

# KaiNexus Team Types

## Permissions and Notifications

All Templates in KaiNexus will have one of four Team Types: Advanced, Simple, Standard, or Author-Only.

The Team Type determines which Team Roles are available on the Item **and** which permissions and notifications people receive when assigned one of those Team Roles.

Use this guide to learn which permissions and notifications accompany each Team Role based on the Team.

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# Advanced Team Permissions

	Sponsor	Facilitator	Leader	Participant	Follower
<b>Manage</b>					
Edit Details	✓	✓	✓		
Edit Location(s)	✓	✓	✓		
Edit Team	✓	✓	✓		
Change Status	✓	✓	✓		
Complete - Resolution not enabled		✓			
Edit Create and Complete Dates <sup>1</sup>	✓	✓	✓		
Edit Start & Due Dates	✓	✓	✓		
Edit Review By Date	✓	✓	✓		
Archive	✓	✓	✓		
<b>Collaborate</b>					
Add Comments	✓	✓	✓	✓	✓
Attach/Remove Files & Links	✓	✓	✓	✓	
<b>Resolution</b>					
Edit Target and Forecast	✓	✓	✓		
Submit Resolution	✓	✓	✓		
Resolve		✓			
<b>Organize</b>					
View Nested Items <sup>2</sup>	✓	✓	✓	Only Simple Team Items	
Add Nested Items	✓	✓	✓	✓	
Edit Nested Items	✓	✓	✓		
<b>Misc.</b>					
Make Private	Sponsors, Facilitators, and Leaders can delete the Item or make it private if the permission is ALSO included in their System Role.				
Delete					

<sup>1</sup> Must be enabled at the Template level.

<sup>2</sup> Private nested Items are not visible unless the “Allow Team to see Private Nested Items” checkbox is enabled in the Template’s configuration and selected.

# Advanced Team Notifications

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	Sponsor	Facilitator	Leader	Participant	Follower
<b>Manage</b>					
Edit Detail	≡ ●	≡ ●	≡ ●		
Edit Team	≡ ●	≡ ●	≡ ●		
Edit Dates	≡ ●	≡ ●	≡ ●		
Change Status*	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩
Resolution Submitted	≡ ●	≡ 🚩 ✉			
<b>Collaborate</b>					
Comments	≡ ● 🚩	≡ ● 🚩	≡ ● 🚩	≡ ● 🚩	≡ ● 🚩
Added to Team	≡ ●	≡ 🚩 ✉	≡ 🚩 ✉	≡ ●	≡ ●
Removed from Team	≡ 🚩	≡ 🚩 ✉	≡ 🚩 ✉	≡ 🚩	≡ 🚩
<b>Organize</b>					
Add Nested Item		≡ 🚩	≡ 🚩		
Remove Nested Item		≡ 🚩	≡ 🚩		
Assign Nested Item		≡ 🚩	≡ 🚩		
Complete Nested Item	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩
Change Status Nested Item		≡ 🚩	≡ 🚩		
Honor Roll on Nested Item		≡ 🚩	≡ 🚩		
Delete Nested Item		✉	✉		
Comment on Nested Item		≡ 🚩	≡ 🚩		
<b>Misc</b>					
Make Private	≡ ●	≡ ●	≡ ●	≡ ●	≡ ●
Delete	✉	✉	✉	✉	✉

\*When an Item is in Overdue Status, the team will receive a notification every day until it is no longer Overdue.

\*Primary and Secondary Edit Custom Team Roles will receive the same notifications as the Facilitator and Participant roles, respectively.

# Standard Team Permissions

	Responsible	Assigner	Author	Collaborator	Follower
<b>Manage</b>					
Edit Details	✓	✓	✓	✓	
Edit Location(s)		✓			
Edit Team	✓	✓	✓	✓	
Change Status		✓			
Complete - Resolution not enabled	✓	✓			
Edit Create and Complete Dates <sup>1</sup>	✓	✓	✓	✓	
Edit Start and Due Dates		✓			
Edit Review By Date	✓	✓	✓	✓	
Archive	✓	✓	✓	✓	
<b>Collaborate</b>					
Add Comments	✓	✓	✓	✓	✓
Attach/Remove Files & Links	✓	✓	✓	✓	
<b>Resolution</b>					
Edit Target and Forecast	✓	✓	✓	✓	
Submit Resolution	✓				
Resolve <sup>2</sup>	✓	✓			
<b>Organize</b>					
View nested Items <sup>3</sup>	✓	✓	✓	✓	✓
Add nested Items	✓	✓	✓	✓	
Edit nested Items	✓	✓	✓	✓	
<b>Misc.</b>					
Make Private	The Author, Assigner, Responsible, and Collaborator can delete the Item or make it private if the permission is ALSO included in their System Role.				
Delete					

<sup>1</sup> Must be enabled at the Template level.

