



# KAHUNA

## End User Guide

## Table of Contents

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Getting Started

Login and change password

Your Profile Page

Individual Matrix Tab Entries

Workbooks Tab Entries

Completion



## Getting started



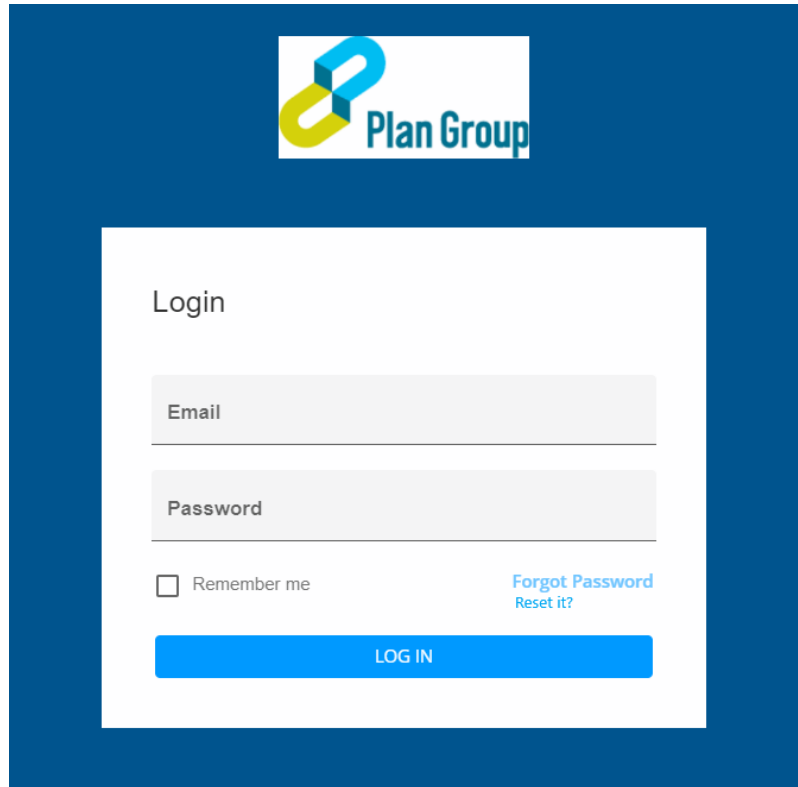
Use your computer or phone's browser and enter the link from your email or use the below link.

Google Chrome is the best browser to use for this. Safari & Microsoft Edge do work as well.

<https://plangroup.kahunaonline.com/Basic>



## Getting started



The screenshot shows the Plan Group login interface. At the top left is the Plan Group logo, which consists of a stylized blue and yellow link icon followed by the text "Plan Group". Below the logo is the word "Login". There are two input fields: "Email" and "Password". Below the "Email" field is a checkbox labeled "Remember me". To the right of the "Remember me" checkbox is a link that says "Forgot Password Reset it?". At the bottom of the form is a blue button labeled "LOG IN".

## Login and change password

The link will open this screen. Your password must be changed upon initial log in by entering your email address and then clicking "Forgot password. Reset it?"



# Password Reset

**Password Reset**

Please enter your email address and click the "Request Password Reset" button below, we will send you an email with a link to reset your password. Please click on the link and it will take you the password reset screen.

