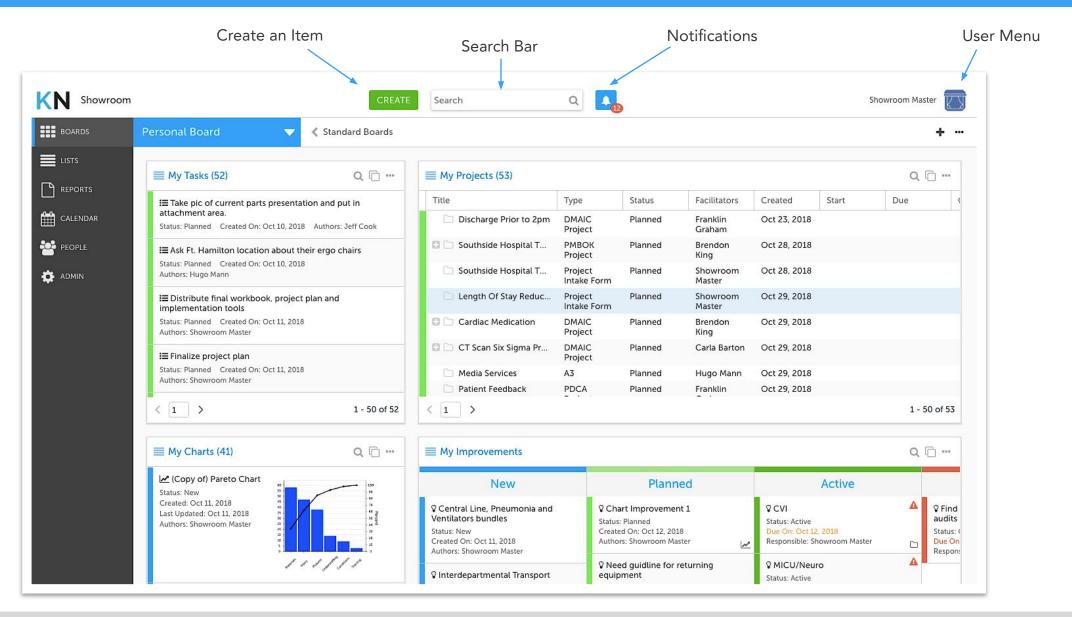
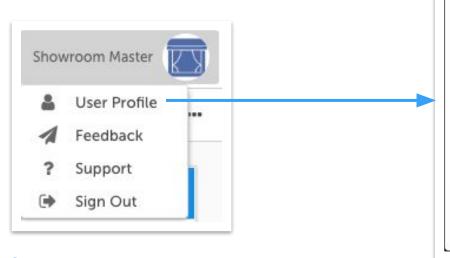


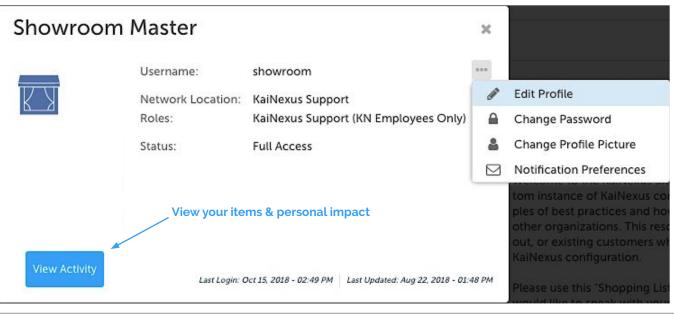
Getting Started in Kai Nexus

Simple Header Toolbar Navigation



User Menu





User Profile

View activity, edit profile, change password, change profile picture, and manage notification preferences

Feedback

Ask questions, report bugs, and leave suggestions for improvement or platform enhancements

Support

Great resource for KaiNexus terminology and functionality. Become a KaiNexpert!

