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KaiNexus Training: Basics 102

# Tasks

# WELCOME



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Product Manager

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:

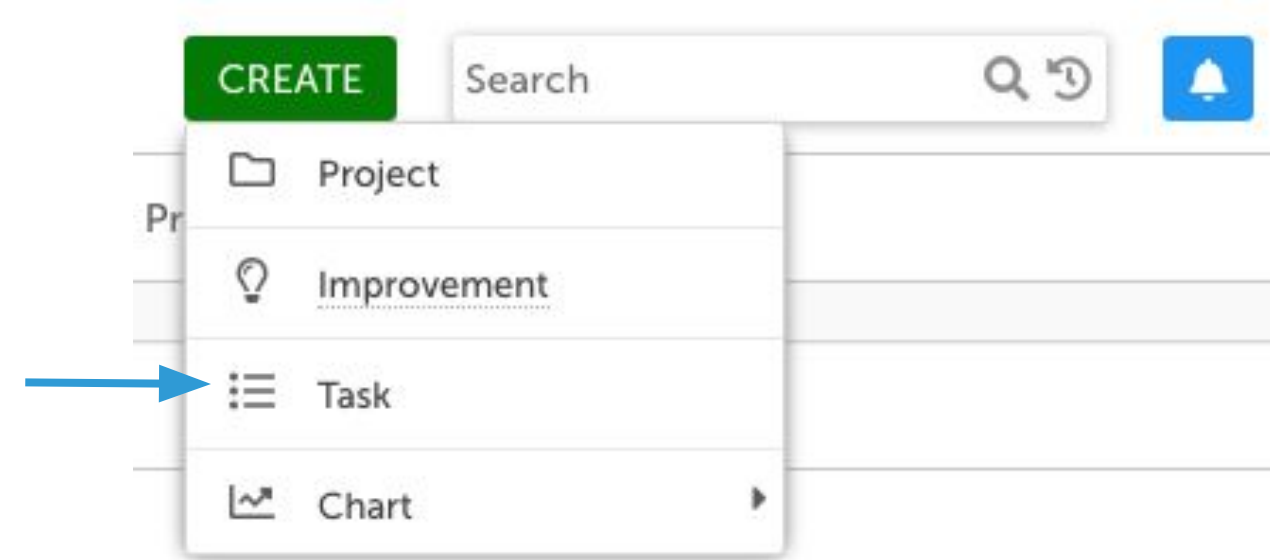
- Small action items
- Can be part of another Item or can be freestanding



