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KaiNexus Training: Basics 102

Tasks

KaiNexus

WELCOME

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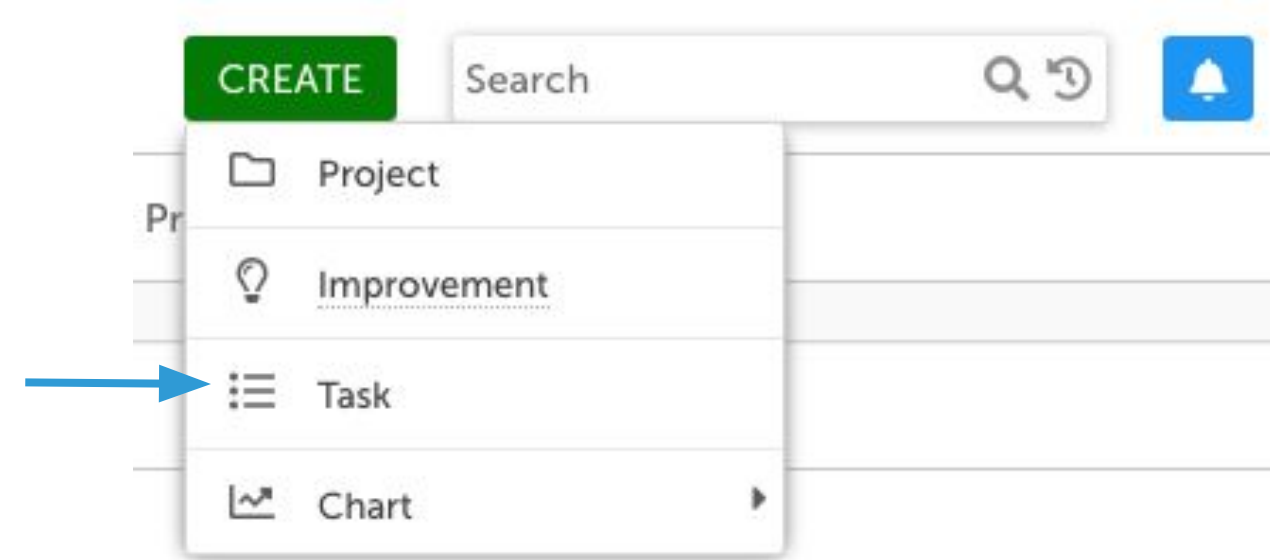
TASKS

Key Characteristics:

- Small action items

- Can be part of another Item or can be freestanding

Creating a New Task:

1. Click the green Create button
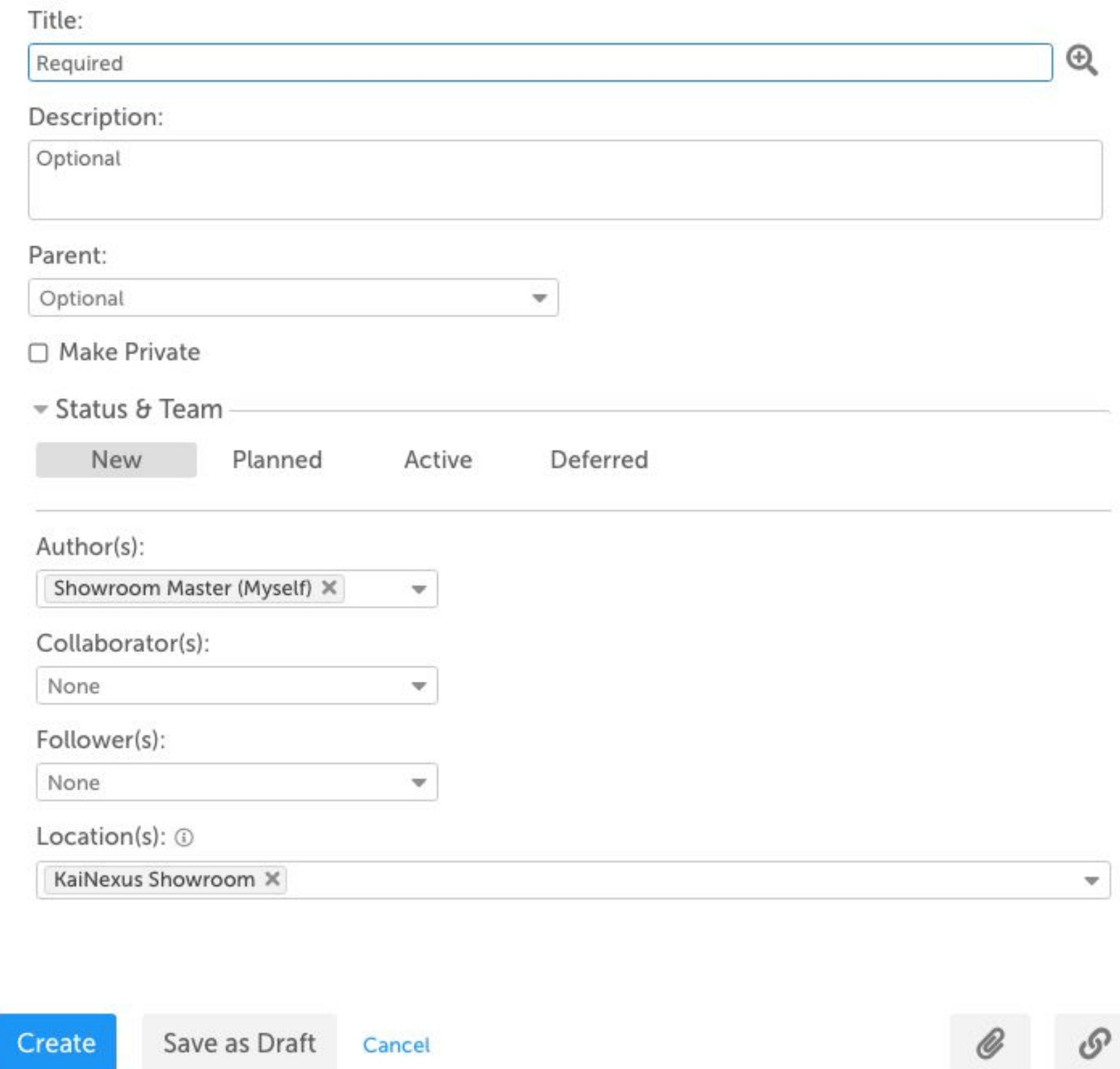
2. Select your desired Task template from the dropdown

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

   Start with a short summary of your Task - 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 Task:

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 Task under

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

5. Select the Status of your new Task.
    - **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 Task team:

    - Author: Originally created the Task
    - Responsible: Responsible for working on the Task
    - 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)
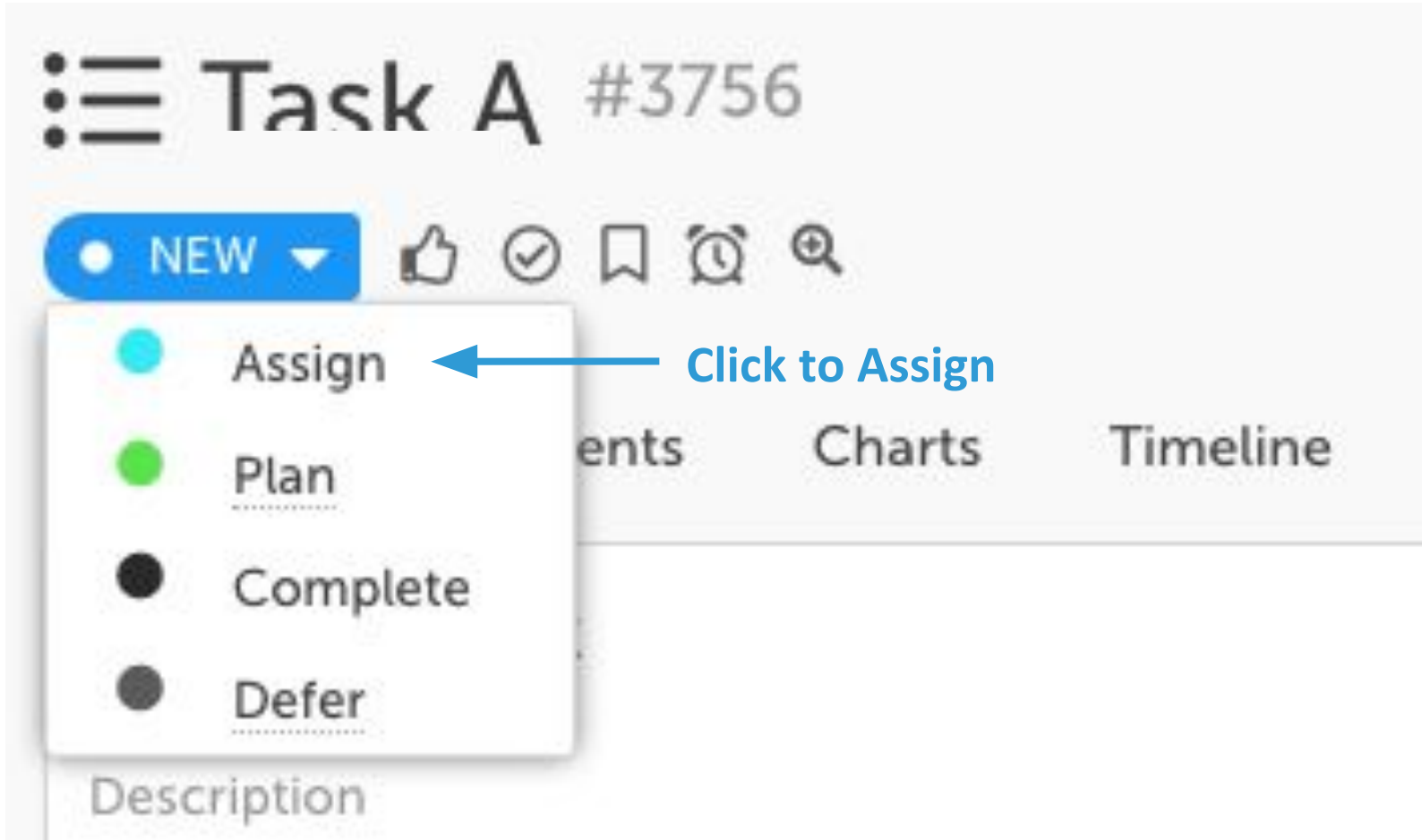
