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KaiNexus Training: Basics 102

Charts

KaiNexus

WELCOME

Created by:

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This presentation covers the information presented the KaiNexus Basics 102: Charts video series. This may differ slightly from your organization's KaiNexus configuration, but the general principles and functionality are the same.

CHARTS

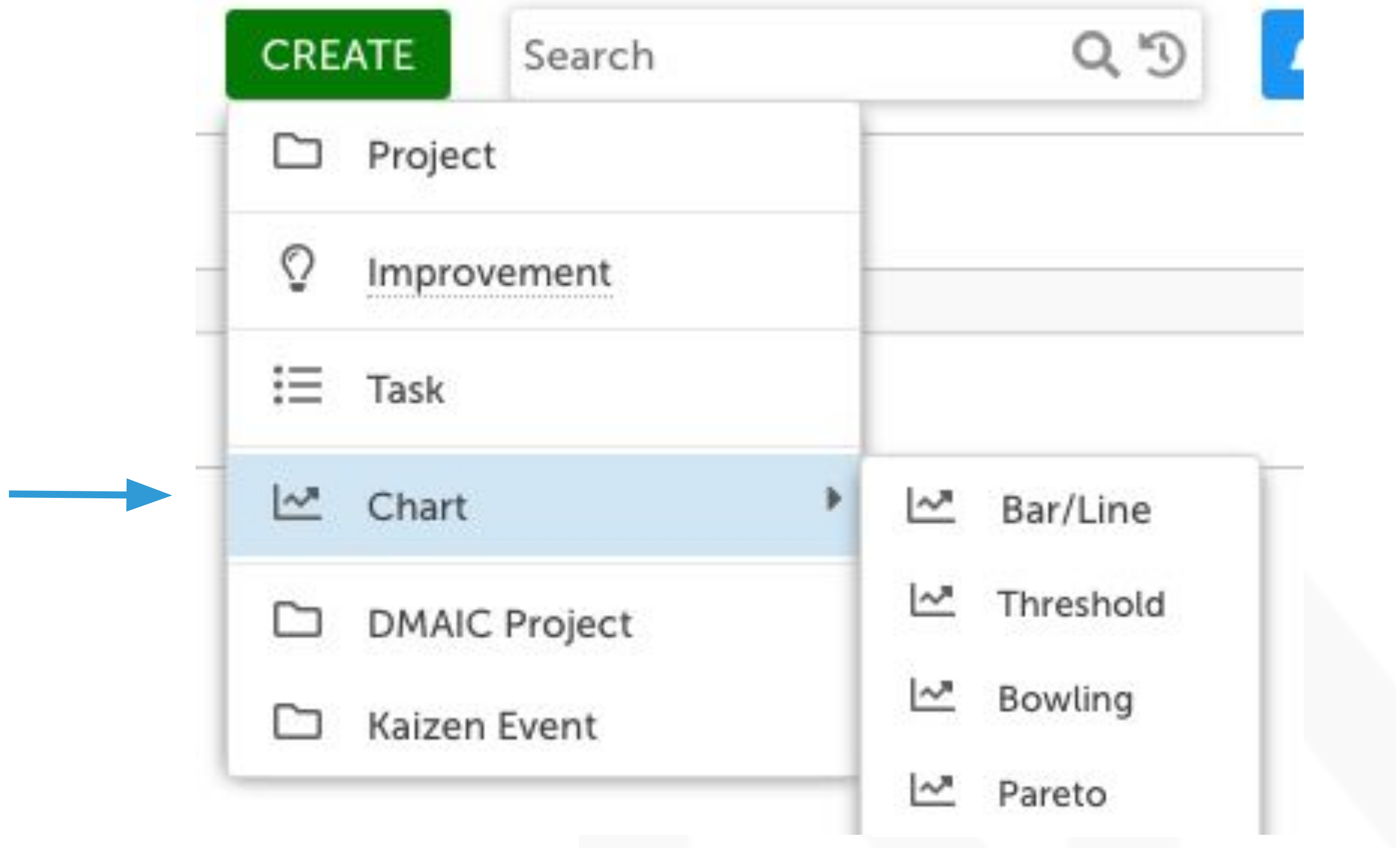
Capture and Measure any KPIs Using:

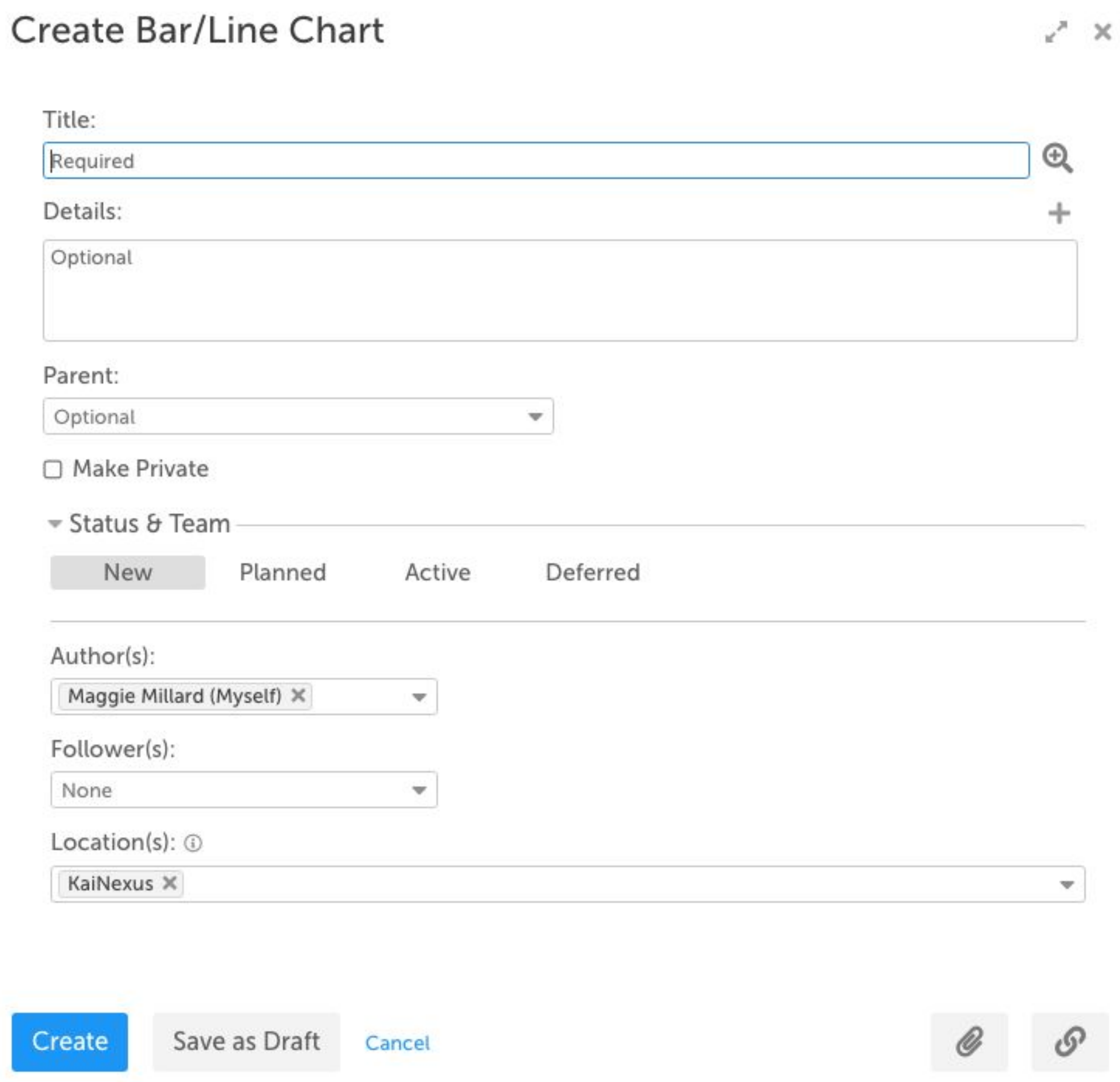
- Bar/Line Charts
- Bowling Charts
- Pareto Charts
- Threshold Charts

Creating a New Chart:

