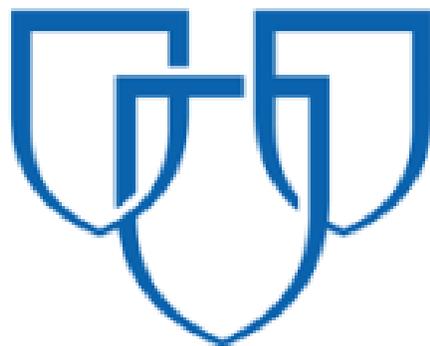


# MAYO CLINIC



CM at Risk / Design Build 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.

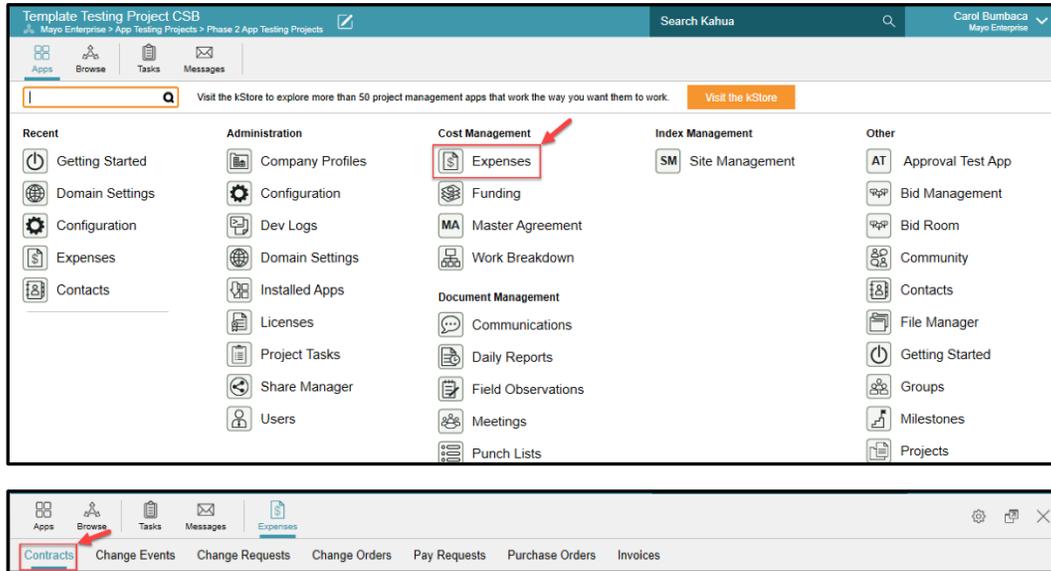
The approval workflow supports returning contracts for updates/changes before final sign off. When a contract has been signed and finalized, the contract is locked in the Contracts app and a PDF version complete with all legal contract language and signatures is rendered. This PDF version, referred to 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 eleven types of CM at Risk and Design Build contracts for the different agreement types and delivery methods. Most of the contract form is standard for all eleven 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 CM at Risk / Design Build 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).

DETAILS	
Project Number	ROMA19C0050
Project Name	Portable View Testing Project
Project Description	This project is for Portable View testing.
Project Location	Rochester
Additional Location Information	<input type="text" value="Lobby 2"/>
Date	<input type="text" value="11/4/2019"/>

All CM at Risk / Design Build contracts have these sections listed in order of appearance on the form:

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

**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.

▼ DETAILS	
Project Number	ROMA19C0030
Project Name	Primary Care Refurbishment
Project Description	Refurbishment of building interior finishes and furniture/art/signage.
Project Location	Rochester
Additional Location Information	<input type="text"/>
Contract No	<input type="text" value="0012"/>
Date	<input type="text" value="10/24/2019"/> <input type="button" value="15"/>
Status	Draft
Mayo Project Manager	Carol Bumbaca - Mayo Enterprise
Mayo Construction Manager	Carol Bumbaca - Mayo Enterprise
Quality Reviewer	Carol Bumbaca - Mayo Enterprise
Owner	<input type="text"/>
Owner Address	
Owner's Representative(s)	<input type="text"/>

**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:

*Project Location: Rochester Medical Science Building 1st Floor Mechanical Room*

**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

▼ CONTRACTED PARTY	
Company	Newman Construction ✕
Contact	Paul Newman - Newman Construction ✕
Contract Signatory	
Phone	(404) 555-5555
Fax	
Address	5555 Peachtree Street Suite 555 Atlanta, GA 30309
Vendor Number	08151979

**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 CM at Risk / Design Build contract depend on the Agreement Type and Delivery Method selected in the Agreement Details section. Fill out the fields as required in this section after selecting the Agreement Type and Delivery Method.

### 5. 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**.

▼ ARIZONA TAX EXEMPTION INFO

Tax Exemption Type Prime Contractor ▼

Tax Detail Prime Contractor 
 Prime Contractor  
 MRRA

Arizona Agency Agreement (only for Prime Contractor)

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

▼ ARIZONA TAX EXEMPTION INFO

Tax Exemption Type Prime Contractor ▼

Tax Detail Prime Contractor 
 Materials Exempt  
 Standard TPT Rules Apply

Arizona Agency Agreement (only for Prime Contractor)

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

Arizona Agency Agreement (only for Prime Contractor)

## 6. 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.

▼ REVIEW

Date Submitted

Date Approved

Date Returned to Vendor

Comments 
 Carol Bumbaca - Mayo Enterprise - 11/6/2019 8:49 AM  
*Time is of the essence. Site deliveries scheduled for 12/1/1.*

Workflow Status Proposal Requested

Pending With Mayo Role Test Project Manager

## 7. 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 nine Item Types.

Insert		1 item(s)						
NO.	DESC	ACCOUNT CATEGORY	ITEM TYPE	COST STATUS	TOTAL			
01	General Construction Labor	.C2101C2010 General Construction	Labor	Draft	\$ 56,446.00			
02	General Construction Material	.C2101C2010 General Construction	Material	Draft	\$ 2,355.00			
03	General Construction Subcontracted	.C2502C201W General Construct Work Order	Construction Subcontracted	Draft	\$ 7,457.00			
04	Reimbursable	.C1101C0250 Reimbursable	Other Construction Reimbursables	Draft	\$ 7,898.00			
05	Architectural Fees	.C1101C0200 Architectural Fees	Prof Services Fee	Draft	\$ 4,444.00			
06	Reimbursable	.C1101C0250 Reimbursable	Prof Services Reimbursables	Draft	\$ 6,400.00			

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 will 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.

