

An abstract graphic featuring several overlapping curved shapes in various shades of blue and black, creating a dynamic, layered effect. The shapes are primarily located on the left and center of the image, with some extending towards the right.

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KaiNexus Training: Basics 102

Projects

WELCOME



Created by:

RYAN **RIPPEY**

Product Manager

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



PROJECTS

Key Characteristics:

- Used for large scope improvement efforts
- Driven from the top-down
- Larger teams
- Longer or ongoing initiatives

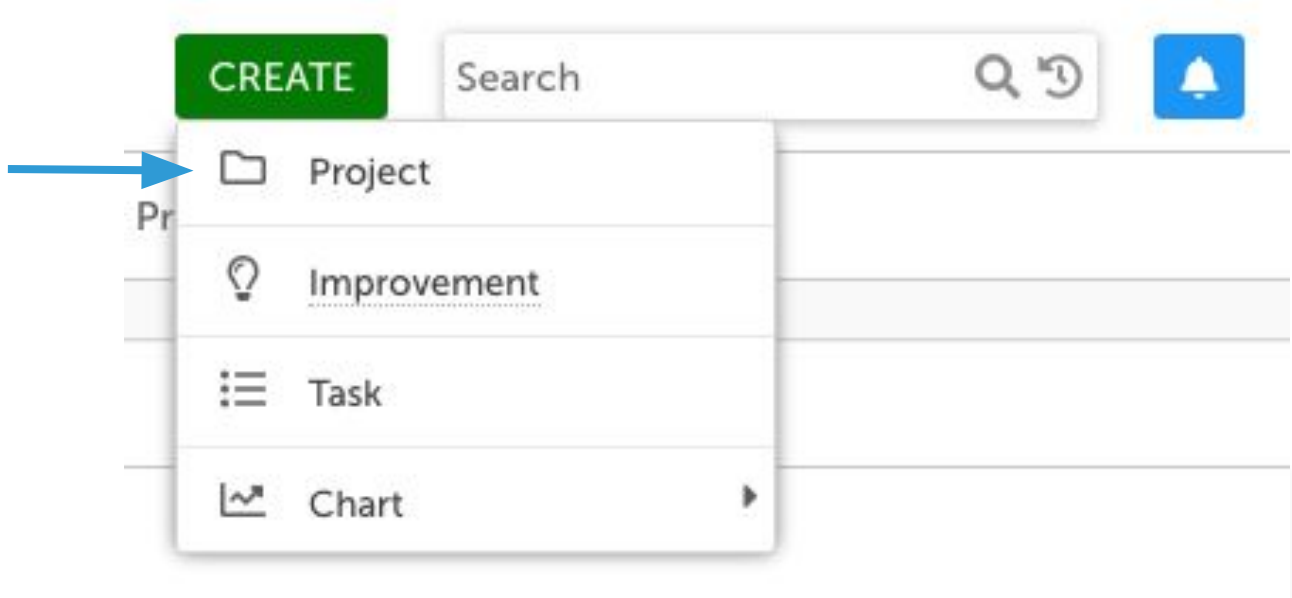
Projects can contain any other KaiNexus Workflow with them, including Projects, Improvements, Tasks, and Charts. This nesting strategy is often used in Strategy Deployment.

Common Examples:

A3s, DMAIC, PDSA, PMBOK, Audit, Kaizen Events

Creating a New Project:

- 1. Click the green Create button
- 2. Select Project from the dropdown



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

Start with a short summary of your Project - 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.



Create Project

Title: Required

Description: Required

Scope: Optional

Goals and Objectives	
	Objective
Goal	Optional

Add Row

Projected Budget: Optional

Ideal Start Date: Optional

Final Sign Off Needed By: Optional

% Complete: Optional

Waste: Optional

Create Save as Draft Cancel



Creating a New Project:

Scope:

Optional

Goals and Objectives

	Objective	
Goal	Optional	

Add Row

Projected Budget:

Optional

Ideal Start Date:

Optional

Final Sign Off Needed By:

Optional

Optional

% Complete:

Optional

Waste:

Optional

Create

Save as Draft

Cancel

1. Text Fields: Type or copy & paste

2. Adhoc Fields: Add rows and columns as needed

3. Number Fields

4. Date Fields: Choose a date and a time, if available

5. Attribute Fields: Choose from a dropdown list

Creating a New Project:

Parent:

Optional

☐ Make Private

☐ Allow Project Team to see any nested private Improvements in this Project.