**Email**

The email address that you login with

**Request Password Reset**

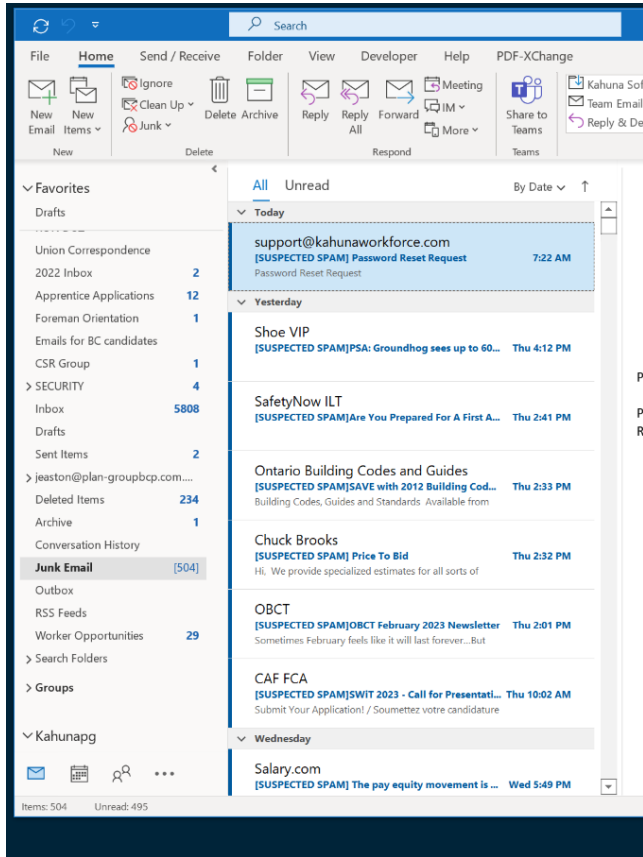
Enter your email and click "Request Password Reset"

You will then see the below green message appear at the top of your computer screen.

Your request for a password reset has been sent, you should receive it shortly.



# Password Reset



You will receive an email from [support@kahunaworkforce.com](mailto:support@kahunaworkforce.com) this may go to your **Junk** or **Spam** box so please check both if you do not see a message in your **Inbox**

The email will contain a link to **Reset my password** click that link. It could look like either of the below.

## Password Reset Request

Please click on the link below to reset your password:  
[Reset my password](#)

## Password Reset Request

Please click on the link below to reset your password:  
Reset my password <<https://beta-plangroup.kahunaonline.com//Account/PasswordReset?t=WHQa5F-9VPbsNcFAjgJBKQ2&f=0>>



## Password Reset

**Password Reset**

Please enter a new password and then confirm it by typing it in again in the "Request Password Reset" box. Once you are complete, click on the "Reset Password" button. You will be prompted to login once you have reset your password.

Password

The password must be at least eight characters long and contain uppercase, lowercase, numbers and special characters.

Confirm Password

Retype your password to confirm it

Request Password Reset

After you click that link your computer's browser will open this page. Enter your new password and confirm it. Note the items it must contain.

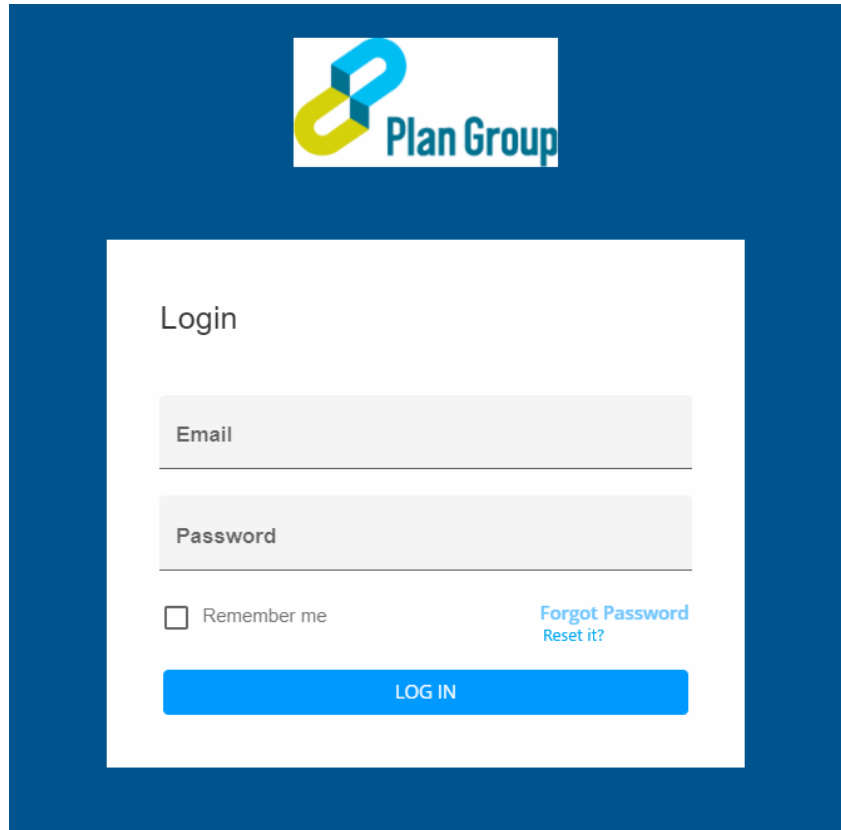
Once you have done that you will get another green banner at the top of your screen with the below message. If you do not see the banner right away scroll up to the top of your screen.