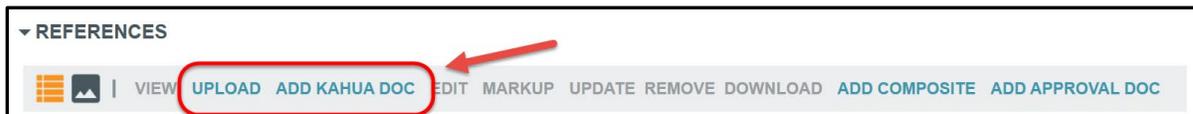
**Total** – enter the dollar total of the line item.

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.

Contract - 0009		Preview
	Prof Services Fee	\$4,444.00
	Prof Services Sub-consultant	
Subtotal Prof Services Fee + Prof Services Sub-consultant		\$4,444.00
	Prof Services Reimbursable	\$6,400.00
	Labor	\$56,446.00
	Construction Subcontracted	\$7,457.00
Subtotal Labor + Construction Subcontracted		\$63,903.00
	Material	\$2,355.00
	Construction Fee	
	Tax	
	Other Construction Reimbursables	\$7,898.00
	<b>Total</b>	<b>\$85,000.00</b>

## 8. 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.



Click **Save** to save the new contract record.

## CREATING THE APPROVAL DOCUMENT

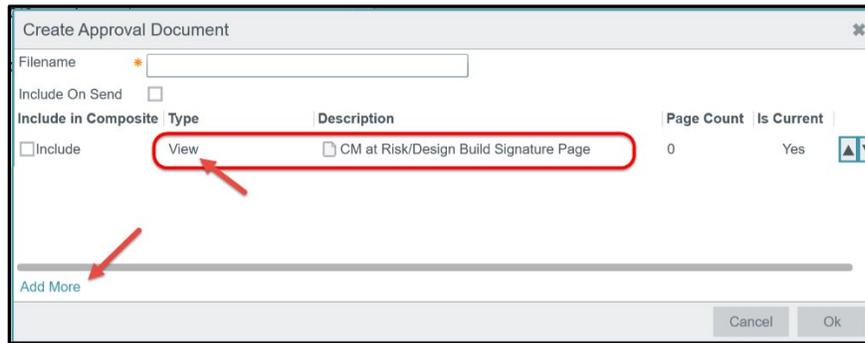
CM at Risk /Design Build type contracts differ from Design and Construction Contracts in an important way. Rather than using an internal view to create the contract document for signature, a Mayo user will create the contract document outside of Kahua, then upload and combine this externally created document with an internal signature page in a special type of reference document called an **Approval Document**.

This approval document is the document that will be presented to approvers during the approval process described in the next section. The following process describes how to assemble several reference files into a single composite Approval Document.

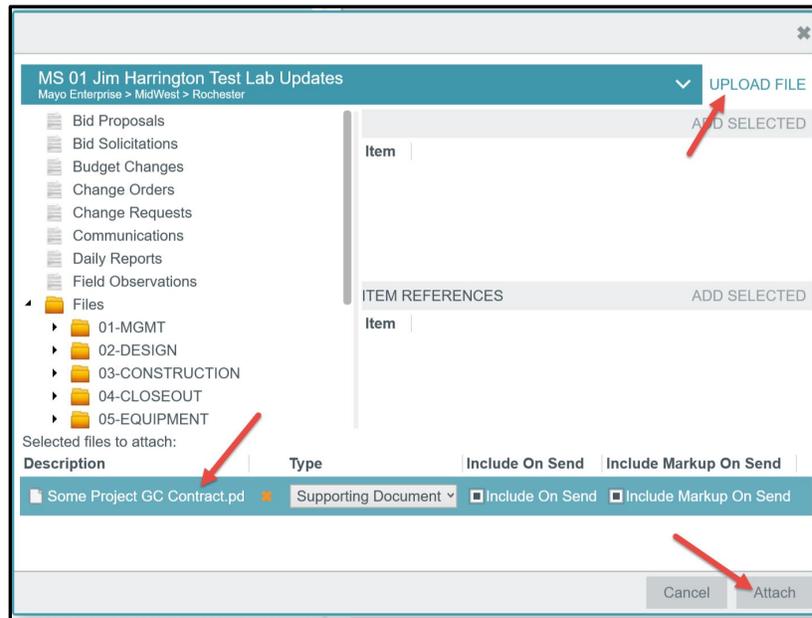
Before you begin creating the approval document on a new record, make sure the record has been saved. Click **Save**, then click **Edit** and scroll to the REFERENCES section at the bottom of the document.



Click **ADD APPROVAL DOCUMENT**. The Create Approval Document wizard presents a list of available documents that can be added to the composite. The list will include any reference files you attached in the previous step, as well as any internal views configured for the document type you have created. The CM at Risk / Design Build contract view has been configured with a Signature Page internal view that you will combine with your external contract document to create the Approval Document for signature.