☐ Allow Project Team to see any nested private Projects in this Project.

▼ Status & Team

New

Planned

Active

Deferred

Sponsor(s): ⓘ

None

Facilitator(s): ⓘ

Maggie Millard (Myself) X

Leader(s): ⓘ

None

Participant(s): ⓘ

None

Follower(s):

None

Project Location(s): ⓘ

KaiNexus X

Create

Save as Draft

Cancel

- ← 1. Parent: Choose which Project (if any) to nest this one under
- ← 2. Edit privacy settings to restrict viewing of this project if available / desired
- ← 3. Select the Status you want the new project 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
- ← 4. Fill in your Project team:
 - Sponsor: Senior Leader providing guidance, support, and direction
 - Facilitator: Leads the Project
 - Leader: Used in larger Projects to lead small teams within the Project. It can also be used for a Lean leader or CI professional.
 - Participants: Responsible for contributing to the objectives and team deliverables
 - Followers: No formal responsibility, but are kept in the loop with notifications
- ← 5. Add Attachments or Links if needed
6. Click Create (to enter it immediately) or Save as Draft (to come back and add to it later before submitting)

Activating a Project:

If you select Active when creating a new Project, you'll be able to give it a Due Date. Once you click Create on that Project, it'll automatically be activated with today as the Start Date.

If you Created the Project 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).

Status & Team

New

Planned

Active

Deferred

Due Date:

Required

CREATE

Search

Projects

Welcome to the KaiNexus Demo > Projects >

Locations

(18) Projects

Title	Facilitator	State
Initiative I: Safety	Greg Jacobson	At Risk
Achieve Perfect Score on OSHA Annual Audit	Greg Jacobson	On Track
Increase Communication Across Departments	Hank Hill	On Track
Maintain Low Workplace Injury Rate	Craig Catoire	On Track
Reduce Readmissions	Beckham Rogers	At Risk
Initiative II: Finance	Greg Jacobson, Jeff Roussel	At Risk
Integrate Cost Saving Practices	Beau Jackson	At Risk
Reduce Material Handling Labor	Amelia Bridges	On Track

Activating a Project:

Class 5: Black Belt Projects #323

Lean Certification

NEW

← Click to Activate

All

Comments

Projects

Improvements

Tasks

Charts

Timeline

Details of Class

Class Topic and Other Information

Black Belt Projects

Project Location(s)

Austin

*** Be advised: Do not, under any circumstances, enter client-specific information in KaiNexus. ***

Comments

Leave a comment...