# Creating a New Task:

1. Click the green Create button

2. Select your desired Task template from the dropdown



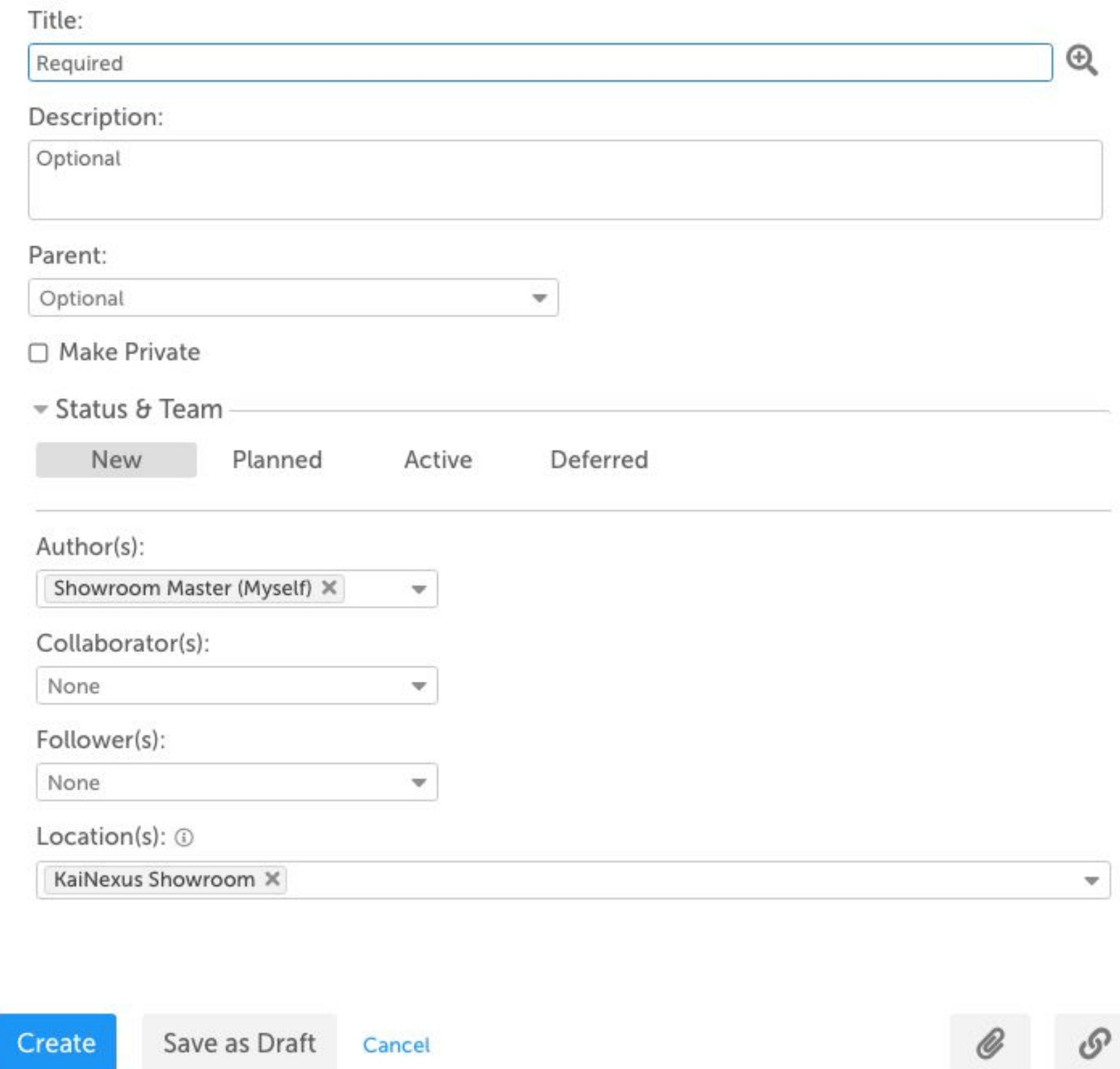
3. Fill in the Required and Optional fields as needed. This will populate all of the information for your Task (note that the available fields shown here may differ from those of your organization).

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.

## Create Task



Title: Required

Description: Optional

Parent: Optional

Make Private

▼ Status & Team

New Planned Active Deferred

Author(s): Showroom Master (Myself) X

Collaborator(s): None

Follower(s): None

Location(s): KaiNexus Showroom X

Create Save as Draft Cancel

# Creating a New Task:

Title:  
Required

Description:  
Optional

Parent:  
Optional

Make Private

▼ Status & Team

New Planned Active Deferred



Author(s):  
Showroom Master (Myself) X

Collaborator(s):  
None

Follower(s):  
None

Location(s): ⓘ  
KaiNexus Showroom X

Create Save as Draft Cancel

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:

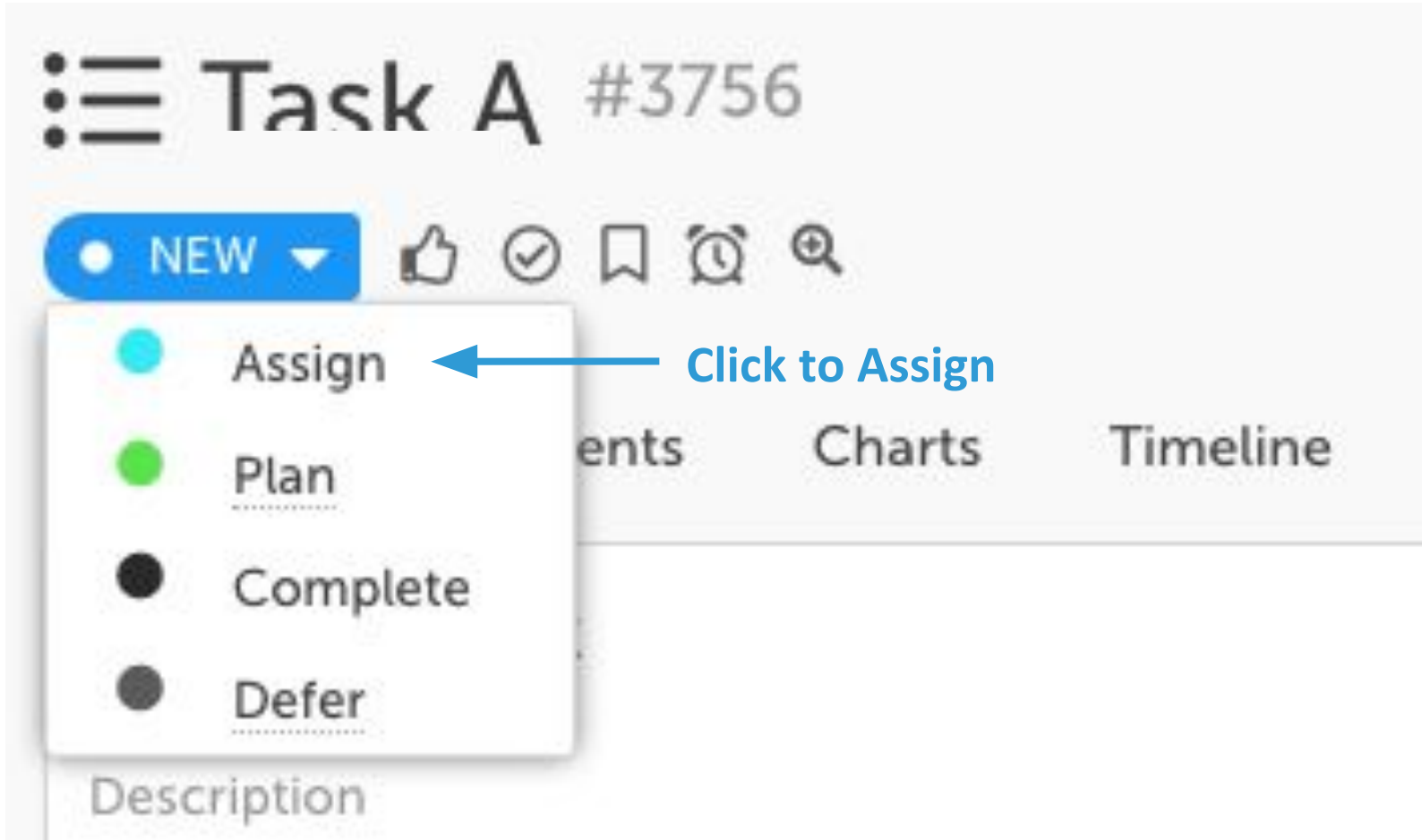
If you select Active when creating a new Task, you'll be required to give it a Due Date and a Responsible person. Once you click Create on that Task, it'll automatically be activated and today will be the Start Date.

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).