<sup>2</sup> If the "Require Resolution Approval" checkbox is enabled on the Template and selected, only the Assigner can Resolve.

<sup>3</sup> Applies only to Simple Team nested Items. However, if the nested Items are Private, they will remain hidden unless the "Allow Team to see nested Items" checkbox is enabled on the parent. When selected, all Private nested Items become visible, regardless of Team Type.

# Standard Team Notifications

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	Author	Assigner	Responsible	Collaborator	Follower
<b>Manage</b>					
Edit Team			≡ ●		
Edit Date		≡ ●	≡ ●		
Edit Due Date		≡ 🚩	≡ 🚩		
Change Status*	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩
Resolution Submitted		≡ 🚩 ✉			
<b>Collaborate</b>					
Comments	≡ ● 🚩	≡ ● 🚩	≡ ● 🚩	≡ ● 🚩	≡ ● 🚩
Added to Team	≡ 🚩 ✉	≡ 🚩 ✉	≡ 🚩 ✉	≡ 🚩	≡ 🚩
Removed from Team	≡ 🚩	≡ 🚩 ✉	≡ 🚩 ✉	≡ 🚩	≡ 🚩
<b>Organize</b>					
Complete Nested Item	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩
<b>Misc.</b>					
Made Private		≡ ●	≡ ●		
Delete	✉	✉	✉	✉	✉
Honor Roll	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩

\*When an Item is in Overdue Status, the team will receive a notification every day until it is no longer Overdue.

\*Primary and Secondary Edit Custom Team Roles will receive the same notifications as the Author and Collaborator roles, respectively.

# Simple Team Permissions

	Responsible	Assigner	Author	Collaborator	Follower
<b>Manage</b>					
Edit Details	✓	✓	✓	✓	
Edit Location(s)	✓	✓	✓	✓	
Edit Team	✓	✓	✓	✓	
Change Status	✓	✓	✓	✓	
Complete - Resolution not enabled	✓	✓	✓	✓	
Edit Create and Complete Dates <sup>1</sup>	✓	✓	✓	✓	
Edit Start and Due Dates	✓	✓	✓	✓	
Edit Review By Date	✓	✓	✓	✓	
Archive	✓	✓	✓	✓	
<b>Collaborate</b>					
Add Comments	✓	✓	✓	✓	✓
Attach/Remove Files & Links	✓	✓	✓	✓	
<b>Resolution</b>					
Edit Target and Forecast	✓	✓	✓	✓	
Submit Resolution	✓				
Resolve		✓			
<b>Organize</b>					
View nested Items <sup>2</sup>	✓	✓	✓	✓	✓
Add nested Items	✓	✓	✓	✓	
Edit nested Items	✓	✓	✓	✓	
<b>Misc.</b>					
Make Private	The Author, Assigner, Responsible, and Collaborator can delete the Item or make it private if they ALSO have the permission in their System Role.				
Delete					

<sup>1</sup> Must be enabled at the Template level.

<sup>2</sup> Applies only to Simple Team nested Items. However, if the nested Items are Private, they will remain hidden unless the "Allow Team to see nested Items" checkbox is enabled on the parent. When selected, all Private nested Items become visible, regardless of Team Type.