Timeline

Team

Facilitator

Greg Jacobson

+ Follow

Dates

Created

Apr 20, 2020

Start

None

Activate

Due

None

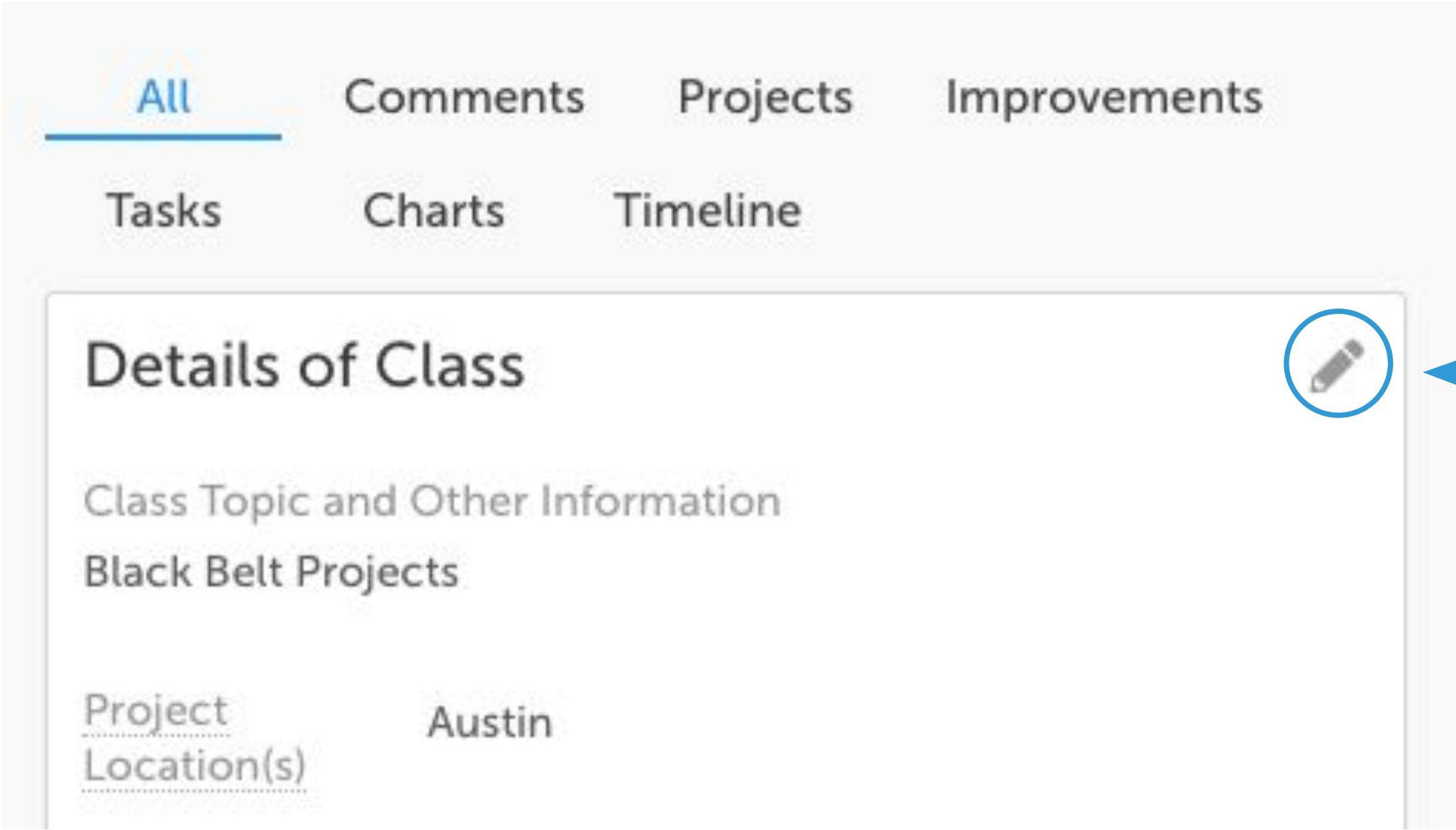
Last Updated

Apr 17, 2020

Click to Activate

Working in a Project:

Edit Details

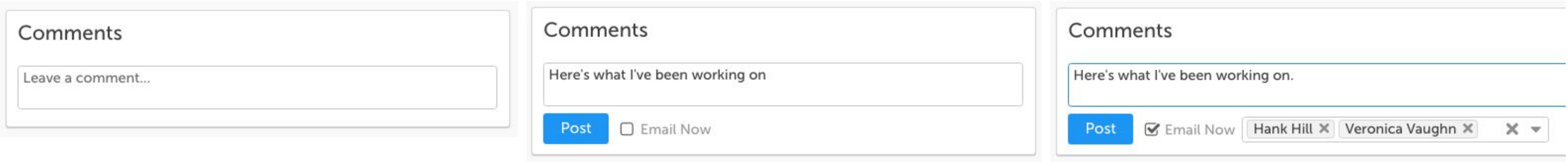


← Edit Any Panel

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

Working in a Project:

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 comment. When you click Post, KaiNexus will send an in-app notification to everyone on your Project Team. Click "Email Now" if you want to send an immediate email to specific people.


Working in a Project:

Timeline


Timeline

Wednesday
Apr 22, 2020


4:02 PM

 Greg Jacobson updated the Facilitator(s).

4:02 PM


 Greg Jacobson updated the parent.

4:02 PM


 Greg Jacobson submitted this.

Tuesday
Apr 21, 2020

10:09 AM


 Greg Jacobson updated the Title.

10:09 AM

 Greg Jacobson updated the Class Topic.

