

# MAYO CLINIC



## Site Administrator Quick Reference Guide

November  
2018



Prepared for the Mayo Clinic  
Enterprise Kahua Deployment

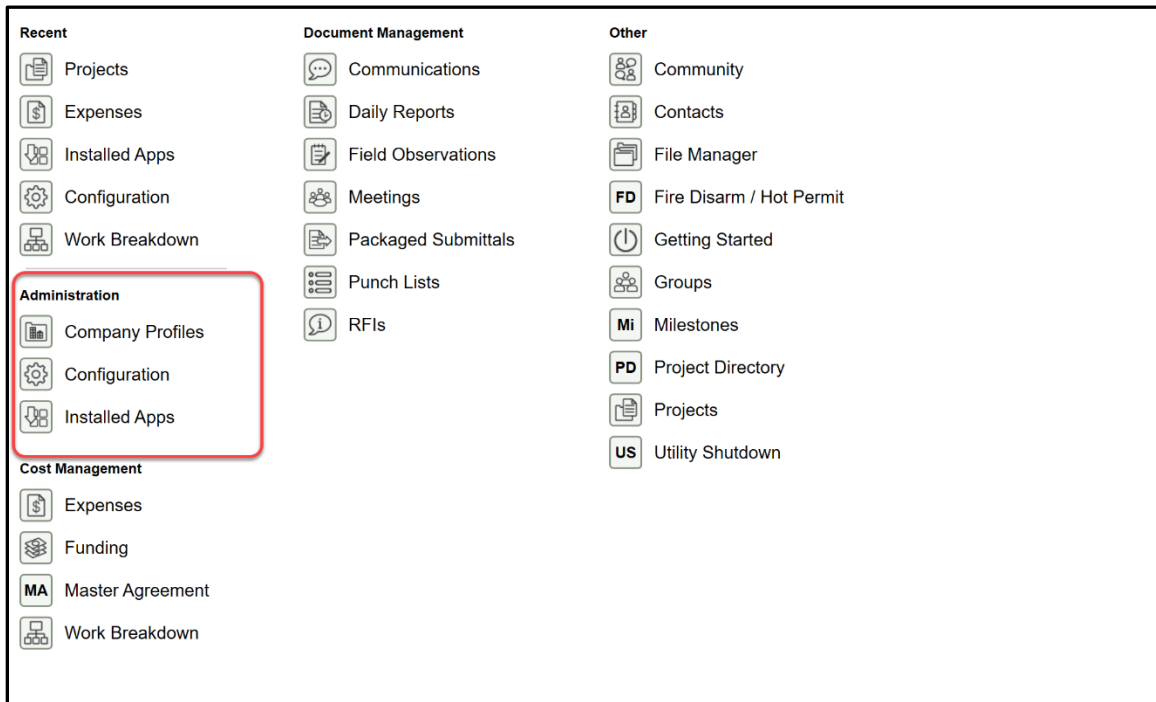
## SITE ADMINISTRATOR OVERVIEW

There are a few basic functions that a Site Administrator will need to be familiar with, and there are additional steps a Site Administrator may take to further organize and manage the company's Kahua domain. This Quick Reference Guide describes the steps necessary to set up and send shares from Mayo Clinic, and to complete basic domain setup. While the domain setup has already been done, knowing the process improves your understanding of the environment.

A Site Administrator has access to the Administration section in the App Launcher.

It includes three apps:

- Company Profiles
- Configuration
- Installed Apps

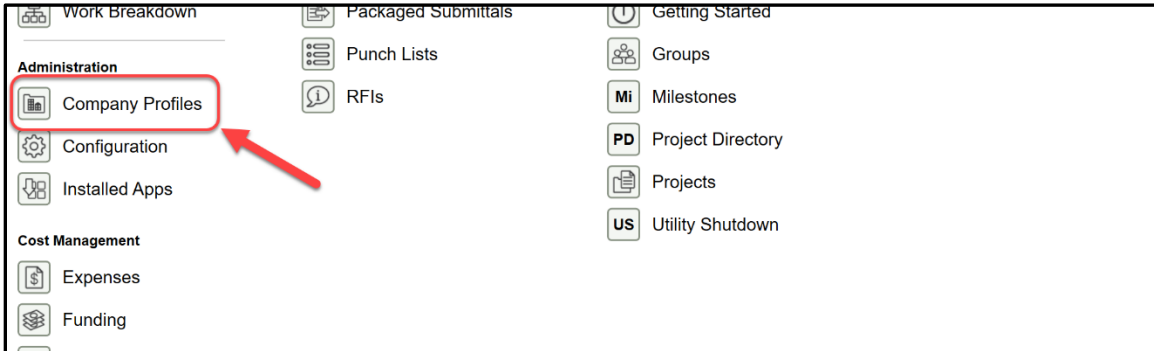


## COMPANY PROFILES

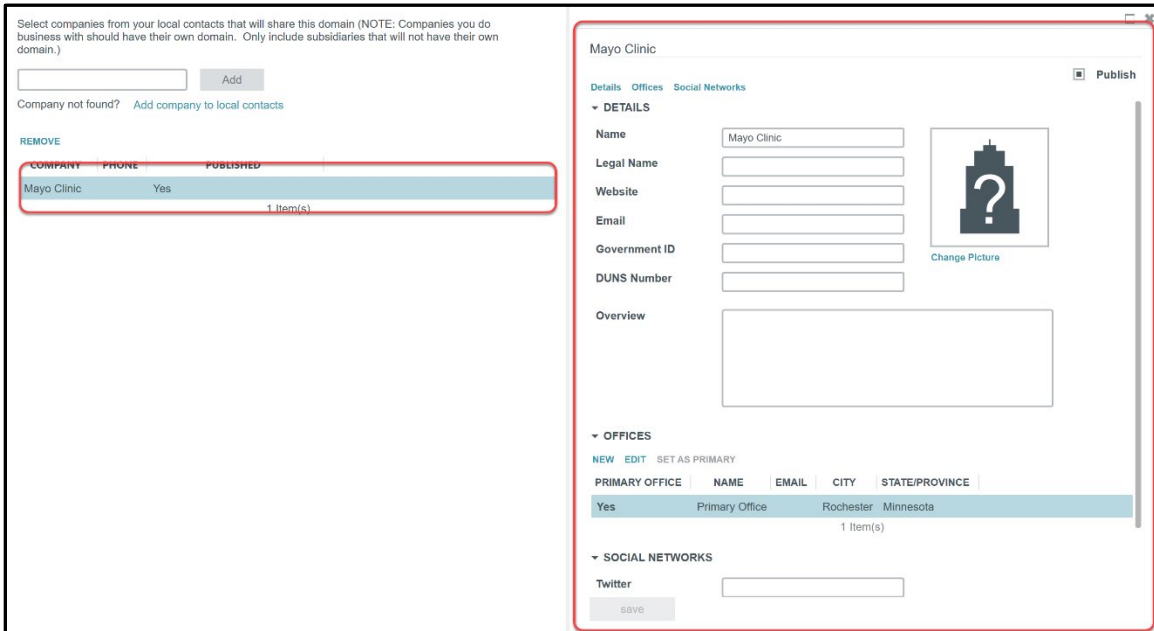
The Company Profiles app allows the Site Administrator to edit the profile of the company. This profile information is displayed in the Kahua Community when users/ Construction Industry Partners (CIPs) add Mayo Clinic to their local contact list.

To edit the company profile:

1. Click **Apps Launcher**, then **Company Profiles** under the Administration section.



2. Select the company record in the Log pane; the Detail pane displays the company record.



3. Fill out the DETAILS section

Fill out any fields as necessary. Remember that this information will be displayed on the company profile when other users/ Construction Industry Partners add Mayo Clinic into their local contact list from the Community.

Mayo Clinic

Publish

Details Offices Social Networks

▼ DETAILS

Name

Legal Name


Website

Email

Government ID

DUNS Number

Overview

 [Change Picture](#)

Note that a picture can be added to the company profile by selecting **Change Picture**. This picture will appear in the Community.

#### 4. OFFICES section

The OFFICES section will display the actual address of the company. If this address needs to be corrected, select **EDIT**.

If the address of another office needs to be added, select **NEW**. Adding offices will allow the Site Administrator to tie a specific office location to an individual user's profile.

▼ OFFICES

[NEW](#) [EDIT](#) [SET AS PRIMARY](#)

PRIMARY OFFICE	NAME	EMAIL	CITY	STATE/PROVINCE
Yes	Primary Office		Rochester	Minnesota

2 Item(s)

When completing the form for a secondary office note that the Name field is required.

Mayo Clinic

secondary office

Details Address Contact Social Networks

Name secondary office

▼ ADDRESS

Country United States

Line 1

Line 2

City

State

County

Postal Code

▼ CONTACT

Email

Phone

Alternate

Fax

Previous Next New Delete Done

Upon filling the necessary fields, the user has different options:

**Previous/Next** – Navigate to other office records if multiples exist.

**New**- Create a new blank record to add a new office address.

**Delete**- Delete the current office record.

**Done**- Close the new office address pane.

**Save**- Save the record.

OFFICES

NEW EDIT SET AS PRIMARY

PRIMARY OFFICE	NAME	EMAIL	CITY	STATE/PROVINCE
Yes	Primary Office		Rochester	Minnesota
	Mayo Clinic Arizona		Phoenix	Arizona
	Mayo Clinic Rochester		Rochester	Minnesota
	Mayo Clinic Florida		Jacksonville	Florida

save



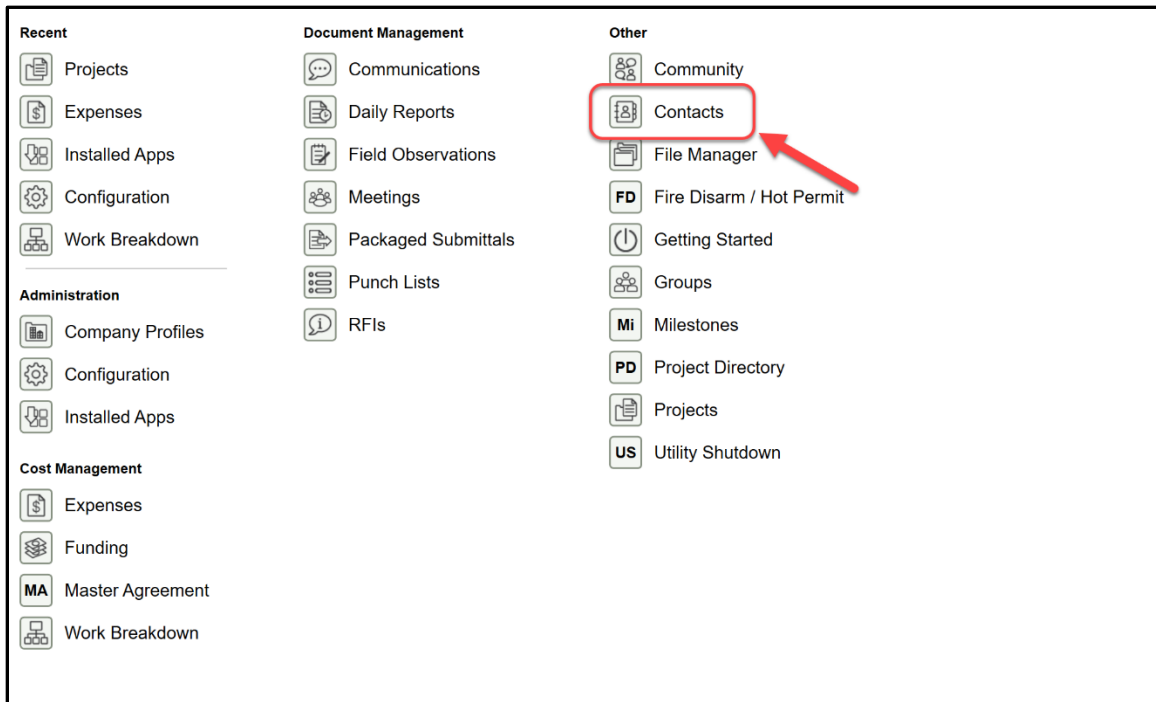
## USER MANAGEMENT- CONTACTS APP

In Kahua, the contacts are managed through the Contacts app. When a contact is added to the Contacts app, the contact information will be displayed to all the Mayo Clinic users across the Mayo Clinic site.

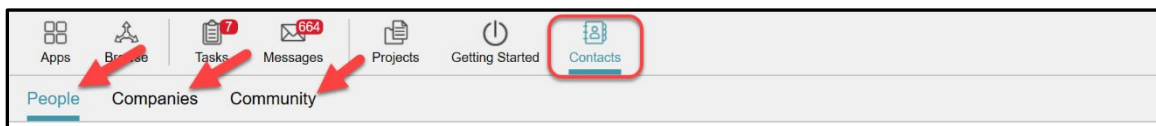
There are two ways to add a contact to the Contacts app:

- Existing Kahua users/companies will be added by finding them in the **Community** tab.
- Adding a contact who is not yet a Kahua user is done manually through the **People** tab.

The Contacts app is located under the OTHER section.



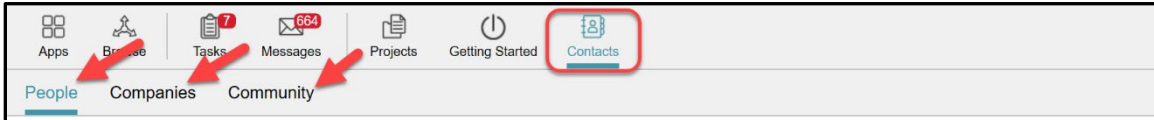
In the Contacts app, three tabs are available:



**People**- Domain specific list (companywide) of contacts. May be users and non-users; represents all contacts that Mayo Clinic engages with to complete project activity.

**Companies**- Domain specific list (companywide) list of companies. May be companies with or without domains; represents the companies that Mayo Clinic engages with to complete project activity.

**Community**- Collection of all profiles of companies and users across the globe with active logins for Kahua, regardless of whether Mayo Clinic has engaged with them in project work. Allows Mayo Clinic to identify companies and users Mayo Clinic could engage with and add to the Mayo Clinic domain’s People or Company list.



### ADDING A KAHUA USER TO THE CONTACTS APP THROUGH THE KAHUA COMMUNITY

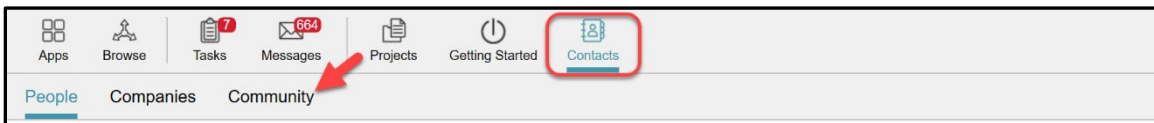
Adding an existing Kahua user will be done through the Community.

The Community is a unique feature of Kahua. It is a central repository of all existing Kahua users across the globe, regardless of whether 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 be able to collaborate with that contact.

Before adding a new contact in your local Contacts app, you should always search into the Community first, to make sure they don’t already have an account. If a user exists in the Community, add them to your company’s contacts.