Do not click on "**click here**". Instead, log back into <https://plangroup.kahunaonline.com/Basic> and enter your new password.

Your password has been successfully changed, click [here](#) to log in.



# Password Reset

A screenshot of the Plan Group login page. The page has a dark blue header with the Plan Group logo (a stylized blue and yellow link icon) and the text "Plan Group". Below the header is a white login form. The form is titled "Login" and contains two input fields: "Email" and "Password". Below the "Email" field is a checkbox labeled "Remember me". To the right of the "Remember me" checkbox is a link that says "Forgot Password Reset it?". At the bottom of the form is a blue button labeled "LOG IN".

Plan Group

Login

Email

Password

Remember me [Forgot Password Reset it?](#)

LOG IN

**SUCCESS!!!**

You can now enter the system with the new password you created!



# Your Profile Page

Now that you have entered the program let's orient you to your profile page. This will be the page you see each time you log into the program from your computer.

The screenshot shows the Plan Group profile page. Annotations include:

- Your Name:** Points to the 'YOUR NAME' text in the top left navigation bar.
- Image:** Points to the profile picture placeholder in the 'Individual Status' section.
- Your trade and classification:** Points to the 'Competency Role' section, which lists 'Sheet Metal' and 'Sheet Metal - Self Assessment'.
- Competency role:** Points to the competency status tiles (Not Assessed, Pending Review, Not Yet Competent, Competent, About To Expire, Expired).
- Methods of entering your information:** Points to the 'Individual Matrix' and 'Workbooks' tabs.

The 'Individual Status' section displays the following information:

- Location: [Redacted]
- Organization: [Redacted]
- Job: Toronto Sheetmetal Journeyperson
- Competency Role: Sheet Metal, Sheet Metal - Self Assessment
- Progress: 0%
- Competency Status Tiles:
  - Not Assessed: 55
  - Pending Review: 0
  - Not Yet Competent: 0
  - Competent: 0
  - About To Expire: 0
  - Expired: 0

The 'Individual Matrix' section includes a 'List Saved Items' button and a table with the following headers:

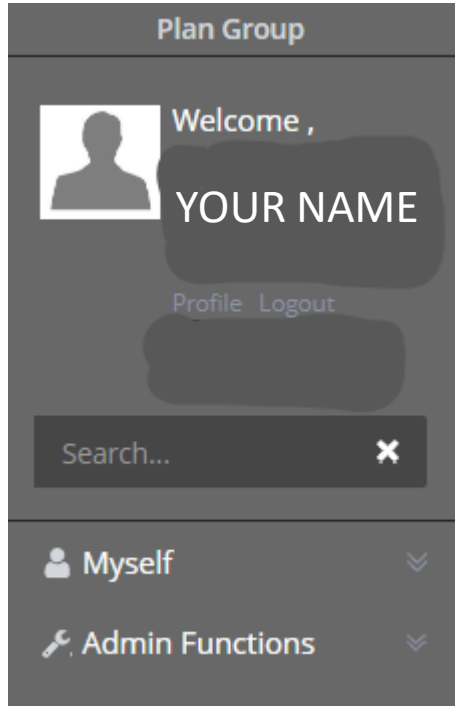
Role	Expiration	Resources	Current vs. Expected
Trade Skills			0%

Methods of entering your information





## Your Profile Page



### Left-Hand Navigation

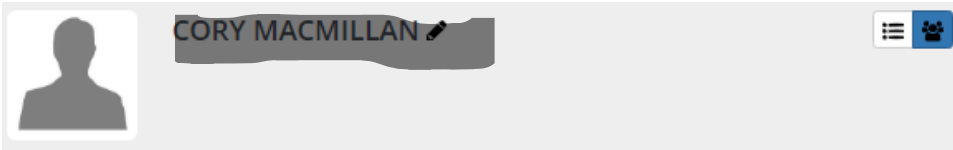
This is your personal welcome area.

