Kiwa Digital

CultureQ Operating Manual

This guide provides information to help you get started with CultureQ.

Welcome to CultureQ®

Tēnā koutou katoa,

Warm greetings to all who use CultureQ.

CultureQ is a novel technology platform that enables Indigenous groups to revitalise their language and cultural heritage while retaining data sovereignty. The innovation responds to growing demand from Indigenous groups globally to take control of their narrative.

As a Māori-owned company operating in Aotearoa, we are developing CultureQ with the guidance of Māori advisors and clients like yourselves who have the cultural context of data and specific tikanga over that data.

This Guide will get you started, explaining the eight easy steps to mastery. But CultureQ is user-friendly, so dive in wherever you choose. Whether you and your team are starting something new or getting more organised with your existing mahi, CultureQ adapts to any project.

We acknowledge everyone contributing to the development of CultureQ, motivated by a shared vision of Mātauranga Māori enduring for generations to come.

Nā tō rourou, nā taku rourou, ka ora ai te iwi.

With your food basket and my food basket, the people will thrive.

Mauri ora!

Steven Renata Managing Director Kiwa Digital Ltd

Introduction to CultureQ

Be a CultureQ expert in eight easy steps



CHAPTER ONE

LEARN CULTUREQ BASICS

Learn the basics of CultureQ and how to set up and manage your account.



CHAPTER TWO

YOUR DASHBOARD

Explore and customise your dashboard.



CHAPTER THREE

DOCUMENT CULTURAL ASSETS

Securely document your documents and assets by preparing, uploading, organising and sharing files in the Documents module.



CHAPTER FOUR

Guardian Al

Get started with Guardian AI to ask questions, check citations, review history, and explore security features.



CHAPTER FIVE

ONBOARDING CULTUREQ

Onboard your CultureQ team by managing users, sending invitations, creating teams, and setting roles and permissions.



CHAPTER SIX

CREATE PROJECTS

Create projects and manage tasks in the Projects module, with an overview of all projects at one glance.



CHAPTER SEVEN

AUDIO RECORDING

Record audio using the recording controls, then save and manage your recordings.



CHAPTER EIGHT

MANAGE THE REGISTRY DATABASE

Manage the Registry Database, including data migration and database administration.



SUPPORT

Access CultureQ support and additional resources.

REFERENCE

Review Security, Privacy Policy, Terms of Service, Development and Copyright information.

CHAPTER ONE

LEARN CULTUREQ BASICS

Section Overview

In this section, you will learn how to:

Find your way around CultureQ

Set up CultureQ on your device

Sign up and log in with multi-factor authentication

Recover your password

Tour of CultureQ

Discover CultureQ with a brief video tour, highlighting the key features you can rely on.



CultureQ Tour

Set up

CultureQ is compatible with any device that supports a web browser. For best performance, we recommend Google Chrome or Microsoft Edge.

Troubleshooting email set-up:

Our email systems use "mailto:" links. These might not work if the browser isn't configured to handle them, or if the user's email client isn't set as the default for mailto links. To resolve this issue, users must ensure that their browser is configured to handle mailto links and that their preferred email client is set as the default for mailto links in their operating system's settings.

Troubleshooting Steps:

1. Check Browser Settings:

Chrome/Edge: Go to chrome://settings/handlers (or edge://settings/handlers) and ensure that your email provider (like Gmail) is allowed to handle mailto links.

Firefox: Go to about: preferences#applications and find the "mailto" entry. Ensure that your preferred email client is set as the default.

2. Check Operating System Settings:

Windows: Go to Settings > Apps > Default apps. Scroll down to "Choose default apps by protocol" and select your preferred email client for the MAILTO protocol.

macOS: Open the Mail app, go to Mail > Preferences, and select your preferred email client from the "Default email reader" dropdown.

3. Verify Default Email Client:

Ensure that your chosen email client (e.g., Outlook, Gmail) is correctly configured and set as the default mail application on your system.

4. Test with a Simple Mailto Link:

Use a simple mailto link like mailto:test@example.com to verify if the issue is with the specific link or a general configuration problem.

5. Consider Browser Extensions:

Some browser extensions might interfere with mailto links. Try disabling extensions to see if that resolves the issue.

6. Restart Browser/System:

After making changes to browser or system settings, restart your browser and/or computer to ensure the changes take effect.

If the problem persists, it could be due to more specific issues like:

Security settings: Some security software or browser settings might block mailto links.

Website-specific issues: The website or page you're on might have its own specific configuration that's causing the problem.

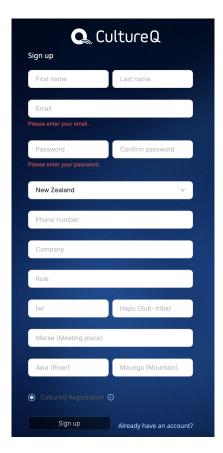
Outdated or incorrect code: The mailto link itself might be incorrectly formatted.

By systematically checking these potential issues, users can resolve the problem of mailto links not working correctly.

Signing up

CultureQ securely stores your information and documents. To ensure ongoing protection, you must set up your account with multi-factor authentication and use it every time you log in to your site.

Step One: Visit your CultureQ site. Complete the sign-up form with your Name, Email, Password, Role, and Country. Then, click "Sign Up" to get started.



Step two: You'll receive two emails from 'cultureq@kiwadigital.com'—a welcome message and an activation email. In the activation email, confirm your email address. This takes you back to CultureQ, where you will see confirmation that your account is now active. Click on the login button to proceed to the login screen

CultureQ Platform

Nau mai | Welcome, Jill Tattersall!

Thank you for signing up to CultureQ. We're thrilled to have you on board.

You will shortly receive an email, with a link to activate your account.

For reference, here's your login information:

Login Page: https://traion.app.cultureq.app/app/ Email: jilltattersall8@gmail.com

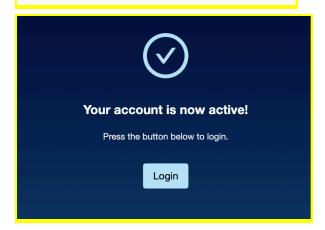
If you have any queries <u>contact our customer support team</u>. (We're lightning quick at replying.)

Mā te wā,

CultureQ team

 $\textbf{P.S.} \ \ \text{Need immediate help getting started? Check out our } \underline{\textbf{help}} \\ \underline{\textbf{documentation}}.$

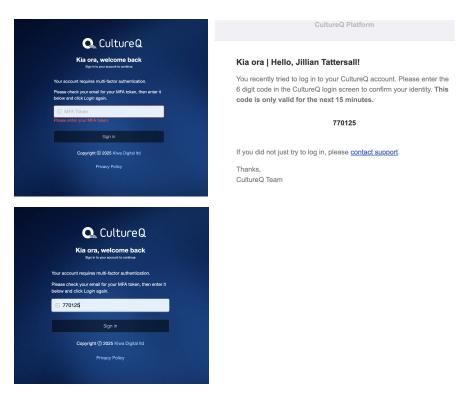
Kia ora | Hello, Jill Tattersall! Thanks for joining CultureQ. Please confirm your email address by clicking the link below. Confirm Email Address If you do not use CultureQ or did not request an account, please ignore this email or contact support if you have questions. Mā te wā, CultureQ team If you're having trouble with the button above, copy and paste the URL below into your web browser. https://tralon.app.cultureq.app/api/v1/user/email/confirm?email=jilltattersall8@gmail.com&token=5071a487-540d-41e5-a182-8b0d42d031a9



Step three: On the login screen, enter your email address and the password you chose when first registering. Click "Login."