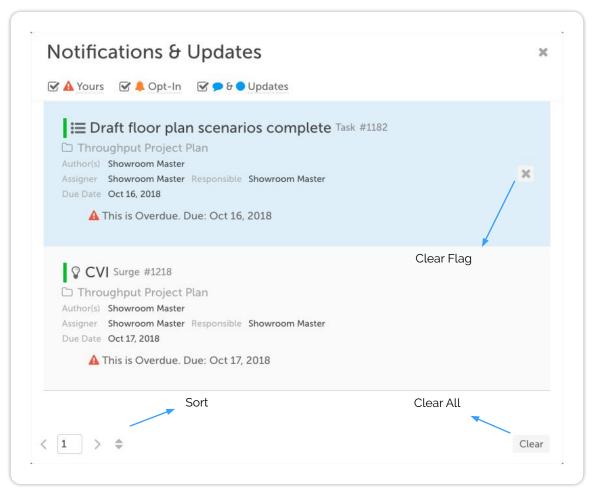
Sign Out

Sign out of KaiNexus



Notifications









Due to your team association with the item

Opt-In



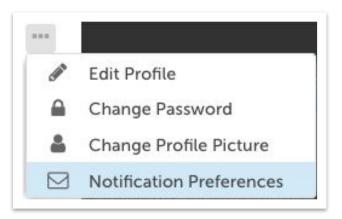
Due to a notification preference that was either configured by you or as part of one of your roles



Comments and timeline updates since the last time you viewed an item

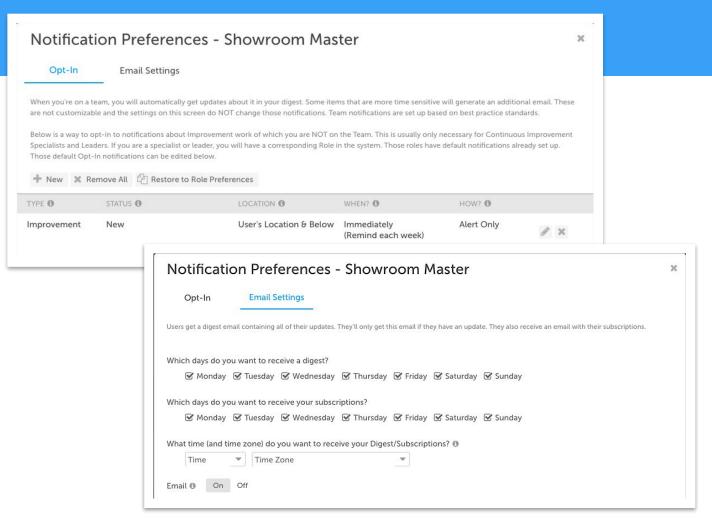
Notifications

<u>Customize Your Notification Preferences</u>



How to Change Your Preferences:

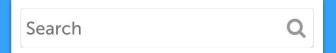
- 1. Click User Menu
- 2. Click User Profile
- 3. Click Ellipses
- 4. Click Notification Preferences

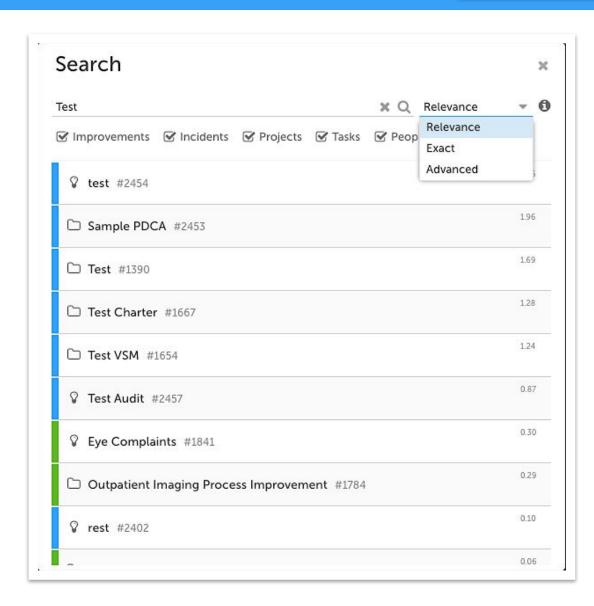


Digest: Email with the important updates about your items since your last digest

Subscriptions: Email with information about and links to any lists and/or boards to which you are subscribed

Search





Relevance (Default Search Method)

Contains exact or similar text

Exact

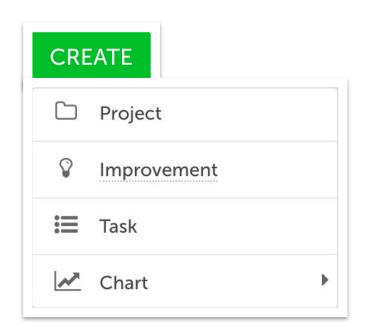
Contains text starting with the exact phrase entered

Advanced

Advanced query including wildcard and Boolean logic

PRO TIP- Deselect the workflow check boxes to help cut through the clutter and find the specific workflow item you are searching for.