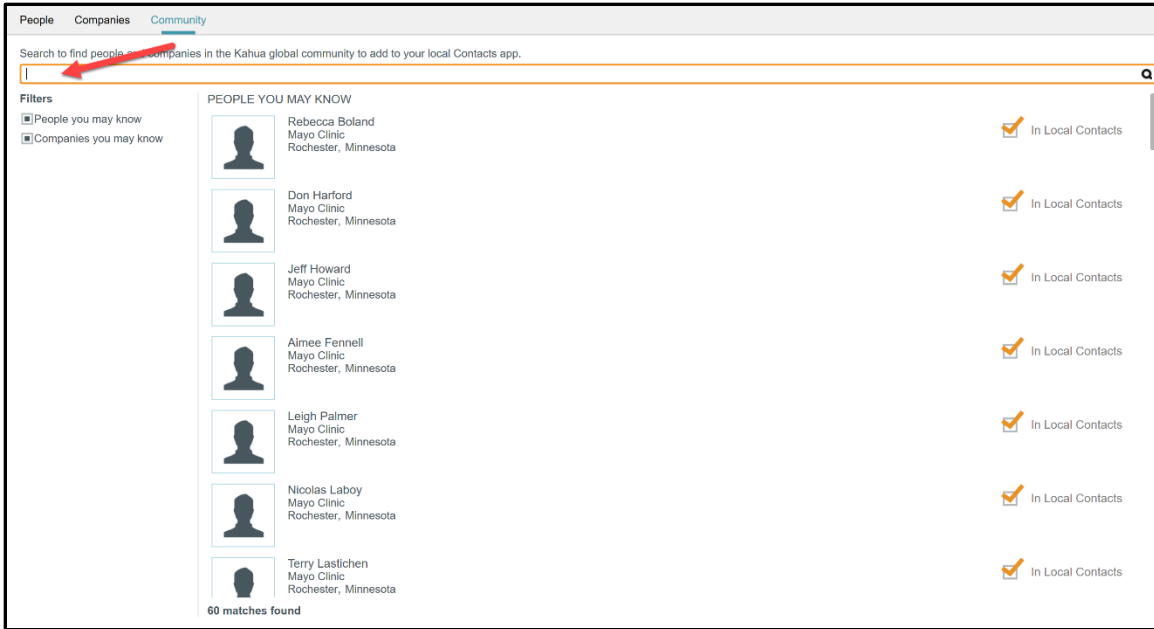
To add a user from the Community:

1. Select Community, located in the Contacts app.



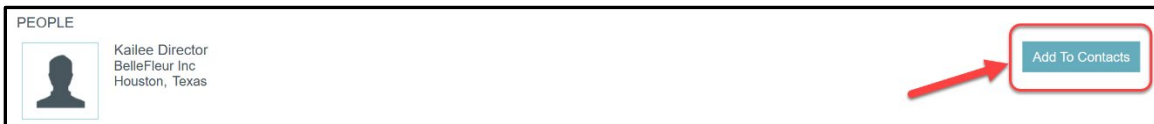
2. To search for a Contact, the user can either type the first name, the last name or the company name of the user to add.



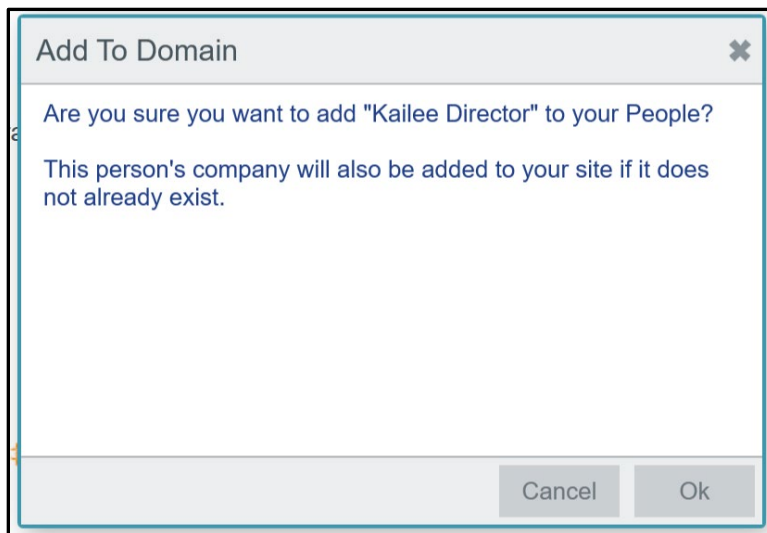


When the result is displayed, an Add to Contacts button may appear in front of the user profile. It means that this user is not part of your local contacts list.

3. Select **Add to Contacts** to add the user to the local contact list.



When a user is added, a window pops up to note that the user's company will also be added to the company's contacts list if it doesn't already exist.



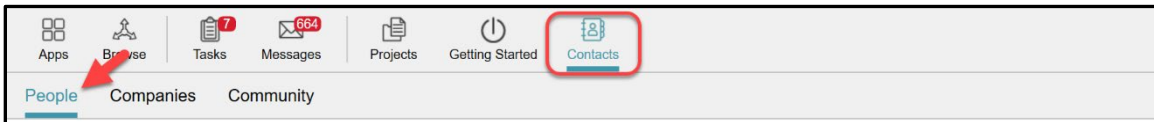
Note that if the searched for contact already exists in the local contacts list, an **Open Contact** link instead of the **Add to Contacts** button will be displayed.



### ADDING A KAHUA USER OR NON KAHUA USER MANUALLY

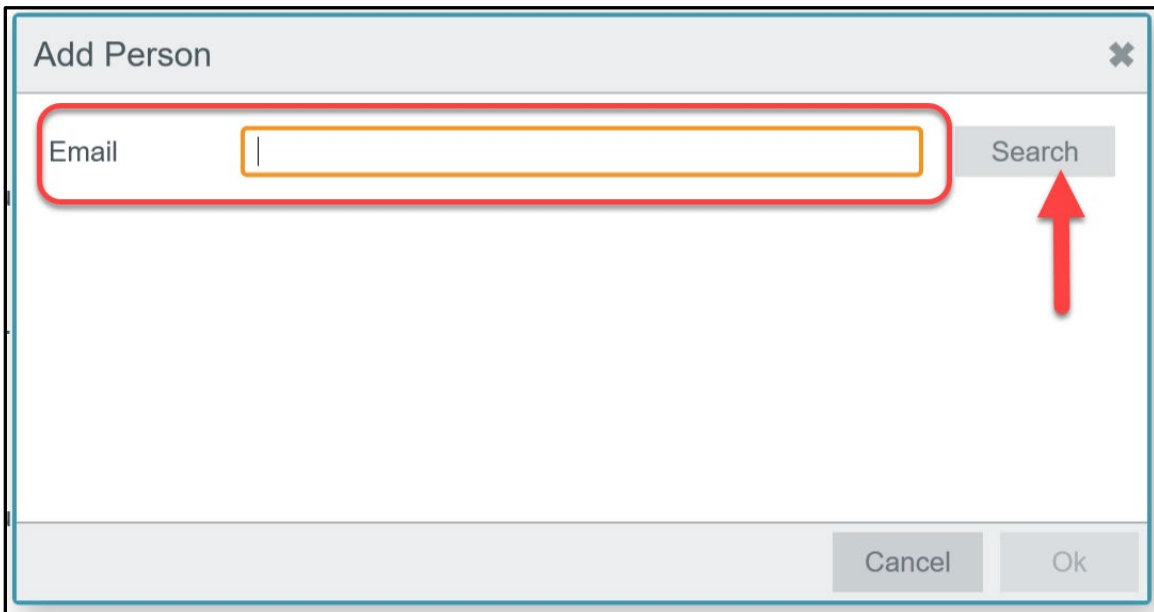
To add a non-Kahua user to the local Contacts list:

1. Select the People tab.

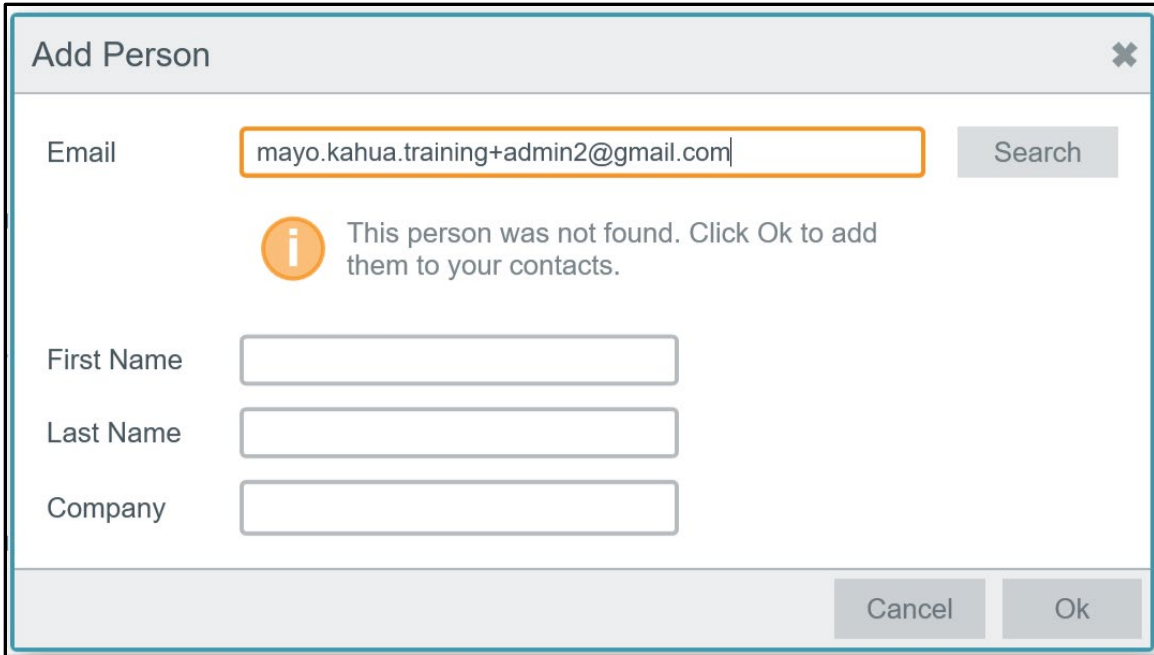


2. Click NEW. A window pops-up.
3. Enter the contact's email that you want to add then click on **Search**.

Kahua will search if the contact already exists either in your Contacts list or in the Kahua Community.

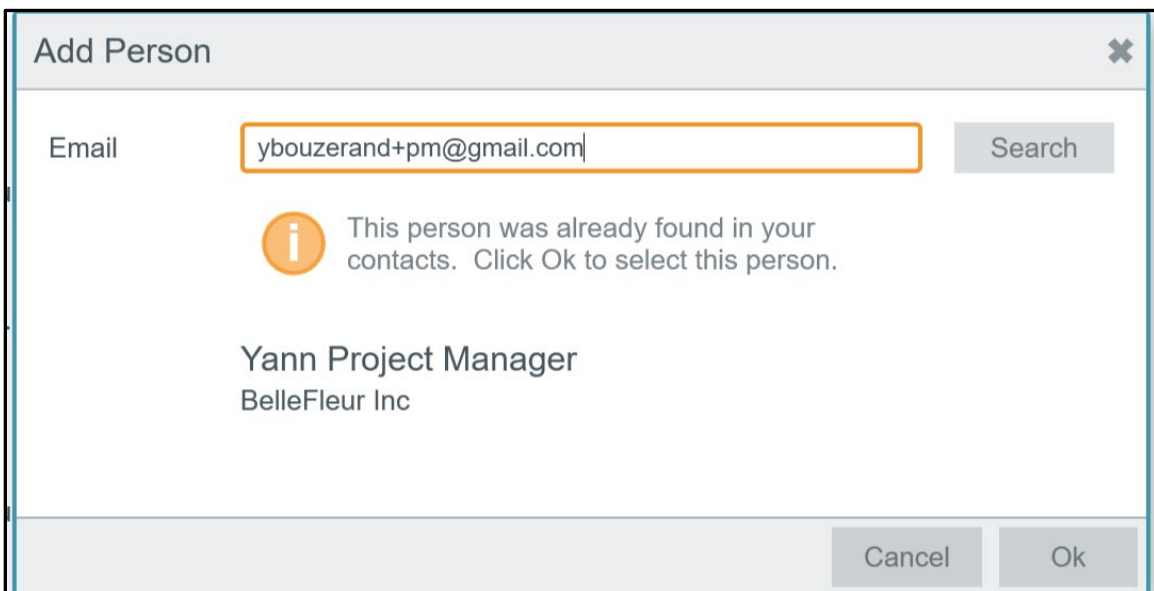


If the contact doesn't exist, the user will be prompted to fill the information to create the record.

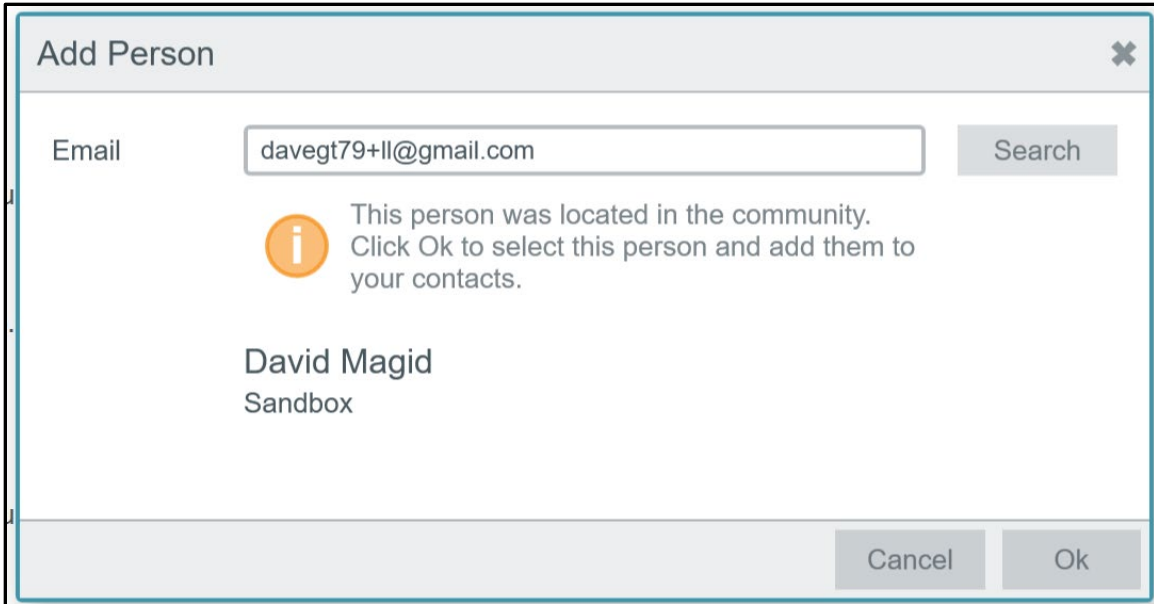


The screenshot shows a dialog box titled "Add Person" with a close button (X) in the top right corner. The "Email" field contains the text "mayo.kahua.training+admin2@gmail.com" and is highlighted with an orange border. To the right of the email field is a "Search" button. Below the email field is an information icon (i) followed by the text: "This person was not found. Click Ok to add them to your contacts." Below this message are three input fields: "First Name", "Last Name", and "Company". At the bottom right of the dialog box are "Cancel" and "Ok" buttons.

