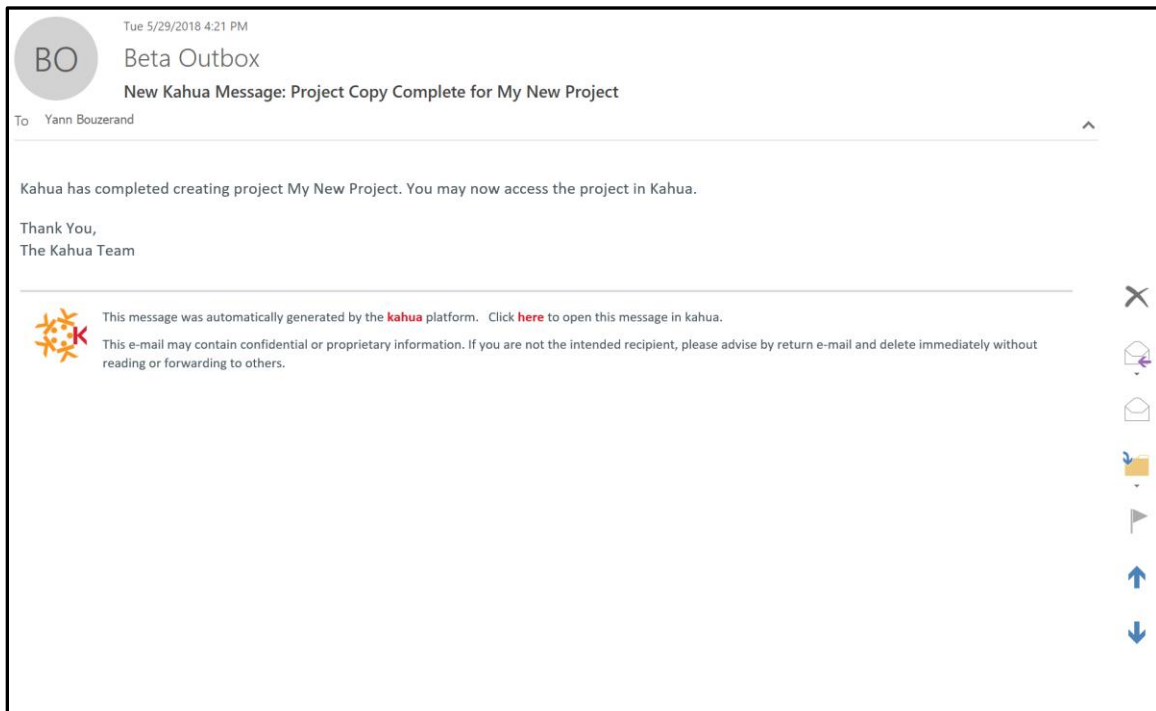


A message will inform the user that the project copy function is underway– a new project will be created in the partition that was selected.



Note that the project may take a couple of minutes to copy before it becomes available for use in the Project Navigator.

Once copied, an email and a message in Kahua will notify the user that the project is ready to be used. To navigate into the new project, use the Navigation Bar and drill down into the partition that was identified as the 'destination project' (parent) during the copy process.



FILLING OUT THE PROJECT INFORMATION

Now that a new project has been created, users may now edit the Project Information. To do so:

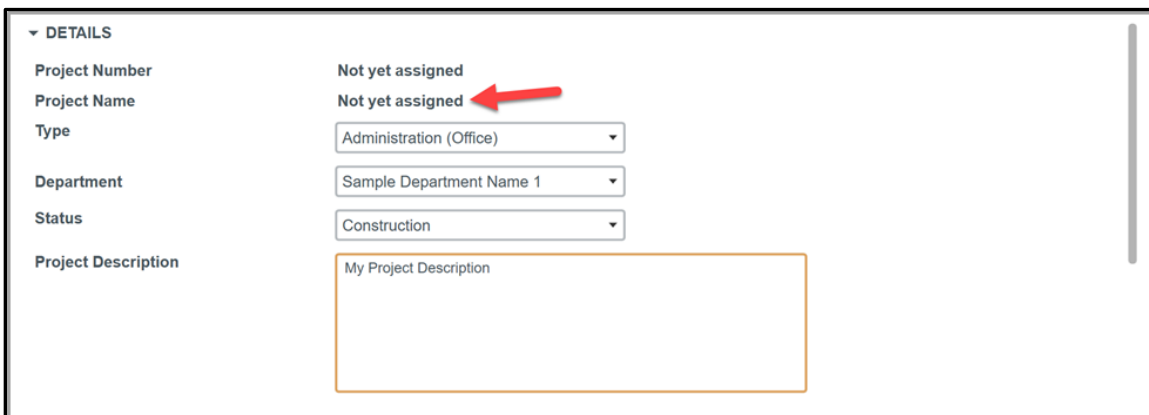
1. Navigate to the newly created Project under the correct region partition using the Browse button. Per above instruction, a user may navigate into the project one of three ways – Search, Browse, or finding in the Recent list if they have been in the project previously.
2. Locate the Project name in the teal Navigation Bar at the top of your screen. This means that you are now working *within* your project. At the end of the Project Name is an icon of a pencil in a box. Click on the icon to bring up a window with the Project Details. This is where basic project information will reside.