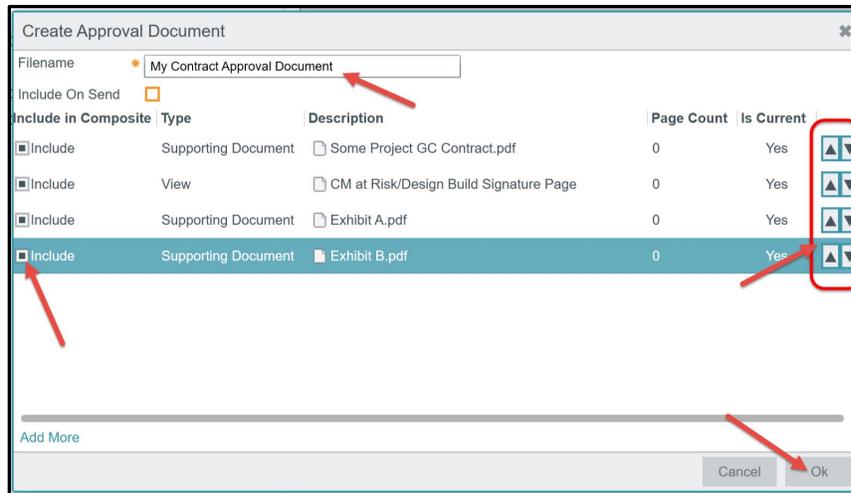
Click **Add More** on the bottom left of the wizard. This screen allows you to gather other documents to add to your composite. These other documents can be other records in Kahua, files in File Manager, or files uploaded from your computer.



Click **UPLOAD FILE**, select the contract document from the location on your hard drive. You may also attach other files, such as contract exhibits or other supporting documents from File Manager to add to your composite document. Click **Attach** to add these selected files to your References.

Back in the Create Approval Document window you now see all the references. Select the **Include** checkbox on the left to select all the files you want to render in the composite. Use the arrow buttons on the right to move change the order of the files in the final document.

**Note: It is important to include the Signature Page View in your Approval Document.** This is where all signature images will be placed. Kahua cannot attach signature images in a document created outside Kahua.



Give the document a **Filename**. This will be the name of the file in the References section of your contract record. When you have all the documents included and in the correct order, click **Ok** to compile the Approval Document and attach it to the record. Click **Save** to save the Contract.

In the REFERENCES section the composite document you created is attached as an Approval Document, and other supporting documents are attached separately as Supporting Documents. In the Approvals Workflow, approvers will be presented only with the Approval Document.

TYPE	DESCRIPTION	CONTRIBUTOR	DATE	MARKUP?	INCLUDE ON SEND	INCLUDE MARKUP ON SEND	IS CURRENT	PREVIEW STATUS
▼ REFERENCES								
VIEW MARKUP DOWNLOAD								
▼ Approval Document								
Approval Document	My Contract Approval Document.pdf		11/22/2019 1:22 PM	No	No	No	Yes	Rendering
▼ Supporting Document								
Supporting Document	Some Project GC Contract.pdf	Jim Harrington	11/22/2019 1:10 PM	No	Yes	Yes	Yes	Rendered
Supporting Document	Exhibit A.pdf	Jim Harrington	11/22/2019 1:10 PM	No	Yes	Yes	Yes	Rendered
Supporting Document	Exhibit B.pdf	Jim Harrington	11/22/2019 1:10 PM	No	Yes	Yes	Yes	Rendered

**Note:** If your included files are very large, it may take Kahua a short time to render the composite Approval Document. When you click to submit your document into workflow, you may get a message indicating that Kahua cannot submit the document while it is rendering. You will be able to submit the document as soon as this process is finished. You can see the status of the rendering in the Preview Status column on the right in the REFERENCES section.

## 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** – 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:

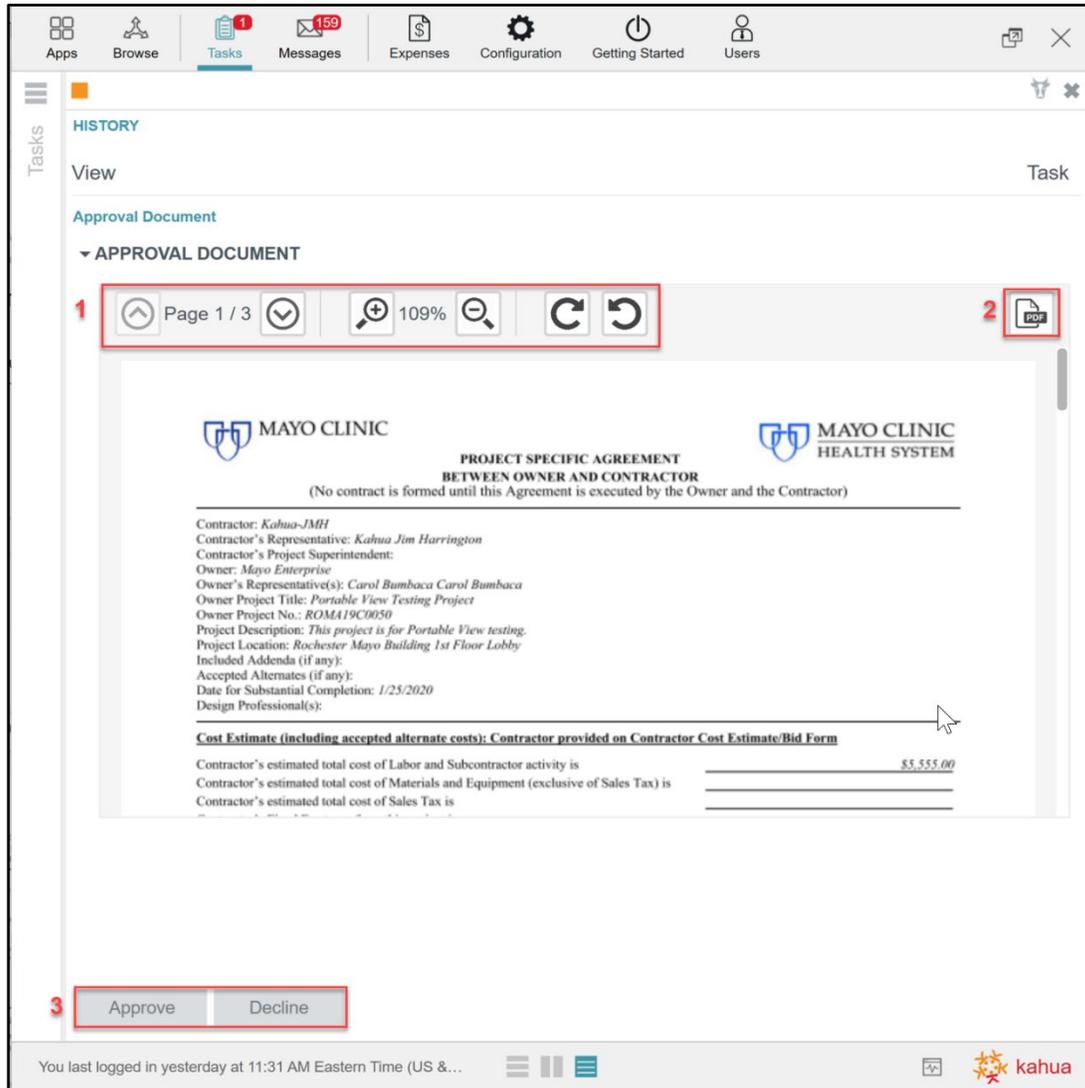


Access a task in one of these ways:

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

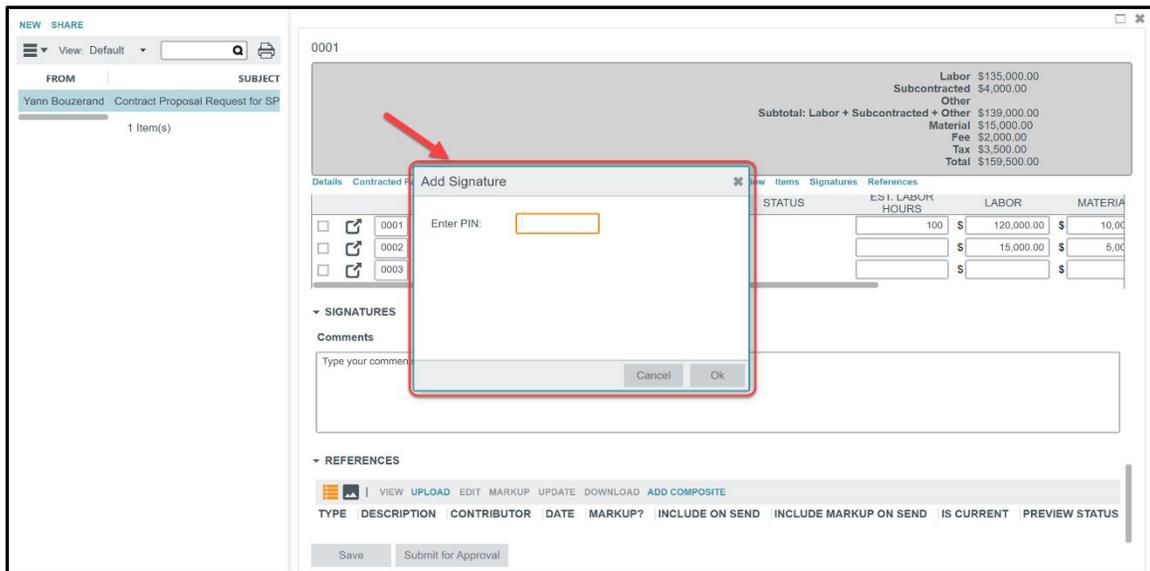
When finished editing, select an action to take on the proposal request:

**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.

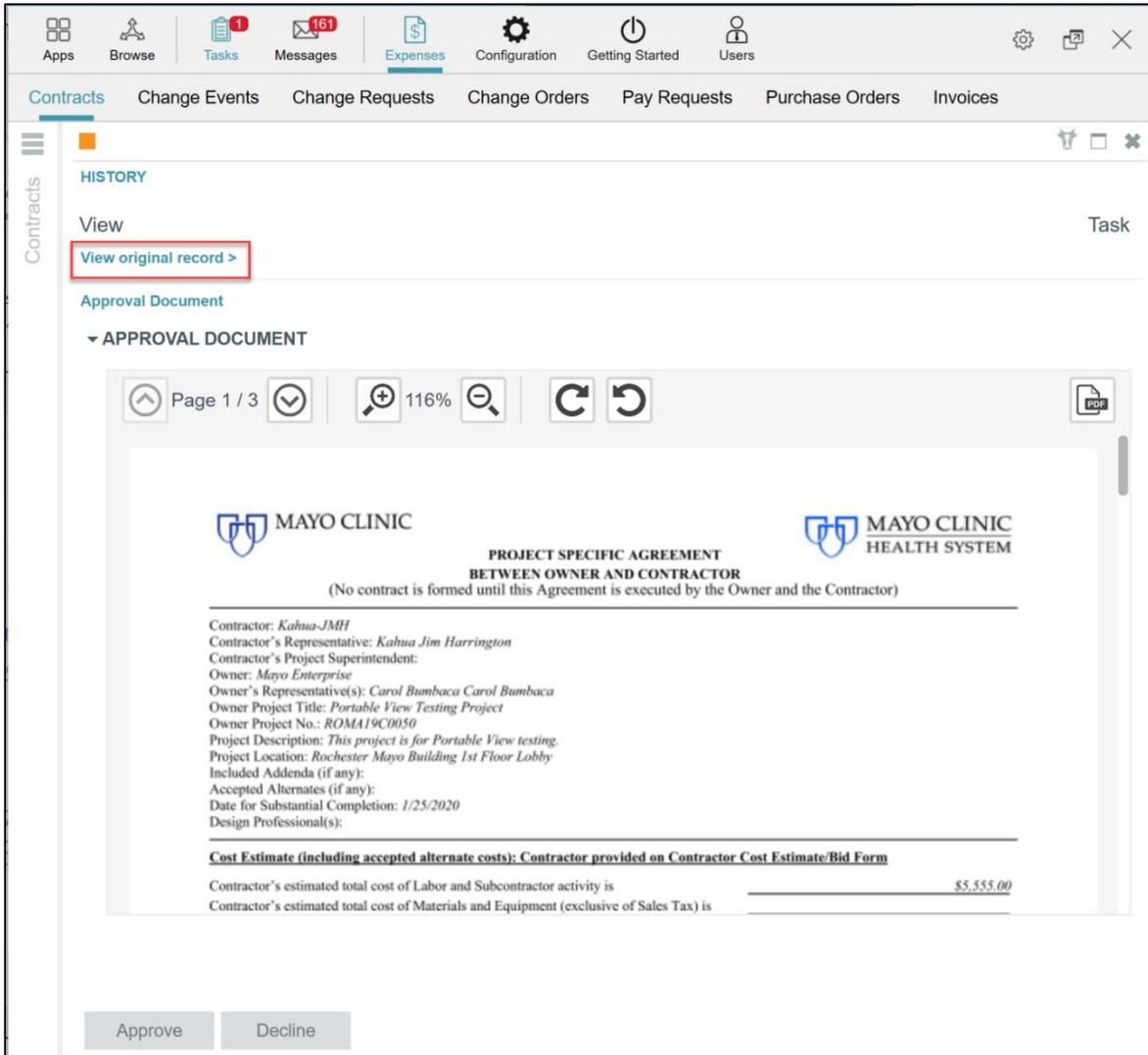
**Submit for Mayo approval** – sends an Approval Task to the originator of the contract from Mayo.