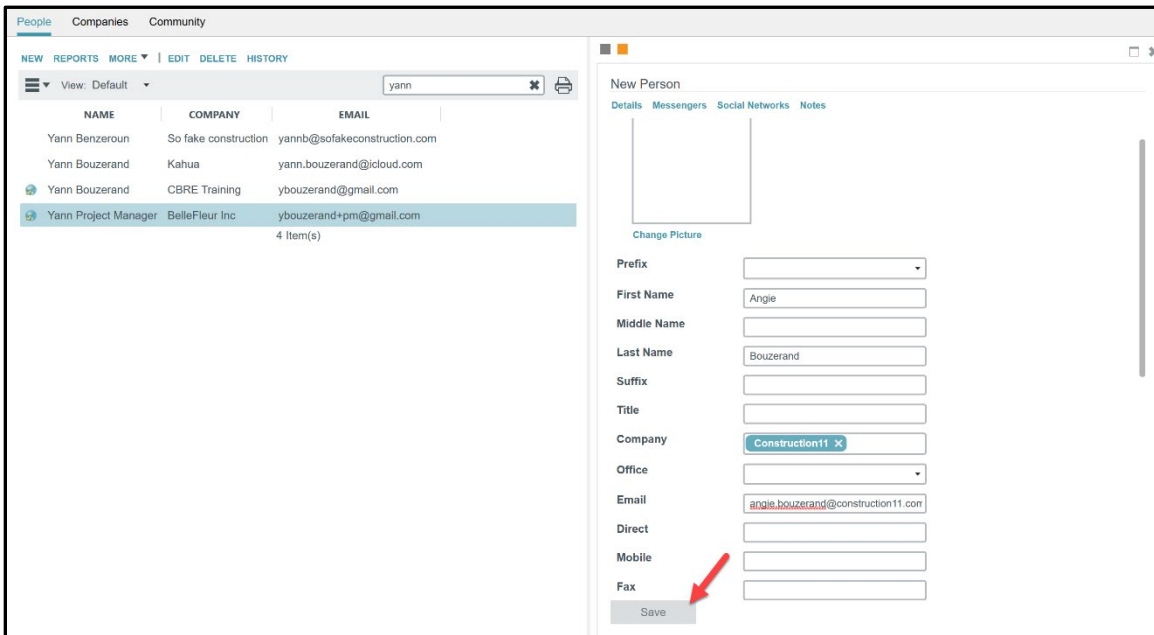
If the contact already exists in your contact list OR in the Community, Kahua will notify it.



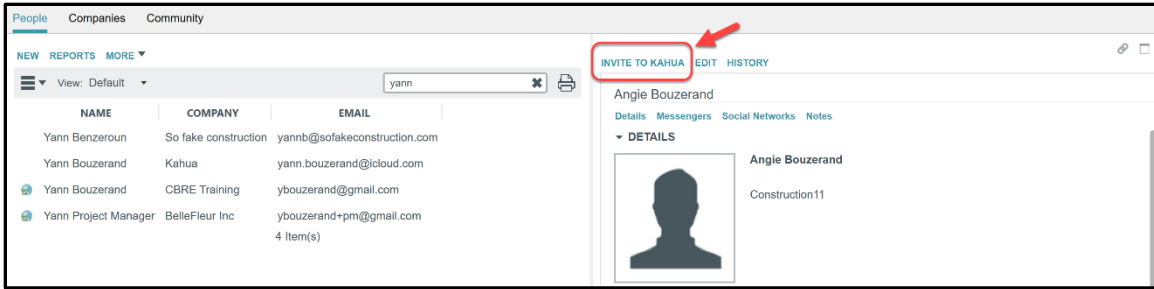
The screenshot shows a dialog box titled "Add Person" with a close button (X) in the top right corner. The "Email" field contains the text "ybouzerand+pm@gmail.com" and is highlighted with an orange border. To the right of the email field is a "Search" button. Below the email field is an information icon (i) followed by the text: "This person was already found in your contacts. Click Ok to select this person." Below this message are the contact details: "Yann Project Manager" and "BelleFleur Inc". At the bottom right of the dialog box are "Cancel" and "Ok" buttons.



4. Once the record is created, select **Save** to save the record.



Note that upon saving, the user will be able to invite the new contact to join Kahua.

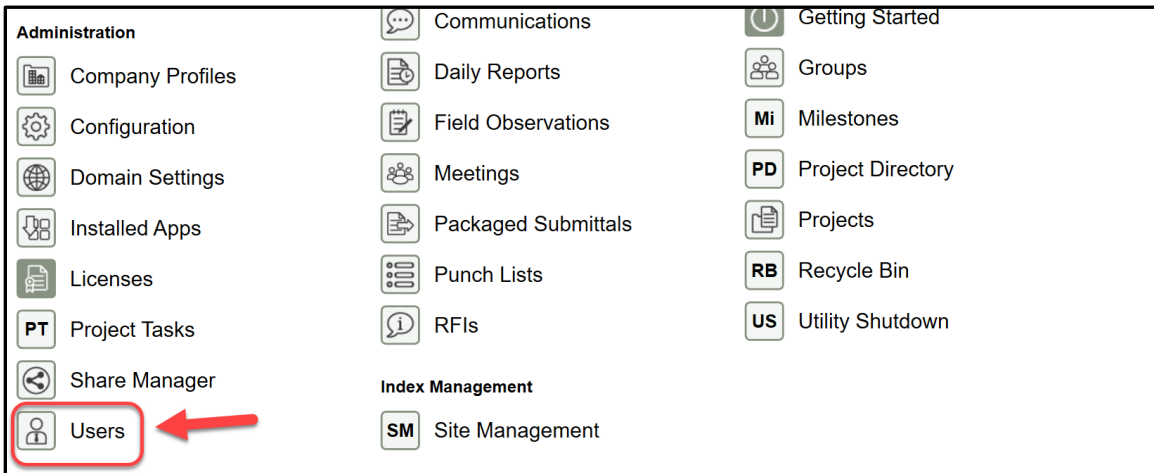


if licenses are necessary to be provide to the external contact, the user will have to coordinate with the Mayo Clinic domain administrator by sending the contact information and the required licenses to assign, by email at [kahuasupport@mayo.edu](mailto:kahuasupport@mayo.edu).

### ADDING A NEW MAYO CLINIC USER TO THE DOMAIN

To add a new Mayo Clinic user to the Mayo Clinic domain, please follow first the previous chapter to create the record in the contact list. Then, the Site Administrator will have to add the new user to the domain through the USERS application.

To add a new Mayo clinic user to the Mayo Clinic domain, navigate to the USERS app located under the Administration section.



The USERS app will display all the actual users of the Mayo Clinic domain.

1. Click on **NEW** to add a user to the Mayo Clinic domain

2. Enter the contact's name
3. Leave on "Yes" to issue a platform license (unless that person will use Kahua periodically and only to answer to a task, in this case a platform license is not necessary. Typically, a platform license is preferred.)
4. Click **Send Invitation**

FIRST NAME	LAST NAME	COMPANY	PLATFORM LICENSE	EXPIRATION
Jerry	Abernathy	Mayo Clinic	Active	7/2/2019
Al	Chihak	Mayo Clinic	Active	7/2/2019
Stacey	Alzamora	Mayo Clinic	Active	7/2/2019
Jim	Anderson	Mayo Clinic	Active	7/2/2019
Jeremy	Anderson	Mayo Clinic	Active	7/2/2019
Michelle	Anderson	Mayo Clinic	Active	7/2/2019
Theresa	Anderson	Mayo Clinic	Active	7/2/2019
Ramsey	Banga	Mayo Clinic	Active	7/2/2019
Andy	Baumanis	Mayo Clinic	Active	7/2/2019
Bradey	Bearden	Mayo Clinic	Active	7/2/2019
Scott	Beckel	Mayo Clinic	Active	7/2/2019
Carrie	Beckendorf	Mayo Clinic	Active	7/2/2019
Becky	Berglund	Mayo Clinic	Active	7/2/2019
Neal	Binner	Mayo Clinic	Active	7/2/2019
Stephen	Boone	Mayo Clinic	Active	7/2/2019
Annie	Bornhorst	Mayo Clinic	Active	7/2/2019
Matt	Bowler	Mayo Clinic	Active	7/2/2019
Bryan	Pierskalla	Mayo Clinic	Active	7/2/2019
Mike	Brigham	Mayo Clinic	Active	7/2/2019
Todd	Brown	Mayo Clinic	Active	7/2/2019
Mark	Browning	Mayo Clinic	Active	7/2/2019

199 Item(s)

Invite New User

Who would you like to invite?

Would you like to issue this person a platform license?  Yes  No

Select from available: EXPIRES 7/3/2019 AVAILABLE 802 / 1000

Cancel Send Invitation

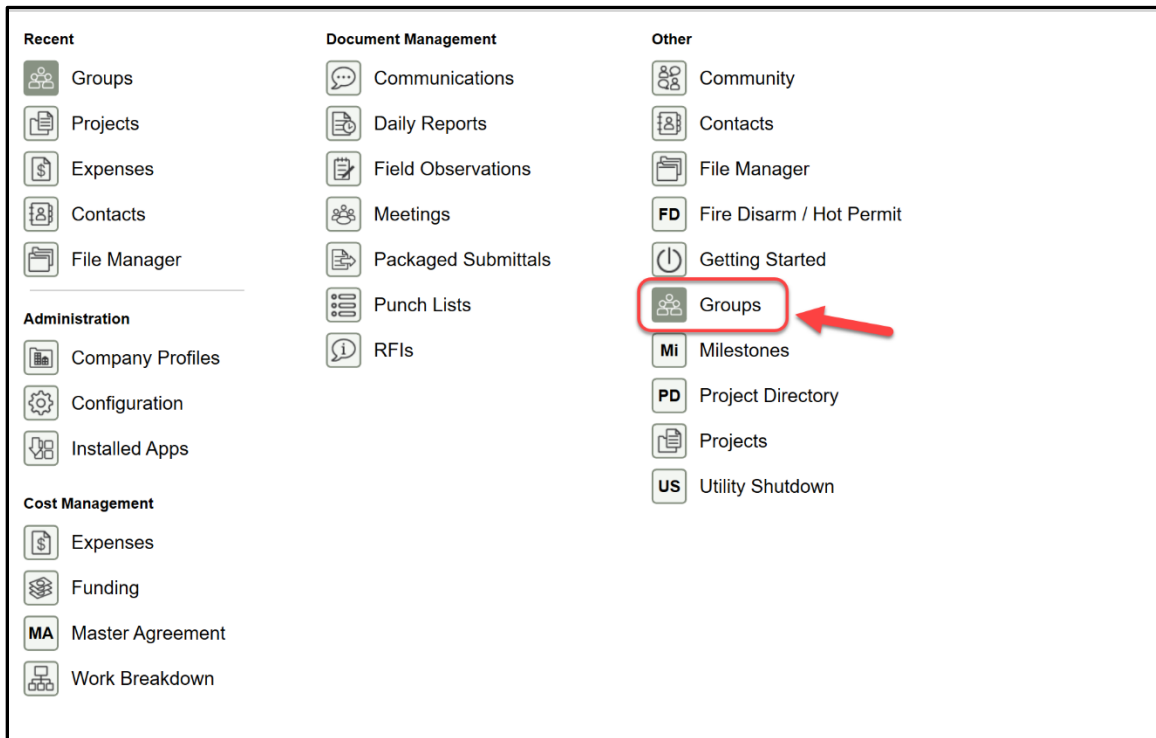
The user will receive an invitation by email to join the Mayo Clinic domain and to become an active user.

## USER MANAGEMENT- GROUPS APP

The GROUPS app is where permission management activities will take place. The Site Administrator has permission to add users to specific groups with a defined set of permissions across each app. Permissions in Kahua can be managed for each specific app, so groups will be setup with permissions specific for a certain project role on each app.

Permission can be granted via the GROUPS app within specific partitions in Kahua, so the system is flexible to have users view only the projects or regions where access has been granted to them. The programming follows the inheritance model where if permissions are granted at a higher partition the same permissions are granted to lower partitions

The GROUPS app is located under the **Other** section.



### 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 the 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 hierarchy 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 **Type names of people to add:** and select the user's name from the drop-down menu.

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 through the steps to add a new contact/user in Kahua before this can be done.

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

**TO REMOVE A USER FROM THE GROUP:**

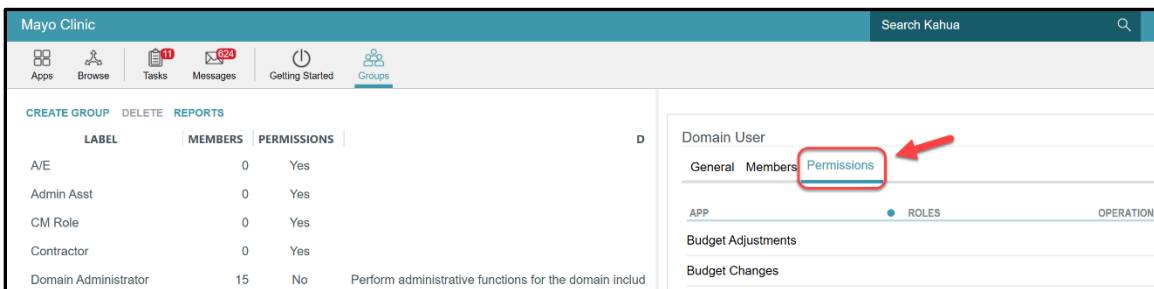
1. Select the contact's name from the list of users.

**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.

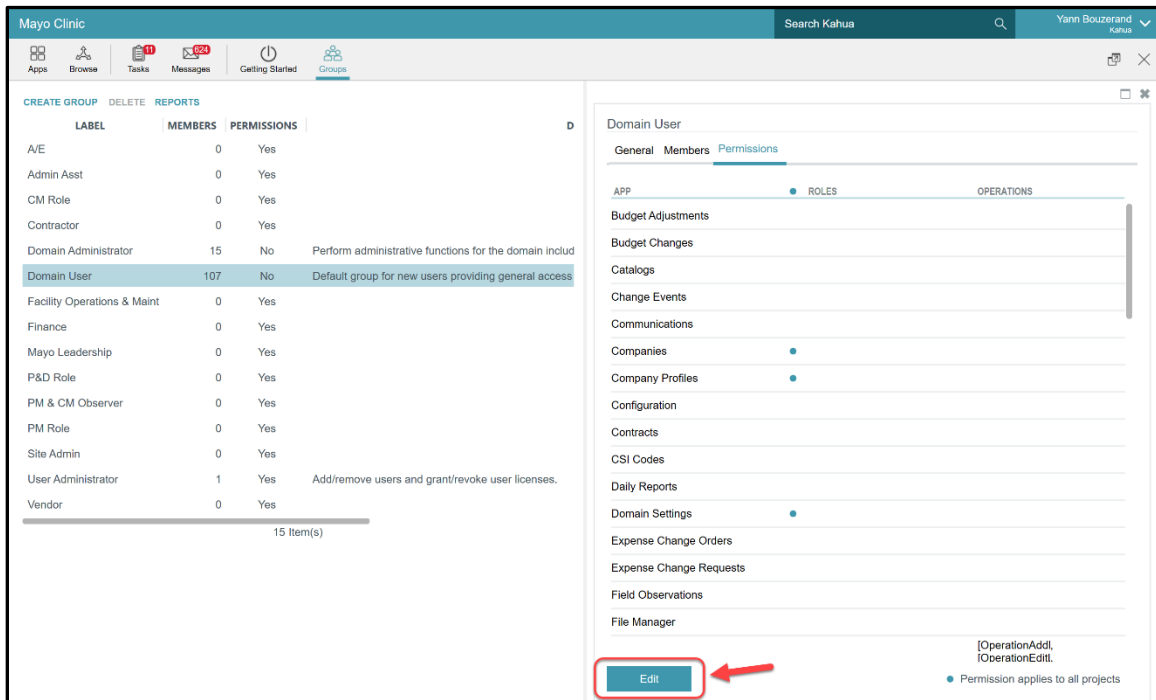
**Note that the permissions of domain specific groups have been previously set by Mayo Clinic and should not be changed unless it has been internally discussed. However, it is important to know how to troubleshoot if a permission has been modified by mistake.**

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.