1. Click the green Create button

2. Select your desired Chart type from the drop down menu.





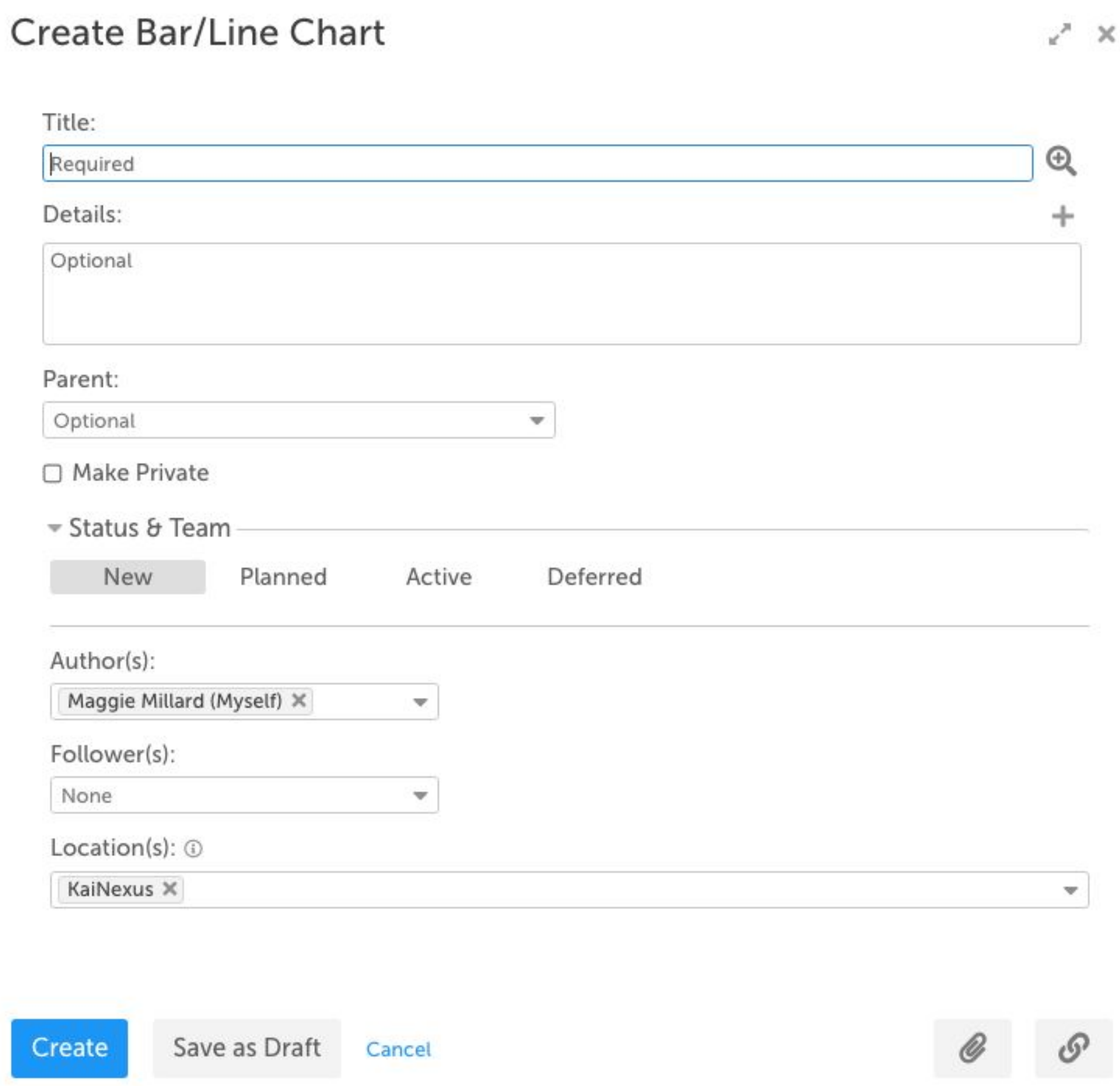
3. Fill in the Required and Optional fields as needed. This will populate all of the information for your Improvement (note that the available fields shown here may differ from those of your organization).

   Start with a short summary of your Chart - often called a Title, Summary, or Theme. Make it unique, so it's easily searchable.

If there are similar items in KaiNexus, a blue icon will appear - hover over or click that and review the items to ensure you're not submitting a duplicate.

You'll be able to complete Optional fields later, if you don't know the answer now.

Creating a New Chart:



1. Text Fields: Type or copy & paste

2. Attribute Fields: Choose from a dropdown list

3. Parent: Choose which Item (if any) to nest this Chart under

4. Edit privacy settings to restrict viewing of this Chart if available / desired

5. Select the Status you want the new Chart entered in as.
   - **NEW**: No identified start date
   - **PLANNED**: Item has been evaluated and work has been scheduled to begin later
   - **ACTIVE**: Makes today the start date
   - **DEFERRED**: Prompts you to enter a review date so you can revisit and reevaluate later

6. Fill in your Chart team:

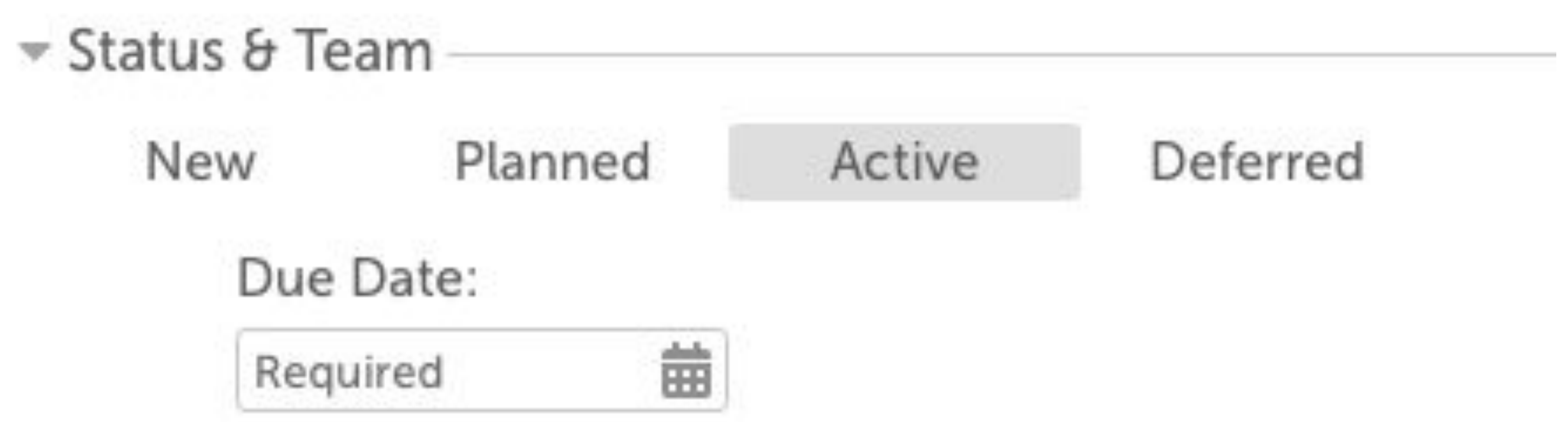
   - Author: Originally created the Improvement
   - Responsible: Responsible for working on the improvement
   - Assigner: Assigned the Responsible to work on it
   - Collaborators: Responsible for contributing to the objectives and team deliverables
   - Followers: No formal responsibility, but are kept in the loop with notifications