Clicking **Profile** will refresh your profile page.

Clicking **Logout** will allow you to log out of the program.



## Individual Profile: Business Card View



- The Business Card View is intended to provide additional information about the User
- Split into **Details View** and **Relationship View**
- **Details View** provides some of the related HR attributes for the user, as well as assigned job and competency role
  - The items visible in this section are configured at the company setting level
- **Relationship View** displays any supervisors or direct reports associated to the user. This is currently not set-up



## Individual Profile: Status Tiles & Overall Percentage



- Individual Profile displays 6 different tiles with counts of status and a percentage indicator.

**Status Definitions** – I have bolded the tiles that will be applicable to you

**Not Assessed** – You have not started the Self Assessment process

Pending Review – N/A

**Not Yet Competent** – User has not met expectation for competency (we will discuss this later in the manual)

**Competent** – User has met or exceeded the competency expectation

About to Expire & Expired – Previous assessment will expire soon if a re-assessment is not conducted within defined expiration period. N/A

### Overall Percentage Indicator

Percentage score based on the number of competent assessments divided by total competencies assigned



# Individual Matrix Tab Entries

- Assigned competencies organized within the hierarchical competency structure.
- Displays Competency Group Structure with roll-up percentage based on competencies within structure


## Interactivity

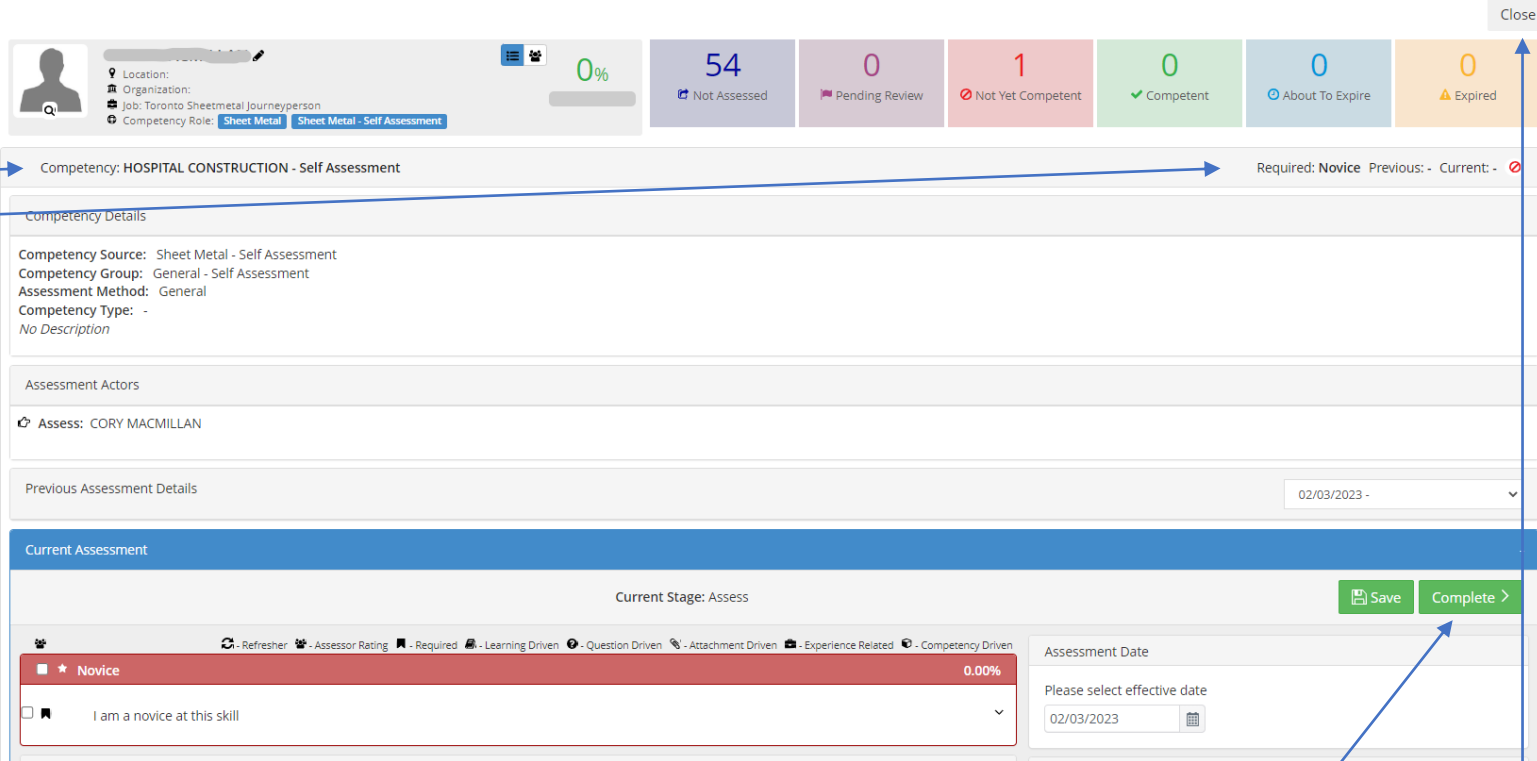
- Clicking on the blue arrow will launch an assessment form

