

# **Basic Navigation - Quick Reference Guide**

June 2018



Prepared for the Mayo Clinic Enterprise Kahua Deployment

# **DOWNLOADING KAHUA**

Navigate to <u>www.kahua.com</u> via your internet browser. Click the *Sign In/Launch* button on the top of the screen.

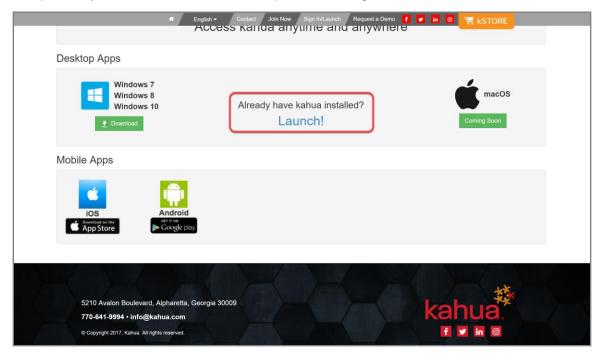
Kahua is available for Windows (7, SP1, 8 and 10) and for MacOS. Click on *Download* for your platform (Windows or macOS).



kahua	English + Contact Join Now Sign In/Launch Request a Demo 🕴	n 🛛 🐺 kSTORE
	Access kahua anytime and anywhere	
	Desktop	
Windows 7 SP1 Windows 8 Windows 10 Download Download	Already have kahua installed?	macOS Common der the Mac App Store Download
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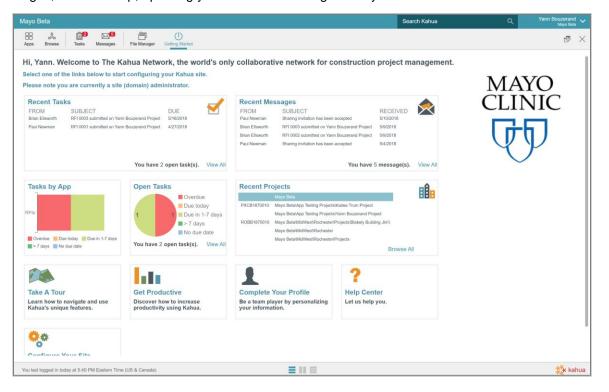
# SIGN IN

Navigate to <u>www.launch.kahua.com</u> via your internet browser. Kahua should launch automatically. If it does not, click the *Sign In/Launch* button on the top of the screen and *Launch* on the page that comes up. Enter your email address and Kahua password to log in.



#### **GENERAL NAVIGATION**

Once signed in, the Getting Started app is opened by default. The Getting Started icon is blue in the selection bar at the top of the window (called the App Bar). The blue color of the icon indicates it's the current active app. The Getting Started app gives you links to important information such as tasks, messages, links for Help, updating your Profile and a large variety of video tutorials about Kahua.



This diagram shows the main navigation areas and icons within the Kahua application. Items 1 through 8 and 13 and 14 appear on all views. Items 9 thru 12 appear within most apps.

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KEY TO NAVIGATION AREAS:

- 1. Project Navigator
- 2. App Launcher
- 3. Project Browser
- 4. Tasks App
- 5. Messages App
- 6. Open Apps Bar
- 7. Global Search
- 8. Account Settings/Help/Sign Out
- 9. Action Menu
- 10. Application Search
- 11. Log Frame
- 12. Details Frame
- 13. Progress Spinner
- 14. View Toggle (List only, Multi-frame / Detail only)

### **ACCESSING AND UPDATING YOUR ACCOUNT SETTINGS**

Your Kahua profile affects how you appear in the local Contacts app as well as the Kahua Community. Other Kahua users from other companies can see and copy their contact information to their own Kahua site. Users can un-publish their profile if they do not want to appear in the Community, however this may limit collaboration with outside parties.

Click on your name in the upper right corner, then select Account Settings to open to your settings.