7. Add Attachments or Links if needed

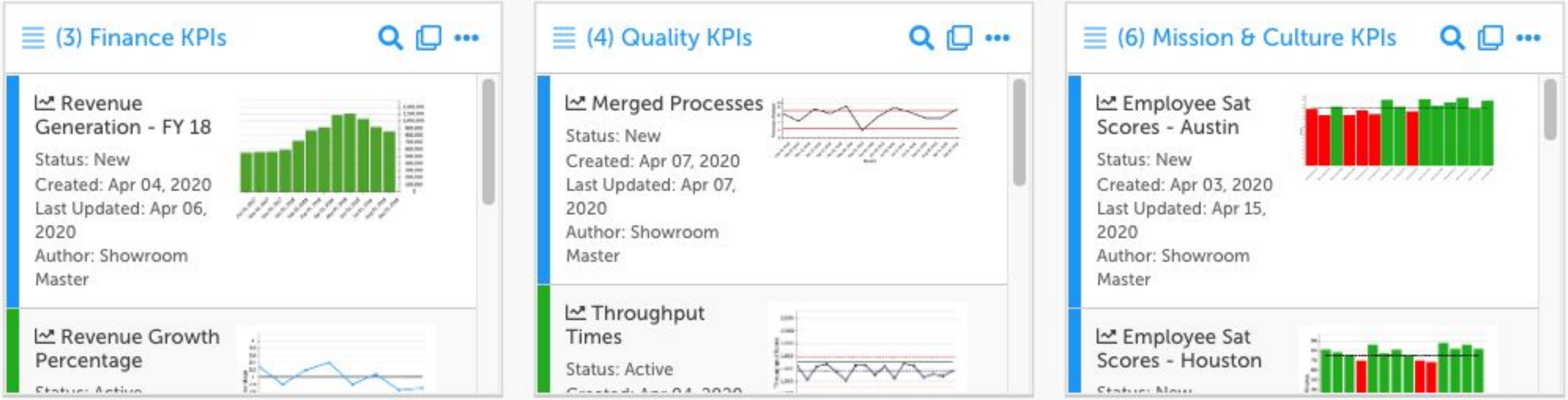
8. Click Create (to enter it immediately) or Save as Draft (to come back and add to it later before submitting)

Activating a Chart:

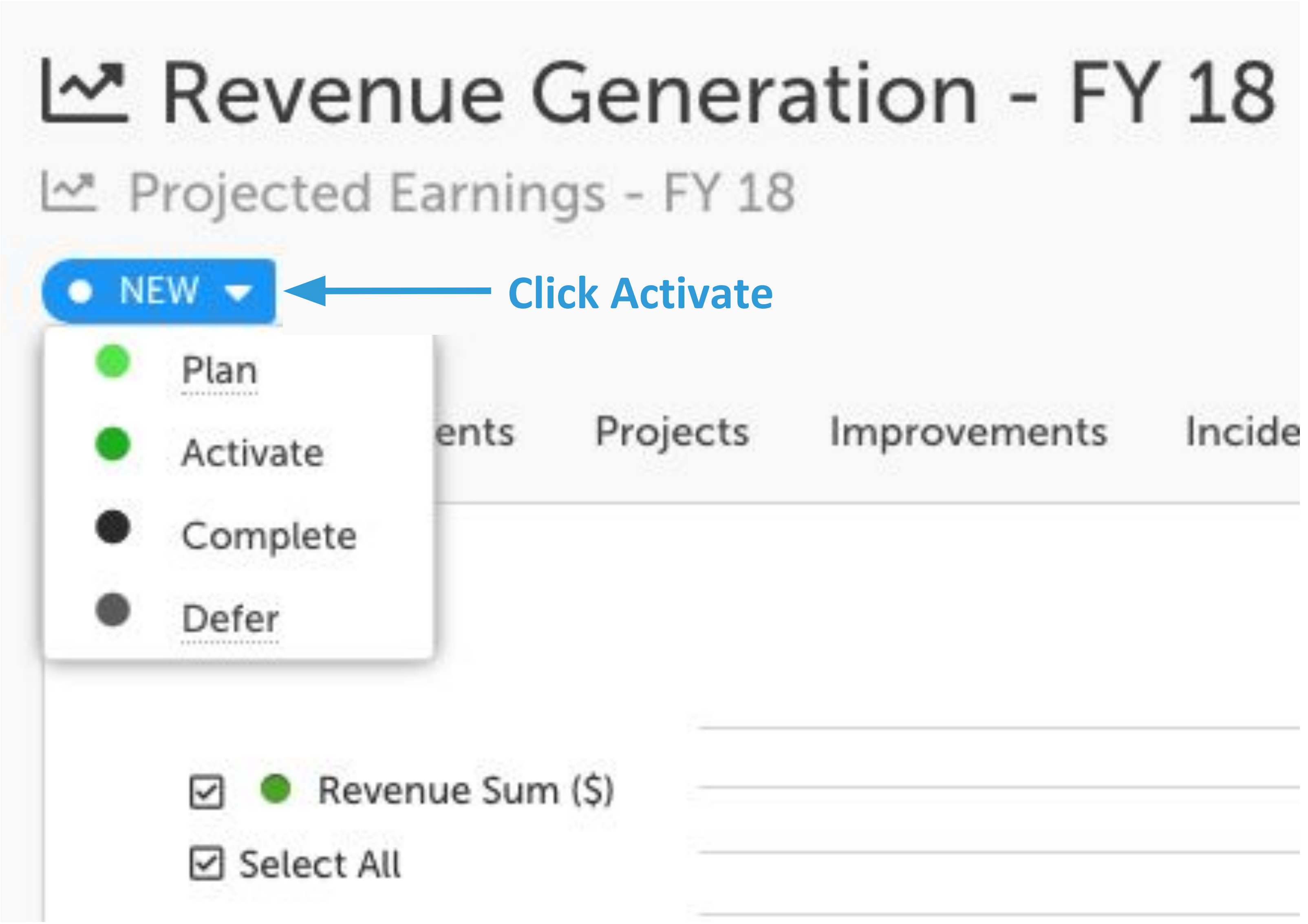
If you select Active when creating a new Chart, your may be prompted to give it a Due Date. Once you click Create on that Chart, it'll automatically be activated and today will be the Start Date.