Step four: You'll be prompted to enter an MFA token. Locate the email sent to you containing your code, copy it, and enter it on the Login screen—click Login to proceed.



Step five: You'll now be prompted to create your own password. Follow the on-screen instructions and select "Change Password" to complete the update.



Congratulations — you've successfully logged on to the TRAION site!

CultureQ Pro Tip:

Check your spam folder if you don't see emails from 'cultureq@kiwadigital.com'. To ensure you receive important emails and updates in the future, add this address to your trusted users.

Logging in after you have signed up

For security purposes, you need to complete multi-factor authentication each time you access your CultureQ site.

Open the CultureQ application. Log in to your account and follow the same multi-factor authentication step you completed during registration.



CultureQ Pro Tip:

After clicking "Login," if it seems like nothing is happening, don't worry. Simply check your inbox for the MFA token, which will have been sent directly to you.

Recover a forgotten password

Go to the login page and click 'Forgot your password?' Enter the email address associated with your account and check your inbox for a reset link. Follow the link to create a new password and regain access.



CultureQ Platform

Kia ora | Hello, Jill Tattersall!

You recently requested to reset your password for your CultureQ account. Use the button below to reset it. **This password reset is only valid for the next 1 hour.**

Reset your password

If you did not request a password reset, please ignore this email or <u>contact support</u> if you have questions.

Thanks, CultureQ Team

If you're having trouble with the button above, copy and paste the URL below into your web

 $\underline{https://qa.cultureq.app/app\#/passport/password-reset/jill@kiwadigital.com/7b7a7d50-8d18-4703-bf81-058ac867d286$

CultureQ Back to "Be a CultureQ® expert" menu

CHAPTER TWO

YOUR DASHBOARD

Section Overview

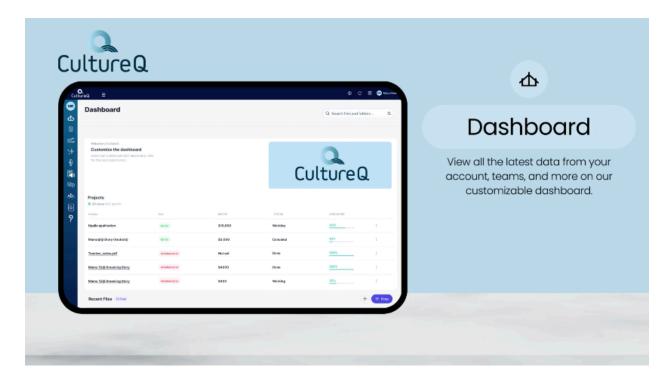
In this section, you will:

Take a tour of the Dashboard

Learn how to navigate Projects and Recent Files from the Dashboard

Tour of Dashboard

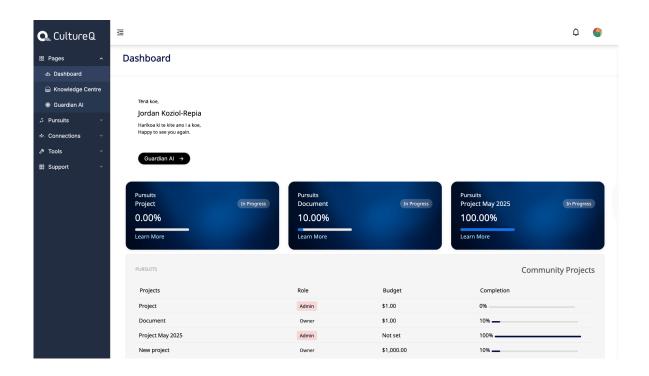
Take a quick video tour of the CultureQ Dashboard and get familiar with its key features.



CultureQ Dashboard

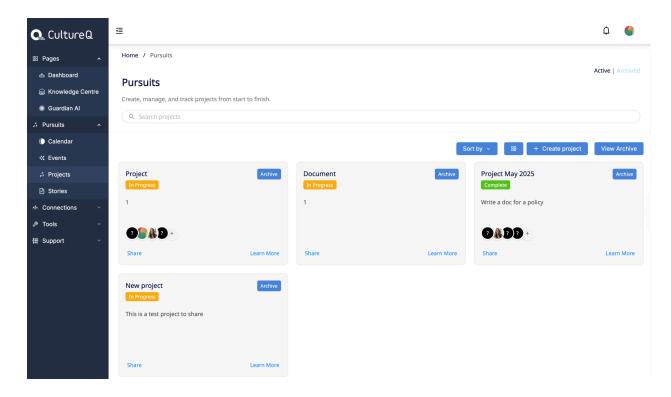
About the Dashboard

The Dashboard is your central hub for managing projects, accessing recent files, and collaborating with your team. It's organised in two sections: Projects and Recent Files.



Projects Section

The Projects section gives you a snapshot of your active and recent projects. It includes:



Project The title of each project.

Role Your role in the project.

Budget The budget for the project.

Status Indicator of progress (e.g. In Progress, Completed, On Hold).

Completion The date the project was completed.

Recent Files section (In development)

The Recent Files section lists files you've recently accessed or worked on, making it easy to return to frequently used assets without having to browse through Project folders. It contains:

File name: The name of each file.

File type: An icon or label showing the file type (e.g., audio, video, script).

Last modified: The date and time the file was last opened or edited.

File permission: Your permission in relation to this file.

Customise Your Dashboard (In Development)

Click "Customise Your Dashboard" to access layout settings. You'll be able to:

Rearrange Sections: Set the order that works best for you.

Resize Sections: Adjust how much content each section displays. Show or Hide Sections: Choose what appears on your dashboard.

Sort Projects: Organise projects by name, last modified date, or other preferences.

Additional resources



Webinar



Rlog



Video

In development

Customise your Dashboard Recent files



Back to "Be a CultureQ® expert" menu



CHAPTER THREE

DOCUMENT CULTURAL ASSETS

Section Overview

In this section, you take a tour of Documents and learn how to:

Prepare and organise data for secure, long-term storage

Upload, download, and manage files

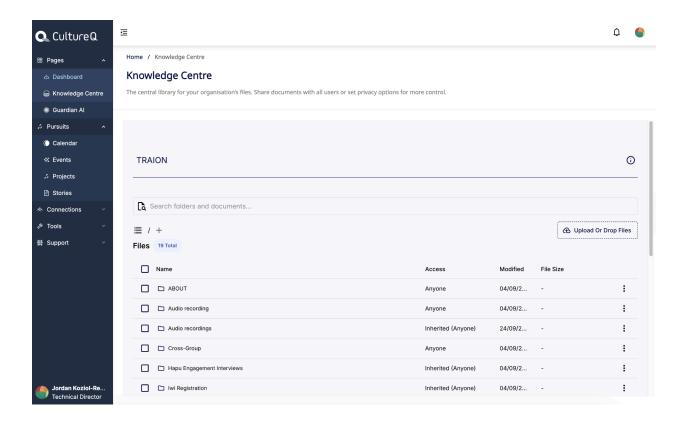
Share files and control access

Organise files with folders, tags, and search tools

Use metadata to enhance file context and discovery

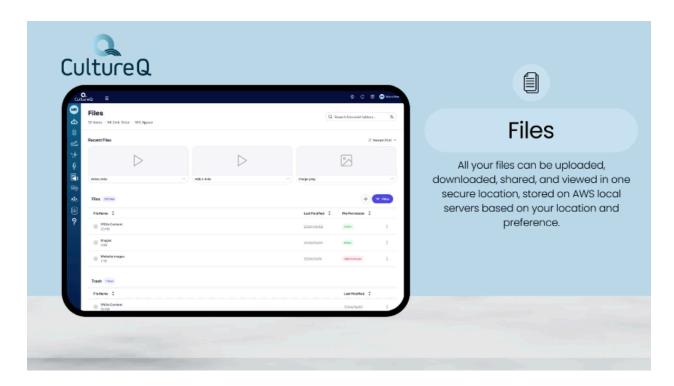
About Documents

The Knowledge Centre is your central hub for managing all digital assets—a single, unified platform that supports collaboration and secure access. With built-in encryption, access controls, and regular backups, it protects sensitive data and scales as your needs grow.



Tour Documents

Discover CultureQ Documents with a quick video tour.



CultureQ Documents

Collections Development

CultureQ is designed to protect data sovereignty, ensuring your organisation manages and controls access to all data, keeping it secure for future generations. To honour this kaupapa, a Collections Development Policy (or similar) may be developed to guide decisions about what materials to acquire, maintain, and discard, and to ensure that all documents and assets are collected, organised, and maintained in a manner that respects cultural rights. The policy may also consider the need to define a Taonga; guidelines/tikanga for users of Taonga; and guidelines on how to acknowledge/credit who/where information comes from and why.

Preparing your data

Begin by planning the folder structure, the documents you intend to load, the information you want to attach to each document, and the permissions you want to implement.

It's also important to think about how the data will be used with the Private Al tool described in Chapter Four. Essential steps to get your data "Al ready" are:

- 1. Clean and Standardise Data where possible:
 - Remove duplicates that could skew results or create redundant answers

- Address missing values through appropriate methods (deletion, imputation, etc.)
- Standardise terminology for titles where possible to ensure consistency across datasets

3. Structure Your Data Appropriately

- Ensure consistent document formats with clear sections where possible
- Implement clear naming conventions and folder structures

4. Add Context and Relationships

- Include metadata about data sources, creation dates, and update frequency
- Define relationships between different datasets or document sections
- Create glossaries for industry-specific terminology
- Add usage guidelines to prevent misinterpretation or misapplication

5. Leverage specialised tools to streamline your data preparation:

- ETL (Extract, Transform, Load) tools to automate cleaning and structuring
- Data annotation tools to add context and relationships
- Data governance frameworks to manage permissions and track data lineage

Your Action Plan to prepare your data may include:

- 1. Audit your current data: Assess what you have and where, identify gaps.
- 2. Plan folder structure: Define your use cases. Be specific about what you want to achieve.
- 3. Confirm polices on collecting, storing and maintaining data. Incorporate these into CultureQ templates.
- 4. Further prepare your data following the guidance for being "Al ready".
- 5. Start with a pilot project: Choose a contained subject for your first initiative.
- 6. Measure and refine: Track results and continuously improve your data quality.
- 7. Scale gradually: Apply lessons learned to broader datasets and use cases.

CultureQ Pro Tip:

Prepare your data for search by adding context, structure, and clear relationships. Define who needs access and why—strong data foundations will shape the quality of AI outcomes.

File Upload and Download

Uploading and Downloading files within Documents is simple and flexible, with support for multiple formats and methods. Whether dragging and dropping or selecting files manually, you can easily manage a range of content types while keeping control over access and visibility. Here's how:

Set up your folders: In the Documents module click on the plus sign and choose New Folder. Once the folder is set up, you can click on the three dots at the end of the line to Rename, Move, Set Access, and Delete your folder.

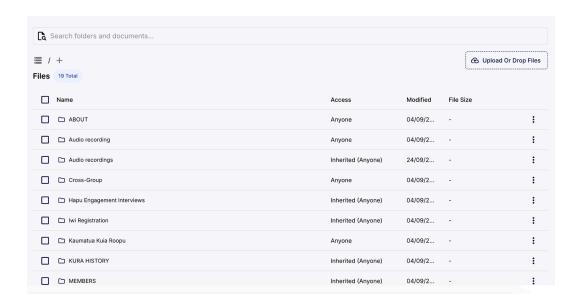
Open a folder: Click on the name of the folder to open the folder and start adding files. You can click on the reverse arrow to return to Folders view.

Load your files: You can load your files using the "Upload or Drop Files" pane: either drag and drop files into the pane, or click to use the standard file picker to browse and select files from your device.

Supported File Types: Upload a wide range of file formats and sizes, i.e. images (PNG, JPEG), documents (PDF), and media (MP4, M4V, MP3). As noted, Word and Excel formats must be converted to PDF; automated conversion is being developed.

File Downloads: Download any file from the Documents to your device by clicking on the download button along the line.

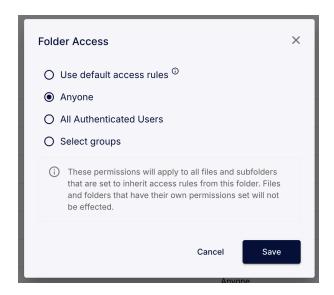
Private Mode: Select "Private Mode" to flag files and exclude them from Al import and queries. (In Development)



File sharing

There are several ways you can set access and share files.

Team-Based Permissions: Share files with entire teams and streamline access for collaborative work by setting access at the Folder level. Click on the dots at the end of the line to see the options. We recommend setting access to "All Authenticated Users" at first setup.



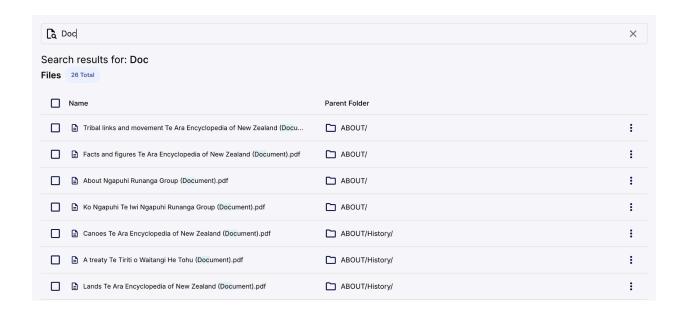
Individual File Sharing: Share specific files with selected users, enabling control over who sees what. Click on the dots at the end of the line, where you will see the options. We recommend setting access to "Inherit access rules from folder" at first setup.

Permission Levels: When you have set up the folder structure, we can work with you to develop a plan to allocate rights to view, download, or edit files as required..

File Search & Organisation

Folder Organisation: Group files into folders for easy access and efficient management.