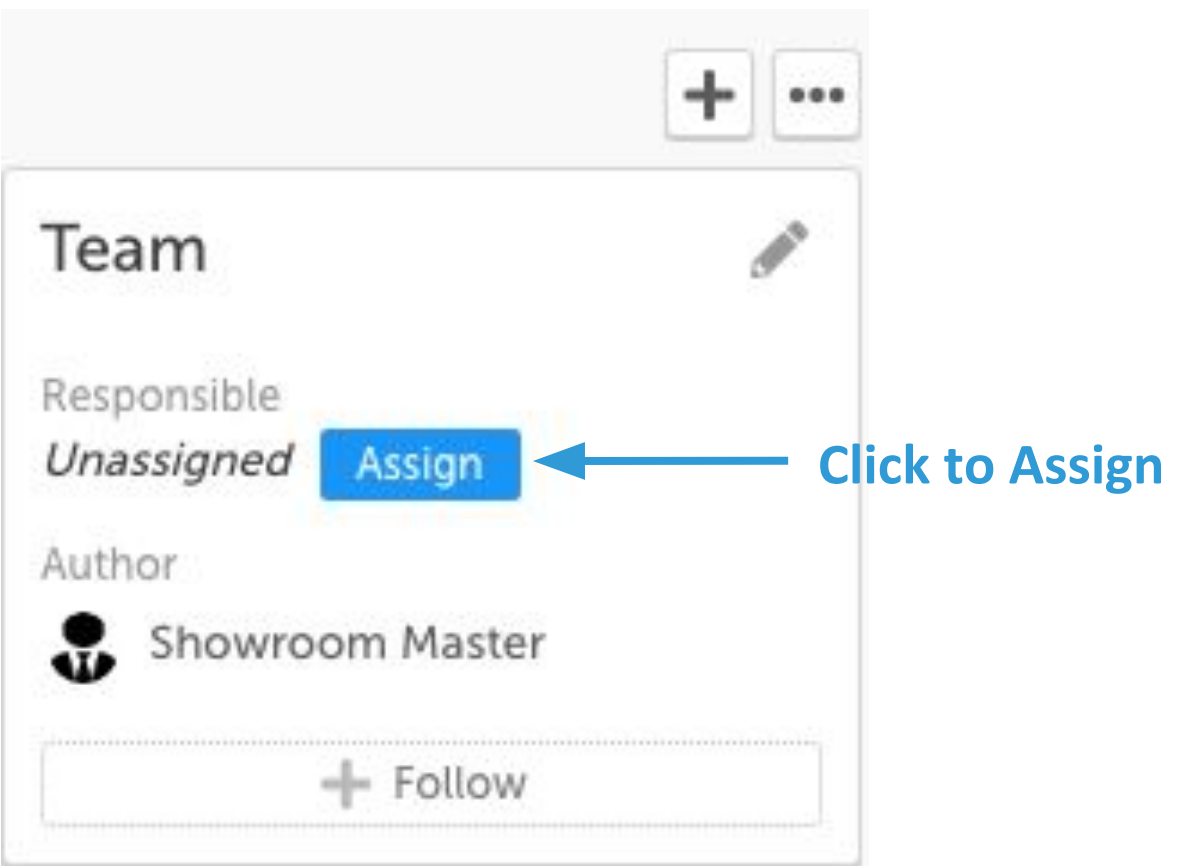
The screenshot displays the KaiNexus user interface. At the top, there is a 'Status & Team' section with buttons for 'New', 'Planned', 'Active', and 'Deferred'. Below these is a 'Due Date' field with a 'Required' label and a calendar icon. A green 'CREATE' button is visible on the left. A search bar with a magnifying glass icon and a notification bell icon is on the right. Below this is a blue navigation bar with 'Personal Board' and a dropdown arrow, followed by 'Welcome!' and breadcrumb navigation: 'Navigation Point' and 'Standa'. The main content area is titled '(34) My Tasks' and contains a list of tasks:

- Complete Week 1 Agenda**  
Status: Planned Created On: May 01, 2020 Author: Showroom Master
- Complete Week 2 Agenda**  
Status: Planned Created On: May 01, 2020 Author: Showroom Master
- Submit Certification for Manager Approval**  
Status: Planned Created On: May 01, 2020 Author: Showroom Master