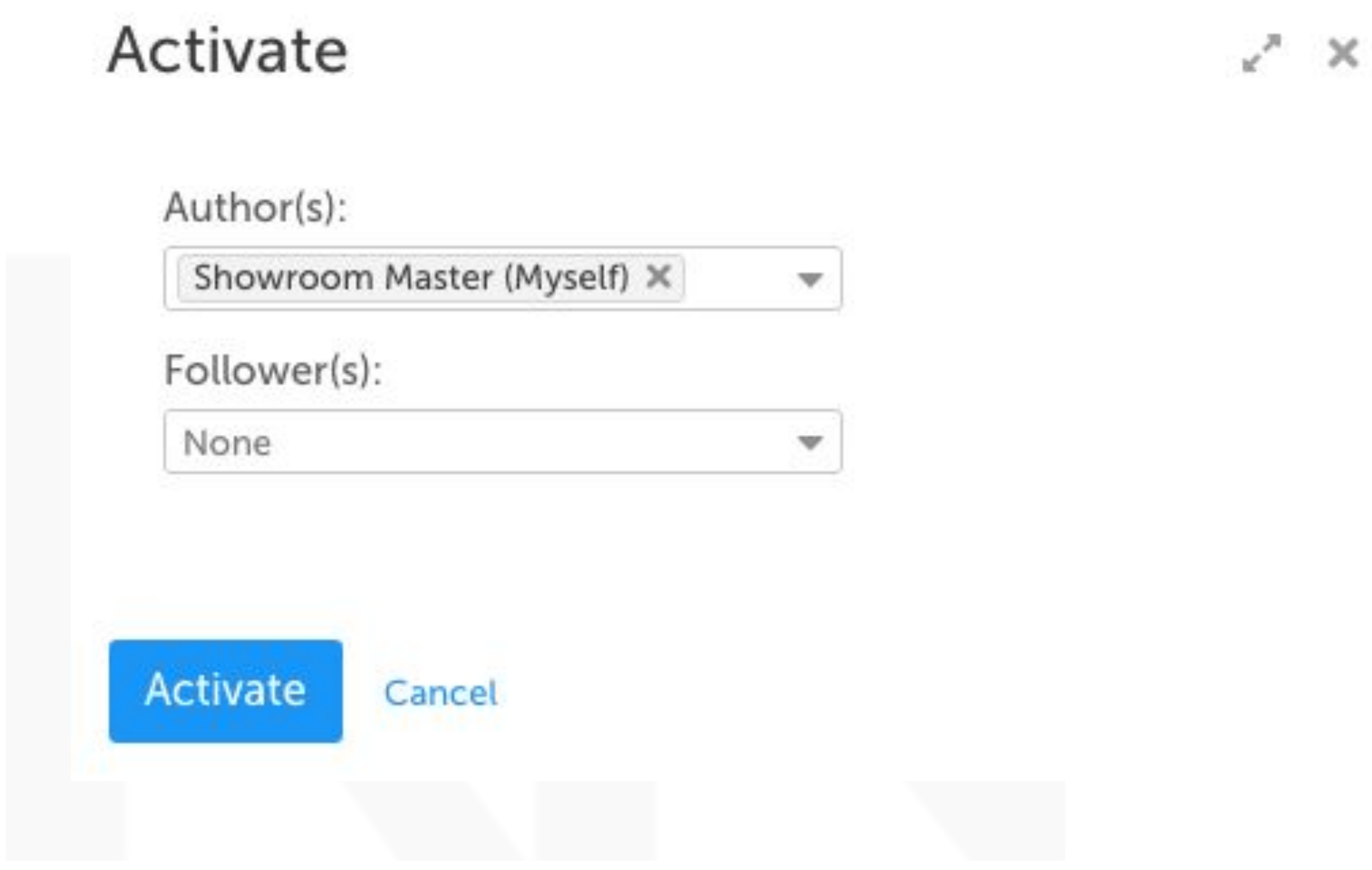


If you Created the Chart in New status and now want to activate it, search for it in the top search box or find it on one of your Boards (location depends on your custom configuration and will look different for all organizations).



Activating a Chart:





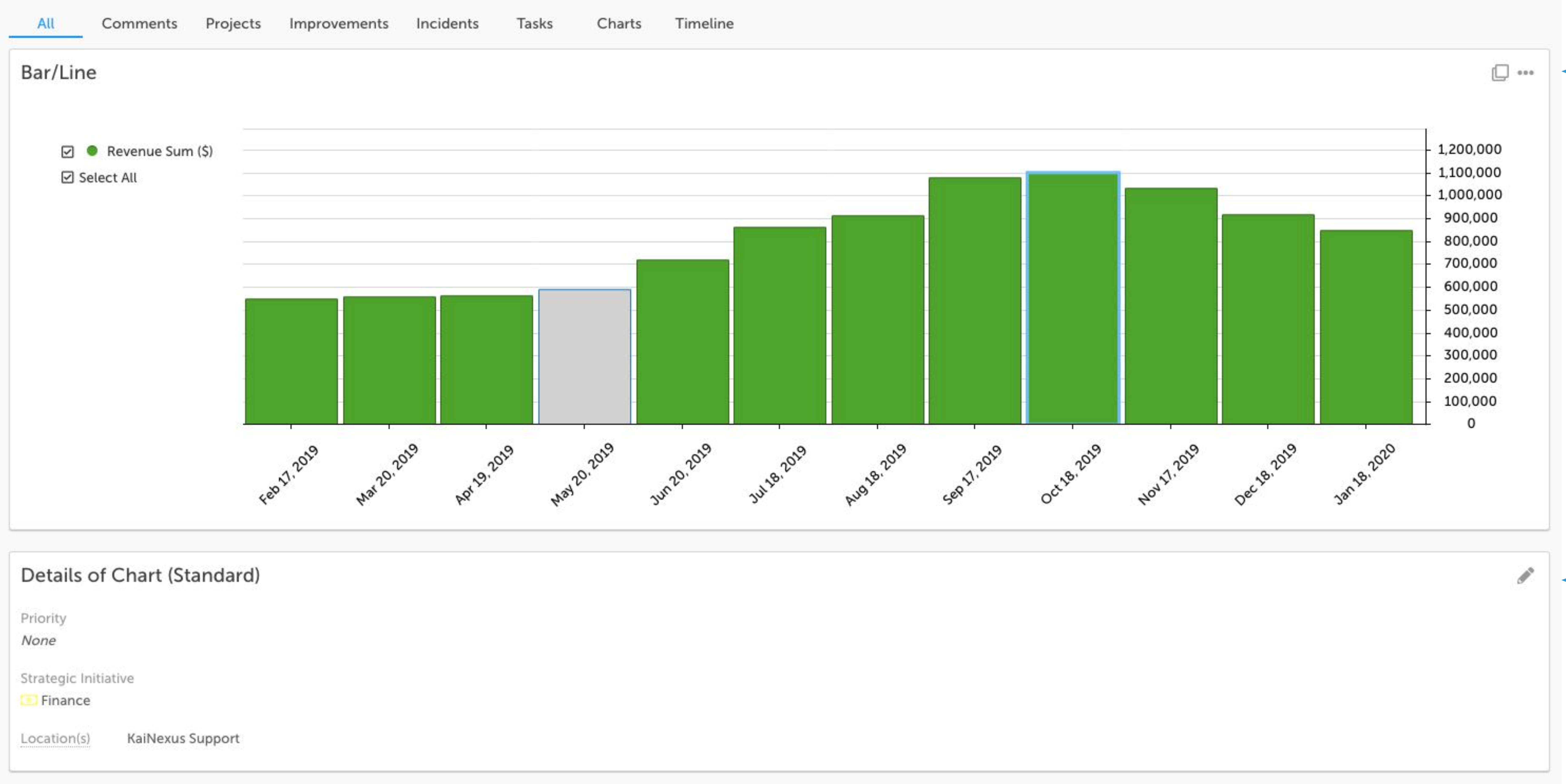
When you click to Activate a Chart, you'll be prompted to update the Team. Today will automatically become the Start date.

To be selected for the Team, people must have an Active KaiNexus account.

Active Charts are any Charts that are being worked on.

Working on a Chart:

Edit Data & Details



Edit Data

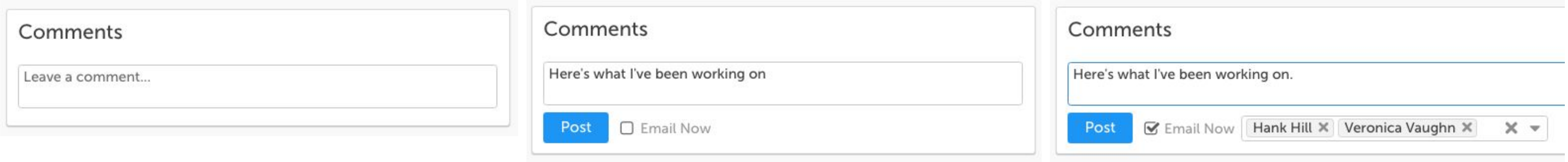
Click the ellipses icon to edit your Chart data. Check out the Charts 101 Training video to learn more about this.

Edit Details

Click the pencil icon to edit the details of a Chart. The fields available here depend on your organization's customization settings.

Working on a Chart:

Comments



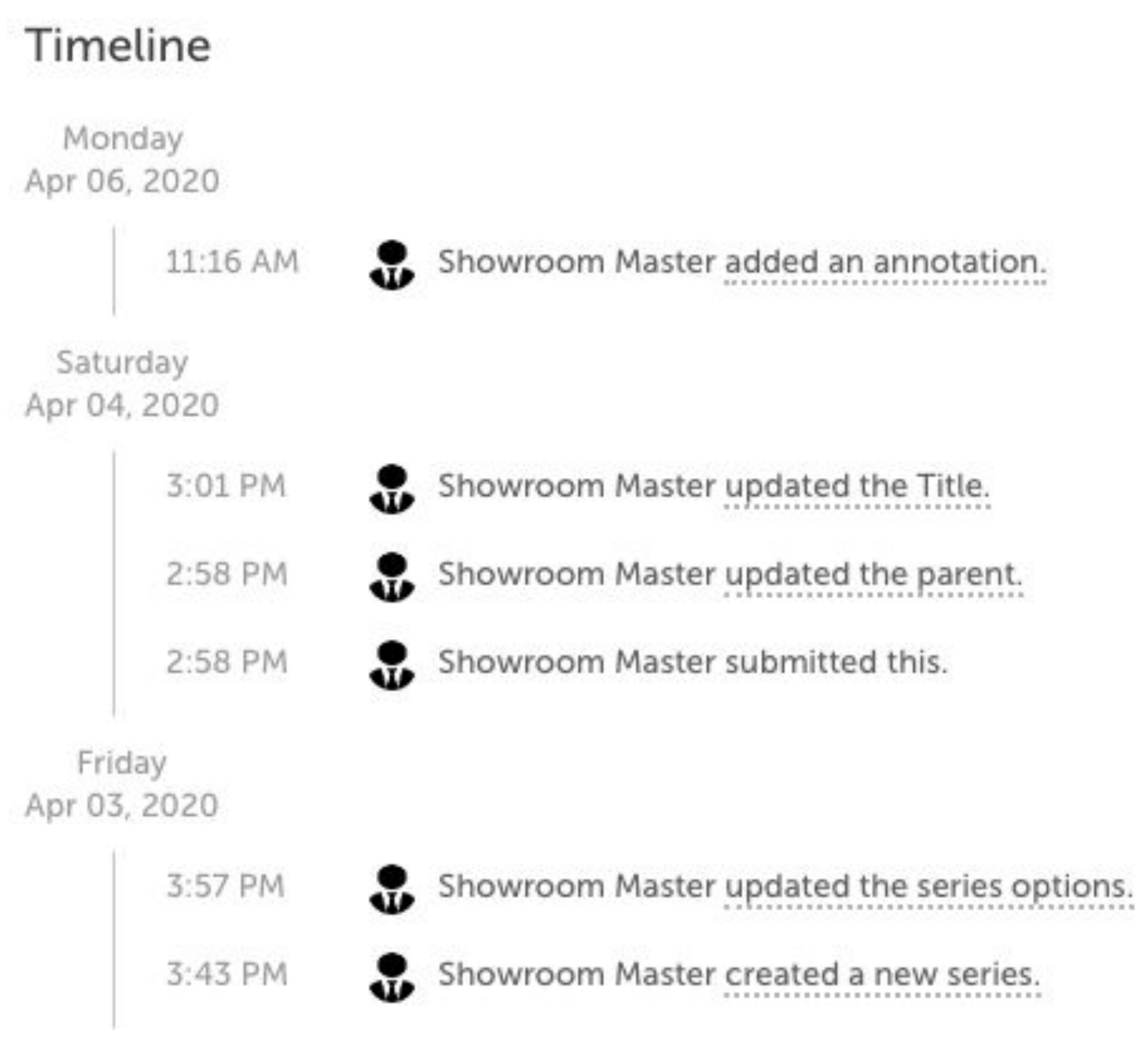
Comments facilitate communication and collaboration.

Use them to record updates and to ask or answer questions. Using Comments cuts down on the need for calls and emails, and speed up communication so that you don't have to wait for meetings to get the information you need.

Click on the box and type in your Comment. When you click Post, KaiNexus will send an in-app notification to everyone on your Chart Team. Click Email Now if you want to send an immediate email to specific people.

Working on a Chart:

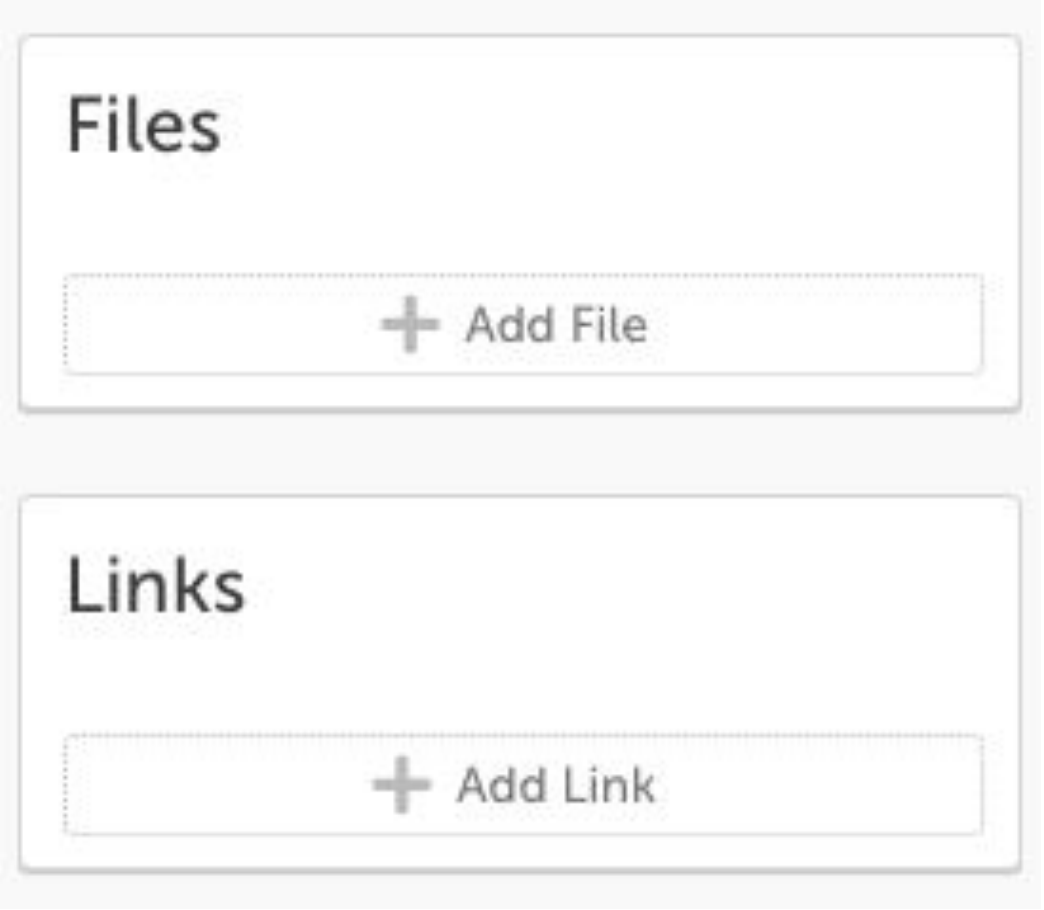
Timeline

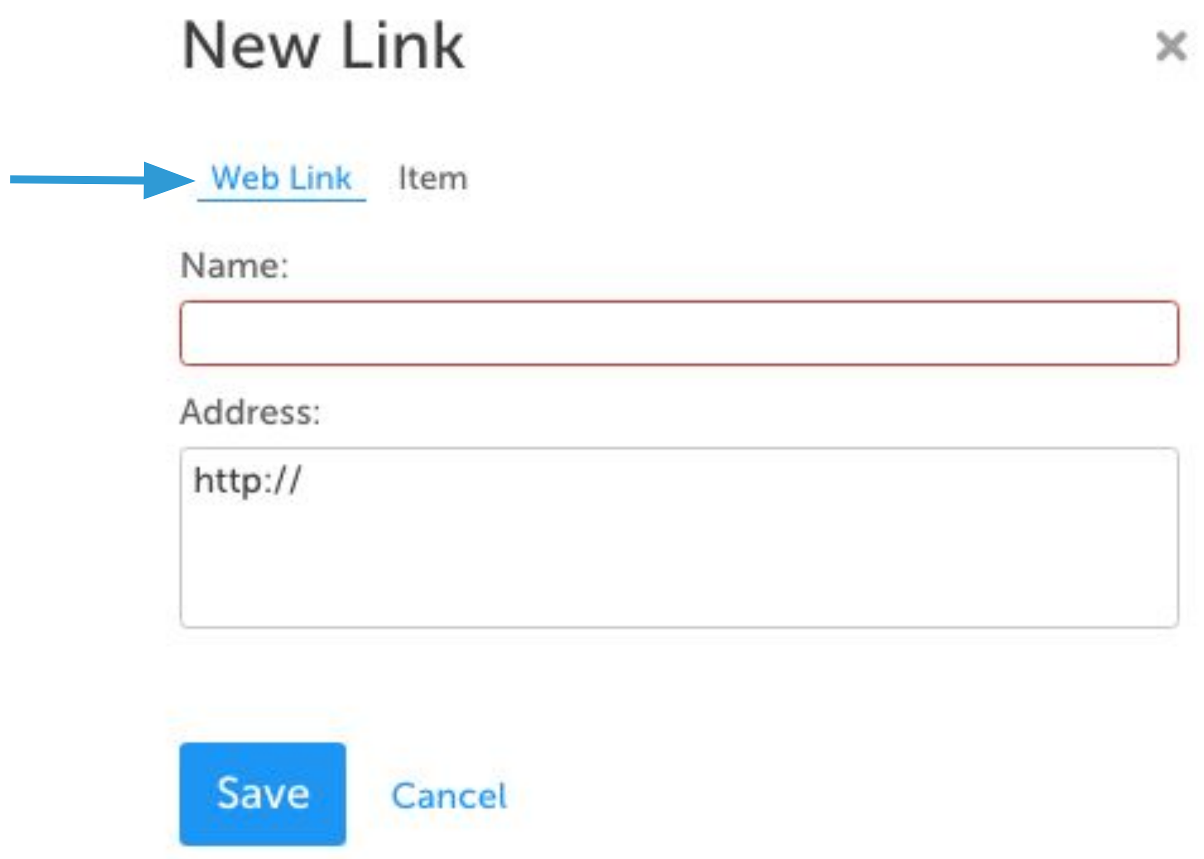


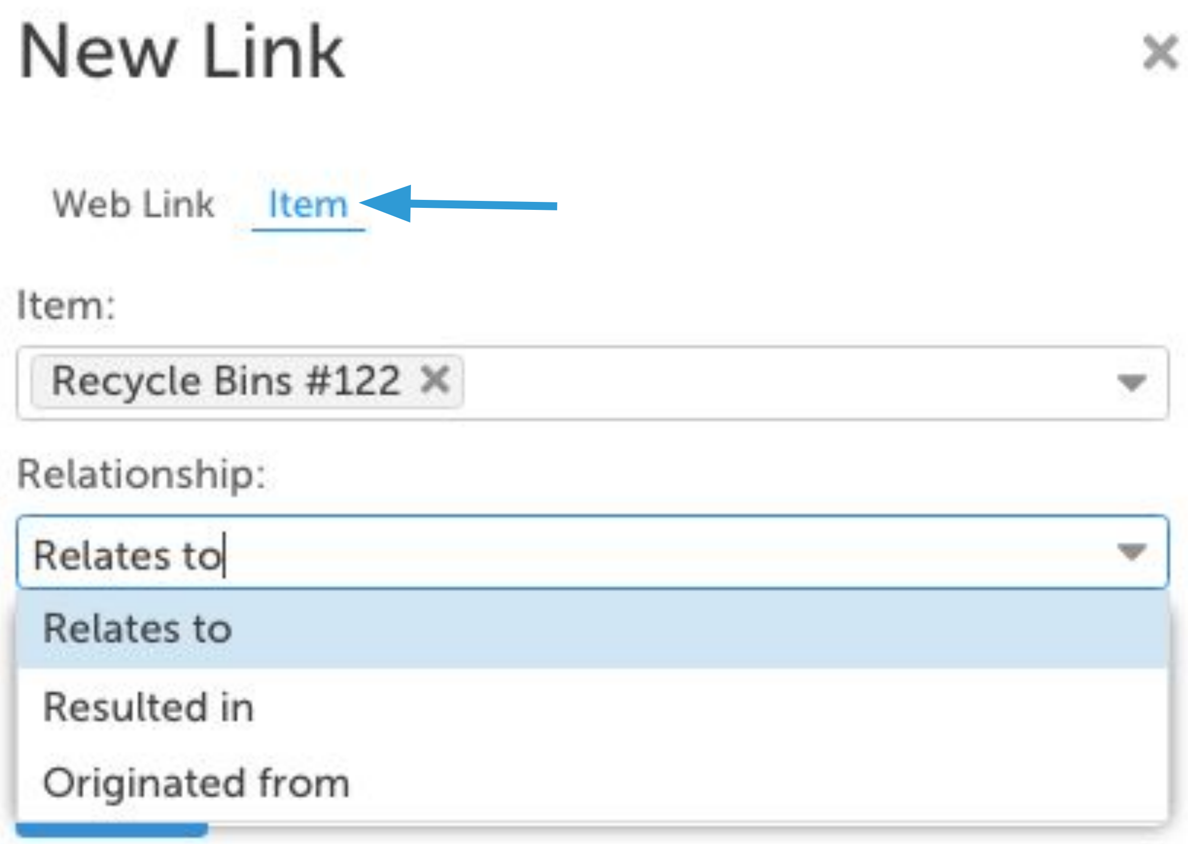
The Timeline is an audit trail that keeps track of everything happening on a Chart, showing who did what and when they did it. All Chart updates will appear here.

Working on a Chart:

Links and Files







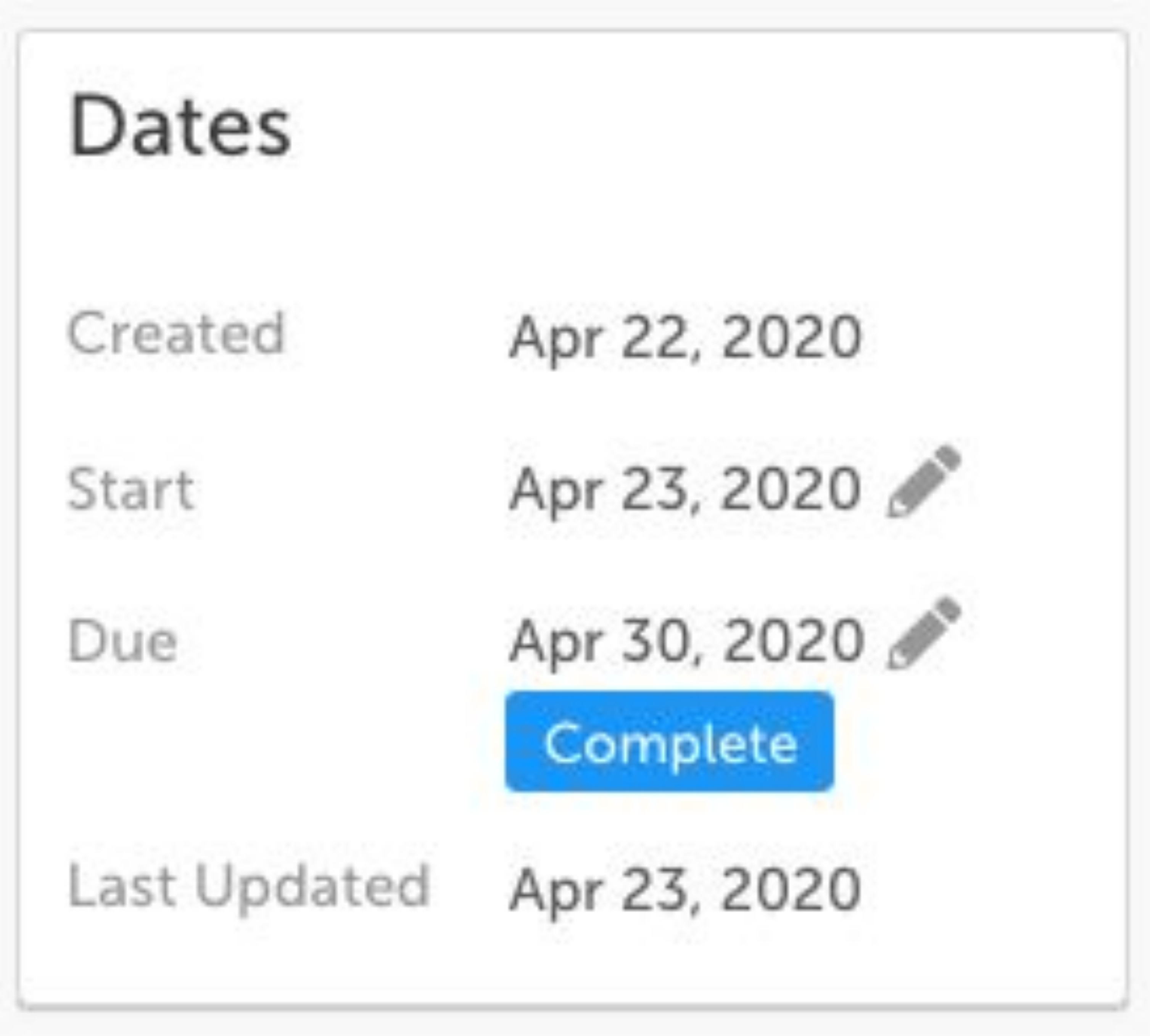
Files: Attach an image, PDF, or Word, PPT, Excel, etc. directly from your computer.