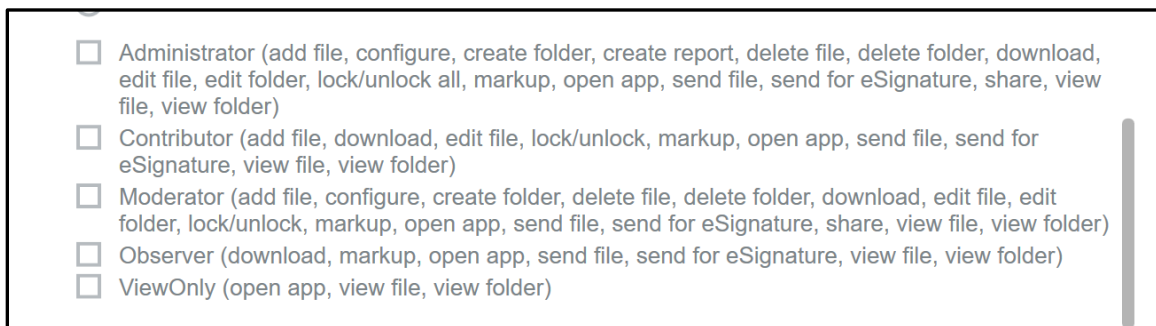


3. Click **Edit** at the bottom of the record.



4. You may choose to change permission for an app by clicking the caret 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.

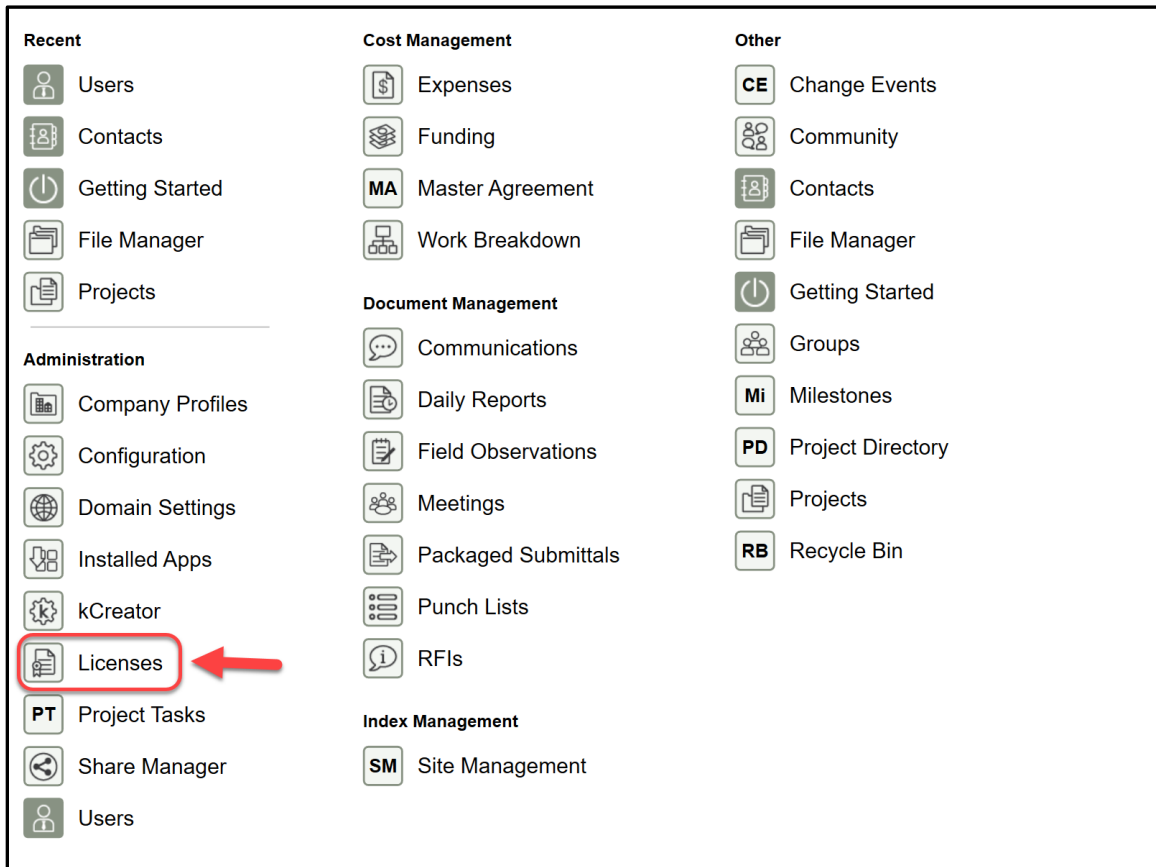
Available actions associated with each permission level are indicated in parentheses to the right of each permission level. Permission levels are assigned for each app.



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

## MANAGING LICENSES

The licenses give access to specific apps in Kahua to the Mayo Clinic users. The Site Administrator and Domain Administrator will be able to assign or revoke the licenses through the Licenses app. This action is typically performed by the Domain Administrator.



### ASSIGNING A LICENSE

To assign a license to a Mayo Clinic user:

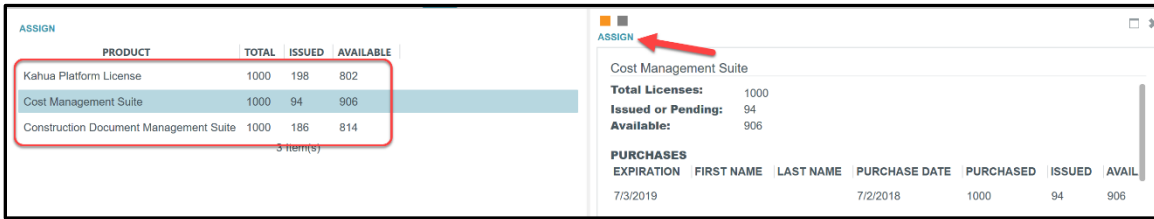
1. Select the type of license

Note that the log displays the numbers of licenses available and issued

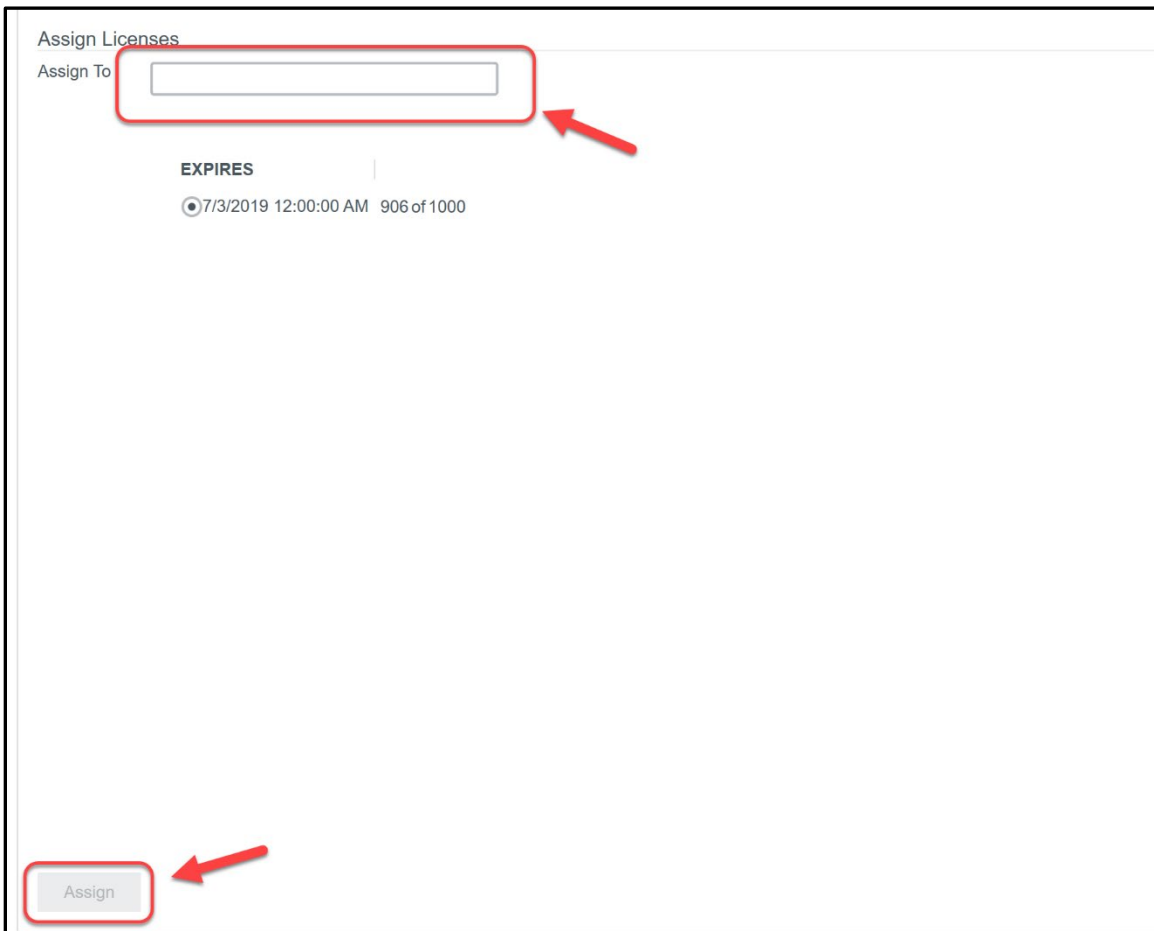
A screenshot of a license log table. The table has three columns: PRODUCT, TOTAL, ISSUED, and AVAILABLE. The 'TOTAL', 'ISSUED', and 'AVAILABLE' columns are highlighted with a red box. A red arrow points to the 'TOTAL' column header. The table contains three rows of data.

PRODUCT	TOTAL	ISSUED	AVAILABLE
Kahua Platform License	1000	198	802
Cost Management Suite	1000	94	906
Construction Document Management Suite	1000	186	814

2. Click ASSIGN in the Detail pane.



3. Begin to type the person's name that will be assigned a license; a drop-down list with matching entries appears. The matching contacts are pulled from the Contacts app. If the person's name is not in the list, it means that the person is not in the Mayo Clinic Contacts list.
4. Click **Assign**.



#### REVOKING A LICENSE

License maintenance sometimes includes removing a license from a contact that is no longer an active user of Kahua. As soon as a license is revoked, it becomes available to assign to another contact if needed.

To revoke a license:

1. Click the type of license from the list in the Log pane.
2. Click on the User's row in the Detail pane.
3. Select **REVOKE** to revoke the user's license.

The screenshot shows the 'ASSIGN' interface with two panes. The left pane, titled 'ASSIGN', contains a table with columns: PRODUCT, TOTAL, ISSUED, and AVAILABLE. The right pane, also titled 'ASSIGN', shows details for 'Cost Management Suite' including total licenses, issued/pending counts, and a list of assigned users.

PRODUCT	TOTAL	ISSUED	AVAILABLE
Kahua Platform License	1000	198	802
Cost Management Suite	1000	94	906
Construction Document Management Suite	1000	186	814
3 Item(s)			

**1**

EXPIRATION	FIRST NAME	LAST NAME	PURCHASE DATE	PURCHASED	ISSUED	AVAILABLE
7/3/2019			7/2/2018	1000	94	906

**3**

**ASSIGNED TO**

EDIT REVOKE

**2**

FIRST NAME	LAST NAME	PROFILE(S)	STATUS	EXPIRATION
Al	Neltzel	Mayo Clinic	Active	7/3/2019
Amanda	Woodward	Mayo Clinic	Active	7/3/2019
Andrew	Reese	Mayo Clinic	Active	7/3/2019
Andy	Baumanis	Mayo Clinic	Active	7/3/2019
Becky	McHugh	Mayo Clinic	Active	7/3/2019
Bob	Dubiel	Mayo Clinic	Active	7/3/2019
Bob	Sanderfoot	Mayo Clinic	Active	7/3/2019
Brad	Lahr	Mayo Clinic	Active	7/3/2019
Bret	Casey	Mayo Clinic	Active	7/3/2019
Brian	Ellsworth	Mayo Clinic	Active	7/3/2019
Bridgette	Shelton	Mayo Clinic	Active	7/3/2019

Note that the revoked license will be added to the AVAILABLE column for the license concerned.

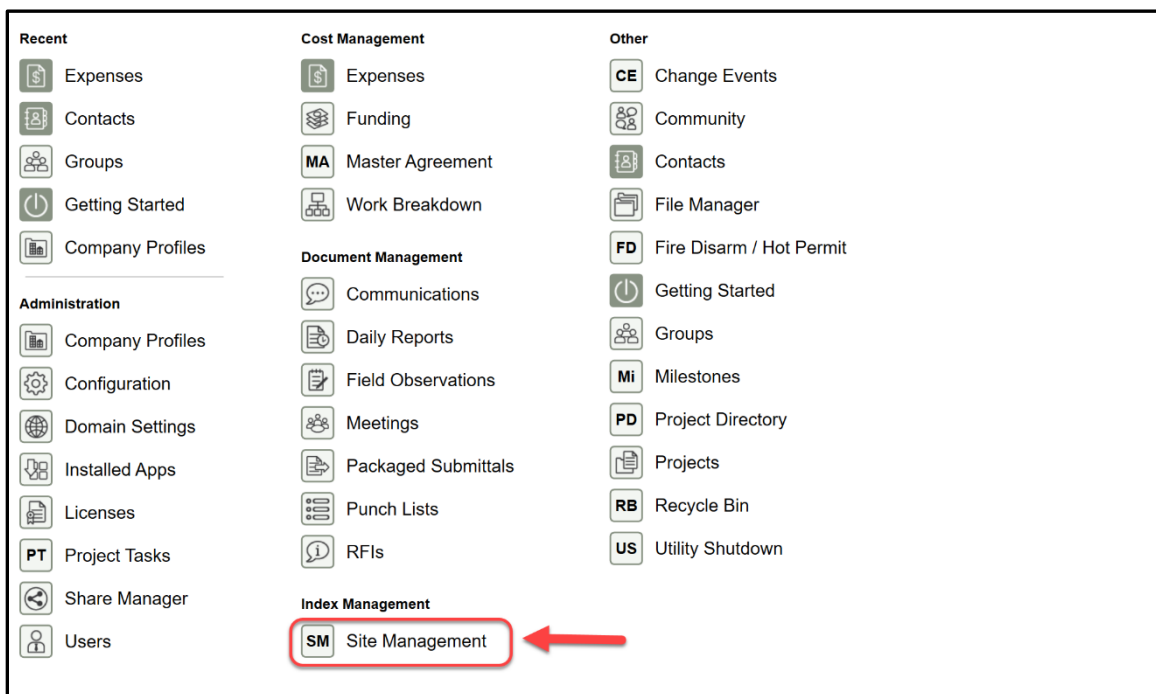
## SITE MANAGEMENT

### SITE MANAGEMENT APP OVERVIEW

The Site Administrator may use the Site Management app to manage all the Mayo Clinic sites. The list of sites is based on the WARS information. In the future it will be connected to the WARS database.