Assigning a Task:

If you select Active when creating a new Task, you'll be required to give it a Due Date and a Responsible person. Once you click Create on that Task, it'll automatically be activated and today will be the Start Date.

If you Created the Task in New status and now want to assign 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).
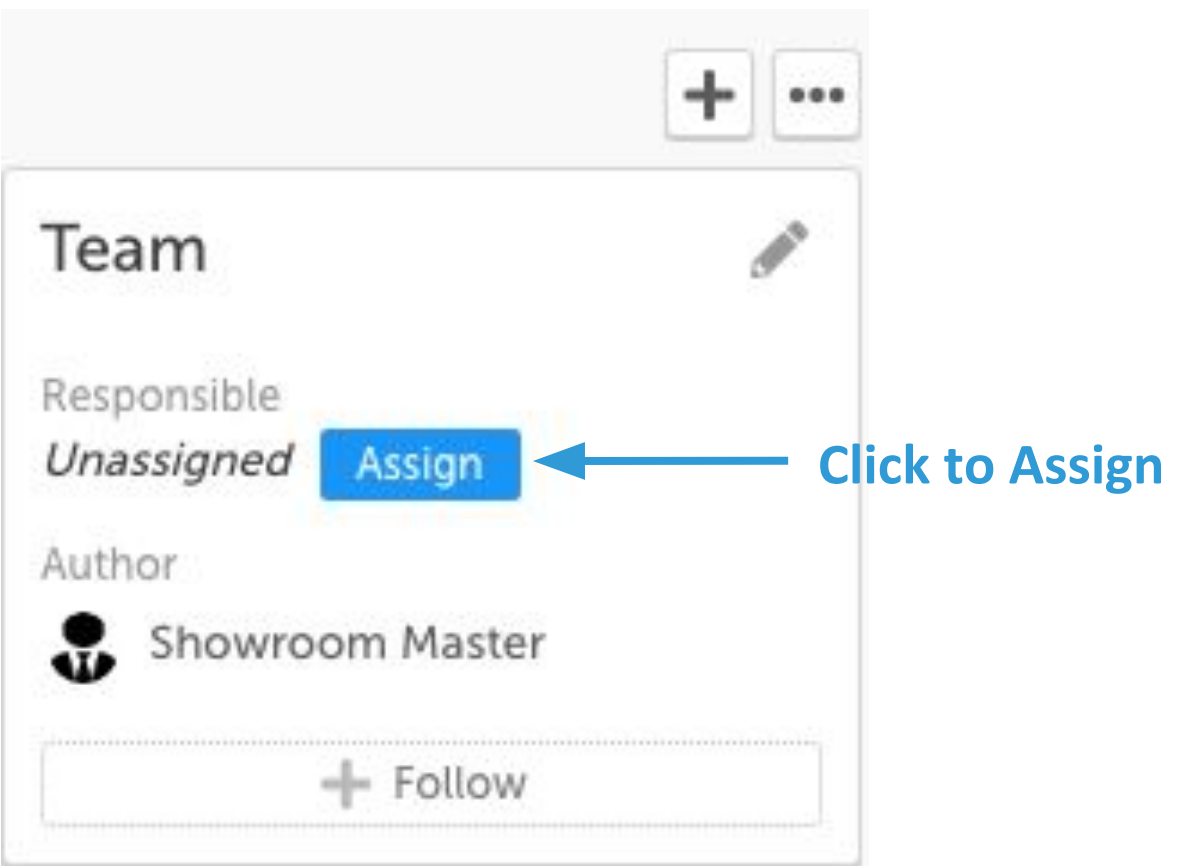
KaiNexus