Sunday
Apr 19, 2020

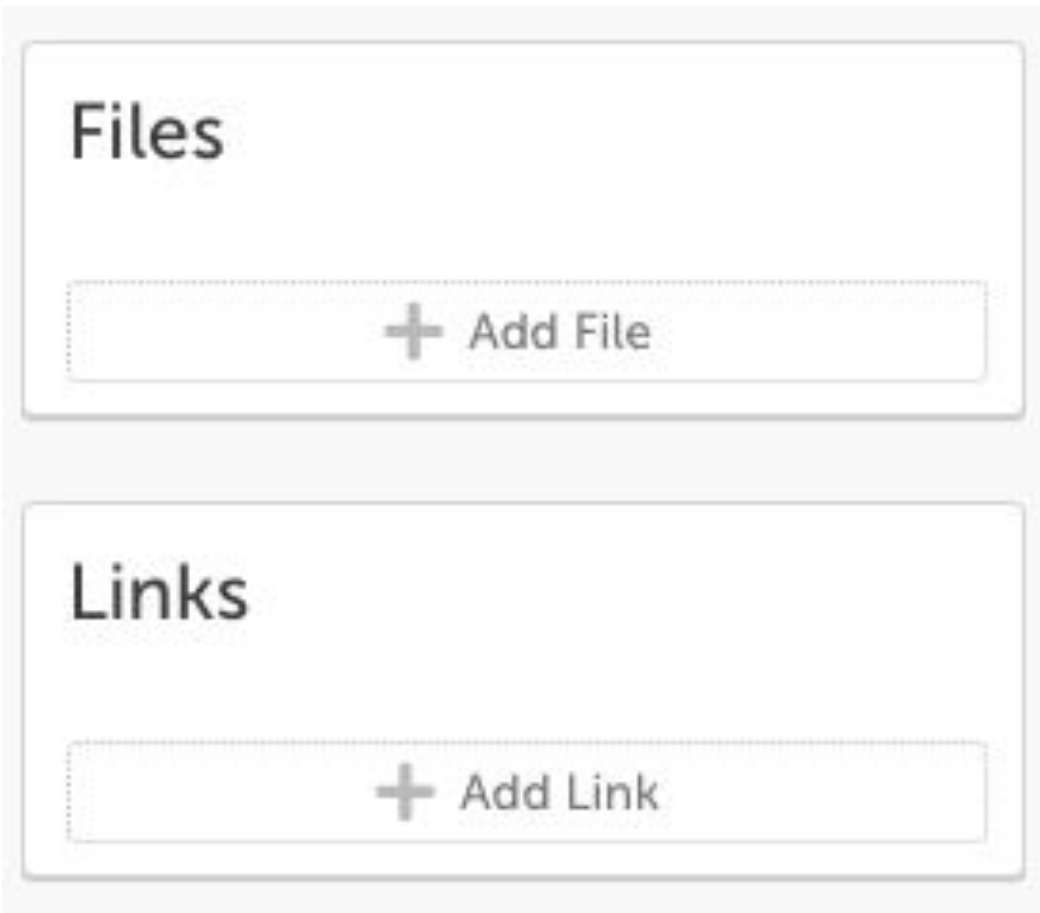
2:33 PM

 Greg Jacobson updated the Category.

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

Working in a Project:

Links and Files

A screenshot of the 'New Link' dialog box. The 'Web Link' tab is selected, indicated by a blue arrow. The 'Name' field is empty. The 'Address' field contains 'http://'. At the bottom are 'Save' and 'Cancel' buttons.A screenshot of the 'New Link' dialog box. The 'Item' tab is selected, indicated by a blue arrow. The 'Item' dropdown menu is open, showing 'Recycle Bins #122' with a close button. The 'Relationship' dropdown menu is also open, showing options: 'Relates to', 'Relates to', 'Resulted in', and 'Originated from'. The first 'Relates to' option is highlighted.