# Assigning a Task:



OR



### Assign Task

Responsible:  
Required

Due Date:  
Required

Leave a comment:  
Optional

Collaborator(s):  
None

Follower(s):  
None

Location(s):  
KaiNexus Showroom

Advanced

Assign Cancel

## Assign a Responsible person and a Due Date.

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

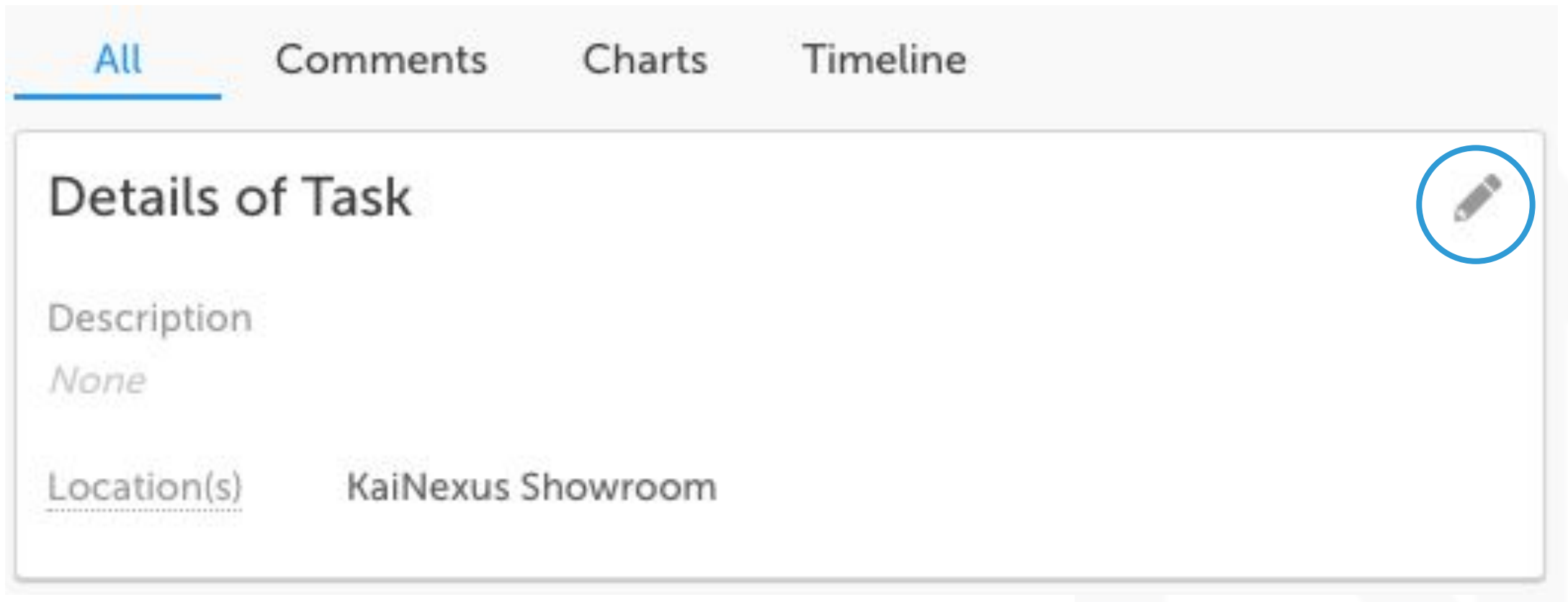
By default, today is the start date. By making the start date sometime in the future, the Improvement will move into Planned status.