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Notice these parts of the Account Settings app:

- "AS" appears in the Open Apps Bar to show this as the current active app
- The Action menu populates with the four activities in this app with the current one in blue
- The user's record shows in the Log Frame
- The user's profile shows in the Detail Frame since the Profiles action is active

#### ACTIONS AVAILABLE IN ACCOUNT SETTINGS

There are four settings areas available on the Account Settings Action Bar; Profiles, Preferences, Password and Signature. New users should take time to fill out these sections as completely as possible as the information is used throughout the platform.

**Profiles** – there are three main sections: Details, Messengers and Social Networks. The users will be able to fill in important contact information. Basic info such as titles, phone numbers, social-media and messenger usernames can be entered. A photo can also be added. The Prefix field at the top of the form is a required field. If a user will be signing documents, it's important to fill out the Title and add a signature.

Note that a change to the email address must be requested by sending a message to Kahua Support at <u>Support@Kahua.com</u>.

**Preferences** – in this section, the users can adjust the application to their preferences: preferred way to be notified about tasks or communications, time zone, language and display of the project number in partition navigation, and apps that you want to appear in the Open Apps Bar upon login.

**Password** – The users will be able to change their Kahua login password. The new password must contain at least eight characters total, have at least one lowercase character, at least one number and at least one uppercase character.

**Signature** – The users will be able to upload and determine what their signature will look like, as well as assign a secure pin to ensure they are the only one able to place the signature on any document.

This signature will be used where a signature authority is required of the user within Cost Applications where Delegation of Authority is used. This is not a signature block utilized in messaging or other forms of communication.

#### SENDING A MESSAGE

All Messages, both sent and received, will be available in your Messages application. Messages are specific to your account and shows all notifications and messages across projects and partitions. You can send a message through an application by selecting the **Send** action button or you can do it through the Messages application. In both cases, the input is similar.

1. Click on the *Messages* icon in the Apps Bar then select *New* from the Action Bar. There is a Send option on the Action Bar in some Apps that will bring up the same screen as Messages.



- 2. Enter the recipient(s) in the appropriate fields using the drop downs that list your Contacts.
- 3. Type the text and body of the message.

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4. Check the 'Copy to Communications' to allow the user to save a copy of a message to the Communications application in your current project in the Project Navigator.

Copy to Communications	
Subject	My subject
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5. Upload any attachments in the References section of the message. You may choose to upload from your computer OR from the File Manager application by clicking *Add Kahua Doc*.

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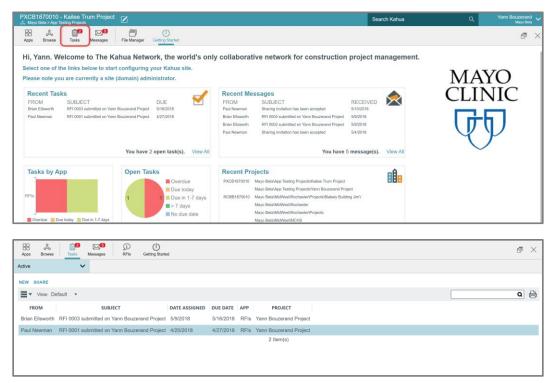
7. When you're done composing the message, click **Send**. Recipients will receive the message and message notifications accordingly.

#### **RESPONDING TO TASKS**

The users will receive tasks from a variety of applications in Kahua. The task icon at the top of Kahua shows how many open tasks you have. The users can also access the Task application from the App Launcher icon.

The Tasks application is specific to the user's account and shows all notifications and tasks across projects and partitions.

- 1. Click on the Task icon.
- 2. Select the task to act on.



3. Each task is different and will have a different input form. Take the appropriate action from the buttons at the bottom of the form.