File Search: Find files quickly via the powerful search tool, searching on tags, folders and document names.



Managing your files

Each document has a drop-down menu to enable you to manage your documents efficiently. You can see this when clicking on the three dots at the end of the line. The options are:

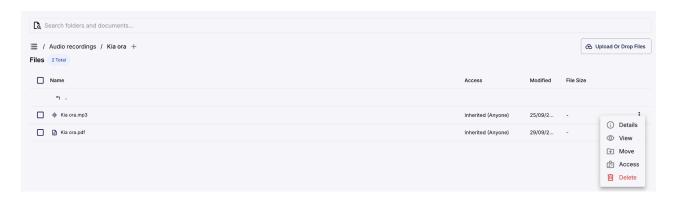
Details: Access the Metadata Editor. Here, you check metadata that's been automatically created and add your custom metadata according to your policy.

View: Preview files directly within the Documents section using the built-in preview pane.

Move: Select to move a file to a different folder in the Knowledgebase.

Access: Control access to files.

Delete: Delete the file.



Metadata Editor

Metadata is an essential tool for search functions and is managed for you by the Metadata Editor.

When you load a file, the Metadata Editor will automatically complete the Title, Tags (Keywords), Description, Author, File size, and Date fields. Allow a few minutes for this to happen.

You can then check and improve these results for each document by opening the dots menu at the end of the file line and clicking "Details". This allows you to change the title; add new tags; and edit the description if you need to.

You can also create custom metadata fields here. For example, you might want to include: persons depicted, Hapū affiliation, whenua, cultural rights, and Users for permissions. Once these have been decided for your organisation, they can be automated to apply to every file. These fields may be compulsory or optional, depending on the type and importance of the document.



Additional resources







ΤΟ ΔDD

- Archive historic documents
- Auto conversion of Word documents to PDF
- Renaming files
- Private mode
- ? If you have any questions, contact <u>cultureq@kiwadigital.com</u>



CHAPTER FOUR

Guardian Al

Section Overview

In this section, you will:

Learn about the CultureQ Guardian AI research assistant

Take a tour of Guardian Al

Get started with the CultureQ Al interface

Use Guardian AI to answer questions backed by your own uploaded sources

Access and review your previous conversations with CultureQ Al

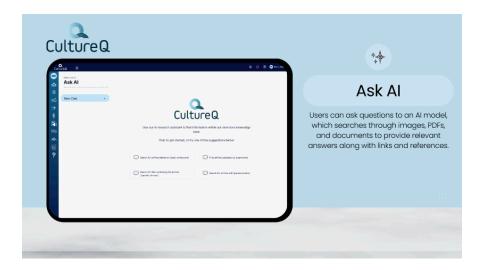
Learn how CultureQ's key security features protect your data with care

About Guardian Al

CultureQ Al is your private, Al-powered research assistant. It analyses your documents to deliver accurate, insightful answers—while keeping your data secure. Unlike public Al tools, CultureQ Al runs within your dedicated environment, ensuring your information stays private and protected.

Tour Guardian Al

Get to know CultureQ Guardian AI with a quick video tour.

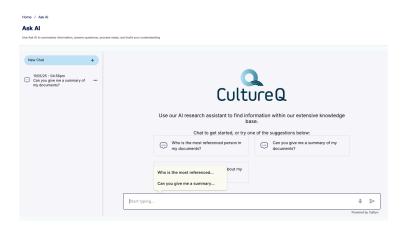


CultureQ Guardian Al

Getting Started and Asking Questions

Once you've processed your documents, you can start asking questions! The Guardian Al interface is designed for a seamless and intuitive experience. Here's what you'll find:

'Start Typing' Input Box: A text box where you can enter your questions for CultureQ Al. Type your question in the input box and press Enter.



Response Area: This is where CultureQ AI displays clear, thoughtful answers to your queries. It analyses your question using your uploaded documents—breaking it down into key search topics, searching your content, evaluating results, and generating a comprehensive response.



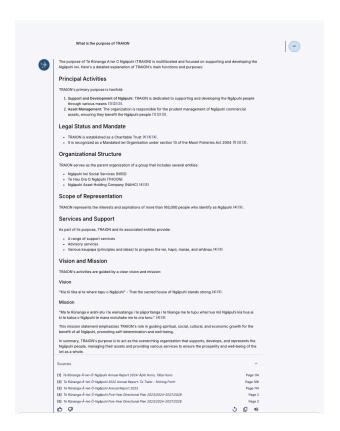
Source: Every statement is backed by a citation. Click any item in the **"Source"** section to jump directly to the relevant paragraph in your source document to confirm you can trust this information.

Good Response or Bad Response: Give Guardian AI feedback to support or reject the response by clicking the **Thumbs Up** or **Thumbs Down** icons.

Generate New Response: Click the **Refresh** icon to ask CultureQ AI to rethink and generate a new answer.

Copy to Clipboard: Click the **Copy** icon to save or share the response.

Read this to Me: Click the **Speaker** icon to listen to the response.



CultureQ Pro Tip:

Be Specific — The more specific your question, the more relevant and accurate the answer will be. Avoid vague or open-ended queries.

Use Keywords — Include relevant keywords from your documents in your questions to help CultureQ AI focus its analysis.

Iterate — If the initial answer isn't quite what you want, rephrase your question or provide additional context. CultureQ AI learns from your interactions.

Explore — Experiment with different questions to discover new insights within your data. Try asking for summaries, comparisons, or specific details.

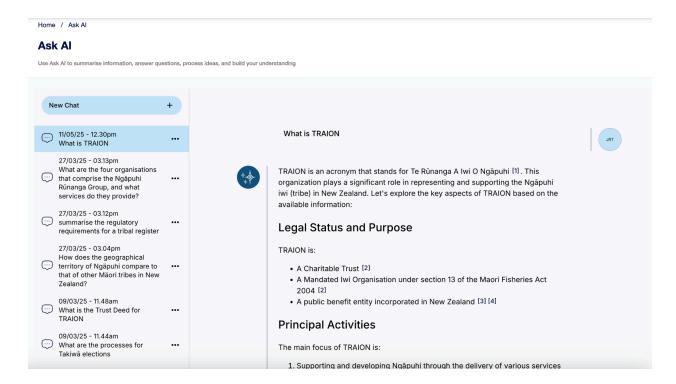
Feedback - Guide CultureQ Al in the right direction. Using thumbs up, thumbs down, or refresh icons helps refine responses and maintain quality.

Reviewing Conversation History

Conversation History: This panel stores your previous questions and responses, making it easy to review past interactions, revisit key insights, and track progress.

Scroll: Through your history.

Click: on any previous inquiry to view its answer.



Key Security Features

CultureQ is built with privacy and security at its core, ensuring your data is protected at every level.

Data Protection

- All stored data is encrypted with AES-256 for strong, reliable security.
- Access is tightly controlled through IAM roles, ensuring only authorised use.
- Data is stored in encrypted, versioned, and object-locked Amazon S3 buckets to maintain integrity.

Built on AWS for Resilience

- CultureQ runs in your dedicated AWS account, using AWS's trusted infrastructure for secure storage, processing, and delivery.
- You can learn more about the development of CultureQ using the AWS Well-Architected Framework through the Māori Data Lens in the Reference Section.