The screenshot displays the 'Individual Matrix' interface for a user. At the top, there is a header with user information (Location: Toronto, Organization: Sheetmetal Journeyperson, Competency Role: Sheet Metal) and a progress bar showing 0%. Below this, there are several status indicators: 'Not Assessed' (55), 'Pending Review' (0), 'Not Yet Competent' (0), 'Competent' (0), 'About To Expire' (0), and 'Expired' (0). The main content area is titled 'Individual Matrix' and 'Workbooks'. A 'List Saved Items' button is visible. The table below shows a hierarchical structure of competencies. The columns are 'Role', 'Expiration', 'Resources', and 'Current vs. Expected'. The 'Current vs. Expected' column shows progress bars and a percentage (0%). A blue arrow points to the 'Sheet Metal - Self Assessment' group, which contains various self-assessment items like 'BENCH EXPERIENCE - Self Assessment', 'BREECHING/VENTING - Self Assessment', etc.

	Role	Expiration	Resources	Current vs. Expected
<b>Trade Skills</b>				0%
<b>Certifications</b>				0%
FIRE ALARM CERTIFICATE	Developmental Certification Role	-	-	0%
GAS LICENCE - HVAC Refrigeration	Developmental Certification Role	-	-	0%
GAS LICENCE - Pipefitting	Developmental Certification Role	-	-	0%
GAS LICENCE - Plumbing	Developmental Certification Role	-	-	0%
GAS LICENCE - Sheet Metal	Developmental Certification Role	-	-	0%
GAS LICENCE - Welder	Developmental Certification Role	-	-	0%
Certificate of Qualification	Sheet Metal	-	-	0%
<b>General</b>				0%
<b>General - Self Assessment</b>				0%
DATA CENTER EXPERIENCE - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
HOSPITAL CONSTRUCTION - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
TRANSPORTATION - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
<b>Sheet Metal</b>				0%
<b>Sheet Metal - Self Assessment</b>				0%
BENCH EXPERIENCE - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
BREECHING/VENTING - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
FANS - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
LOUVERS & PLENUMS - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
AHU ASSEMBLY - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
KITCHEN EXHAUST - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
RISERS - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
OVAL DUCT - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
ENVIRONMENTAL WTP - Sheet Metal - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
SIEMIC INSTALLATIONS - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
MIG WELDING - Sheet Metal - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
TIG WELDING - Sheet Metal - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
MECHANICAL ROOMS - Sheet Metal - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
MEASUREMENT/TAKEOFF - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
RUN JOBS - Self Assessment	Sheet Metal - Self Assessment	-	-	0%
ENVIRONMENTAL WWTP - Sheet Metal - Self Assessment	Sheet Metal - Self Assessment	-	-	0%