3. Select *Edit* on the Action Bar.



4. In the Details section, clear the temporary name assigned when creating the project. Tab out of the Name field. Note the field becomes non-editable and displays the message “**Not Yet Assigned**”. This is because the Project Name and Project Number will be created based upon concatenation of specific project attributes to have a standard and consistent naming and numbering convention across the enterprise.
5. Fill in all required fields – note that several fields may have defaulted information from the template project. Update any information in these fields, and all other fields, as needed. Users should enter as much information as possible – note that this information can be updated later as the project progresses.



- In the Location section, select the Site, Campus, Building(s) and Floor(s) that the project applies to. Note that the drop downs will filter based upon the selections in the previous boxes. If multiple buildings are chosen, the Floor selection will automatically default to “Multiple Floors”.

▼ LOCATION

Site

Campus

Building

Floor

Project Name Descriptor

Direction

- Enter a Project Name Descriptor – this field will be used to help identify the project by displaying as part of the project name. It should be short, yet descriptive.
- Fill out the Schedule section information with any known dates.
- Fill out the Project Workflow Roles section. This section will allow users to designate Kahua users who will be playing specific project roles- these roles will be used in workflow for specific apps and may not align with an individual's formal title.

Note that if a specific individual does not appear in the drop down, they must be added as a Contact in Kahua before they may be added to a specific role. If the individual will need to approve documents in Kahua, they also must have an active Kahua login with signature details filled in to engage in approval processes.

▼ PROJECT WORKFLOW ROLES

Operational Owner/Administrator	<input type="text"/>
Project Manager	<input type="text" value="Yann Bouzerand - Mayo Beta X"/>
Construction Manager	<input type="text"/>
Mayo P&D Architect	<input type="text"/>
Mayo P&D Interior Design	<input type="text"/>
Finance Support	<input type="text"/>
Contract Quality Reviewer	<input type="text"/>
Administrative Assistant	<input type="text"/>
Delegated Signature #1	<input type="text"/>
Delegated Signature #2	<input type="text"/>
Delegated Signature #3	<input type="text"/>
Lead Design Professional	<input type="text"/>
Lead Design Professional - Construction Administrator	<input type="text"/>
Co-Design Professional	<input type="text"/>
Lead Contractor	<input type="text"/>

10. Fill out the Budget \$/SF section. Note that specific fields will be calculated based upon your responses.

▼ BUDGET \$/SF

Approval To Plan	<input type="text" value="Select a date 15"/>
Program and Budget Approval Date	<input type="text" value="Select a date 15"/>
Approval Entity	<input type="text"/>
Funding Entity	<input type="text"/>
Project Square Footage	<input type="text"/>
Approved Project Budget	\$ <input type="text"/>
Budget \$/SF	\$ <input type="text"/>
Level Of Construction	<input type="text"/>
Budgeted Construction Cost	\$ <input type="text"/>
Budgeted Construction \$/SF	\$ <input type="text"/>

11. Fill out the Account Information section.

▼ ACCOUNTING INFORMATION

Expense Type C - Capital ▼

PAU

Departmental PAU

Company Number

Account

Sub Account

Note that the Expense Type is required as it is utilized to create the Project Number. The other accounting information will be defaulted in certain cost documents on the Project.

12. In the References section, Kahua allows the user to attach supporting documents. Note that each project has a standard file folder structure in the File Manager app as well where most documents will be stored.

Select *Upload* to upload documents from the computer or *Add Kahua Doc* if the documents are in the File Manager app.