Privacy-First Design

- Data Minimisation: We collect only what's essential, reducing stored information and risk.
- User Control: You can anonymise, modify, or delete your data in line with privacy best practices.

Proactive Threat Management

- Continuous monitoring with centralised alerts enables fast threat detection and response.
- A defined incident response plan ensures quick action and lasting protection.

TO ADD

PUBLIC AI SHARE - HOW TO GET THE LINK TO SHARE

Additional resources







If you have any questions, contact <u>cultureq@kiwadigital.com</u>



CHAPTER FIVE

ONBOARD, BUILD, AND MANAGE YOUR CULTUREQ PROJECT TEAMS

Section Overview

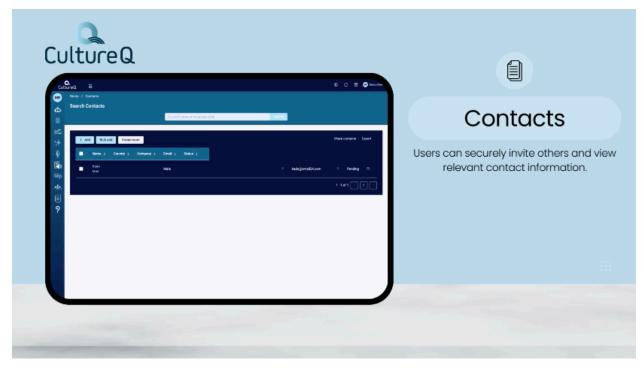
In this section, you will learn:

How you can use the Users tool to invite others to your site securely Information on your users that can be collected with their permission How you can use Users to support your work

How to invite collaborators to your Projects using the Teams tool How to create teams, assign roles, set permissions, and update on changes

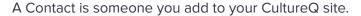
Tour users

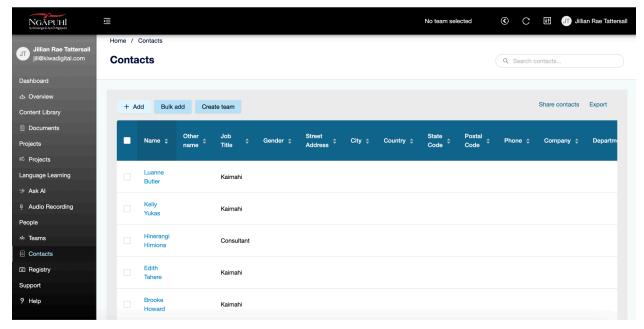
Discover CultureQ Documents with a quick video tour.



CultureQ Users

About Users





Adding a contact

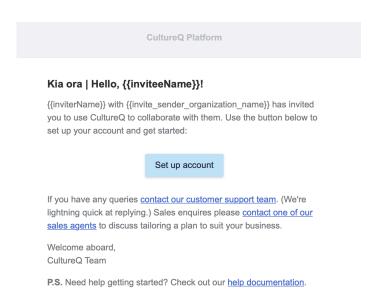
Add a Contact Click the "+ Add" button in the Users tab to begin.

Enter Details Fill in the contact fields; only those marked with an asterisk are required, all details can be updated later.

Save or Continue Click "Save and Close" to finish, or "Add Another" to enter more users.

Invitation to join Once added, Users will receive an invitation to join and become part of your CultureQ network.

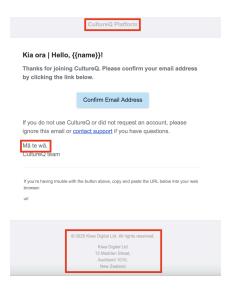
If the user is not registered, they will receive the "set up account" email where they should click the'Set up account' button.



A browser window will open after pressing the button. The user will then enter their details via the registration page and select the 'Sign up' button.



Then after entering their details in the registration, they will receive an email to confirm their email address is correct.



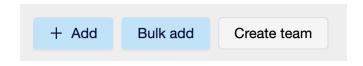
After that, the user can login and they will receive an MFA code and can then login, following the steps in Chapter One.

Note: The MFA code stays valid on the device they use and will need to be reactivated on the device again if the user changes internet (wifi/LAN) or they shut down/restart their device.

Note: you see a blended list of all users who have registered, a contact can not be deleted once registered.

Bulk add users

Bulk Add Users: Click the "Bulk Add" button to get started.



Use Template: Download the provided template to format your contact list.

Upload File: Click "Upload File..." to import your completed CSV with details like name, address, and company.



Invitation to join Once uploaded, all Users listed will receive an invitation to join and become part of your network, following the steps outlined above.

Edit Contact

Edit Contact: Click on the contact's name to open their details.

Make Changes: Update the information where you have this..

Save or Cancel: Click "Save & Close" to confirm changes, or select the "X" at the top right to cancel.

Track Status – Once registered, the contact's status will update in the Status column.

Inviting users to be part of a Project Team

Once you add Users to your CultureQ network, you can collaborate with them in shared project spaces. To invite users to a Project, follow these steps:

Assign Contact to a Team: In the "Team" section, select an existing team or create a new one.

Add Member: Click "+ Add Member", choose the contact, assign a role, and select the project.

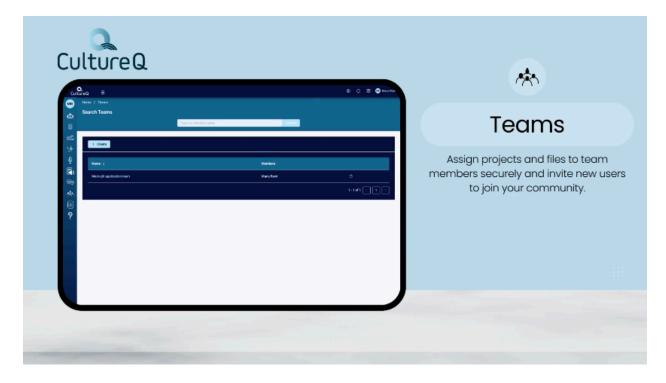
Send Invitation: Click "Save" to send the user an email invite. They'll be notified and gain access to the assigned project.

CultureQ Pro Tip:

Prepare a short explanation of the project that you can send when you invite collaboration. For example a description of the pilot plan, what the 'testing' phase will look like, and how they are asked to participate.

Your teams

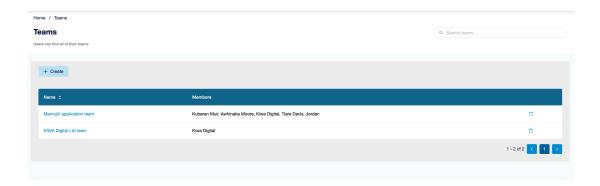
Get to know CultureQ Teams with a quick video tour.



CultureQ Teams

About Teams

Teams allow you to share projects with your Users. Users assigned to projects can see other Users within the team and communicate with each other. You're automatically assigned the Admin/Manager role when you create a team.



Create and Manage your Project Team

To set up a Team for your Project in CultureQ:

Go to Teams: Open the "Team" tab from the main menu and click "+ Create"

Name Your Team: Enter a required team name in the "Name" field.