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

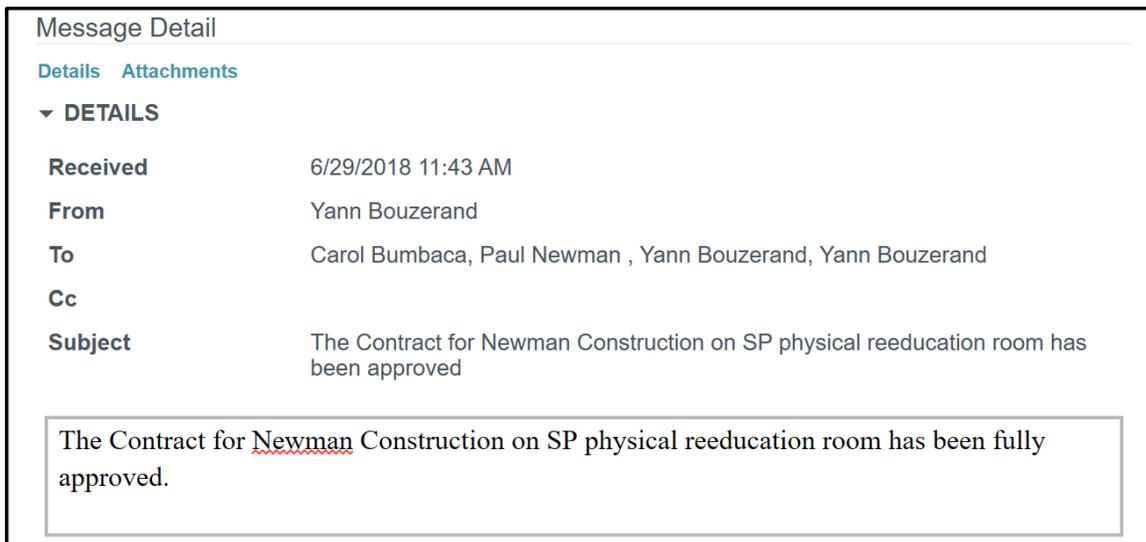
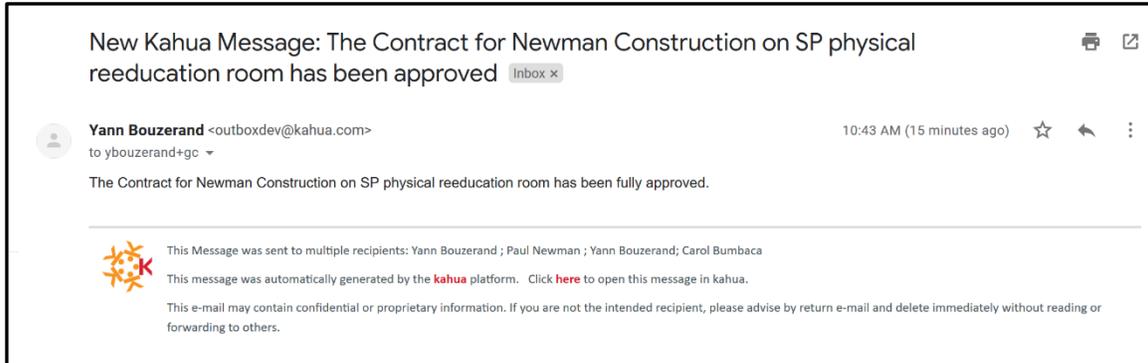
The approval task presents the PDF document with the ability to Approve or Decline. The last page of the contract document has the schedule of values for reference. If necessary, a Mayo user may also view the data record in the Contracts app, click on the contract record and use the [View original record](#) 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.

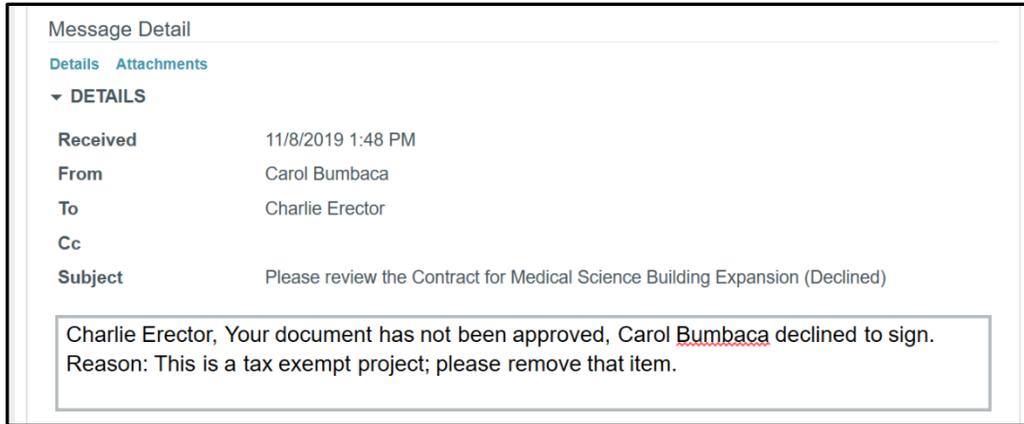
## NOTIFICATION OF AN APPROVED CONTRACT

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:



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.