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Paul Newman RFI 0001 submitted on Yann Bouzerand Project 4/20/2018 4/27/2018 RFIs Yann B	- DETAILS	- 11
	Project Yann Bouzerand Project	- 11
2 Item(s)	No. 0001	- 11
	Date 4/20/2018	- 11
	Subject my subject	- 11
	Status Open	- 11
	Author Paul Newman - Newman Construction	- 11
	CSI Code	- 11
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# **SEARCHING IN KAHUA**

Kahua provides you with the ability to search across the entire system or a specific project. The system will search all forms and uploaded content, including the content of uploaded files.

- 1. Enter a word or phrase in the Search field.
- 2. Click *Enter*.
- 3. Results will appear in the Log. Use the filter options on the left of the screen to define the scope of the search.

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### **RUNNING A LOG REPORT**

Reports are available in most applications in Kahua. There are standard reports and options to build custom reports. These steps provide an example of a standard Log report.

1. In the Log view, click the Printer Icon to generate the report.

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0019	Testing Cindy's defe	ct	Open	Kailee Trum - Kahua	4/6/2018	Kailee Trum - Kahua				
0018	Testing		Open	Kailee Trum - Kahua	4/6/2018	Kallee Trum - Kahua				
0017	Testing		Open	Kailee Trum - Kahua	3/31/2018	Kailee Trum - Kahua				
0016	Testing Cindy Defec	ts	Open	Kailee Trum - Kahua	4/6/2018	Kailee Trum - Kahua				
0015	Rebar question		Closed	Rita Hayworth - Hayworth Design	3/28/2018					
0014	Subject		Responded	Kailee Trum - Kahua	3/21/2018	Kailee Trum - Kahua	D			
0013	Testing New Save B	utton	Open	Kailee Trum - Kahua	3/30/2018	Kailee Trum - Kahua				
0012	Yann New Test		Open	Yann Bouzerand - Mayo Beta	3/12/2018					
0011	Testing Solicited Rev	viewers	Open	Kailee Trum - Kahua	3/9/2018	Kailee Trum - Kahua				
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2. The report will be displayed in the Detail Frame on the right.

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Kahua supports saving reports in three common formats (.CSV, .XSLX and .PDF). A report may also be saved in the Project's File Manager by selecting *Save to Kahua*.

# **RUNNING A CUSTOM REPORT**

1. Click on *Reports* when you are in the Log Frame.

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0023	another test from Yan	n	Responded	Rita Hayworth - Hayworth Design	4/14/2018	Paul Newman - Newman Construction							
0022	nouveau test		Closed	Rita Hayworth - Hayworth Design	4/19/2018								
0021	Testing		Open	Kailee Trum - Kahua	4/13/2018	Kailee Trum - Kahua							
0020	Consultant Test		Open	Kailee Trum - Kahua	5/4/2018	Kailee Trum - Kahua							

- 2. Select a report from the list presented. The Detail Frame displays the selected item. Select any filters to use on the report data.
- 3. Click View.

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4. The report displays in the Document Details frame on the right with options to save in different formats or to save it in the Kahua File Manager.