CREATE



Project or Improvement?

- 1. Projects can nest other Projects, Improvements, Charts and/or Tasks. Improvements can only nest Charts and/or Tasks.
- 2. Improvements typically measure impact. You may complete a Project or Task when work is done on the item. When work is done on an Improvement, you will resolve the item and measure any qualitative and/or quantitative change.



Projects

Often used for larger scope improvement efforts. Typically driven from the top-down, have a larger team and may be a longer or ongoing initiative



Improvements

Typically bottom-up driven and used for smaller scope improvement efforts



Tasks

These are the to-do items on Project or Improvement



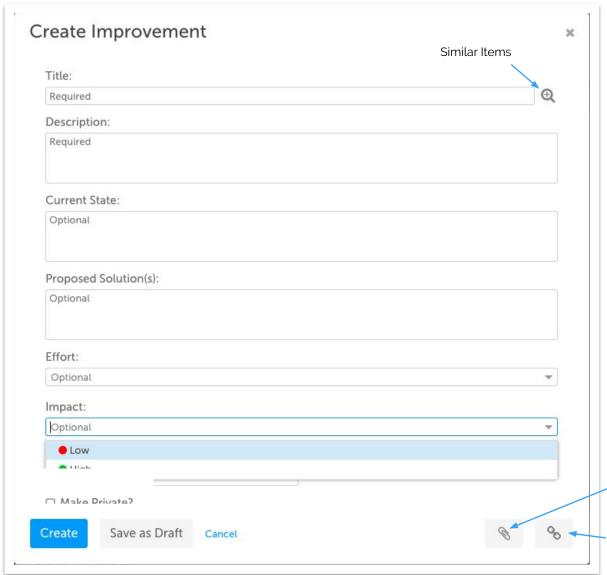
Charts

A way to capture and measure any KPIs

NOTE:

These templates may be titled something other than Project, Improvement or Task within your organization's KaiNexus instance.

Phase 1 | CREATE



STEPS

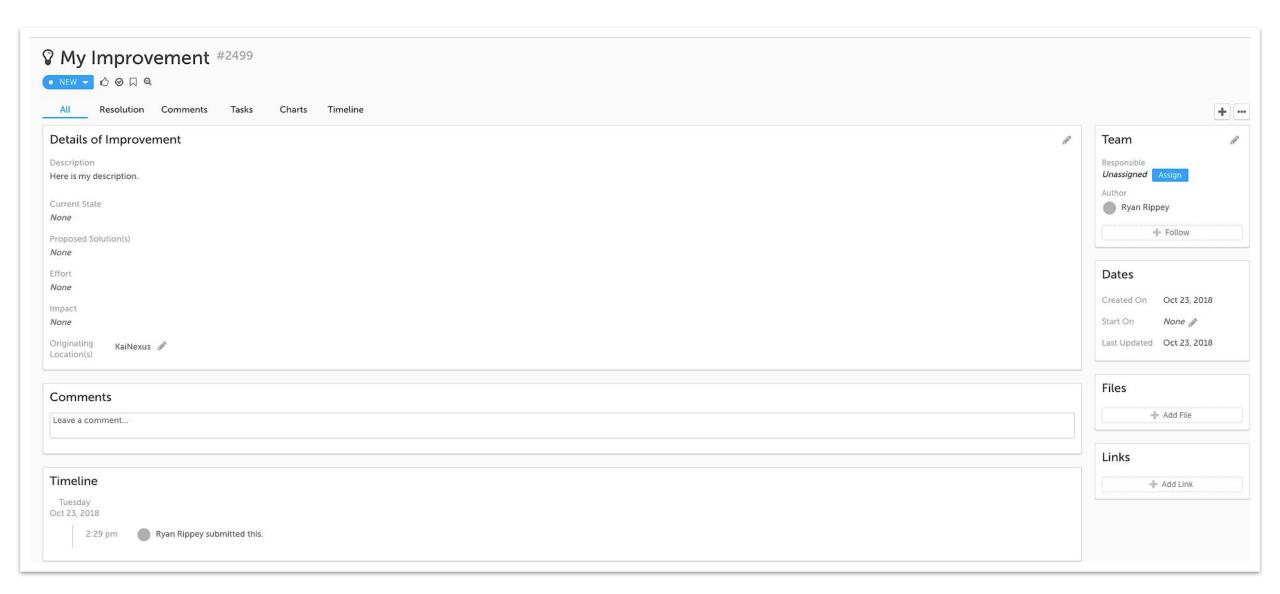
- 1. Select Template to Create
- 2. Populate All Required Fields
- 3. Click Create

PRO TIP – When entering your Title, view similar items in the system by clicking the magnifying glass to the right of your Title field.