▼ REFERENCES

☰
|
VIEW
UPLOAD
ADD KAHUA DOC
EDIT
MARKUP
UPDATE
REMOVE
DOWNLOAD
ADD COMPOSITE

TYPE	DESCRIPTION	CONTRIBUTOR	DATE	MARKUP?	INCLUDE ON SEND	INCLUDE MARKUP ON SEND	IS CURRENT	PREVIEW

13. Upon completion of populating project information (HAVING THE BUILDING AND FLOOR prior to taking action is critical), scroll to the bottom of the form and choose an action. The available actions are Save, assign a Project Number and Assign a Project Name and each is described below.

ASSIGN PROJECT NUMBER - Will allow the user to assign a project number based on the WARS numbers (CAMPUS, BUILDING (if no building or multiple will be XX), YEAR, FUNDING (Capital or Expense or Study) and SEQUENTIAL NUMBER) implemented by Mayo Clinic. The user will want to assign a project number *in advance of "save"* if a number has never been assigned yet. The number will be created from a specific algorithm (see below). The information entered in the Project form fields will be used to calculate the number. This number will be utilized for integration with Lawson financial systems, so it is important that the number be calculated with the correct information. The number will be made up of the below components:

SAVE - Will allow the user to save any updates made to the record. Before saving, users should always ensure the Project Number and Name have been assigned.

digit 1	digit 2	Digit 3	Digit 4	Digit 5	Digit 6	Digit 7	Digit 8	Digit 9	Digit 10	Digit11
R	O	M	A	1	8	C	0	0	1	0
WARS Campus Code		WARS Building Code ("XX" if multiple buildings, site work or infrastructure)		Year of Inception		Project Funding Source: C= Committee Approved Capital Project E= Committee Approved Expense Project	Sequential Number	Sequential Number	Sequential Number	Sub Project Number (Usually 0)

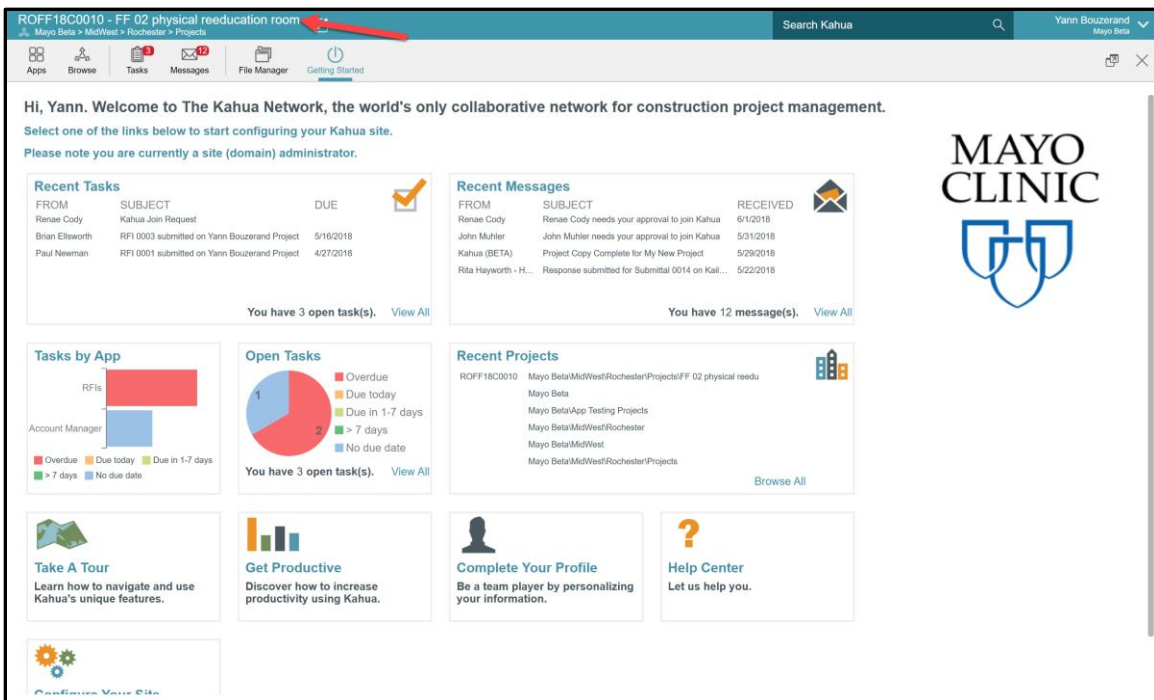
ASSIGN PROJECT NAME- Will calculate a project name (which will be visible in the Navigation bar) for the project based on the description entered in the following fields:

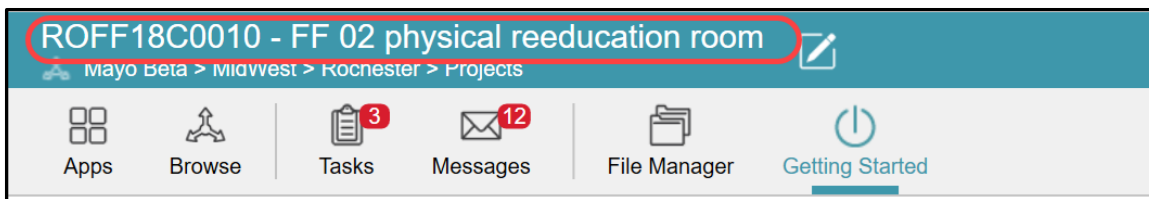
[Building] + [Floor (if none or multiple, will default to XX)] + Project Name Descriptor

Note that the user **MUST** assign a project number and a project name when creating a new project to be used in Lawson Integration.

14. Select **Assign Project No** to assign a project number, then select **Assign Project Name** to generate the project name. When complete, select SAVE. Users will not have to reassign project number or name when future edits are made to project information.

The project is now ready, and users may begin to work in other apps.





A breakdown of the Project Number as assigned above is below:

ROFF18C0010 – is the project number assigned

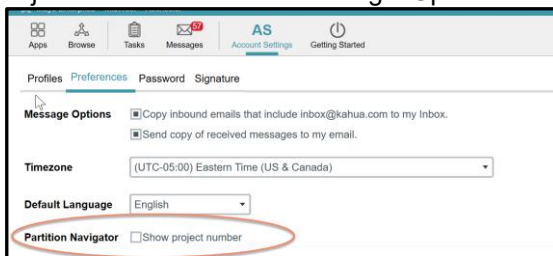
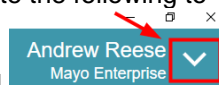
FF – is the Building code

02 – is the Floor code

Physical reeducation room - is the detail added into the project Name Descriptor field

Tip: If a user is NOT able to see the Project Number in the navigation bar, complete the following to


enable display of project numbers in the navigation bar: Click on the carrot symbol to the right of your name in the top right corner of the display. Then, click 'Account Settings.' Navigate to 'Preferences' and select 'Show project number.' Save the settings. Upon next login, the project number



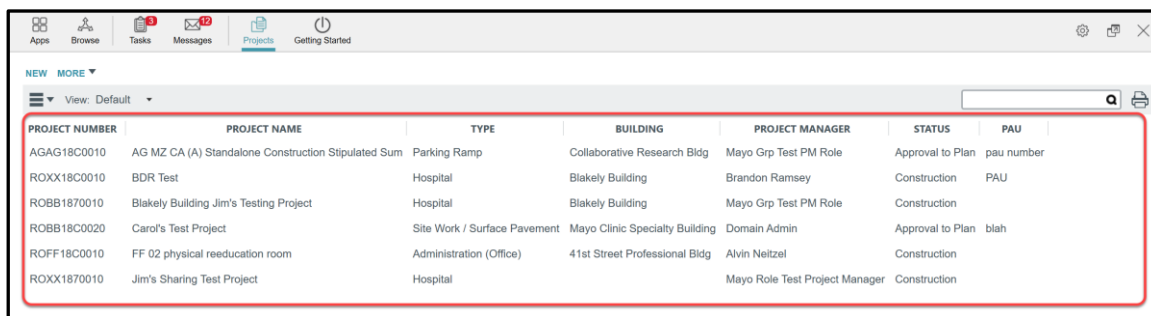
will display in the navigation bar.

ACCESSING THE PROJECTS LOG

Within the Projects app, Kahua displays all the project records that reside directly underneath the partition that you are in (in your Navigation Bar). This can be helpful to see a list / log of projects within a specific partition or region. Navigate in the Navigation Bar to a specific region.