Add Members: Click "+ Add Member", then select a contact from the dropdown or search field.

Assign Roles: In the role column, select the dropdown menu and set the Role that is appropriate for the project Member (refer to the descriptions below for descriptions of Roles and their permissions).

Add More Members: if needed.

Assign Projects: Click "+ Add Project", then select a project from the dropdown. Note: Projects need to be created first (see <u>Projects</u> below) and each Project can only be linked to one team.

Save: Click "Save" to finish.

You'll receive a confirmation email showing the project has been shared, with you listed as the team leader.

Invited project members will receive an email invitation with details about who invited them, which team they have been added to, and which projects they can view, along with a URL link to the listed project(s).

CultureQ Platform

Kia ora | Hello, Isaac Smith!

Jackson Reed has added you via your team Legal team as an Editor

Project name

RFP Documents

If you have any queries <u>contact our customer support team</u>. (We're lightning quick at replying.)

Mā te wā, CultureQ team

to the following project(s):

P.S. Need help getting started? Check out our <u>help documentation</u>.

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Kiwa Digital Ltd

12 Madden Street,

Auckland 1010,

New Zealand



CultureQ Pro Tip:

When a user is added, a role is changed, a project is added, or a user is removed from a team, they will receive an email notification. All notification emails come from "cultureq@kiwadigital.com". Users may need to whitelist this email address to prevent it from being filtered as spam, especially if they have a filter for advertisements.

Roles and Permissions

CultureQ supports defined user roles to help manage access and responsibilities within Teams.

Each role comes with specific permissions to keep collaboration structured and secure:

Administrator – Full access to manage teams, projects, documents and accredit lwi Registrations (see Manage the Registry Database section)

Editor – Can access and edit assigned projects and documents.

Viewer – Read-only access to view shared content.

Administrator(s)	Editor(s)	Viewer(s)
Complete control	Manage Changes	Read only
 Add projects Remove projects Assign users to project role Share projects Access and edit documents Accredit lwi Registrations 	 Access projects Access and edit documents 	 View projects Access and view documents (limited)

CultureQ Pro Tip:

Assign Roles based on what each user needs to do—nothing more, nothing less.

Additional resources







In development

If you have any questions, contact <u>cultureq@kiwadigital.com</u>



CultureQ Back to Be a CultureQ® expert menu

CHAPTER SIX

CREATE PROJECTS

Section Overview

In this section you will:

Tour Project

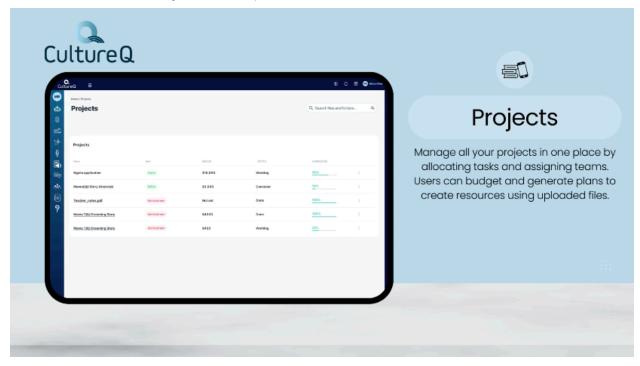
Learn Projects and how it supports kaupapa-driven work.

Familiarise yourself with the Projects overview page and its functions

Learn to create, manage, and track your Projects from setup to completion.

Tour of Projects

Get to know CultureQ Projects with a quick video tour.



CultureQ Projects

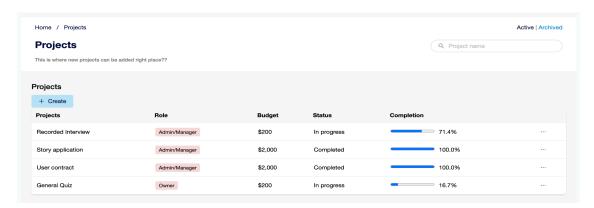
About Projects

For any project, there's a lot to manage—key information, shifting timelines, and the right people at each phase. Your goal: keep things moving, deliver on time and within budget while upholding kaupapa. CultureQ supports you every step of the way.

Projects Overview Page

The Project Overview page is your central hub for managing everything in motion. Here, you can view, filter, and track all your projects in one place.

Project List View: Each row in the project list represents a project in progress, completed, or planned. It's a clear, sortable table designed to help you stay on top of the details.



Projects Name: Click the assigned Project Name to open its dedicated Project Page for detailed information.

Your Role: Here you can Identify your role in each project (e.g. Project Manager, Team Member, Reviewer). This helps identify your responsibilities across your portfolio.

Budget: Quickly view the allocated budget for each project for quick budget tracking.

Status: See where each project is at a glance, statuses include *In Progress*, *Completed*, *On Hold*, *Planning*, or *Cancelled*.

Completion Bar: A visual tracker showing how far along each project is, with a percentage for easy progress monitoring.

Filter: This feature allows you to refine the Projects list based on criteria. You can filter by

Status: to view only those Projects at a particular stage, e.g. In Progress or Completed.

Role: to focus on your direct contributions across Projects.

Budget: Narrow your view by budget range. This can be useful for budget management.

Search: Use the search bar to locate specific projects by name or keyword, ideal when working across a larger portfolio.

Create New Project: Click the "+ Create" button to begin a new Project. This button will take you to the next stage of creating a new Project, with a pre-designed Create Project overlay (see more in the next step, Creating Projects)

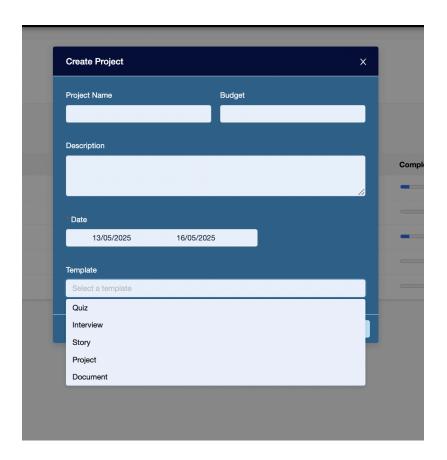
Creating New Projects

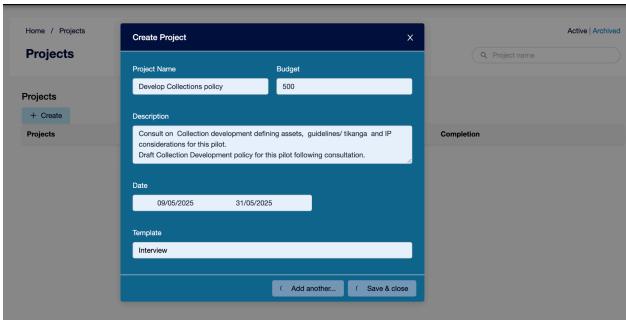
The "Create Project" overlay is your starting point for setting up a project in CultureQ. It guides you step by step, keeping the process focused and straightforward. Choosing a pre-designed template can streamline setup and ensure consistency across your projects.

Here's how:

Create a New Project: To begin, click the "+ Create" button on the Project Overview page.

A Create Project overlay will appear, dimming the background so you can concentrate on the task at hand.