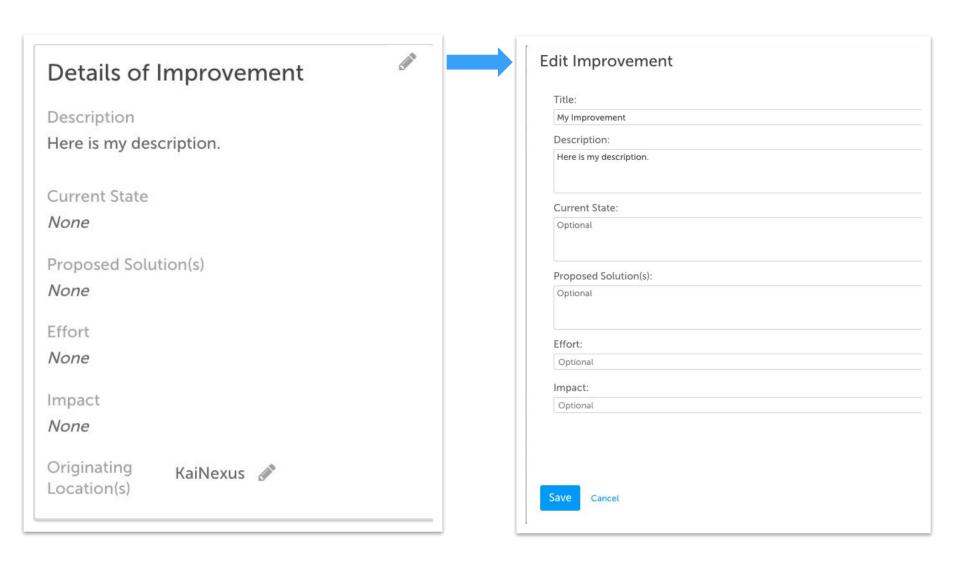
Add File

Add Link

Standard Layout Breakdown

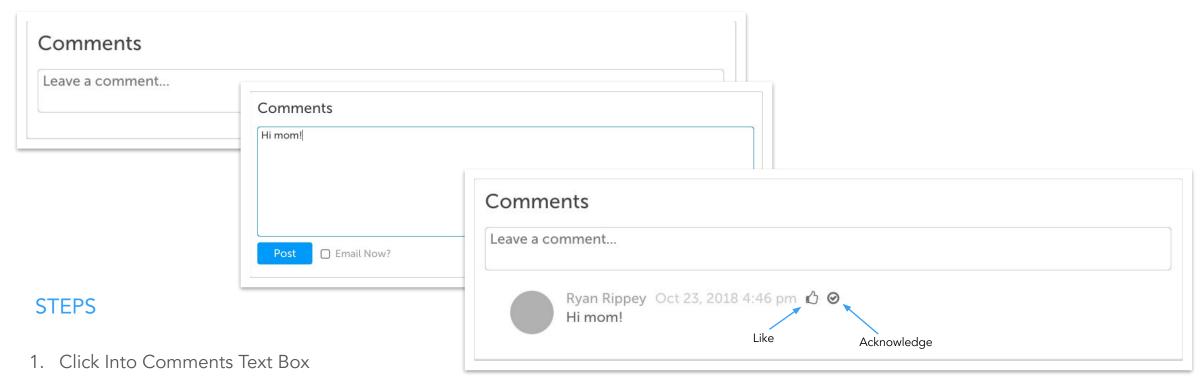


Details



- Click to make updates to any fields in the Details section
- 2. Be sure to save once you're done

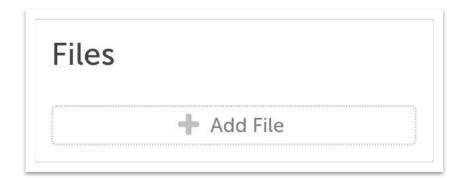
Comments Communication & Collaboration within Items



- 2. Type in Your Comment
- 3. Post/Email Your Comment

PRO TIP – Like or Acknowledge a Comment to let people know you've seen it!