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016 Testing Cindy Defects	Open	Kailee Trum - Kahua	4/6/2018	Ka	0018 0017	Testing Testing	Open Open	Kallee Trum - Kahua Kallee Trum - Kahua	3/31/2018	Kailee Trum - Kahua Kailee Trum - Kahua	
015 Rebar question	Closed	Rita Hayworth - Hayworth Design	3/28/2018		0015	Testing Cindy Defects Rebar question		Kaliee Trum - Kahua Rita Hayworth -	4/6/2018 3/28/2018	Kallee Tram - Kahua	
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013 Testing New Save Button	Open	Kailee Trum - Kahua	3/30/2018	Ka	0012	Yann New Test	Open	Yann Bouzerand - Mayo Beta	3/12/2018		
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011 Testing Solicited Reviewers	Open	Kailee Trum - Kahua	3/9/2018	Ка	0009	Testing Cindy Defects Testing Cindy Defects	Open	Kaliee Trum - Kahua		Kalee Trum - Kahua Kalee Trum - Kahua	
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009 Testing Cindy Defects	Open			Ka	0007	Status	Oren	Mayo Beta Kaliee Trum - Kahua		Kalee Trum - Kahua	10011120
					0005	Testing What kind of	Open Open	Kallee Trum - Kahua Kallee Trum - Kahua	2/15/2018	Kalee Trum - Kahua Kalee Trum - Kahua	
008 Testing Sending to Official After Save	Open	Kailee Trum - Kahua	3/1/2018	Ka	0.04	rolierblades do we get	?	Parke Indii Parka	21222010	Public Train Publica	
007 test 1	Closed	Yann Bouzerand - Mayo Beta	2/20/2018		powered by		On 14 May 2018 1	17 PM EST By Yann B		Date:	Page 1 of 2
006 Status	Open	Kailee Trum - Kahua	2/16/2018	Ка	kahua		Ger 14 MBY 2018-20	er ew car by tani o	ouzerend - Mayo	000	rage 1 or 2
005 Testing	Open	Kailee Trum - Kahua	2/15/2018	Ka							
004 What kind of rollerblades do we get?	Open	Kailee Trum - Kahua	2/22/2018	Ka							
003 subject	Open	Kailee Trum - Kahua	2/11/2018	Ka	RFIs						the
					Kallee Trum Project,	List Construction				View.	Default
	24 Item(s)										

# LOG VIEWS

There is a built-in standard Log View for each application that displays the most common columns for that application. Individual users can customize and save views within an application.

1. In an application log, select the Pancake icon – the picture of the three stacked bars.

88 Apps	As 12 As Messages RF							٨	æ	$\times$
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No.	Subject	Status	Official Responder	Due Date	Responsible	References				
0024	Rebar question	Open	Rita Hayworth - Hayworth Design	4/20/2018	Rita Hayworth - Hayworth Design					- 12
0023	another test from Yann	Responded	Rita Hayworth - Hayworth Design	4/14/2018	Paul Newman - Newman Construction					- 12
0022	nouveau test	Closed	Rita Hayworth - Hayworth Design	4/19/2018						- 12
0021	Testing	Open	Kailee Trum - Kahua	4/13/2018	Kailee Trum - Kahua					- 12
0020	Concultant Text	Onon	Koiloo Trum - Kobuo	5/4/2018	Kailao Trum - Kabua					

2. A new window pops up displaying a list of options to personalize. The four standard options for all Logs system wide are documented here. Other options may appear on Logs where appropriate.

Apps Browse	Tasks Messages RFIs	Gotting Started						٢	æ )	<
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Column				esponsible	References					
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	No.			- Newman Construction	n					
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SAVE THIS CO	NEIGURATION		save	Kahua						
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**Column** – Used to choose the columns and order of columns in the Log. Check or uncheck boxes next to the column name to display or suppress that column. Use the Up and Down arrows on the right of the panel to re-order appearance of the columns in the Log view.

**Sort** – Used to customize the sort order of items in the Log. Multiple sort keys can be specified in a user defined order.

**Filter** – Used to apply view filters based on a specific column and selected values in that colum. Example: display only the contracts with the type equals Master Terms & Conditions.

**Grouping –** Used to group records based on a specific attribute.

3. After filling out the custom view settings, give a name to the view in the Save This Configuration field and click **Save**.

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0013 Testing New Save Button	Open Kaile	e Trum - Kahua 3/	30/2018 Kai	ilee Trum - K	ahua					
0012 Yann New Test	Open Yann	n Bouzerand - Mayo Beta 3/	12/2018							
0011 Testing Solicited Reviewers	Open Kaile	e Trum - Kahua 3/	9/2018 Kai	ilee Trum - K	ahua					
0010 Testing Cindy Defects	Open Kaile	e Trum - Kahua 3/	29/2018 Kai	ilee Trum - K	ahua					
009 Testing Cindy Defects	Open		Kai	iloo Trum - K	abua					

4. Saved views appear in the View drop down on the Log. Click on the black arrow to display the available views and select one to display.