The data recorded in this app is the data that will be pulled out in a drop-down list when a user creates a new project, in the Location section of the Project Information. This data is also used to create the Mayo Clinic project number.

The Site Management app is located under the Index Management section.



### ADDING NEW SITES (TO BE DONE IN COORDINATION WITH FACILITIES INFORMATION SYSTEMS)

To add a new site:

1. Click NEW at the top left to open a new site record in the Detail pane.
2. Fill out the DETAIL section.

**Type-** This is a drop-down list. Each type will display different fields as shown below:

Site:

Type	<input type="text" value="Site"/>
Name	<input type="text"/>
Path	<input type="text"/>
Notes	<input type="text"/>

Campus:

Type	<input type="text" value="Campus"/>
Code	<input type="text"/>
Name	<input type="text"/>
Site	<input type="text"/>
Path	<input type="text"/>
Notes	<input type="text"/>

Building:

Type	<input type="text" value="Building"/>
Code	<input type="text"/>
Name	<input type="text"/>
Campus	<input type="text"/>
Path	<input type="text"/>
Notes	<input type="text"/>

Floor:

The screenshot shows a form with the following fields:

- Type:** A dropdown menu with 'Floor' selected.
- Code:** A text input field.
- Name:** A text input field.
- Building:** A text input field.
- Path:** A text input field.
- Notes:** A large text area for entering notes.

**Name-** Text field, type the name desired.

**Code-** Text field, enter the Building code from the Mayo Clinic WARS database.

**Site-** Drop-down list, select the appropriate site.

**Campus-** Drop-down list, select the appropriate campus.

**Path-** this field is used to provide context of where this record is in the site hierarchy. It should list all levels above the current item being created as in the example below.

**Type** Campus  
**Code** RO  
**Name** Rochester  
**Site** Rochester  
**Path** Rochester

**Type** Building  
**Code** SI  
**Name** Siebens Building  
**Campus** Rochester  
**Path** Rochester - Rochester

**Type** Floor  
**Code** SL  
**Name** Subway Level  
**Building** Siebens Building  
**Path** Siebens Building - Rochester - Rochester

**Notes-** Free text field, add any necessary notes.

When you have completed entering data for this new site, click on the appropriate action:

**Save/ Close** – To save the record and close the Detail pane.

**Save/ Copy**- To save the record and copy the same data into a new record.

**Save**- To save the record.

If a new item is added to the Site Management App, each corresponding sub-category will also need to be added as a new record. For example, if a new 10 story building was added, the building will be added, each floor will need to be added as new records

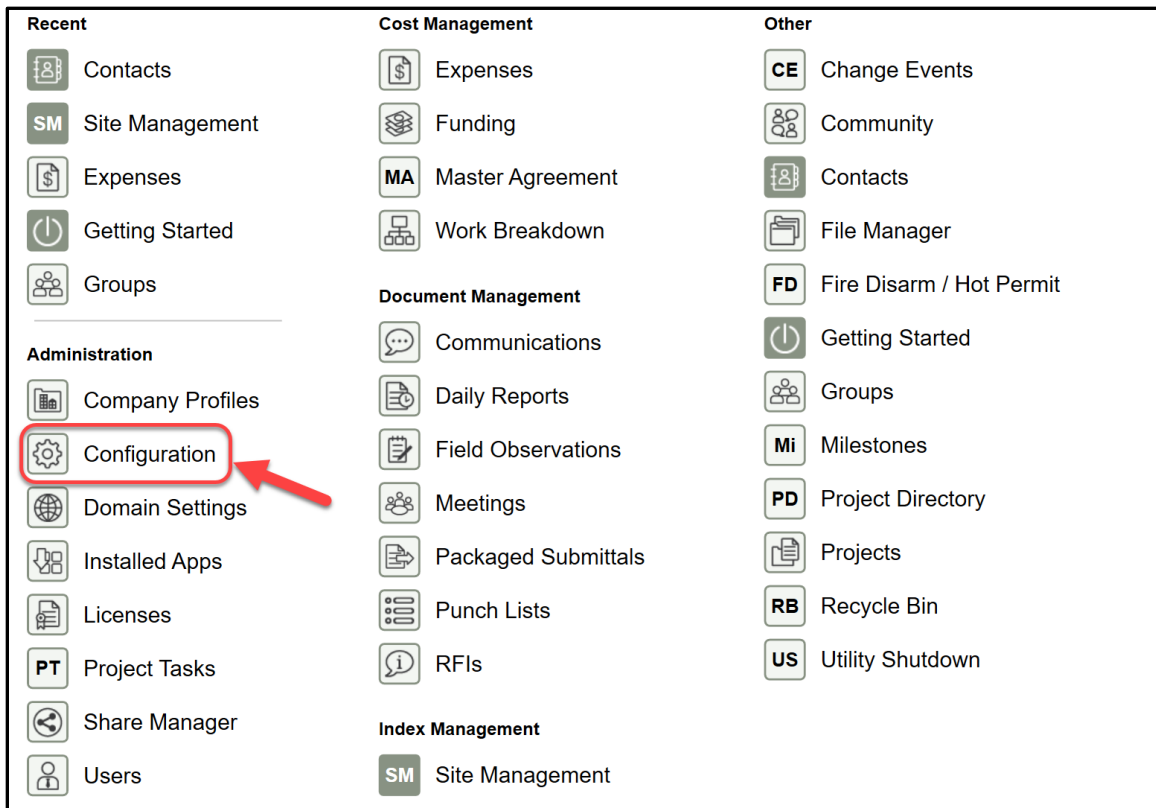


## PROJECT CONFIGURATION

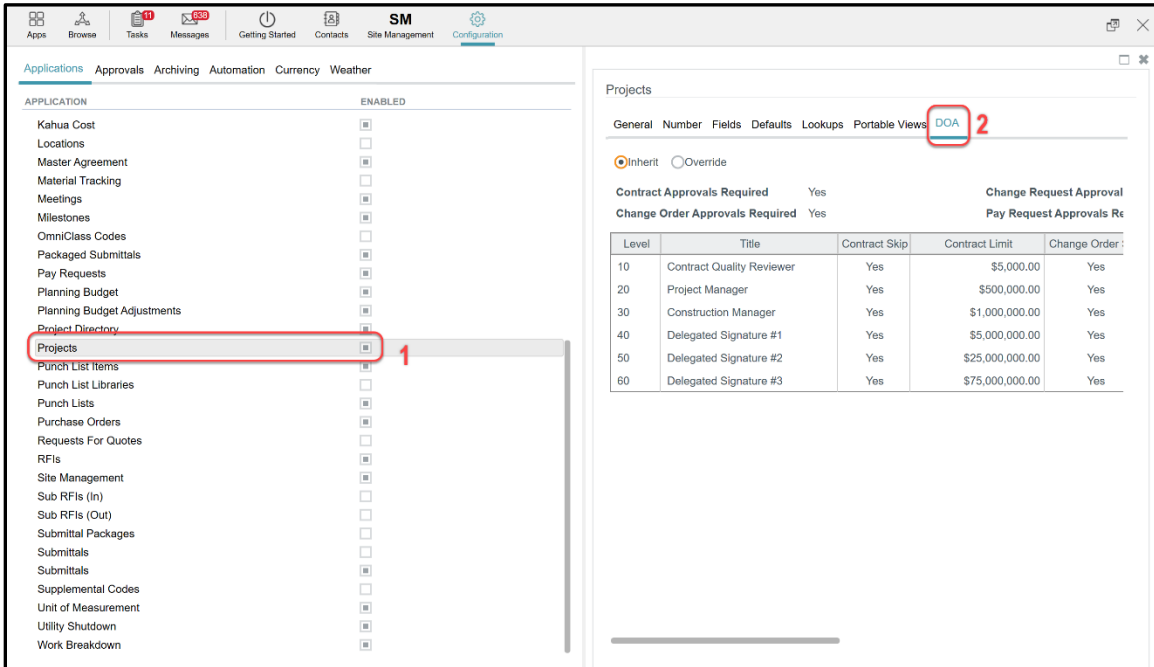
### DELEGATION OF AUTHORITY CONFIGURATION

The Delegation of Authority (or DOA), is a configurable approval process set by the Site Administrator with limits based on the amount of a contract, a Change Event, a Change Request and a Pay Request. Depending on how the DOA is established and upon the dollar amount requested, the process will go through one or more Mayo Clinic approvers.

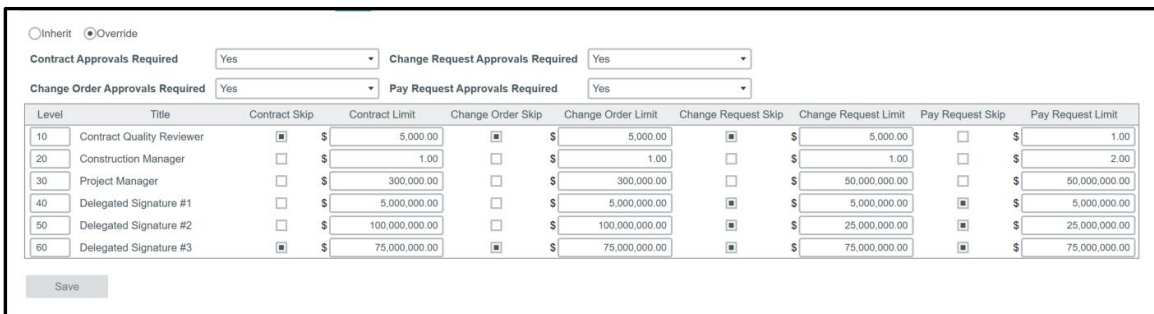
To configure the DOA, select the Configuration app in the App launchers



1. Click **Projects** from the Log list
2. Click **DOA** on the submenu in the Detail pane



Here is an example of DOA used in the Mayo Clinic domain



For each role listed in the “Title Column” each app has a radio button that will determine whether that role can be skipped in the workflow. If the radio button is enabled, the role will be skipped for that app.

The dollar amounts listed in the limit list the amount for Each APP and Role that can be approved through work flow. For example, if \$10,000 is the limit for a role, and a value of the record is \$10,000 then the record will not go to the next level for approval. If the value is \$10,001 then the record will go to the next level for approval

## DEFAULTING ENTITY FOR RFIS AND SUBMITTAL ITEMS

In the RFIs and Submittal Items apps, Mayo Clinic can default a specific person involved in a workflow:

1. The Official Responder/ Reviewer
2. The Mayo Responder/ Reviewer
3. The consultant Responder/ Reviewer
4. Solicited Responder
5. Cc field

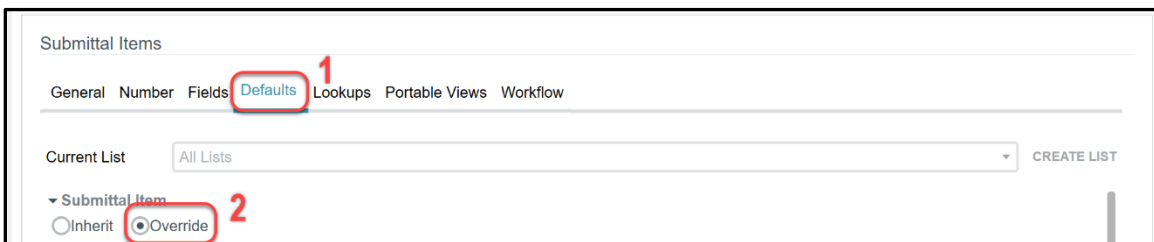
Once set, when the initiator creates an RFI or Submittal, the defaulted names will display.



The screenshot shows a form titled "RESPONSE". The "Official Responder" field is populated with "Rita Hayworth - Hayworth Design" and is highlighted with a red box. Below it, "Mayo Responders" lists "Jim Harrington - Kahua" and "Consultant Responders" lists "Jason Project Designer - BelleFleur Inc". The "CC" field is empty. The "Due Date" field is set to "Select a date" with a calendar icon showing "15".

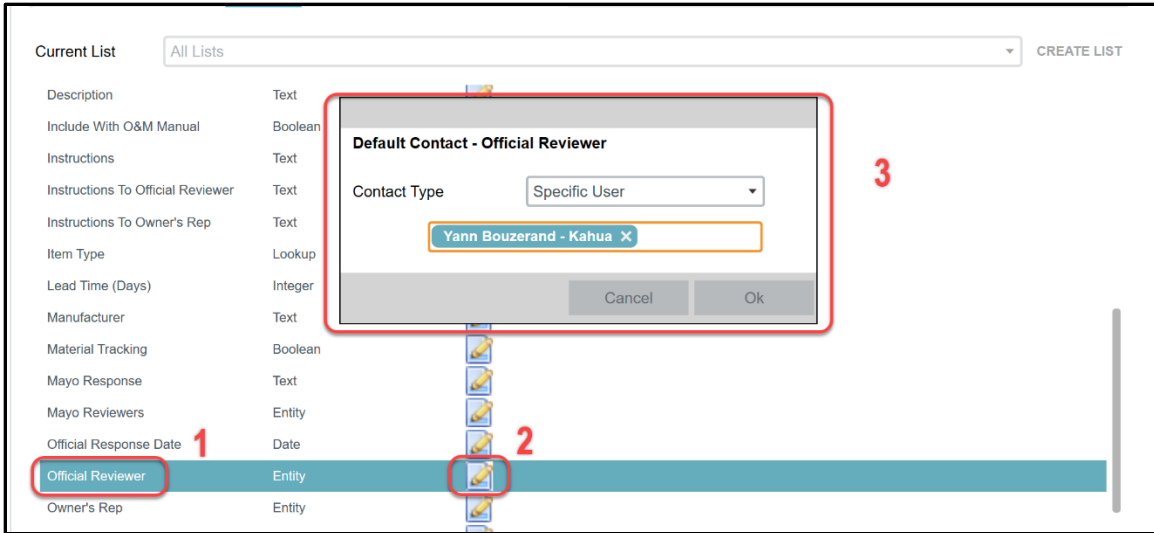
To default an entity in the fields:

1. Go to the Configuration app located under the Administration section.
2. Select the RFI / Submittal items app in the Log list
3. In the Detail pane, select the **Defaults** tab (1) then select Override (2)



The screenshot shows the "Submittal Items" configuration page. The "Defaults" tab is selected and highlighted with a red box and the number "1". Below the tabs, the "Current List" is set to "All Lists". Under the "Submittal Item" section, the "Override" radio button is selected and highlighted with a red box and the number "2".