# Simple Team Notifications

	Author	Assigner	Responsible	Collaborator	Follower
<b>Manage</b>					
Edit Team			≡ ●		
Edit Date		≡ ●	≡ ●		
Edit Due Date		≡ 🚩	≡ 🚩		
Change Status*	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩
Resolution Submitted		≡ 🚩 ✉			
<b>Collaborate</b>					
Comments	≡ ● 🚩	≡ ● 🚩	≡ ● 🚩	≡ ● 🚩	≡ ● 🚩
Added to Team	≡ 🚩 ✉	≡ 🚩 ✉	≡ 🚩 ✉	≡ 🚩	≡ 🚩
Removed from Team	≡ 🚩	≡ 🚩 ✉	≡ 🚩 ✉	≡ 🚩	≡ 🚩
<b>Organize</b>					
Complete Nested Item	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩
<b>Misc.</b>					
Made Private		≡ ●	≡ ●		
Delete	✉	✉	✉	✉	✉
Honor Roll	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩

\*When an Item is in Overdue Status, the Team will receive a notification every day until it is no longer Overdue.

\*Primary and Secondary Edit Custom Team Roles will receive the same notifications as the Author and Collaborator roles, respectively.

# Author-Only Team Permissions

	Author	Follower
<b>Manage</b>		
Edit Details	✓	
Edit Team	✓	
Edit Location(s)	✓	
Change Status	✓	
Complete - Resolution not enabled	✓	
Edit Create and Complete Dates <sup>1</sup>	✓	
Edit Start and Due Dates	✓	
Edit Review By Date	✓	
Archive	✓	
<b>Collaborate</b>		
Add Comments	✓	✓
Attach / Remove Files & Links	✓	
<b>Resolution</b>		
Edit Target and Forecast	✓	
Resolve	✓	
<b>Organize</b>		
View nested Items <sup>2</sup>	✓	✓
Add nested Items	✓	
Edit nested Items	✓	
<b>Misc.</b>		
Make Private	The Author can delete the Item or make it private if the permission is ALSO in their System Role.	
Delete		

<sup>1</sup> Must be enabled at the Template level

<sup>2</sup> Applies only to Simple Team nested Items. However, if the nested Items are Private, they will remain hidden unless the "Allow Team to see nested Items" checkbox is enabled on the parent. When selected, all Private nested Items become visible, regardless of Team Type.

# Author-Only Team Notifications

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	Author	Follower
<b>Manage</b>		
Change Status*	≡ 🚩	≡ 🚩
<b>Collaborate</b>		
Comments	≡ • 🚩	≡ • 🚩
Added to Team	≡ 🚩	≡ 🚩
Removed from Team	≡ 🚩	≡ 🚩
<b>Organize</b>		
Add Nested Item	≡ 🚩	≡ 🚩
Remove Nested Item	≡ 🚩	≡ 🚩
Complete Nested Item	≡ 🚩	≡ 🚩
<b>Misc.</b>		
Delete	✉	✉

\*When an Item is in Overdue Status, the Team will receive a notification every day until it is no longer Overdue.

\*Primary and Secondary Edit Custom Team Roles will receive the same notifications as the Author.

# More Information

Learn More at [Support.KaiNexus.com](https://support.kainexus.com)

[Notifications](#) | [Advanced Team](#) | [Simple Team](#) | [Standard Team](#) | [Author-Only Team](#)

Need to disable some default Team role-based email notifications? [Learn more here](#).

## Examples of Notification Types:

### RED FLAG

 **O2 Regulators** Idea #2850

Author Showroom Master

Assigner Showroom Master Responsible Showroom I

Due Date May 11, 2020

 This is Overdue. Due: May 11, 2020

### BLUE DOT

 **Metric Review Meetings for Ne**

Author Showroom Master

Assigner Showroom Master Responsible Bill Urban

Due Date Jun 15, 2020

  Bill Urban updated the Title.

### EMAIL DIGEST

**KaiNexus**

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**Digest**

 **Update Total Financial Impact** Task #492598

 Total Financial Impact (Monthly)

Author Matt Banna

Complete Date Jun 02, 2020

 Status changed to Complete.

12:47 pm Matt Banna reopened this because it is a Recurring Item.


12:47 pm Matt Banna completed this.

### IMMEDIATE EMAIL

**KaiNexus**

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**You are now the Responsible**

 [Documentation about how to properly manage spread / adding a new group within a live instance](#) #619750

**ACTIVE** Improvement

Responsible Maggie Millard

Assigner Jeff Roussel

Due Date Aug 31, 2020

[VIEW DETAILS](#)