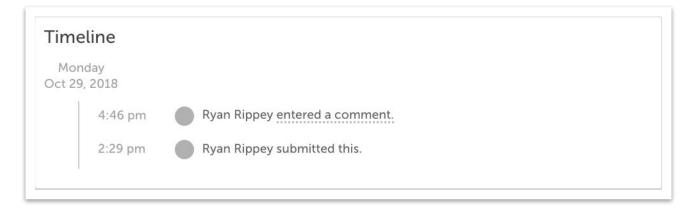
Files, Links, & Timeline



Upload an image, PDF, Microsoft Word, PowerPoint and/or Excel document to your item directly from your computer.



Add a web link (could be a Google doc or Google sheet link) and/or link items in KaiNexus to show association.



Reference an audit trail that keeps track of everything happening within the item.

Dates

Dates

Created On Oct 01, 2018

Assigned On Oct 05, 2018

Start On Oct 08, 2018 🧳

Due On Oct 26, 2018

Completed On Oct 26, 2018 🧳

Last Updated Oct 29, 2018

Created On – When it was originally submitted.

Assigned On – When someone was officially assigned to work on it.

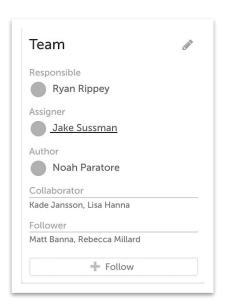
Start On – When the work on it actually began (or is scheduled to begin).

Due On – When the work on it should be completed.

Completed On – When it was completed.

Last Updated – When the most recent changes were made.

Team



Improvement / Task Team

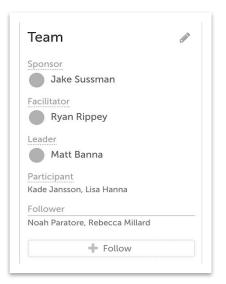
Responsible – The person who has been made responsible for working on the item.

Assigner – The person who assigned the item. They may be required to approve the Resolution before it can be completed.

Author – The person who originally came up with the idea for the Improvement or created the Task.

Collaborator – Someone who contributes to the success of an item, even if they aren't primarily responsible for it.

Follower – Has no formal responsibility, but is kept in the loop and notified about any activity associated with it.



Project Team

Sponsor – Usually a senior leader who provides guidance, support, and direction and is the champion of the Project.

Facilitator – Leads and executes the Project. Typically, there are a limited number of Facilitators per Project.

Leader — A position often used in larger Projects to lead small teams within the Project. Can also be used for a lean or CI professional in your organization.

Participant – Responsible for contributing to the overall Project objectives and team deliverables.

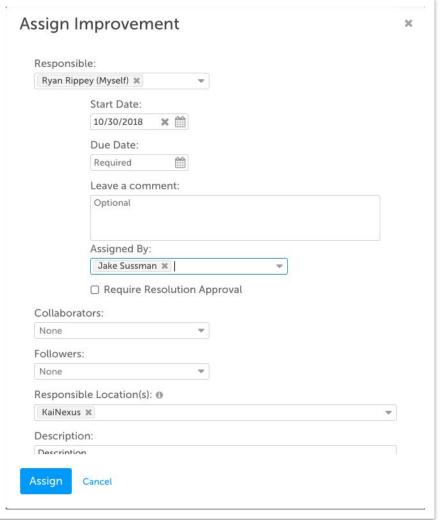
Follower – Has no formal responsibility, but is kept in the loop and notified about any activity associated with it.