4. Select the role that you want to default (1).
5. Click on the pen icon (2) – a window pops up.
6. Select the person to default (3) – click **OK** when then **SAVE**.



## INHERITANCE VS OVERRIDE

**Inherit-** means the property of the record carries down from that point in the domain structure down within the hierarchy until/if overridden.

**Override-** is to break the inheritance of the record at partition level within the domain. Where overridden, that point down in the tree will inherit that new configuration.

Note that to Inherit or Override an app, you will have to go to the Configuration app located in the Administration section, then select the app that you would like to modified.

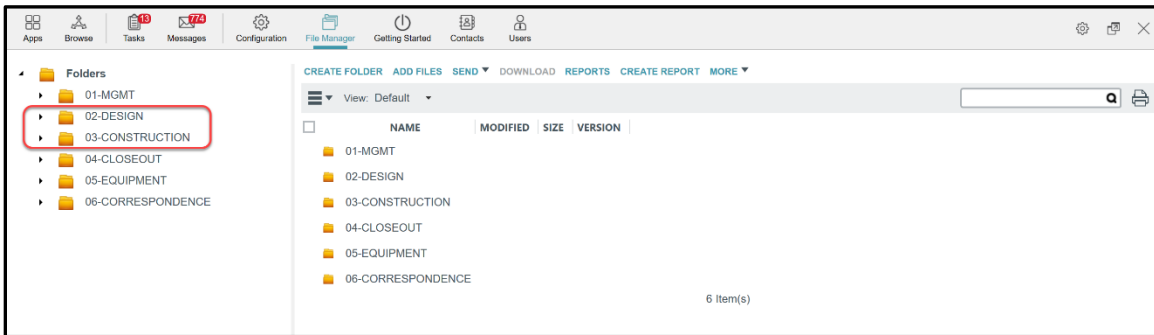
## COLLABORATION

To work with your Construction Industry Partners (CIPs), Mayo Clinic must share folders and applications. Sharing folders and applications will let the contractors/designers collaborate with the Mayo Clinic team.

### SHARING FOLDERS

To collaborate through the File Manager app with your Construction Industry Partners (CIPs), specific folders will have to be shared:

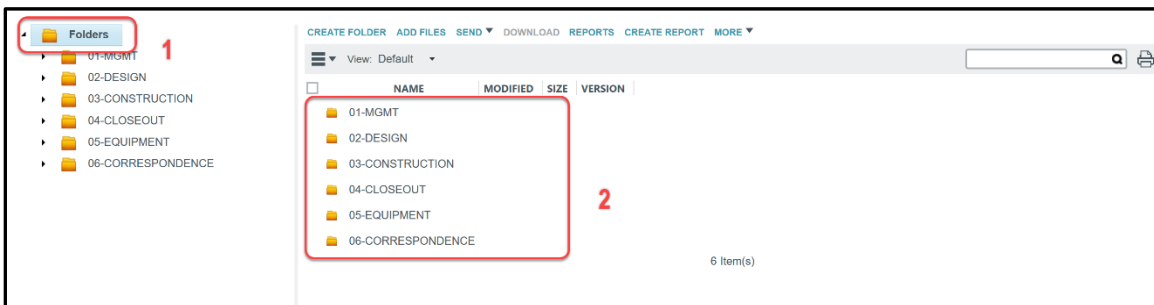
- 02- DESIGN
- 03- CONSTRUCTION



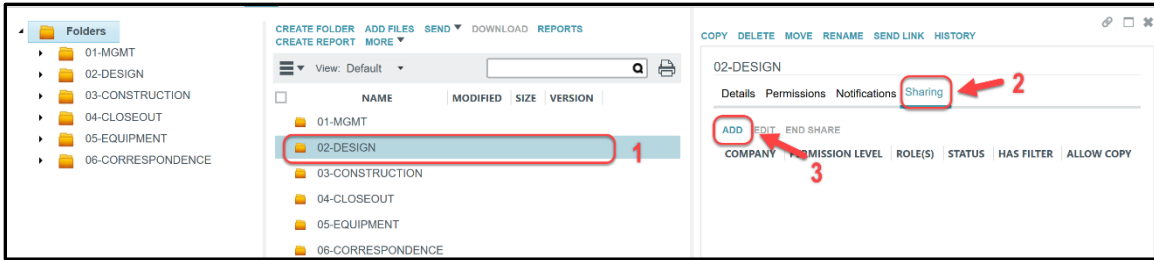
Note that the recipient will have access to all the contents of the folder that you share.

To share a folder, for instance the 02-DESIGN:

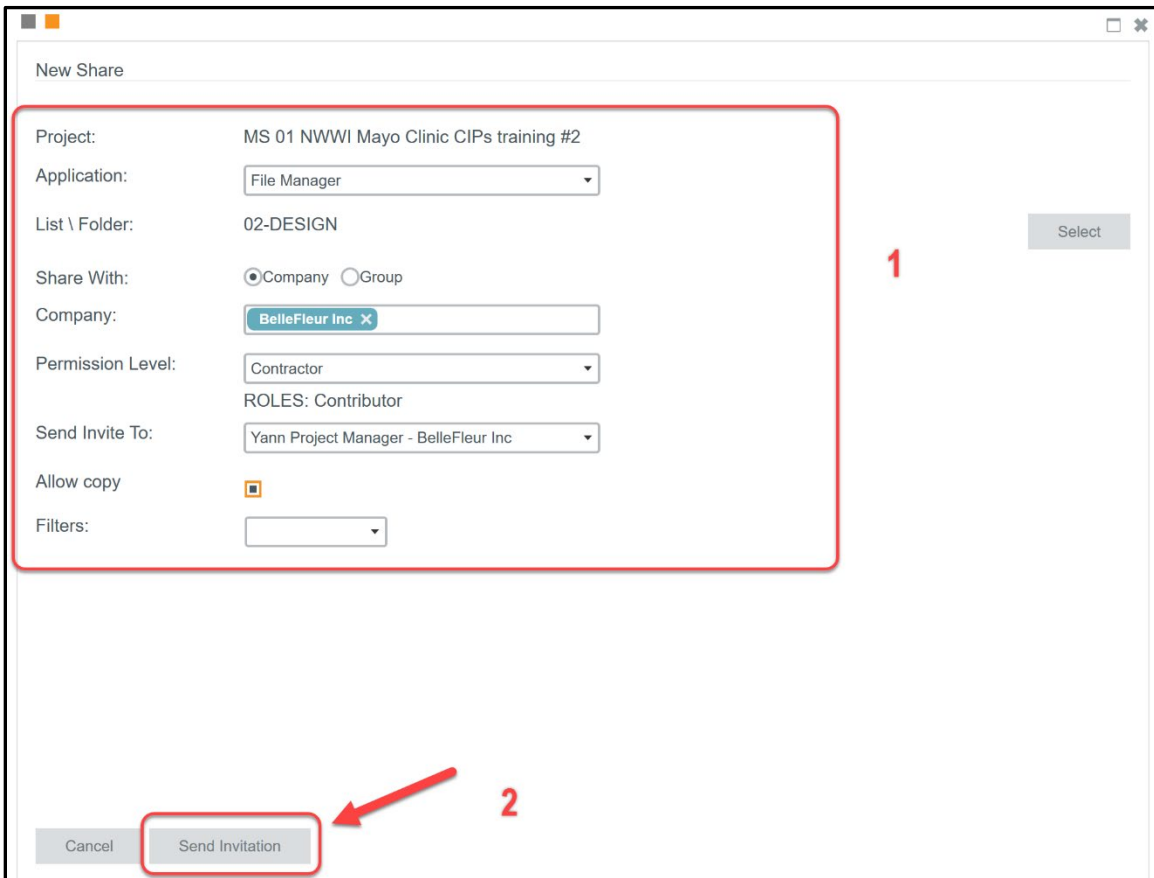
1. Select the parent folder in the left column – To share a folder, the parent folder must be selected first **(1)** to get access to the child subfolders **(2)**. When selected,



2. Select the folder to share in the second pane **(1)** – a third pane appears. (screenshot below)
3. Select Sharing in the third pane. **(2)**
4. Select ADD **(3)**



5. Fill out the fields **(1)** (see screenshot below)
6. Select **Send invitation** **(2)** to send the invitation to the CIP.



## SHARING APPS

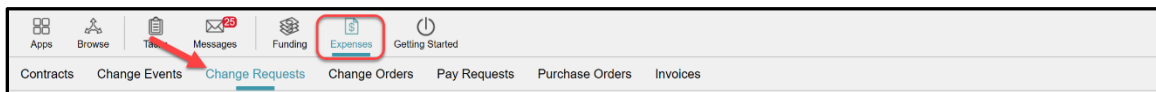
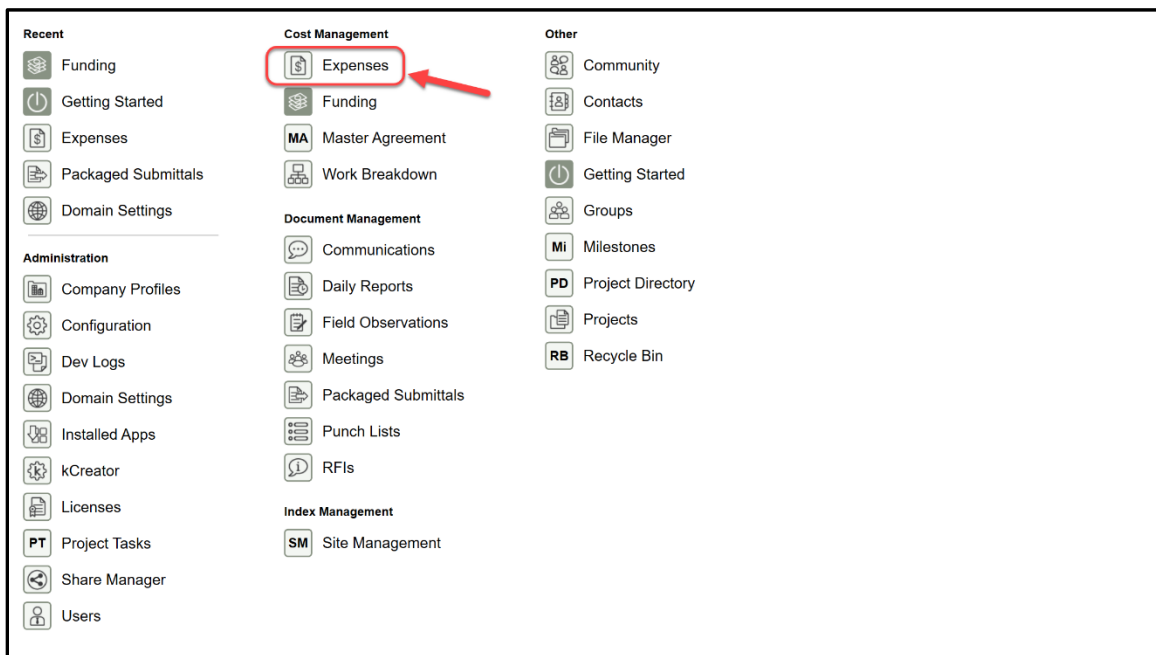
To work with your CIPs, Mayo Clinic must share their apps.

The following apps will be shared with the CIPs when a new Project is created:

- RFIs
- Submittals
- Contracts
- Change Requests
- Change Orders
- Pay Requests

The process of sharing an app will be the same across all the apps above. For instance, this is how to share the Change Requests app:

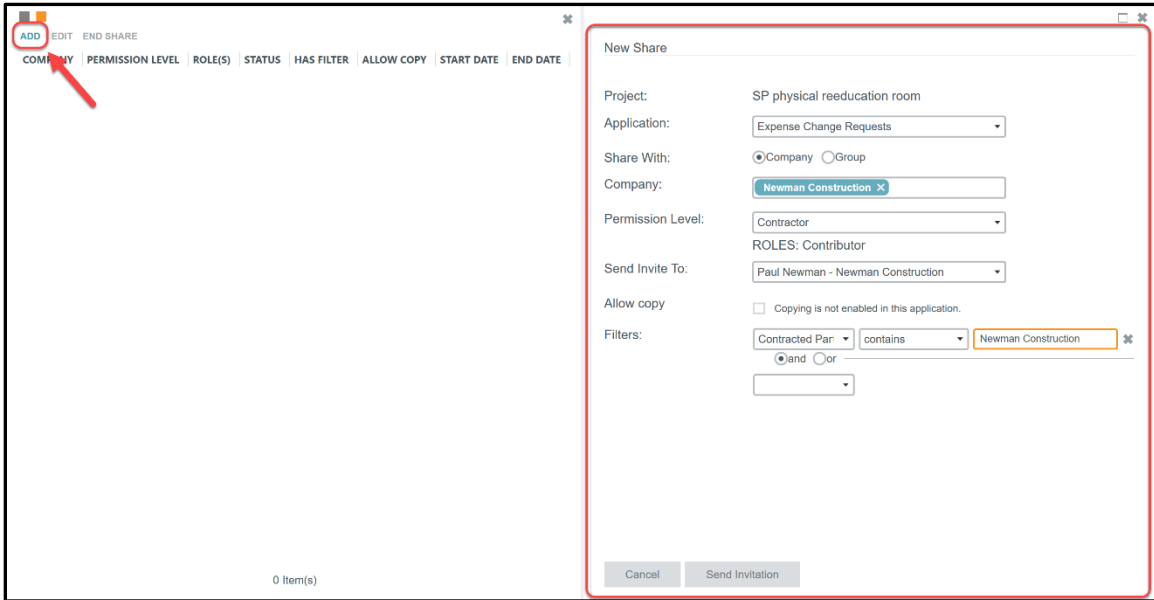
1. Insure that you are in the correct project
2. Navigate to the Change Requests app located in the Expenses



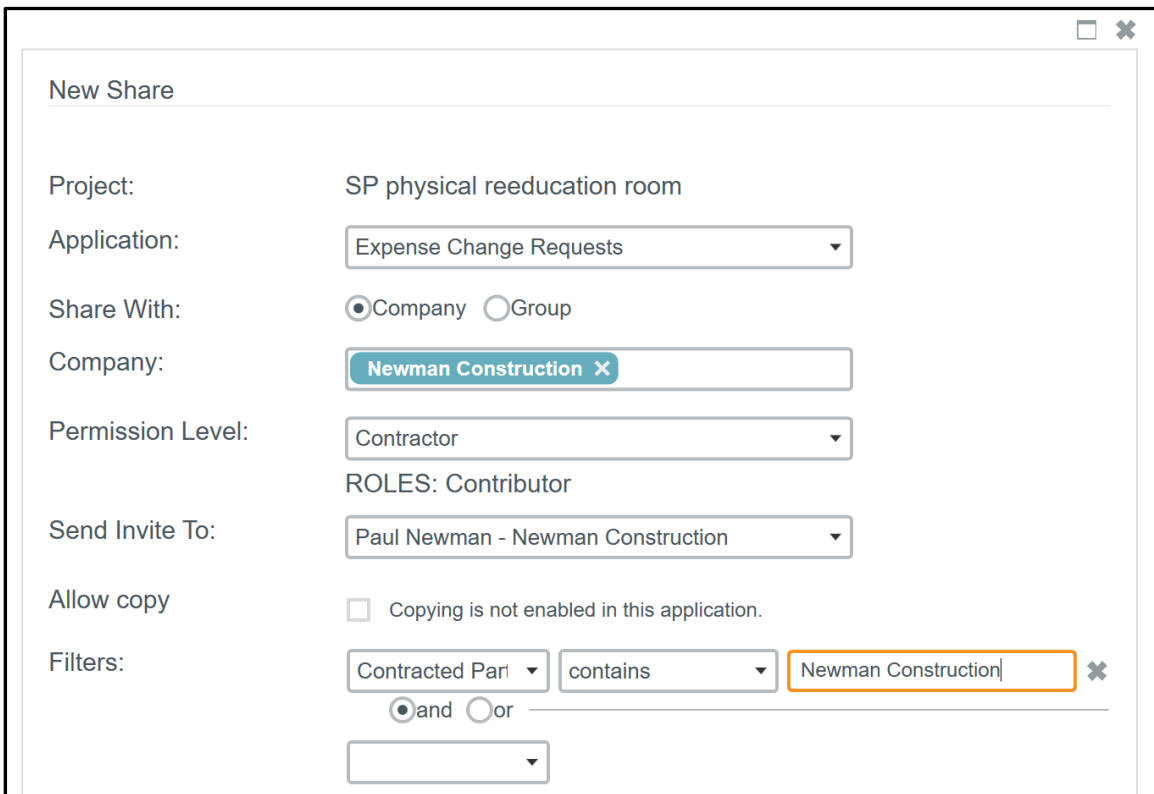
3. Select the button **MORE**, then **SHARING**



4. Select ADD. The right pane displays the New Share window



5. Fill out the fields.





**Project-** This is a view only field that indicates the project’s name that is being shared from Mayo.

**App-** This is a drop-down list of apps that could be shared. By default, it displays the current app.

**Share With-** This is a radio button field. The user will be able to choose between *Company* or *Group*. Note that Mayo will typically be sharing with Company, as this allows for greater flexibility in filtering shares to eliminate risk of sharing confidential information on the log.