Complete the project setup by entering the following details:

Project Name: Give your project a clear and concise name.

Description: Outline the goals, scope, or key objectives.

Budget: Enter the total budget allocated for the project.

Start Date and Due Date: Use the date pickers to set the project's timeline. (compulsory field).

Project Template View: Choose from available templates to save time and maintain consistency across your projects. Selecting a template will automatically pre-fill certain fields.

Save & Close: When ready, click "**Save & Close**" to create the project. It will be added to your Project Overview, and you'll be taken directly to the new Project Page.

Cancel: If you'd prefer not to proceed, select "Cancel" to exit the overlay. Any information you've entered will not be saved.

CultureQ Pro Tip:

Templates can be created for any kind of project—whether you're writing an RFP, conducting interviews with kaumatua, or developing a web app for tamariki. As soon as you have a project in mind, let us know. We'll work with you to build a custom template and get you up and running.

Managing Tasks

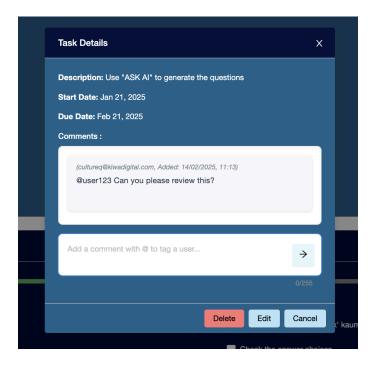
The Task Details overlay allows you to enter, review and manage individual tasks within a Project.

Task Name: A clear title for the task.

Description: A detailed description of the task to provide context, instructions, or key information.

Start Date and **Due Date**: Set clear timeframes to keep things on track.

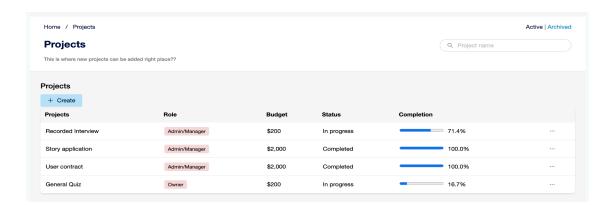
Comments Section: Keep conversations task-specific. View who said what and when in the comment history, and use the entry field to add new updates or reply to existing threads.



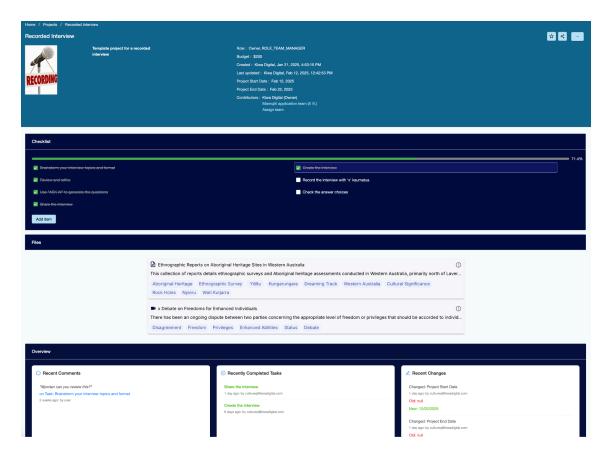
Viewing a Project

The Projects page gives you a detailed view of a single project—everything you need, all in one place.

Selecting Projects - To view a project, simply double-click the project row you'd like to open.



At the top, the Project Header offers key information at a glance, including the Project image or icon, Name, Description, Budget, and Team members involved.



Key features Include:

Completion Module: keeps you on track.

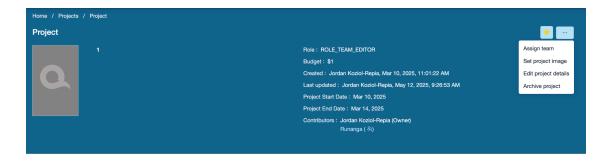
Completion Bar: a visual update as tasks are ticked off, providing a clear snapshot of progress. It may change colour to reflect status—green as you near completion, or red if overdue.

Checklist Section: Here you can break your project into clear, actionable tasks. Tick each item as it's completed; uncheck to revise directly from the checklist. To add items to your Checklist click "Add Item" to open the Add New Item overlay, where you can enter a task description along with its Start Date and End Date.

Documents Section is where all project files live. You'll see a table with each file's name, size, and upload date. Use the "+ **Add Files"** button to upload new content and keep everything organised and version-aware.

The Overview section summarises your project's activity—how many files have been added, who's involved, and how many comments have been made, so you can keep track of contributions and collaboration.

With CultureQ Projects, everyone stays aligned—working from the same page, with clarity and confidence. Here are some additional Features you can utilise from the Project page:



Assign Team: assign a team to your project



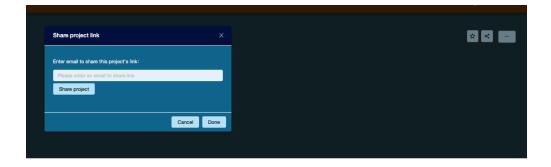
Set project image: insert an identifying image

Edit Project Details: edit the details you entered when you set the project up.

Archive Project: file the project when completed, this then appears on your projects list with the status "Completed".

Favourite: click the "Star Icon" to add this project to your favourites

Share Project: click the "Share Icon" to share project link with someone using their email address



Additional resources









If you have any questions, contact <u>cultureq@kiwadigital.com</u>



CultureQ Back to Be a CultureQ® expert menu

CHAPTER SEVEN

AUDIO RECORDING IN CULTUREQ

Section Overview

In this section you will learn:

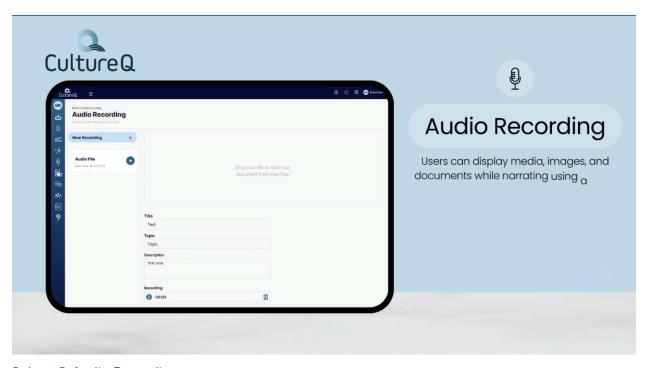
How to set up a recording session

How to record your audio track

Where to store the audio file you create

Tour of Audio Recording

Get to know CultureQ Audio Recording with a quick video tour.



CultureQ Audio Recording

About Audio Recording

CultureQ's Audio Recording feature makes it simple to capture, manage, and share audio linked to your documents—amplifying the voices behind the work and making content more accessible and dynamic.

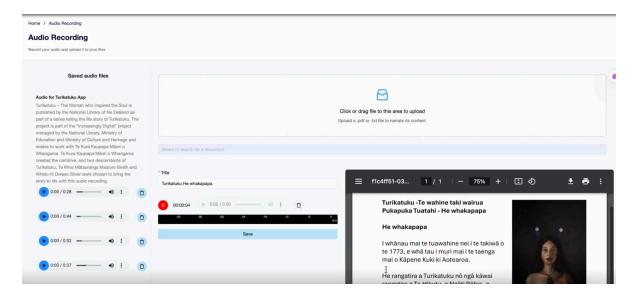
Getting started

Adding Documents:

- Drag-and-Drop: Drag and drop document files (e.g., PDF, DOCX) directly into the designated area.
- **Database Integration:** Select a file from your Documents.