Phase 2 | ASSIGN

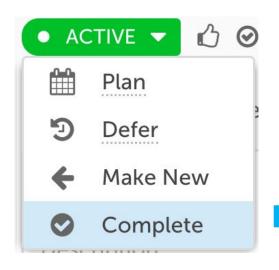


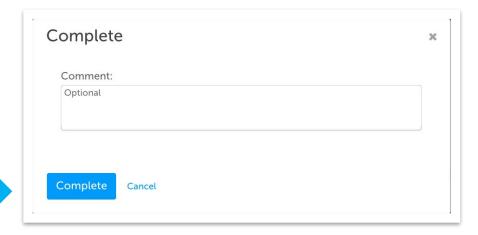
STEPS

- 1. Click Assign (On an Improvement or Task)
- 2. Populate Your Team & Dates
- 3. Click Assign



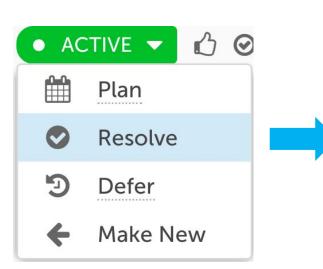
Phase 3 | RESOLVE & COMPLETE

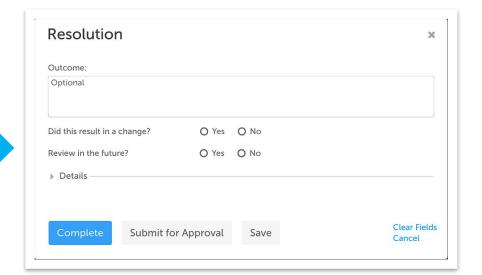




STEPS

- 1. Click Status Picker
- 2. Click Complete
- 3. Repeat Step 2

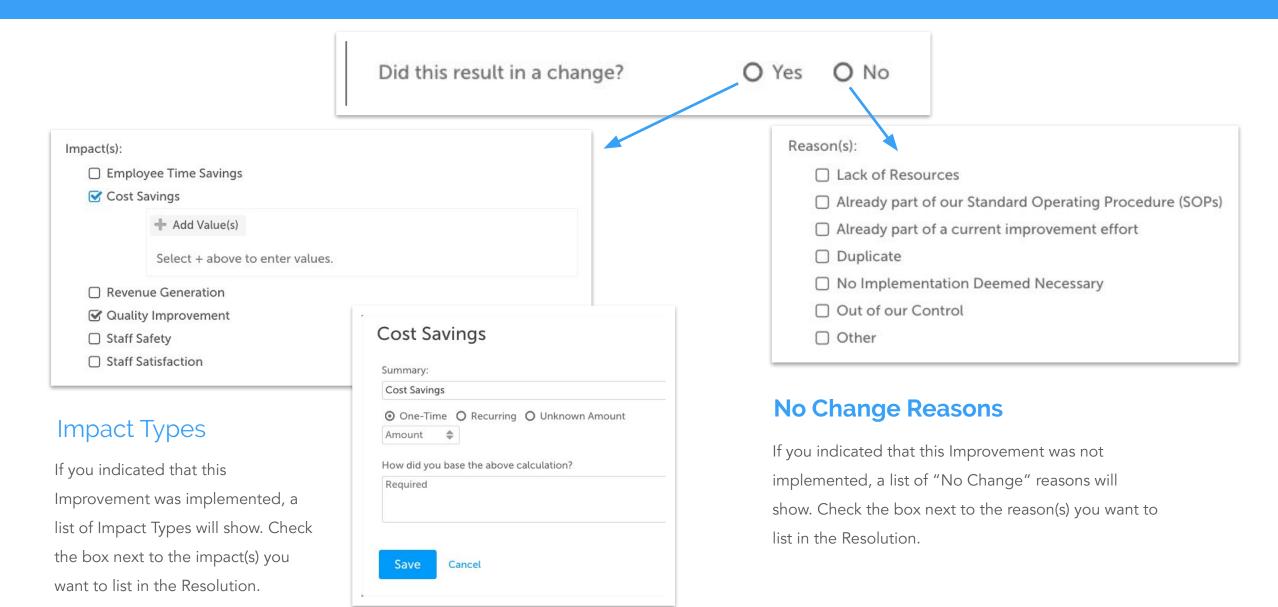




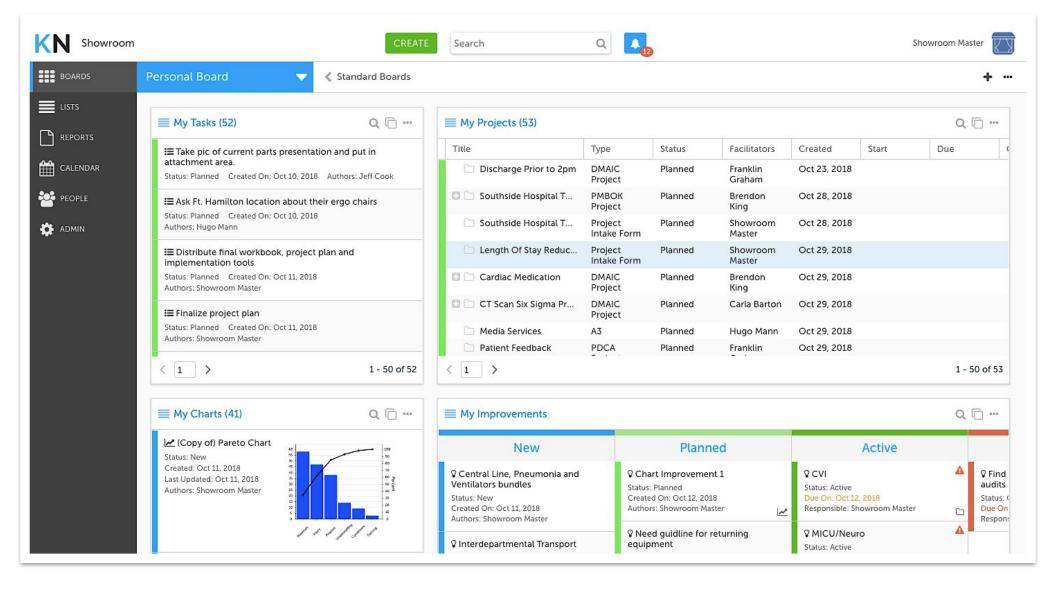
STEPS

- 1. Click Status Picker
- 2. Click Resolve
- 3. Update Resolution
- 4. Click Submit for Approval or Complete

Resolution

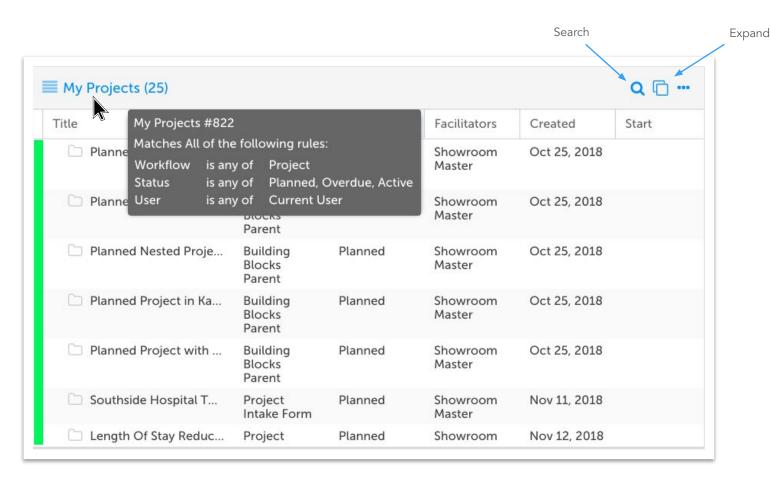


Boards A collection of cards showing info relevant to the current user



PRO TIP - Click the ellipses in the top right of any board and select "Make Default Board" to set it as your default board.

Cards



PRO TIP - Hover over the title of a card to view the filters being applied to that card.

Item List Card View Options



Detail: quickly see important information about each item.



List: can see a grid of items to which you can add and remove columns and control exactly what information should be visible.



Tree: can see the hierarchy of items - how they are nested within one another. In addition, you can add and remove columns and control exactly what information should be visible.



Kanban: breaks down a list of items by status - each column contains all the relevant items of a particular status.



Gantt: way of illustrating the start and finish dates of a list of items.

Statuses

New

All New items. To transition past the New status, build out the team and give it a start and due date.

Planned

Used when a new item has been evaluated and work has been scheduled to begin at a future date.

Active

An item that is currently being worked on. It has been assigned, has not been completed or had a resolution submitted, and has not yet reached its due date.

Overdue

An item is considered Overdue if it is not completed by its due date. Be sure to run to the red and take the appropriate action on all Overdue items!

Resolution Submitted

An item enters this status when someone submits a resolution that requires approval from the assigner before it can be completed.

Complete

Work on the item is considered finished at this stage.

Deferred

This status allows you to return to the item at a later date and reevaluate it. Think of this as the "parking lot" status.