Assigning a Task:

Click to Assign

OR

Click to Assign

Assign a Responsible person and a Due Date.

The Responsible person can be anyone with an active KaiNexus account.

By default, today is the start date. By making the start date sometime in the future, the Improvement will move into Planned status.

If you're assigning it to someone other than yourself, leave a comment to give that person more context on the Task.

Add the rest of the team if necessary, and click Assign.

Working on a Task:

Edit Details
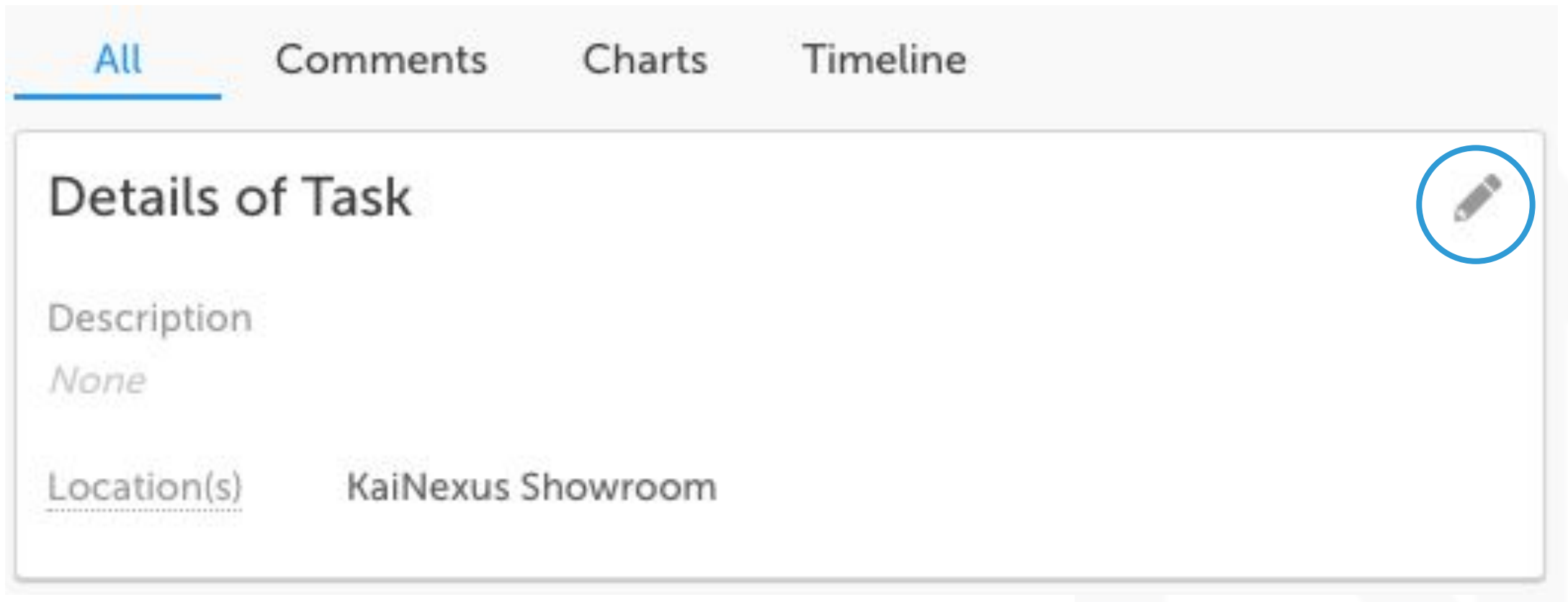
Edit Any Panel

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

Working on a Task:

Comments
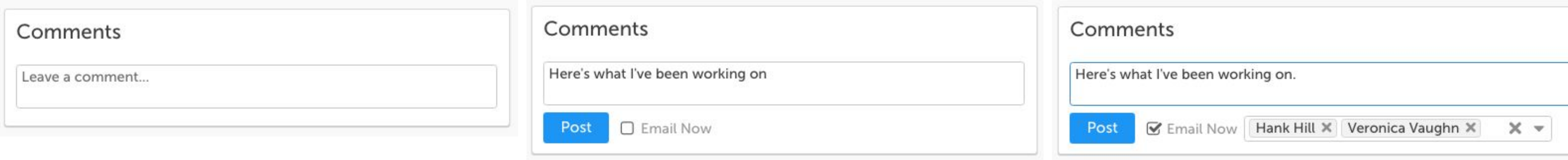
Comments facilitate communication and collaboration.

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 Task Team. Click Email Now if you want to send an immediate email to specific people.

Working on a Task:

Timeline

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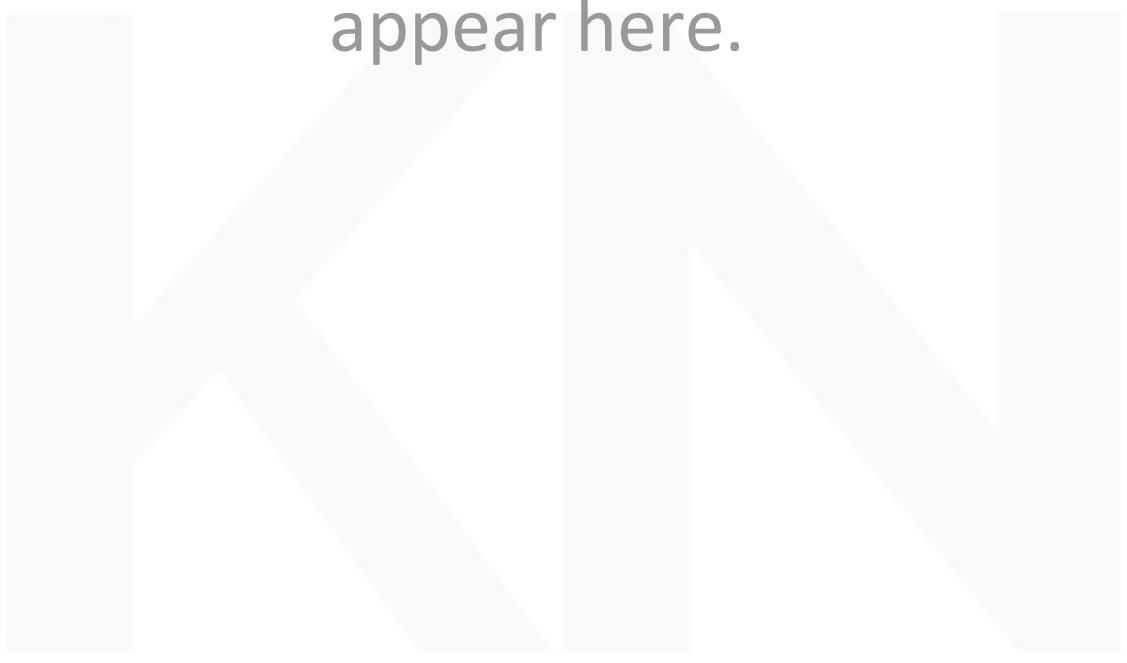
Working on a Task:

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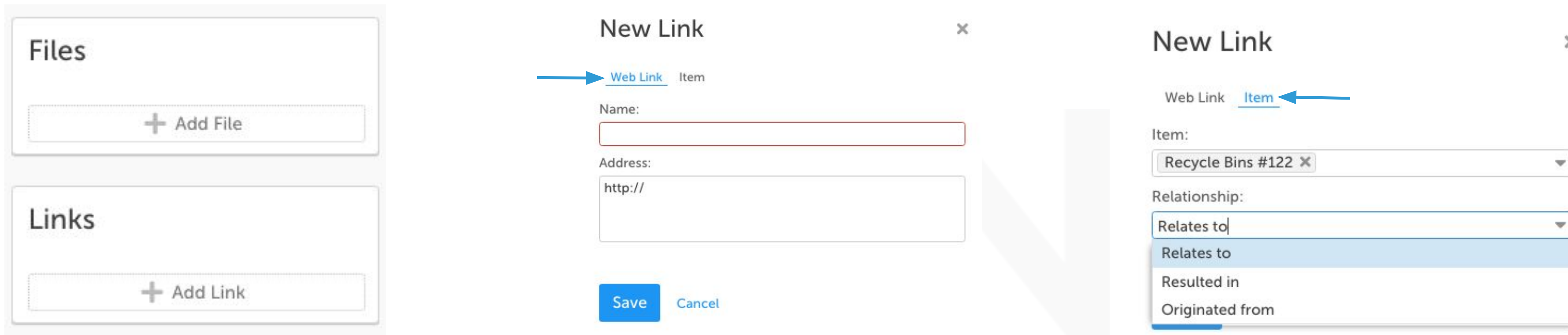
Files: Attach an image, PDF, or Word, PPT, Excel, etc. directly from your computer.

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).

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Working on a Task:

Dates

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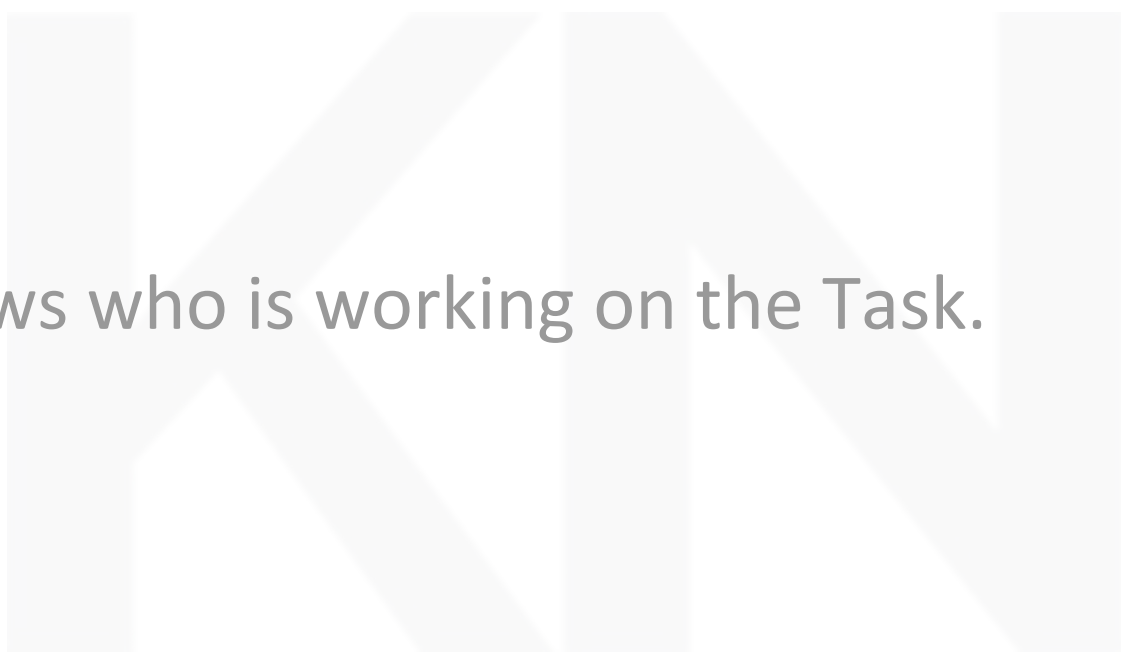
Working on a Task:

Team
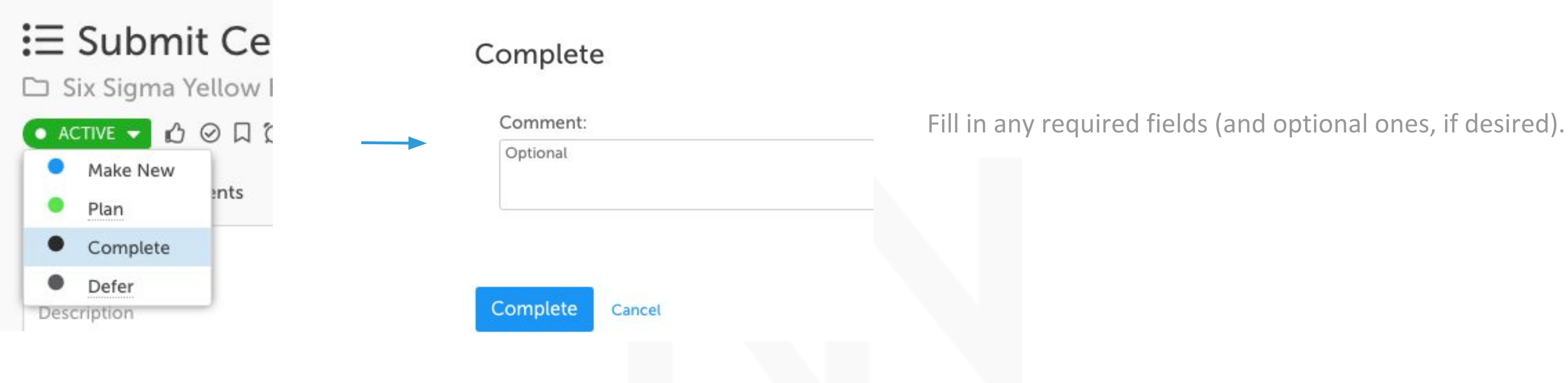
This panel shows who is working on the Task.
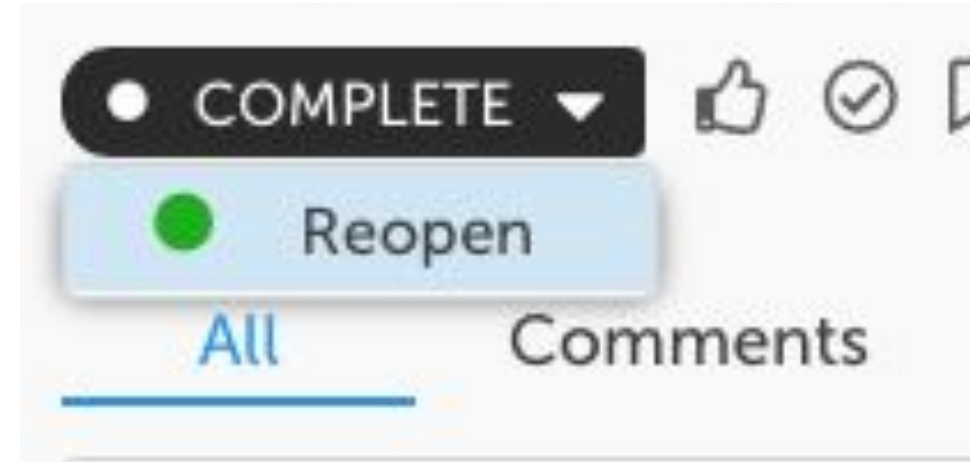
Complete a Task:

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 Tasks 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 Task again, simply select Reopen from the status picker.

Need More Help?

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

KaiNexus

Submit a Ticket   Sign in

KaiNexus Support

| Search | **Search** |

Coaching   The Basics

Working with Your Items   Boards and Cards

Lists of Items and People   Reports

The Admin Area   Additional Modules and Customization

KaiNexus Updates

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