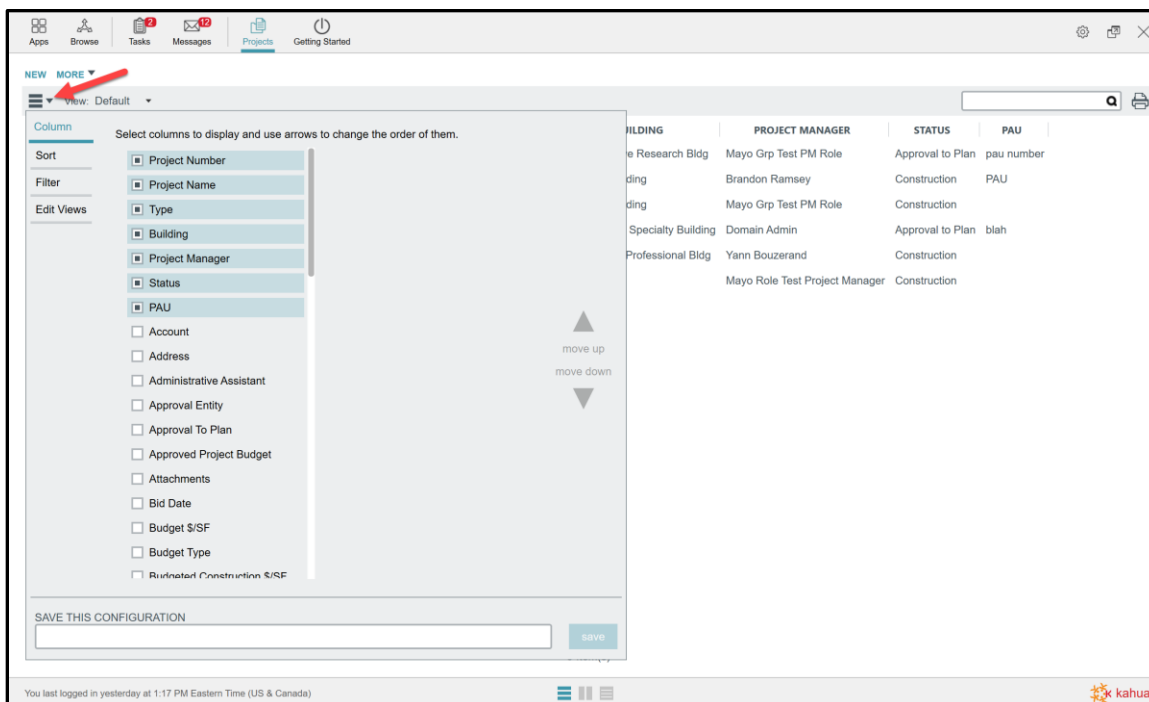
1. Select the correct region partition.
2. Select the Apps Launcher .
3. Select the Projects app.

All the projects created for this specific region will display in the log.



PROJECT NUMBER	PROJECT NAME	TYPE	BUILDING	PROJECT MANAGER	STATUS	PAU
AGAG18C0010	AG MZ CA (A) Standalone Construction Stipulated Sum	Parking Ramp	Collaborative Research Bldg	Mayo Grp Test PM Role	Approval to Plan	pau number
ROXX18C0010	BDR Test	Hospital	Blakely Building	Brandon Ramsey	Construction	PAU
ROBB1870010	Blakely Building Jim's Testing Project	Hospital	Blakely Building	Mayo Grp Test PM Role	Construction	
ROBB18C0020	Carol's Test Project	Site Work / Surface Pavement	Mayo Clinic Specialty Building	Domain Admin	Approval to Plan	blah
ROFF18C0010	FF 02 physical reeducation room	Administration (Office)	41st Street Professional Bldg	Alvin Neitzel	Construction	
ROXX1870010	Jim's Sharing Test Project	Hospital		Mayo Role Test Project Manager	Construction	

4. The user can personalize the log view by selecting the Pancake icon (looks like three stacked lines) at the top of the left of the Log.



The screenshot shows the 'Column' configuration menu. A red arrow points to the 'Pancake' icon (three stacked lines) at the top left of the log view. The menu allows users to select columns to display and use arrows to change the order of them.

Column Configuration:

- Project Number
- Project Name
- Type
- Building
- Project Manager
- Status
- PAU
- Account
- Address
- Administrative Assistant
- Approval Entity
- Approval To Plan
- Approved Project Budget
- Attachments
- Bid Date
- Budget \$/SF
- Budget Type
- Rushed Construction \$/SF

Buttons: move up, move down, SAVE THIS CONFIGURATION, SAVE

The user will be able to add fields to the columns displayed, sort, filter, and save these views created. This can be a quick way to pull a useful tabular report across projects in a region or a partition.

When saving a custom view, all other users will see this view if they toggle views using the drop down arrow to the right of 'Default.' This is one way that Kahua allows users to quickly create reports. All apps in Kahua allow users to customize Log views.

- To print the log, select the Printer icon. This report will be available in PDF, EXCEL and CSV format. Kahua renders a view of the report directly within Kahua for quick reference. To save this report in the Kahua File Manager, select "SAVE TO KAHUA".