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



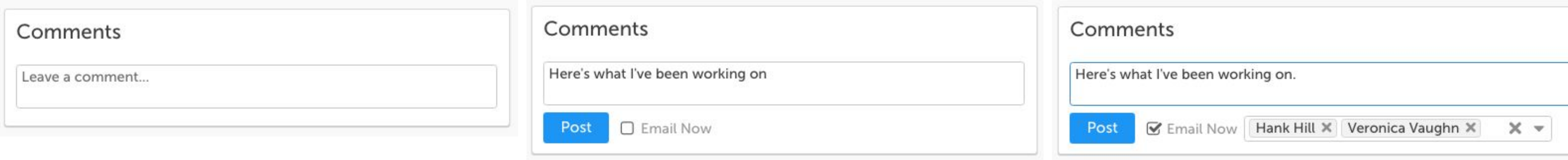
Edit Any Panel

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

### 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.

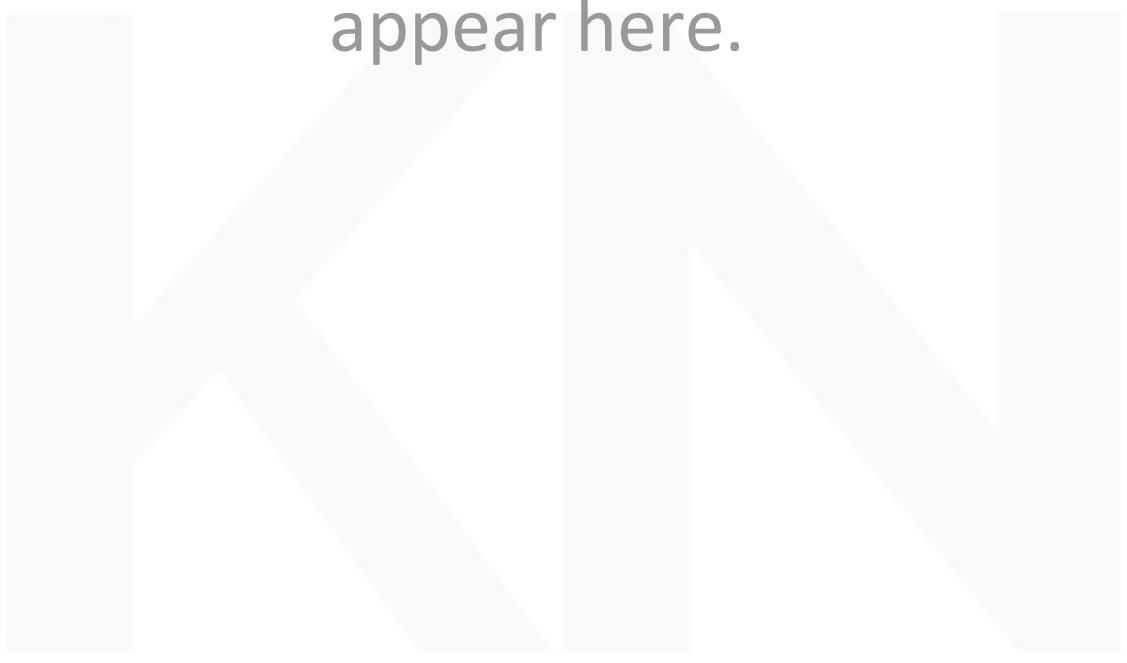
Tuesday  
Apr 21, 2020

- 10:09 AM  Greg Jacobson updated the Title.
- 10:09 AM  Greg Jacobson updated the Class Topic.

Sunday  
Apr 19, 2020

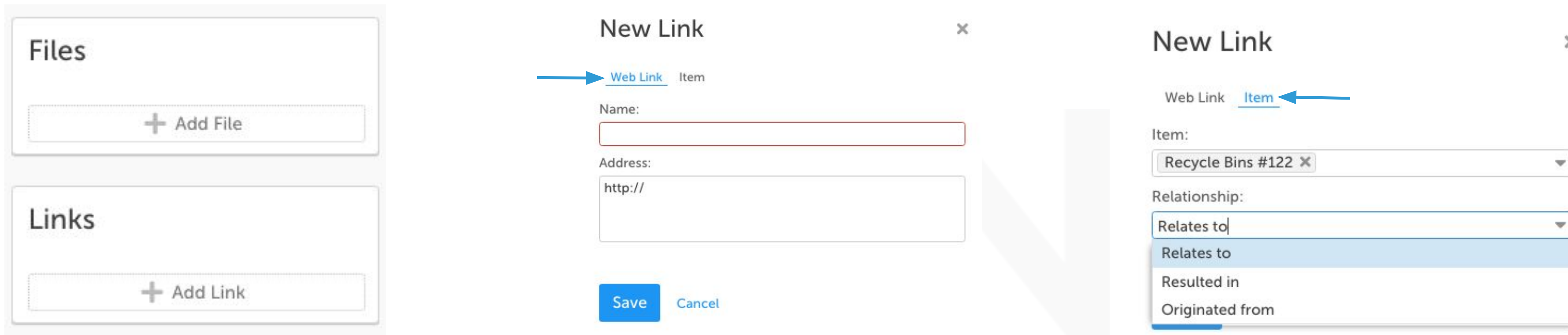
- 2:33 PM  Greg Jacobson updated the Category.

The Timeline is an audit trail that keeps track of everything happening on a 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).

# Working on a Task:

## Dates


### Dates


Created	Apr 22, 2020
Start	Apr 23, 2020 
Due	Apr 30, 2020 
	<input type="button" value="Complete"/>
Last Updated	Apr 23, 2020