The Contractor may unlock the contract then edit it and send it into workflow again.

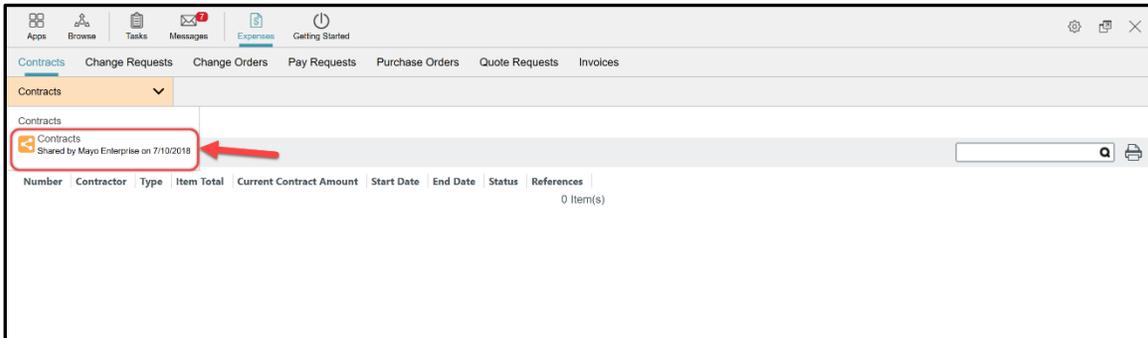
## VIEWING THE CONTRACT IN THE CONTRACT APP SHARED BY MAYO CLINIC

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

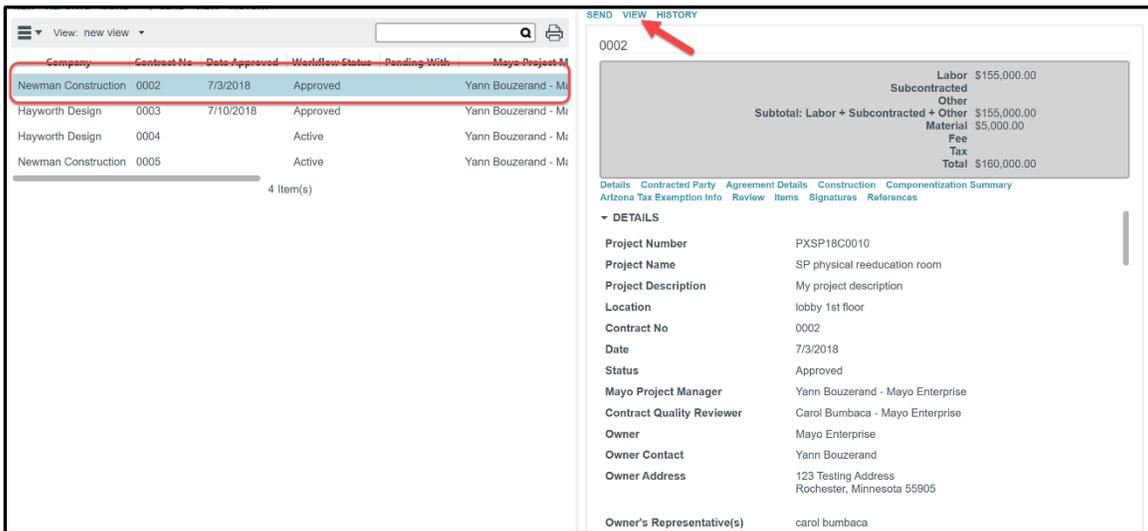
1. Navigate to the project where Mayo Clinic is sharing the app.



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.

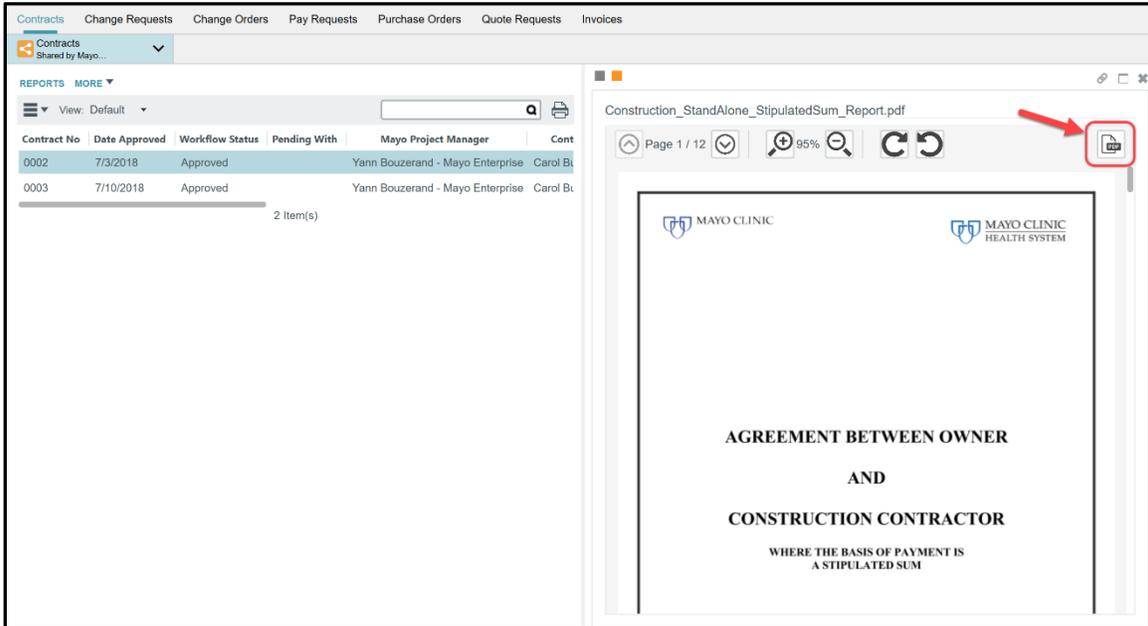


3. Select the contract in the log then select **VIEW** from the menu in the detail pane to see the contract. Note that the log view is configurable. You may create one or many views and toggle between them. For example, you may make fields visible in the log like Contractor Company. You may apply filters 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.