When the user chooses *Company*, specific fields will appear to help define the parameters of the share:

The screenshot shows a form with the following fields and values:

- Project:** SP physical reeducation room
- Application:** Submittals
- Share With:**  Company  Group
- Company:** Newman Construction
- Permission Level:** Contractor
- ROLES:** Contributor
- Send Invite To:** Paul Newman - Newman Construction

**Company-** Select the desired company to share the app with. Kahua will display the company that the users added to the Contact App.

**Permission Level-** Select the appropriate permission level for the company being shared with. For instance, a contractor will have the *Contractor* group level permission. This list is looking to the ‘Groups’ that were set up by Mayo to define standard permissions. Choose the appropriate group.

Note that the roles have been set by Mayo Clinic and give specific permission to the external party users.

In this case, the *Contractor* permission level will allow the external party user to: Add, edit, export, open the app, process and view Change Requests, but NOT to delete Change Requests.

**Send Invite To-** Select the external party user to whom the invitation to share will be send. Kahua will display the users from the company field selected above. You should choose just one individual to receive the sharing invitation and who will be responsible for accepting the share via a task in Kahua. This will typically be the person in the company that is responsible for managing that project.

When the user chooses *Group* rather than *Company*, specific fields will appear. 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.

**New Share**

---

Project: Patient Rooms Renovation

Application: Expense Change Requests

Share With:  Company  Group

Permission Level: Contractor

ROLES: Contributor

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
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**Permission Level-** Select the Permission Level in the drop-down list. 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 populated below.

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**. The user will be able to choose the users/companies to invite to the share. These users will receive a task to accept the share into their domain.

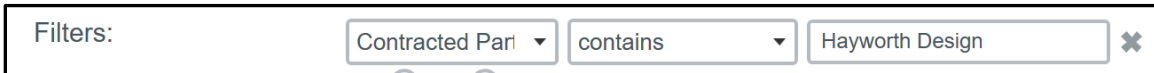
Send Invite To:

Name	Company	Company Status	Invitation Status
<input type="checkbox"/> Domain Admin	Mayo Enterprise	Not Invited	Not Invited
<input type="checkbox"/> Mayo Role Test Project Manager	Mayo Enterprise	Not Invited	Not Invited
<input type="checkbox"/> Mayo Role Test Construction Manager	Mayo Enterprise	Not Invited	Not Invited
<input type="checkbox"/> Mayo Role Test Proponent	Mayo Enterprise	Not Invited	Not Invited
<input type="checkbox"/> Mayo Role Test Corporate Officer	Mayo Enterprise	Not Invited	Not Invited
<input type="checkbox"/> Mayo Role Test Facilities Head	Mayo Enterprise	Not Invited	Not Invited
<input type="checkbox"/> Mayo Role Test Project Lead	Mayo Enterprise	Not Invited	Not Invited
<input type="checkbox"/> Mayo Role Test Quality Lead	Mayo Enterprise	Not Invited	Not Invited

**Allow copy**- this option allows the external parties to keep a copy of the record shared with the Mayo Clinic upon termination of the share. This is good practice if the company will need to reference a static version of the log post-project.

**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. Filtering is required to be done for this reason.

The filter should be set as follow



**Contracted party + contains + company's name**

OR

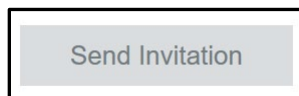
**Contracted party + equals + company's name**

**If contains is used**- it means that Kahua will display all the records with the word you entered in the filter at any level of a document (title, sentences etc..).

**If equals is used**- it means that Kahua will display only the records with exactly that string and nothing more than the word you entered in the filter.

Make sure that the filter you choose ensures that the selection will be unique.

6. After 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 section.



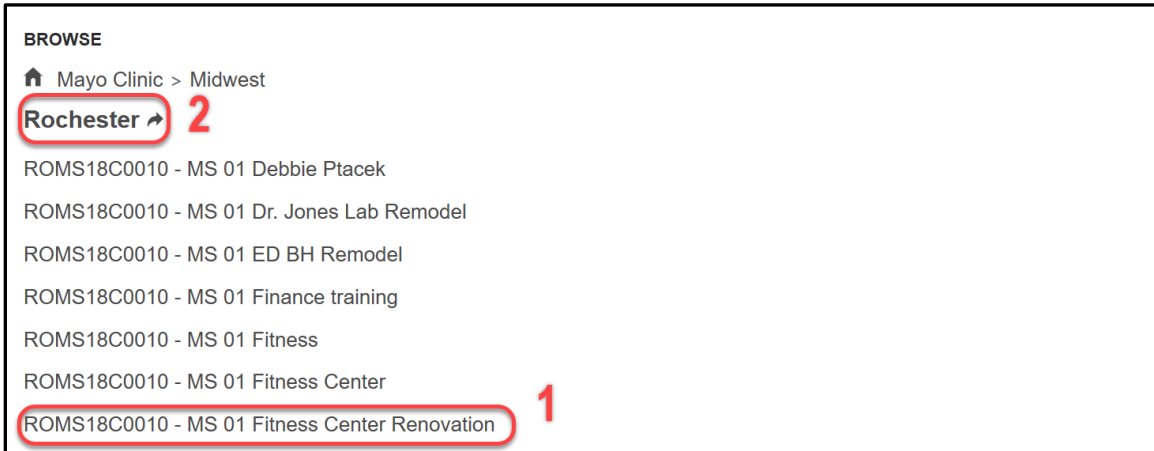


## CREATING A SUB-PARTITION/ PROJECT

To create a sub-partition/ project:

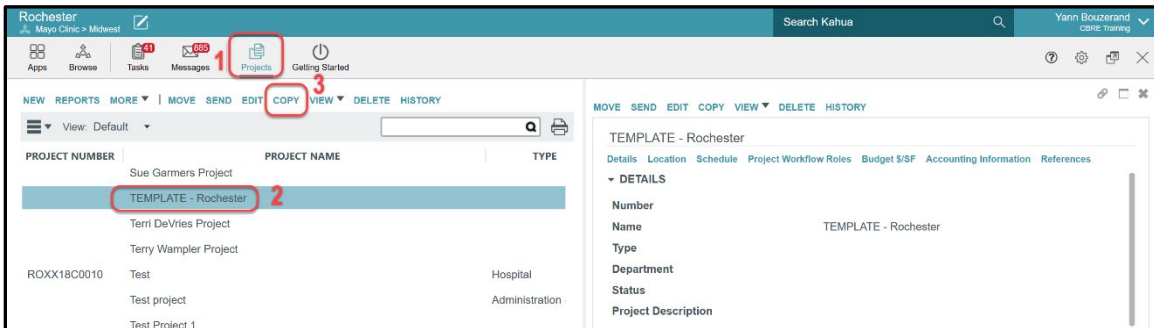
1. Navigate to the site partition under where you want to create your sub-partition/ project.

For instance, I would like to create a sub-project named **Pool renovation**, below the **Fitness Center Renovation project (1)**, created under the **Rochester partition (2)**.

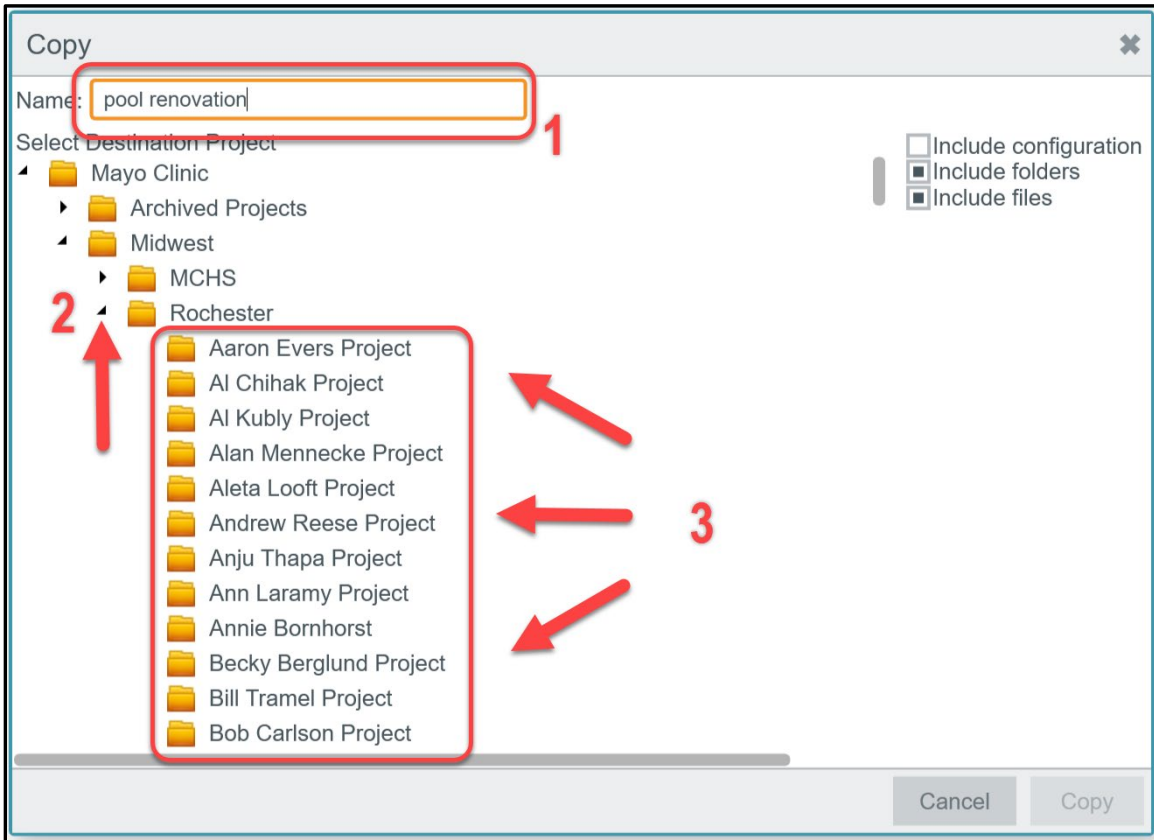


In this case, the users will have to select the Rochester Partition to copy the template.

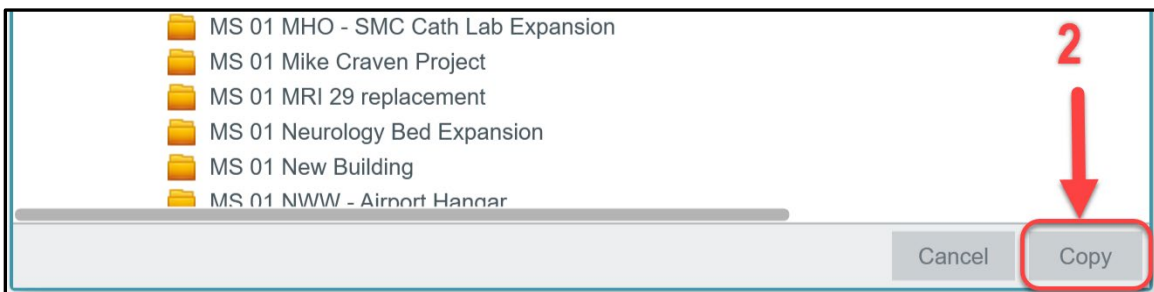
2. Once in the correct partition, go to the Projects app (1), select the template (2) then select **COPY** (3)



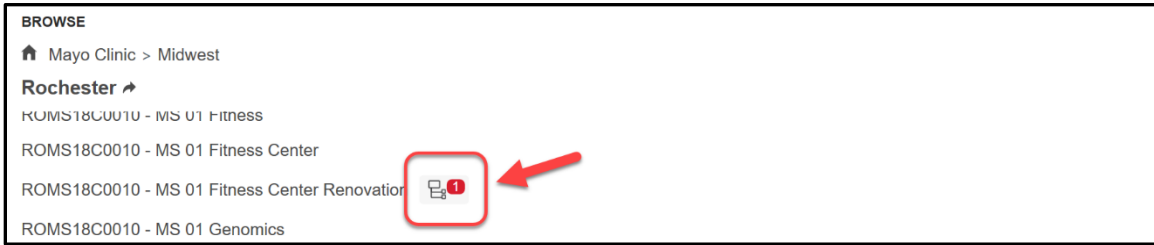
3. In the copy window, name the project (1), extend the site partition under which the main project is created by clicking on the black arrow (2), the projects created under the Rochester partition appear (3).



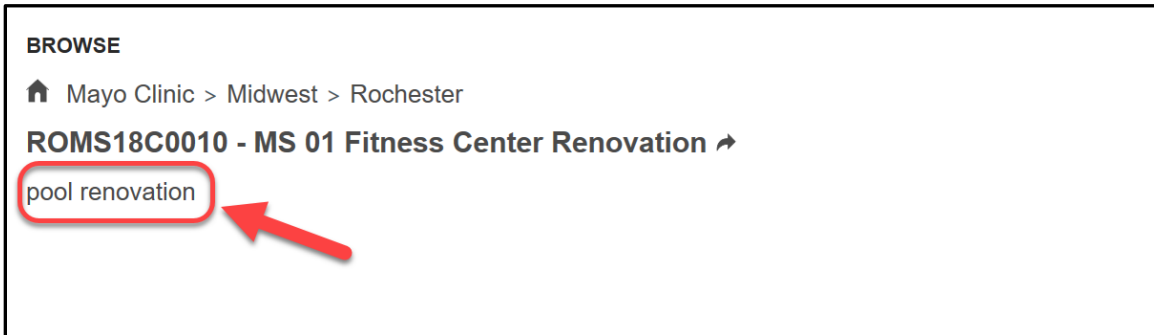
4. Select the project under which you want to create your sub partition/ project (1) then click on **COPY** (2).