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 in a Project:

Dates

Dates

Created

Apr 22, 2020

Start

Apr 23, 2020

Due

Apr 30, 2020

Complete

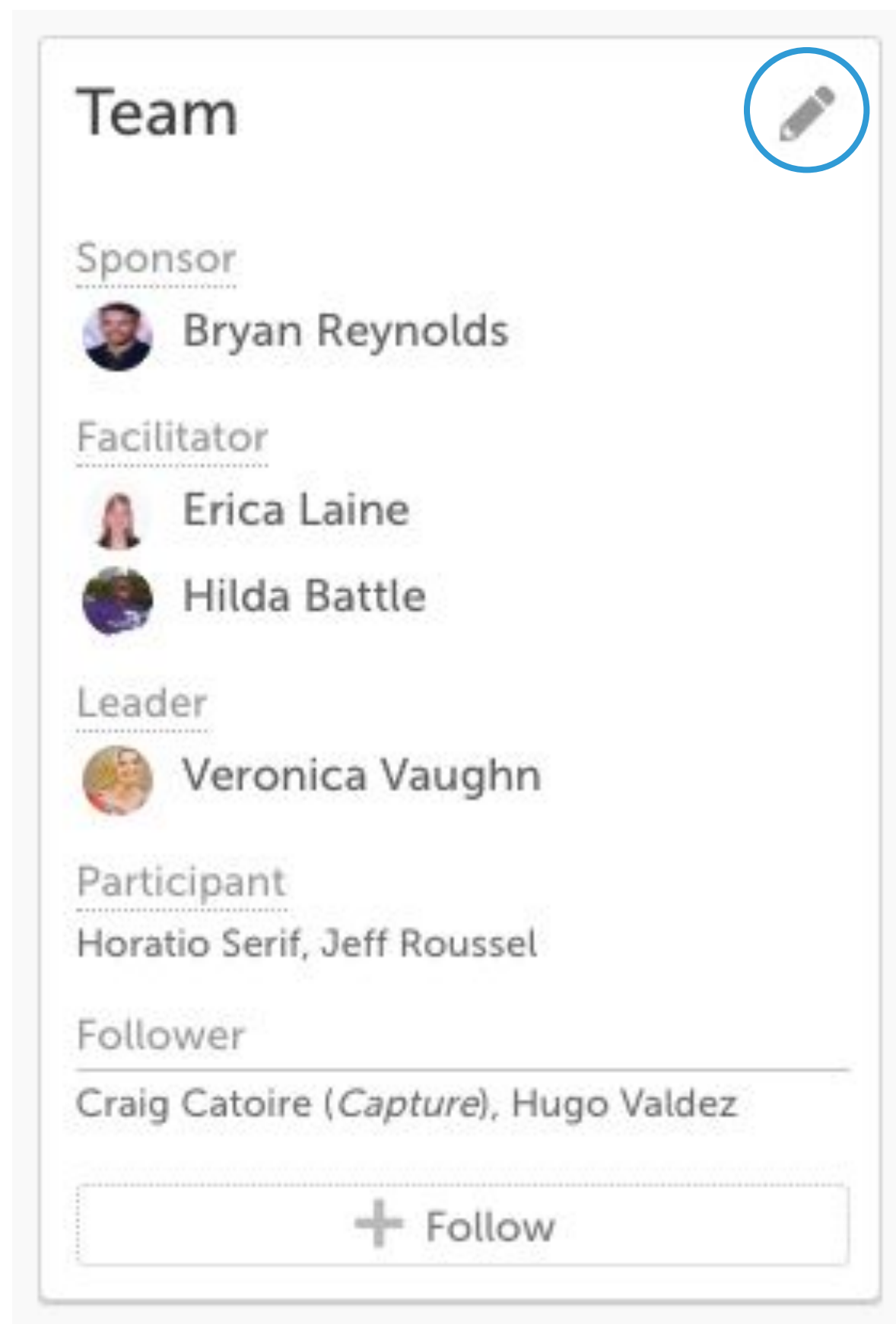
Last Updated

Apr 23, 2020

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

Working in a Project:

Team

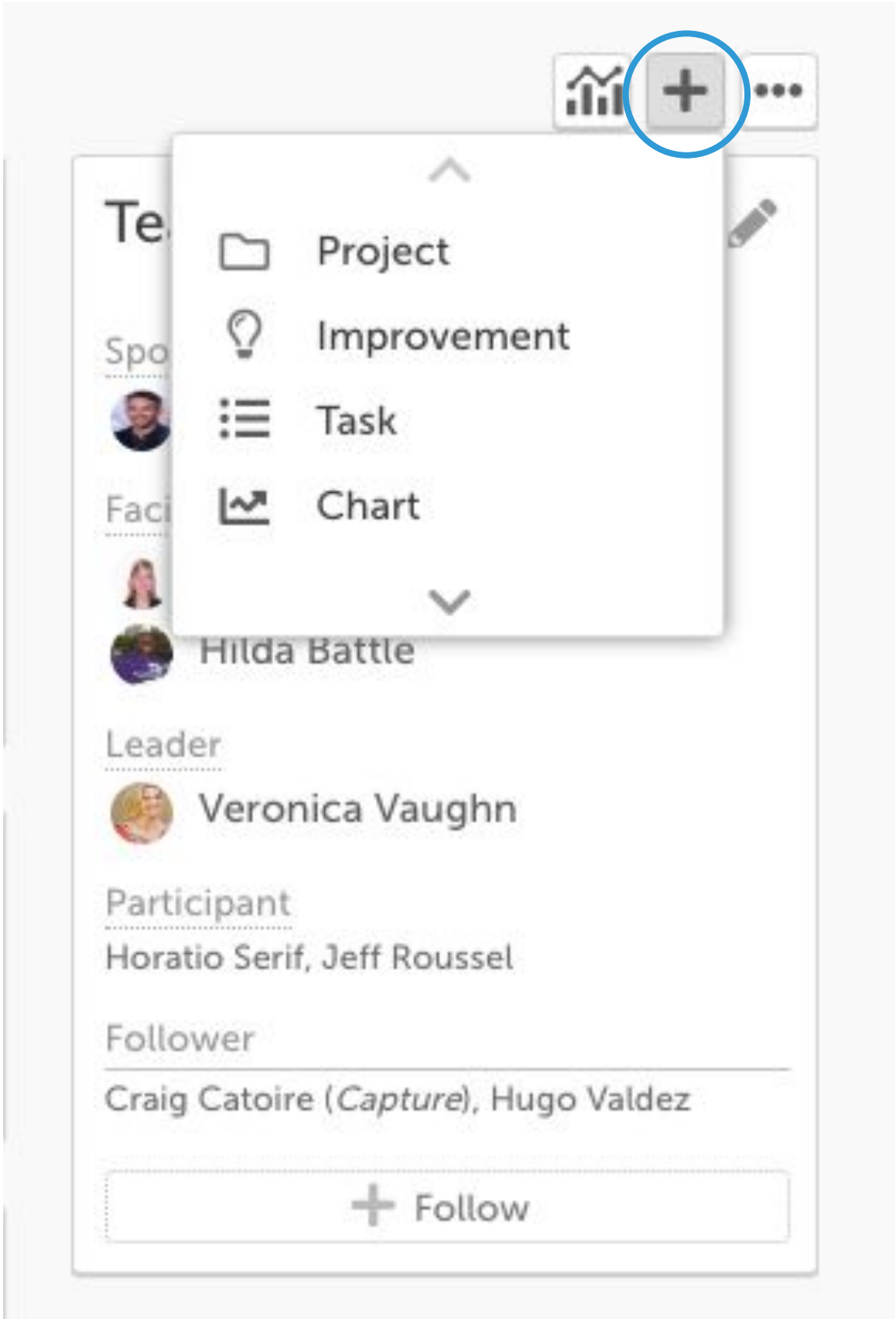


This panel shows who is working on the Project.

- Sponsor: Senior Leader providing guidance, support, and direction
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Working in a Project:

Nested Workflows



Nest other Items within your Project to show their relationship and make them visible in one place.

Completing a Project:

Class 5: Black Belt Projects #323

Lean Certification

ACTIVE

Make New

Plan

Complete

Defer

entsProjectsImprovementsTasks

Class Topic and Other Information

Black Belt Projects

Project Location(s)Austin

Dates

Created

Apr 22, 2020

Start

Apr 23, 2020

Due

Apr 30, 2020

Complete

Last Updated

Apr 23, 2020

Complete

Comment:

Optional

Complete

Cancel

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

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

Lean Certification

COMPLETE

Reopen

AllCommentsProjects

Need More Help?

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