## Individual Matrix Tab Entries – Top of screen shot

- After clicking on the blue arrow  you will be taken to this page, which is the assessment form.
- Displays Name of Competency, required proficiency level, and previous level
- Divided into four sections:
  - **Competency Details** – Gives more information regarding competency attributes
  - **Assessment Actors** – Defines who can perform assessments on this competency, which is yourself.
  - **Previous Assessment Details** – As your skills advance in a competency and you update your assessment, you can see the history by clicking on it
  - **Current Assessment** – Section used to conduct your current assessment.



Competency: HOSPITAL CONSTRUCTION - Self Assessment

Required: Novice Previous: - Current: -

Competency Details

Competency Source: Sheet Metal - Self Assessment  
Competency Group: General - Self Assessment  
Assessment Method: General  
Competency Type: -  
No Description

Assessment Actors

Assess: CORY MACMILLAN

Previous Assessment Details

02/03/2023 -

Current Assessment

Current Stage: Assess

Save Complete >

Assessment Date

Please select effective date

02/03/2023

Novice 0.00%

I am a novice at this skill

On page 11 I made a notation on the **Not Yet Competent** tile? Well if you click **complete** without checking off a level of knowledge it will show in that “red” tile. You can simply click **Close** if you want to go back without completing.

## Individual Matrix Tab Entries – Bottom of screen shot

This is what you will see on the bottom part of the assessment form discussed on the previous page.

- You will have 3 levels to choose for each competency.
  - **Novice** – Experience is basic, requires much guidance and instruction
  - **Proficient** – Experience is intermediate, has completed task regularly but still requires practice
  - **Expert** – Experience is advanced, requires minimal guidance to complete the task
- When a level is selected you can click the drop down arrow and you will have the ability to make a comment or add an attachment (picture, doc)
- You can also add an overall comment or add an attachment on the right hand side of the screen.

The screenshot displays the bottom portion of an assessment form. The main section is titled 'Novice' and shows a progress bar at 100.00%. Below the title, there is a dropdown menu with 'Novice' selected, and a 'Comments' button. Underneath is an 'Assessor Comment' field with a placeholder 'Add Comment...'. The form also shows options for 'Proficient' and 'Excellent' levels, each with a 0.00% progress bar. On the right side, there is an 'Assessment Date' section with a date picker set to '02/03/2023', an 'Assess' section with fields for Assessor, Assess Time, Assessment Source, Expiration Date, and URL, and a 'Comments' text area. At the bottom right, there are 'Supplemental Attachments' and 'Learning Resources' sections, both with 'View Attachments' and 'Add Attachment' buttons. The bottom of the form has a 'Current Stage: Assess' label and 'Save' and 'Complete >' buttons.



Do not forget to click on the **Complete >** button either at the bottom or the top of the **Current Assessment** section to ensure your entry is added successfully. If using the Individual Matrix Tab this process has to be done for each entry.



# Workbooks Tab Entries

QUICK and EASY!

In the **Workbooks tab** you can make multiple selections for all the various competencies. You would click on the **Select a Level** and choose your level of knowledge for each one.