- Once Copied, the sub partition/ project will appear in the projects list through the Browse application, represented by this icon:



- Click on the icon to display the sub partition/ project.




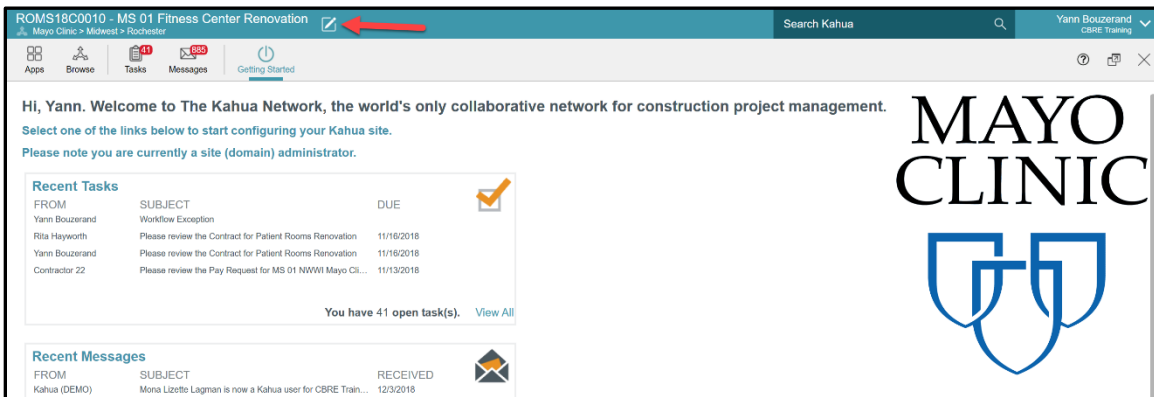
Note that if specific permissions have been set in the “parent” project, the sub-partition/ project will inherit these permissions from the “parent” project.

## CHANGING A PROJECT NUMBER

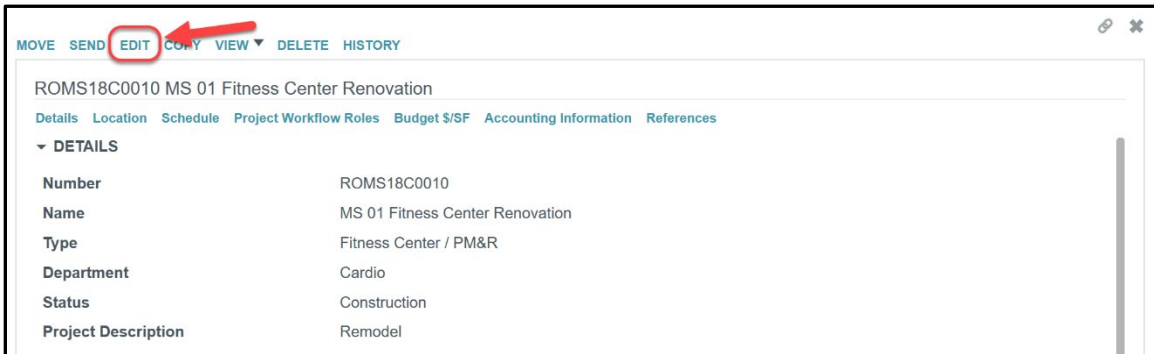
To change a project number:

1. Navigate to the project

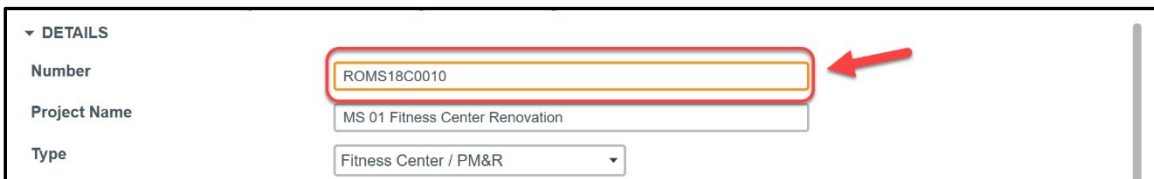
2. Click on the  icon located near by the project name at the top left of the interface.



3. Select **EDIT**



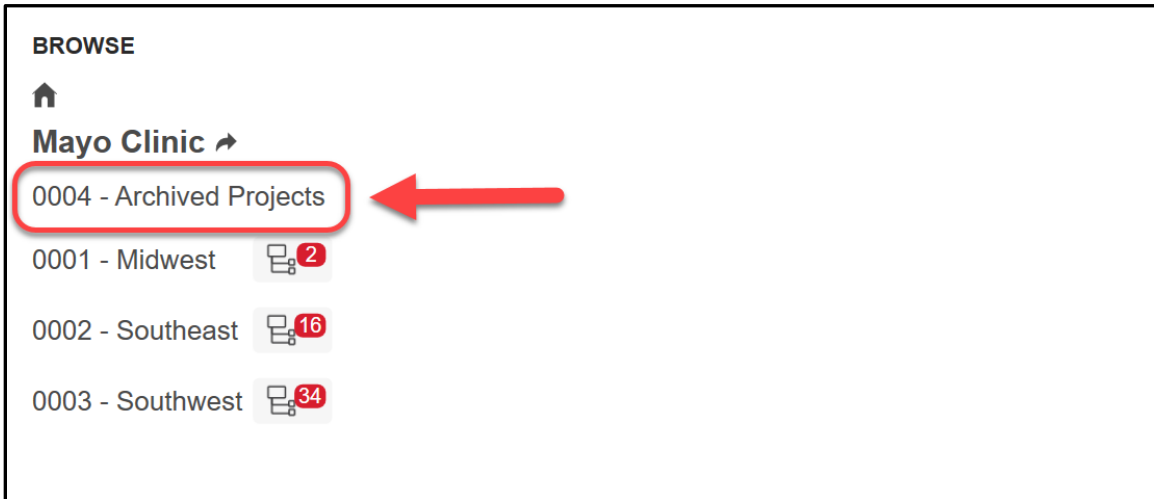
4. Edit the Number field in the detail section then click SAVE at the bottom of the page to save the new project number.





## PROJECT ARCHIVAL

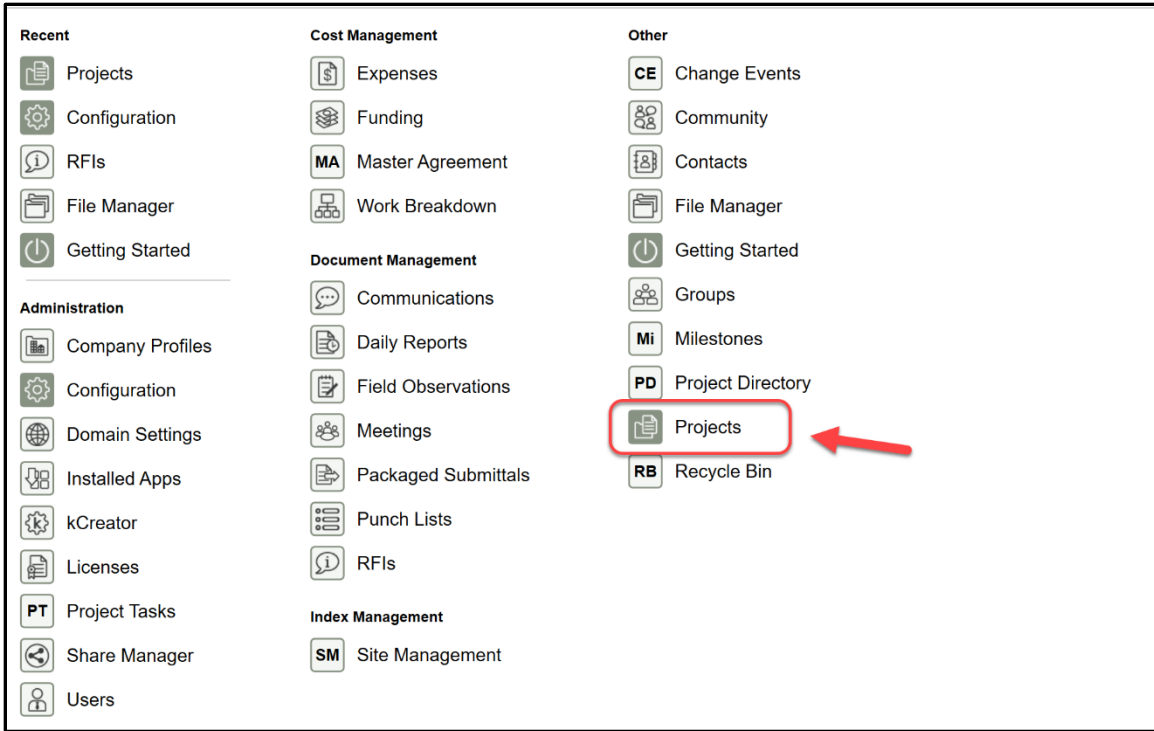
When a project is done, Mayo Clinic moves the project to a partition named Archived Projects.



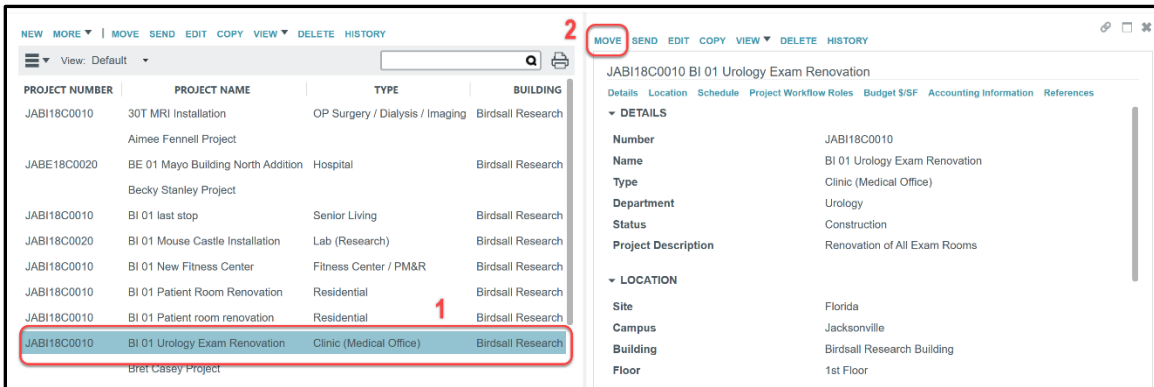
This partition is global, which mean that ALL projects from ALL Mayo Clinic sites will be archived in this partition.

To archive a project:

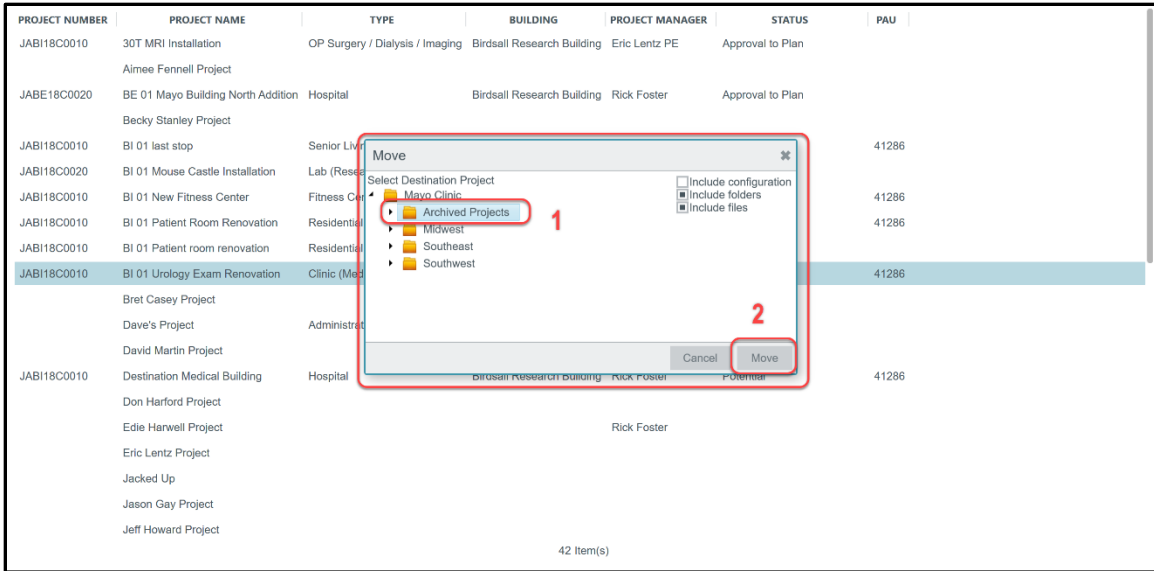
1. Navigate to the site partition – for instance, if the project to archive is below Southeast, navigate to the Southeast partition.
2. Select the project app located below the OTHER section.



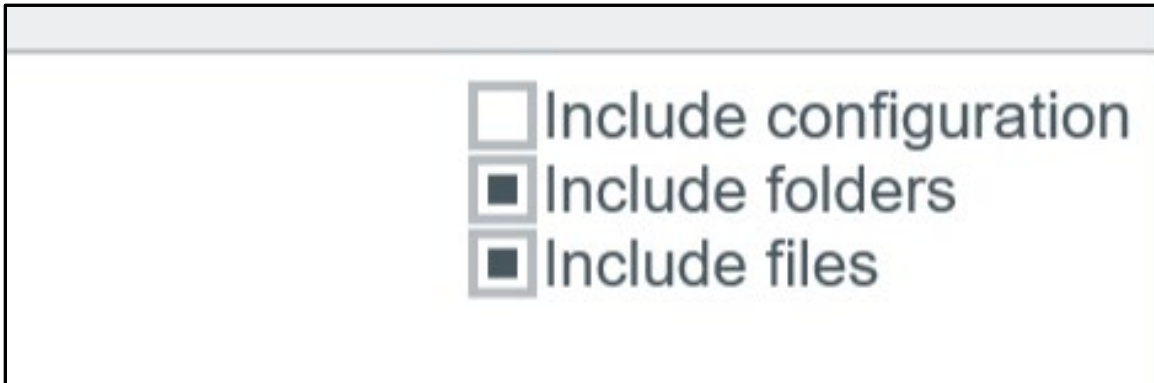
3. Select the project (1) in the log and click on MOVE (2) – a window pops up.



4. Select the Archived Projects partition (1) and click on Move (2)



Note: Do not touch the check boxes in the MOVE windows. Leave as is with the Include Folders and Files box checked.



Kahua will move the project under the Archived Projects partition.

Once a project is within the Archived Projects partitions, the permissions are different: Only the PMs and the CMs will have access to this partition as "Observers". The records in the archived projects will be to view only and not editable.