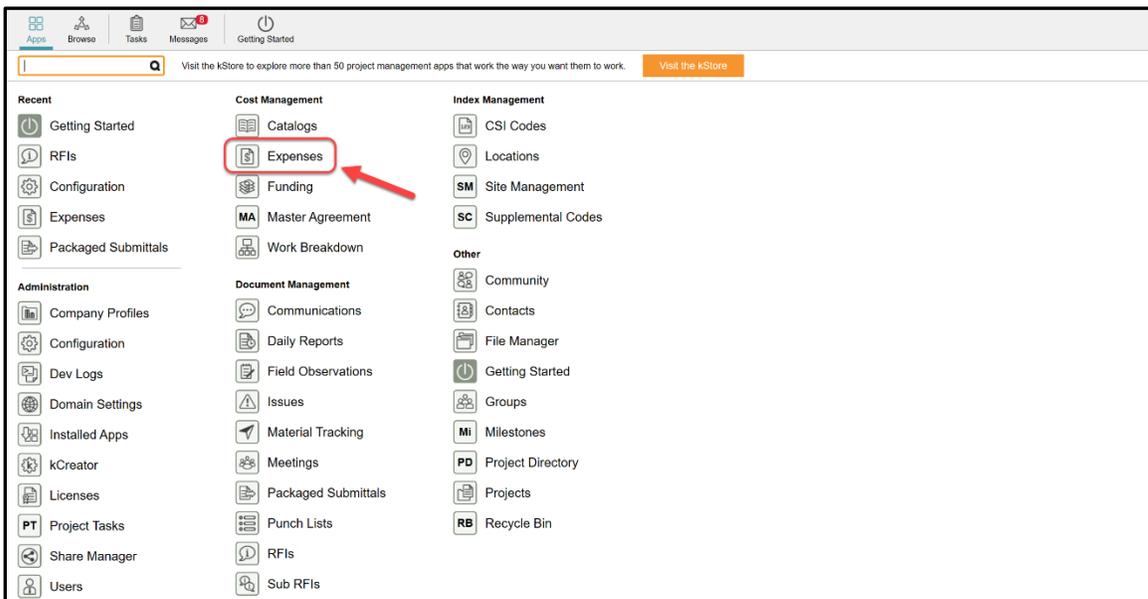
## SHARING THE CONTRACTS APPLICATION WITH AN EXTERNAL PARTY

**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:

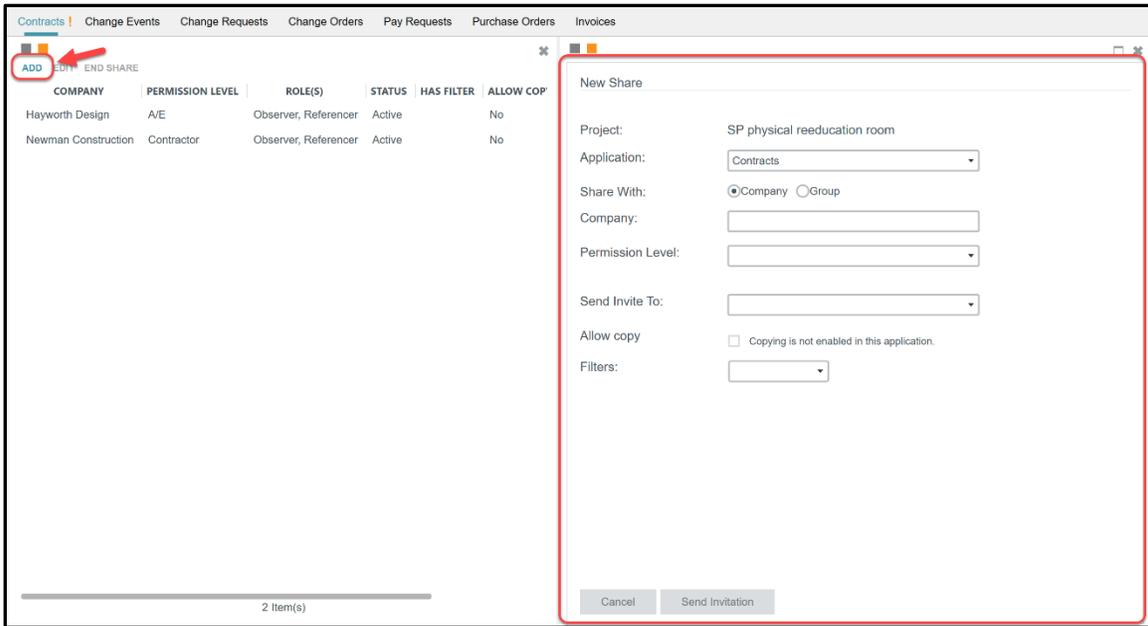
5. Click on the Project Navigator to navigate to the project level from which you will share.
6. Access the Contracts sub app located in the Expenses app.