Individual Status

Location: [Redacted] 2%  
Organization: [Redacted]  
Job: Toronto Sheetmetal Journeyperson  
Competency Role: Sheet Metal  
Sheet Metal - Self Assessment

53 Not Assessed | 0 Pending Review | 1 Not Yet Competent | 1 Competent | 0 About To Expire | 0 Expired


Individual Matrix | **Workbooks**

Competency	Group	Expected Proficiency	Current Status	Last Assessed	Select Level	Comment	Attachments
CONFINED SPACE - Self Assessment	General - Self Assessment	■ ■ ■	🔒		-- Select a Level --	Comment	📎 0
DATA CENTER EXPERIENCE - Self Assessment	General - Self Assessment	■ ■ ■	✓	02/03/2023	-- Select a Level --	Comment	📎 0
FINISHING - Self Assessment	General - Self Assessment	■ ■ ■	🔒		-- Select a Level --	Comment	📎 0
BREECHING/VENTING - Self Assessment	Sheet Metal - Self Assessment	■ ■ ■	🔒		-- Select a Level --	Comment	📎 0
ENVIRONMENTAL WTP - Sheet Metal - Self Assessment	Sheet Metal - Self Assessment	■ ■ ■	🔒		-- Select a Level --	Comment	📎 0
ENVIRONMENTAL WWTP - Sheet Metal - Self Assessment	Sheet Metal - Self Assessment	■ ■ ■	🔒		Select a Level --	Comment	📎 0
FANS - Self Assessment	Sheet Metal - Self Assessment	■ ■ ■	🔒		-- Select a Level --	Comment	📎 0
FINISHING - GRILLS/FLEX DUCT - Self Assessment	Sheet Metal - Self Assessment	■ ■ ■	🔒		-- Select a Level --	Comment	📎 0
KITCHEN EXHAUST - Self Assessment	Sheet Metal - Self Assessment	■ ■ ■	🔒		-- Select a Level --	Comment	📎 0
LOUVERS & PLENUMS - Self Assessment	Sheet Metal - Self Assessment	■ ■ ■	🔒		-- Select a Level --	Comment	📎 0




# Workbooks Tab

QUICK and EASY!

After selecting all your entries you would hit the **Submit Worksheet >** button, located at the bottom of the screen.. You will receive a pop up **Submit Actioned** click this button to save the entries. You will need to refresh your browser  after this in order to have the entries shown in the system.

You can also add comments or attachments in this area as well for any competencies you choose.

You can also click on the  in order to access the assessment form for each competency as what was explained in the **Individual Matrix Tab** section if you choose.

Individual Status

Location: [redacted] Organization: [redacted] Job: Toronto Sheetmetal Journeyperson Competency Role: **Sheet Metal** **Sheet Metal - Self Assessment**

2%

53 Not Assessed 0 Pending Review 1 Not Yet Competent 1 Competent 0 About To Expire 0 Expired

Individual Matrix Workbooks

Competency	Group	Expected Proficiency	Current Status	Last Assessed	Select Level	Comment	Attachments
CONFINED SPACE - Self Assessment	General - Self Assessment				-- Select a Level --	Comment	0
DATA CENTER EXPERIENCE - Self Assessment	General - Self Assessment			02/03/2023	-- Select a Level --	Comment	0
FINISHING - Self Assessment	General - Self Assessment				-- Select a Level --	Comment	0
BREECHING/VENTING - Self Assessment	Sheet Metal - Self Assessment				-- Select a Level --	Comment	0
ENVIRONMENTAL WTP - Sheet Metal - Self Assessment	Sheet Metal - Self Assessment				-- Select a Level --	Comment	0
ENVIRONMENTAL WWTP - Sheet Metal - Self Assessment	Sheet Metal - Self Assessment				-- Select a Level --	Comment	0
FANS - Self Assessment	Sheet Metal - Self Assessment				-- Select a Level --	Comment	0
FINISHING - GRILLS/FLEX DUCT - Self Assessment	Sheet Metal - Self Assessment				-- Select a Level --	Comment	0
KITCHEN EXHAUST - Self Assessment	Sheet Metal - Self Assessment				-- Select a Level --	Comment	0
LOUVERS & PLENUMS - Self Assessment	Sheet Metal - Self Assessment				-- Select a Level --	Comment	0

**Submit Worksheet >**







# KAHUNA

## End User Guide

**YOU HAVE SUCCESSFULLY COMPLETED!**

Please note you can update your self assessment at anytime to track your progress in a competency. Growth is a continuous process!!

You can log out of the program but don't forget the new password you made!! 😊