Links: Add two types of links:

- Add a web link (website pertaining to the Project, a Google Drive link, etc.)
- Add an item link (for example, link two similar Projects in different departments to visualize how things are progressing and jump back and forth).

Working on a Chart:

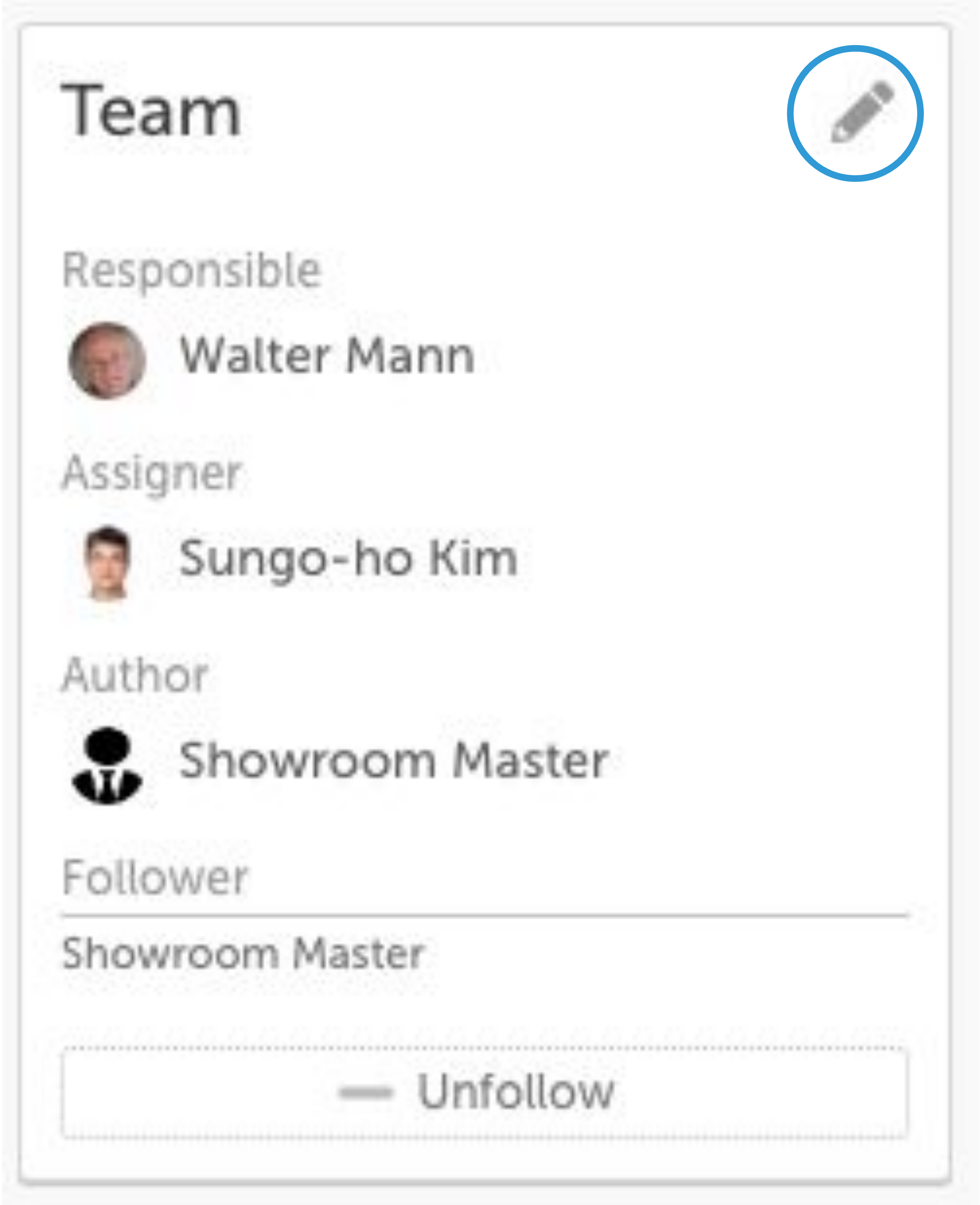
Dates



The Dates panel shows when the Chart was created, when it started, when it's due, and when it was last updated. When you complete the Chart, that date will show up here too.

Working on a Chart:

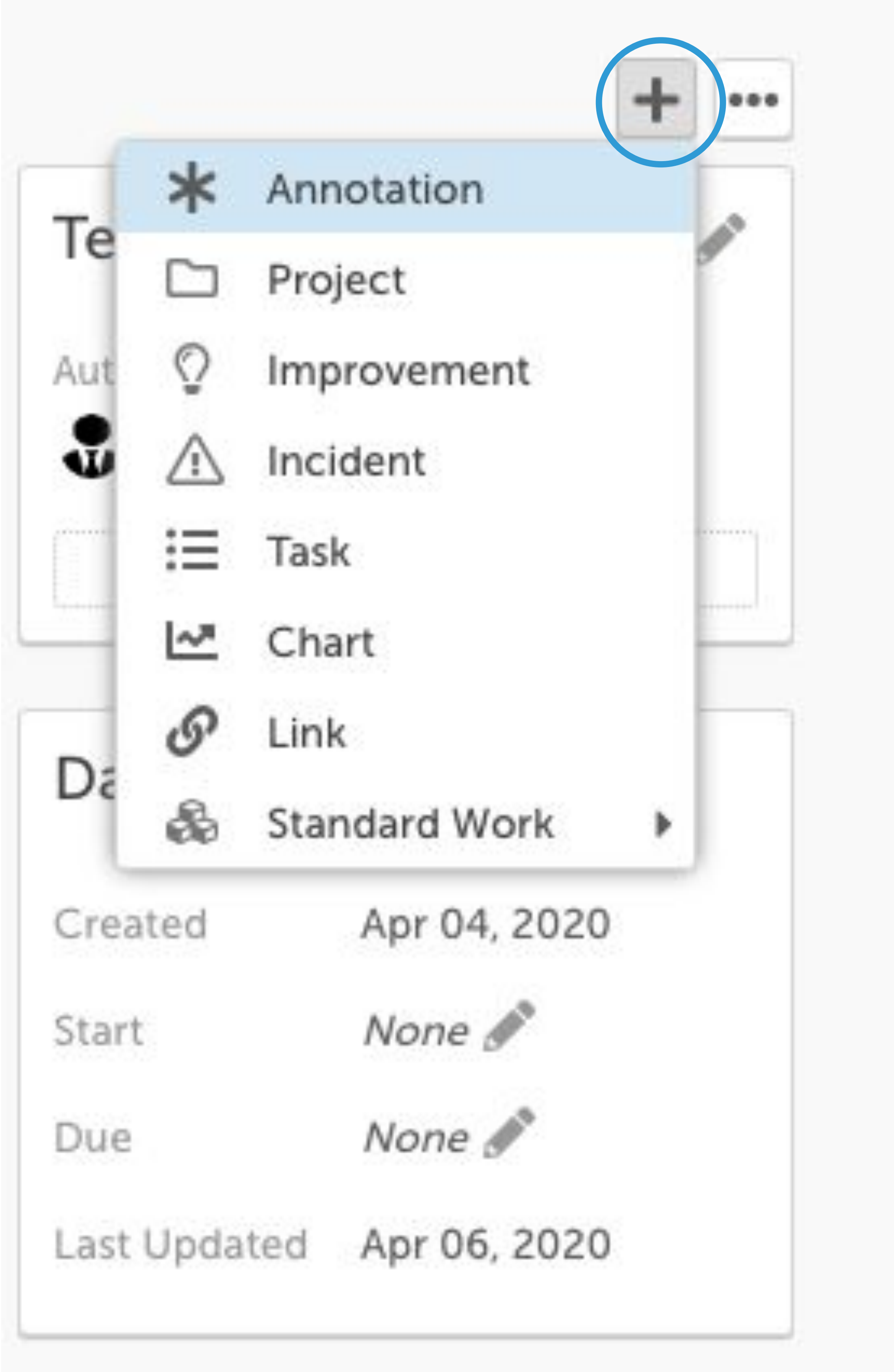
Team



This panel shows who is working on the Chart.