Viewing Documents:

The integrated document viewer supports both text and PDF formats. You can view your document content while making a recording.



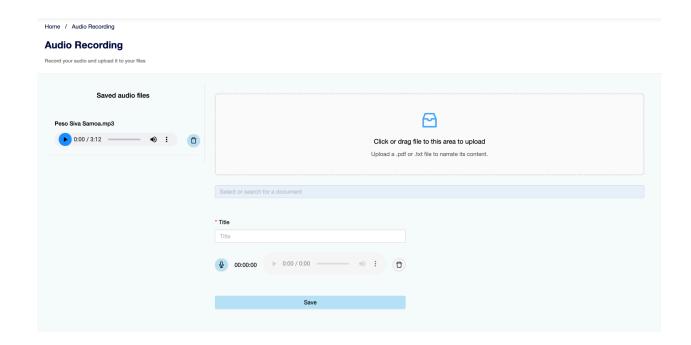
Metadata Entry

Before or after recording, you can add metadata to your recording:

- **Title:** Enter a descriptive title for your recording.
- **Topic:** Specify the topic of the recording.
- **Description:** Provide a brief description of the recording's content.
- **Recording File Output:** Filename and format of the recording will be displayed here.

Recording Controls

In this section, you will learn how to run a recording session.



Starting a Recording:

- Click the prominent "Record" button. Recording will begin using your computer's microphone.
- In some cases, your system will prompt you to allow recording in your browser and/or active tab.

Playback:

• Click the "Playback" button to listen to your recorded audio.

Deleting a Recording:

• Click the "Trash" button to delete the current recording.

Sharing a Recording:

- Click the "Share" button.
- Choose your sharing option (e.g., generating a shareable link or downloading the file).

CultureQ Pro Tip:

Use CultureQ to record multiple takes in draft format. You can preview each take before selecting the final version to save.

Saving Recordings

Saving Your Work:

- Save Progress: Click "Save Progress" to save your current recording state. This is useful for saving drafts.
- Save File: Click "Save File" to finalize and save the completed recording.

Recording Settings

Accessing Recording Settings:

Open the "Options" menu.

Available Settings:

- Codec Selection: The currently active audio codec is displayed.
- Noise Suppression: If available, you can enable or disable noise suppression.
- Sample Rate: If adjustable, you can modify the sample rate.

Device/Browser Handling:

CultureQ utilises your browser's APIs and device settings for managing recording options such as input device selection and volume control. These settings are typically accessed through your browser's preferences or system settings.

Additional resources







In development

Transcription

Text to speech



If you have any questions, contact <u>cultureq@kiwadigital.com</u>



CultureQ Back to Be a CultureQ® expert menu

CHAPTER EIGHT

MANAGE THE REGISTRY DATABASE

Section Overview

In this section you will:

Take a Tour of the registration database

Learn about the CultureQ registration Database

Navigate the member registration process to submit data

How to manage the Member Registry

How to migrate data from Salesforce

Tour of registration database

Get to know the CultureQ Registration Database with a quick video tour.

CultureQ Registry

Member registration process

Members can register via the form you have set up with your CultureQ admin

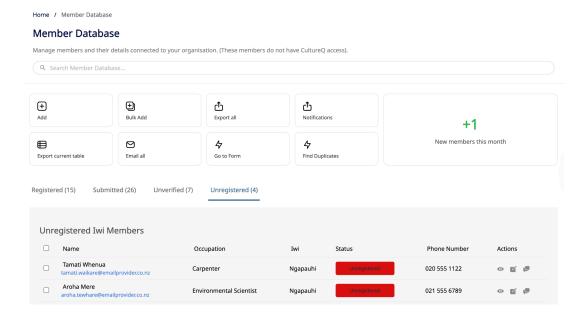
Assigning Administrators

See Roles and Permission in Teams section

User status

- 1. From your CultureQ platform, click on "Registry" in the main menu.
- 2. Click on the "Submitted" tab to see new registrations.
- 3. View and check the entries by selecting the 'Eye icon' option. This will open the edit the chosen user.
- 4. Once the registered person is confirmed, select 'Registered' to push the entry into the Registered Users tab.
 - a. If the user is not confirmed, you may move them to the following:
 - i. Unverified: These users are to be confirmed
 - ii. Unregistered: These are for users who may be spam, duplicates, deceased or incorrect
- 5. All Registered users can then be viewed in the 'Registered' tab.

6. Duplicates and errors can be moved to the 'Unregistered' tab for sorting

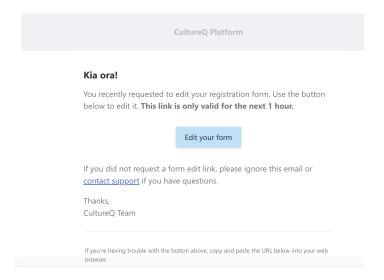


Editing information (members)

Registered members do not need a CultureQ account to access their information. However, they need to follow a process as all iwi registration data is stored securely. They can retrieve their data by going back to the sign-in form and requesting an edit. Using the email address they provided during registration they then request a one-time verification link.



The one-time link will send them to their form to edit and save their personal information.



Editing an entry (Administrators)

Editing an entry allows users to view and edit each registered users data.

- 1. Select a contact to edit by clicking on the 'eye' icon next to a person's name
- 2. Edit or view their details
- 3. Select save or close to exit the view

Migrating data from Salesforce

You can easily export data from Salesforce as a CSV file and ingest it into CultureQ. The steps to ensure a smooth data transfer are included in the <u>REFERENCE</u> section. KIWA will help you with this process.

CultureQ Pro Tip:

Before importing data in bulk, always back up your existing records. To ensure a smooth process, test the import with a small sample file before uploading large datasets.

Additional resources









If you have any questions, contact <u>cultureq@kiwadigital.com</u>



CultureQ Back to Be a CultureQ® expert menu

?

SUPPORT

Section Overview

In this section you will learn:

How to get support

Answers to some frequently asked questions

About Support

We're here to help you get the most out of your CultureQ experience. This section answers frequently asked questions, provides troubleshooting tips, and provides contact information for further assistance.

Contact Support

If you've reviewed the FAQ and troubleshooting section and still need assistance, please don't hesitate to contact us.

- Email: <u>cultureq@kiwadigital.com</u>
- **Support Portal:** https://kiwadigital.com/cultureg-support/

Please provide the following information when contacting support:

- Your CultureQ username (if applicable)
- A detailed description of the issue
- The device you are using (e.g., iPhone 16, Samsung Galaxy S25, etc.)
- Your operating system version (e.g., Windows, iOS 16, Android 13)
- Screenshots or screen recordings of the issue (if possible)

FAQ

You can find the complete FAQ here: https://kiwadigital.com/faq-cultureq/



CultureQ Back to Be a CultureQ® expert in eight easy steps menu