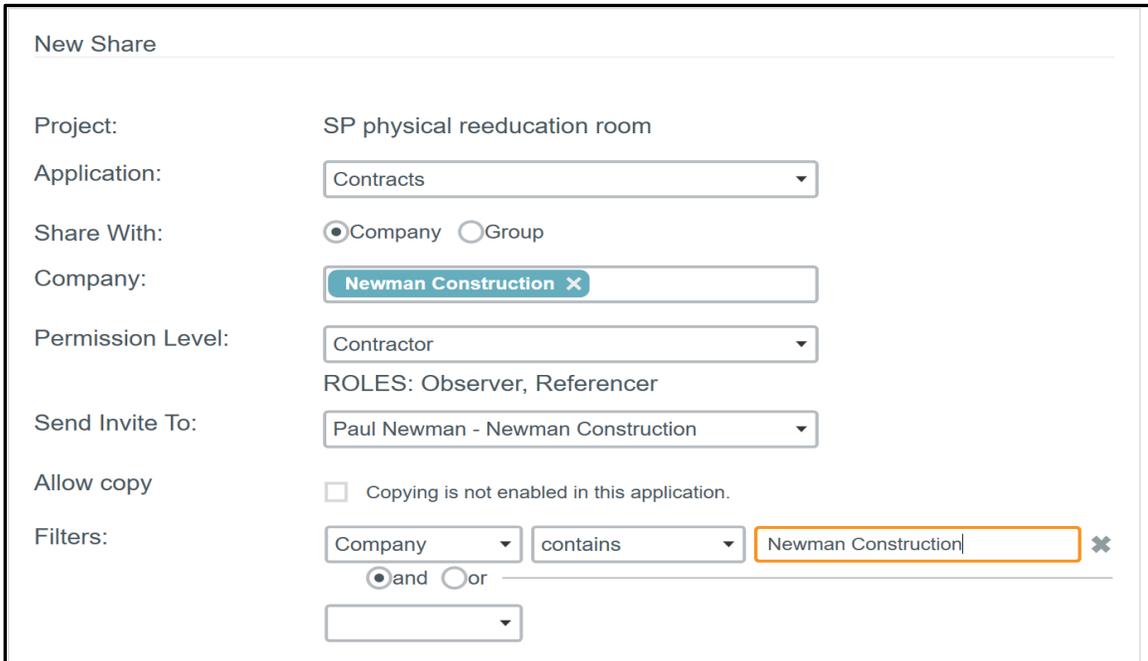
7. Click **MORE** to access the drop-down menu (SHARING is one action available as a subset of the MORE button), then click **SHARING** to share the app with the CIP.



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.

Project:	SP physical reeducation room
Application:	<input type="text" value="Contracts"/>
Share With:	<input checked="" type="radio"/> Company <input type="radio"/> Group
Company:	<input type="text" value="Newman Construction X"/>
Permission Level:	<input type="text" value="Contractor"/> ROLES: Observer, Referencer
Send Invite To:	<input type="text" value="Paul Newman - Newman Construction"/>

**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:

Share With:  Company  Group

Permission Level:

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
<input type="checkbox"/> 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
<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

**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:



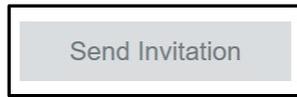
**Company + Contains + company's name**

**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.



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

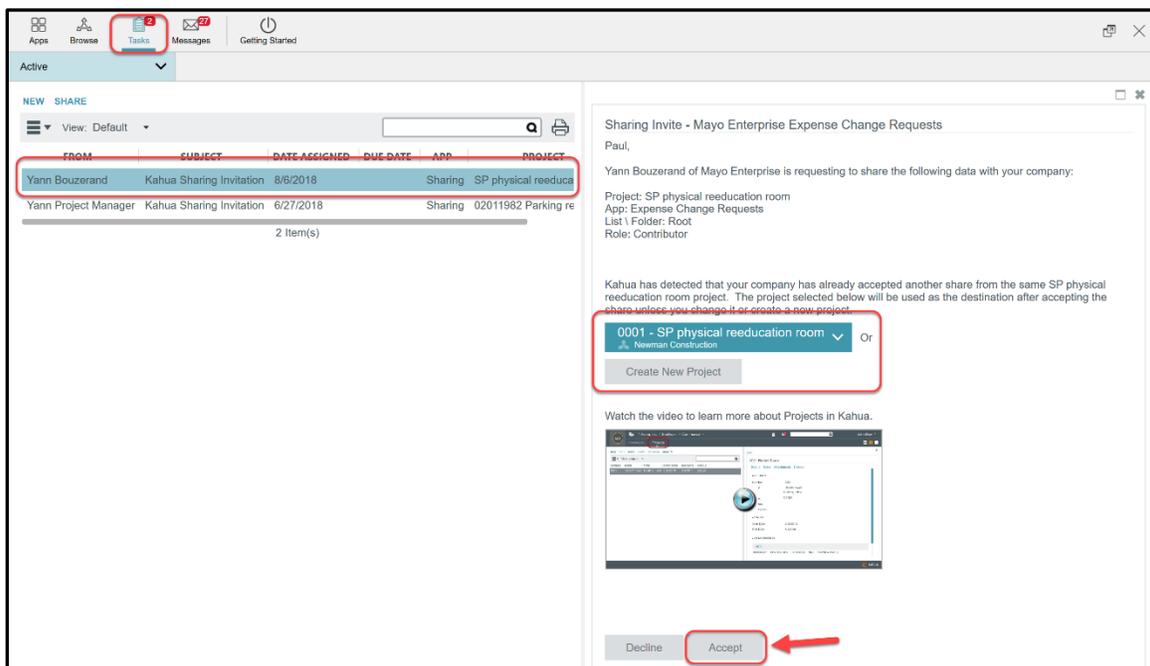
This section has instructions for Construction Industry Partners (CIPs). These steps do not apply to Mayo users, but Mayo users should be familiar with them as they support and assist third parties in accepting shares.

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

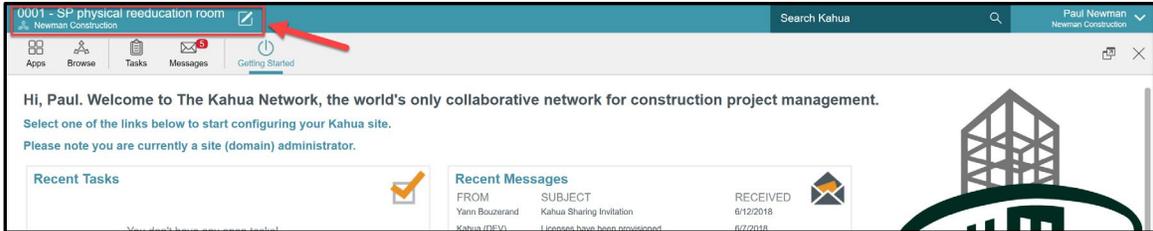
1. The CIP will receive a sharing invitation in the Tasks application within their domain (not the Mayo domain).
2. Click on the **Tasks** icon to load all tasks into the List View window.
3. Click on the **Kahua Sharing Invitation** task to open the Detail View of that task. A right detail pane will 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.