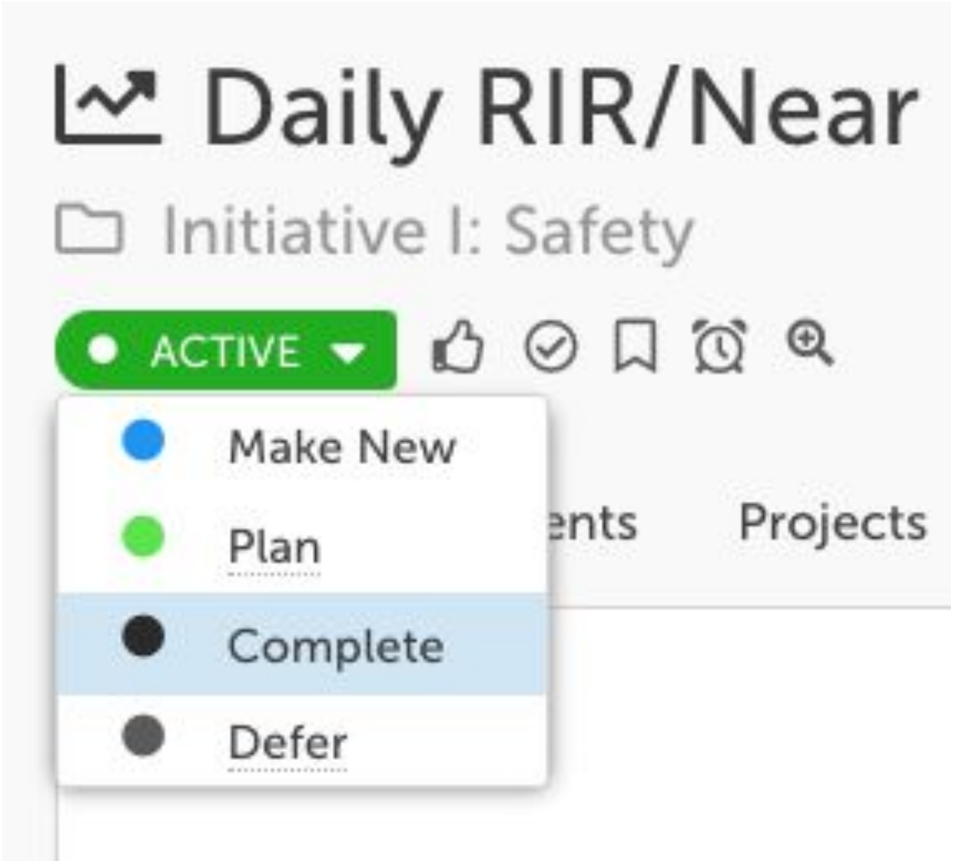
Working on a Chart:

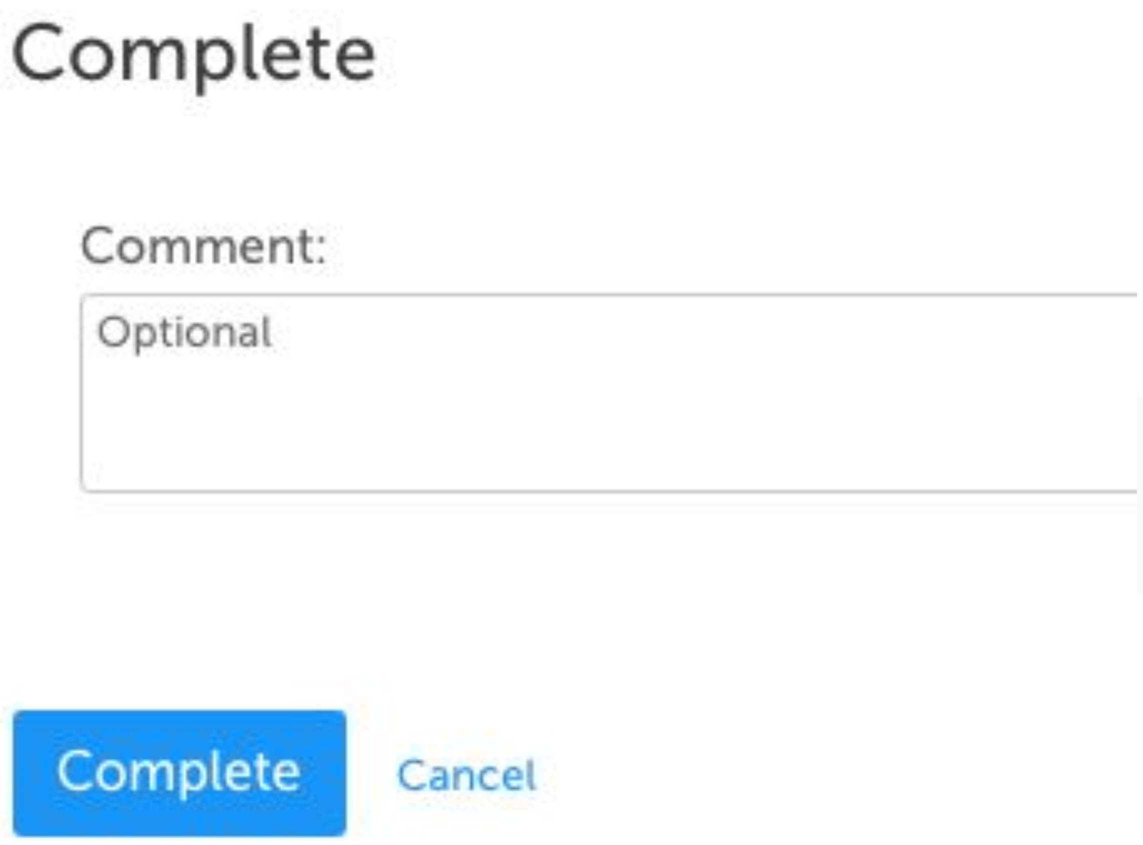
Nested Workflows



Nest a Workflow within your Chart to show their relationship and make them visible in one place.

Resolve a Chart:

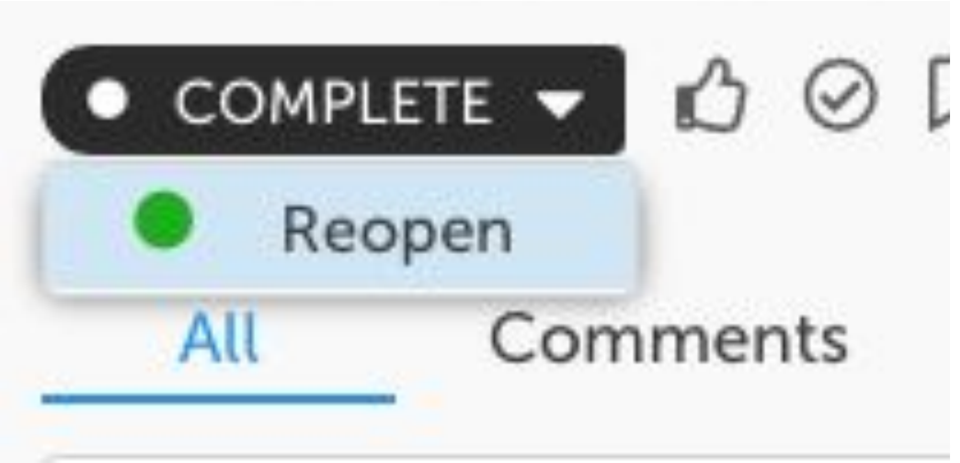




Fill in any required fields (and optional ones, if desired).

KaiNexus is a knowledge repository for all of your improvement work. You can revisit any past Charts from around your organization at any time to learn from, add to, or improve upon them.

If at some point you want to start working on a completed Chart again, simply select Reopen from the status picker.



Need More Help?

Visit support.kainexus.com to search, browse, or request assistance.