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

**Team** 

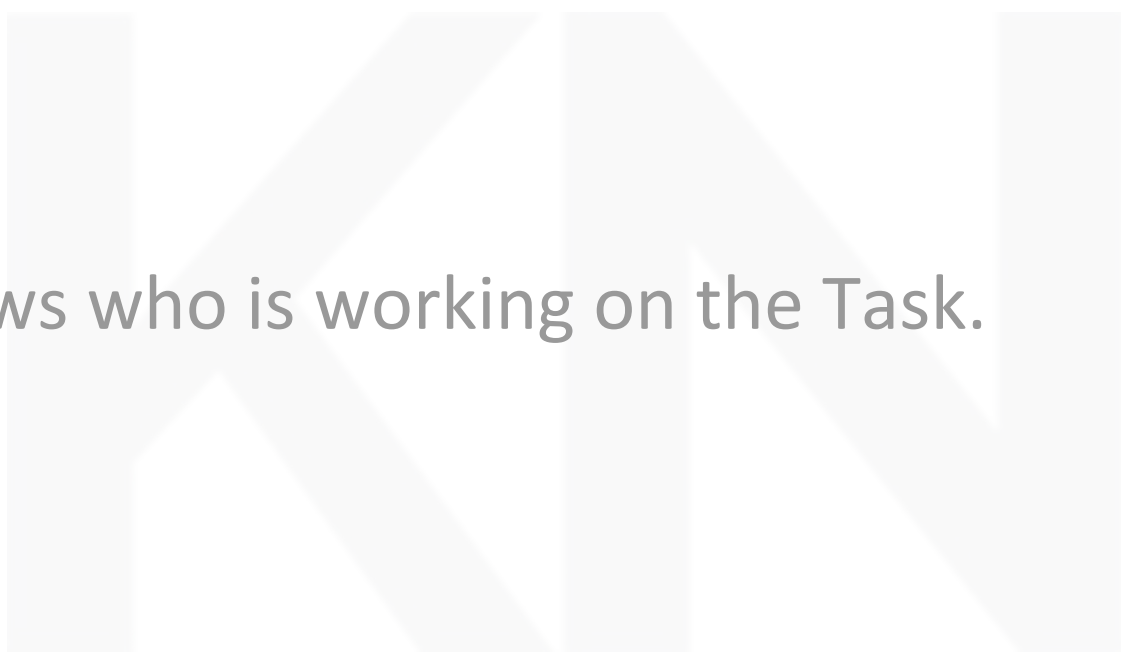
Responsible  
 Walter Mann

Assigner  
 Sungo-ho Kim

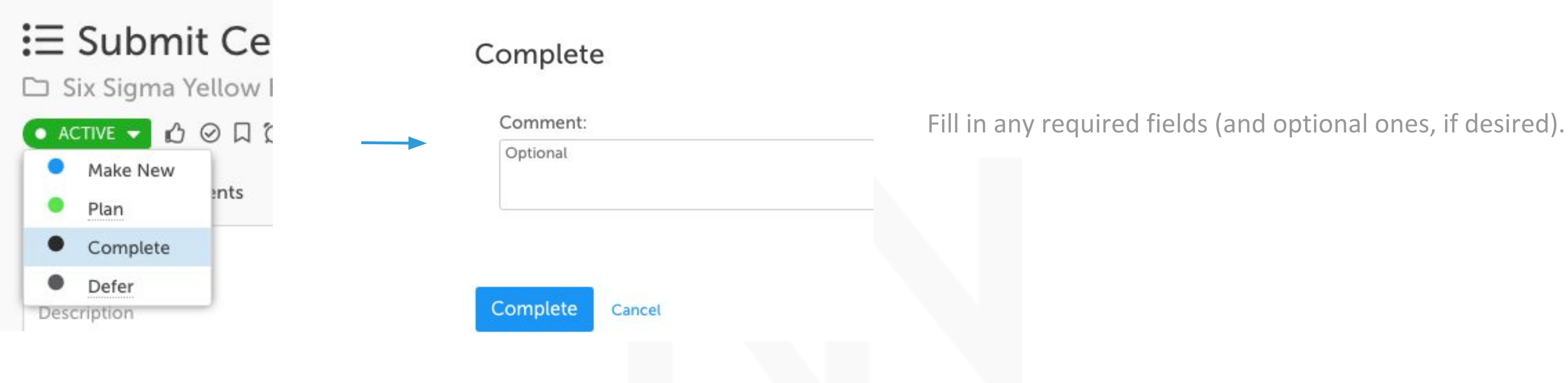
Author  
 Showroom Master

Follower  
Showroom Master

This panel shows who is working on the Task.



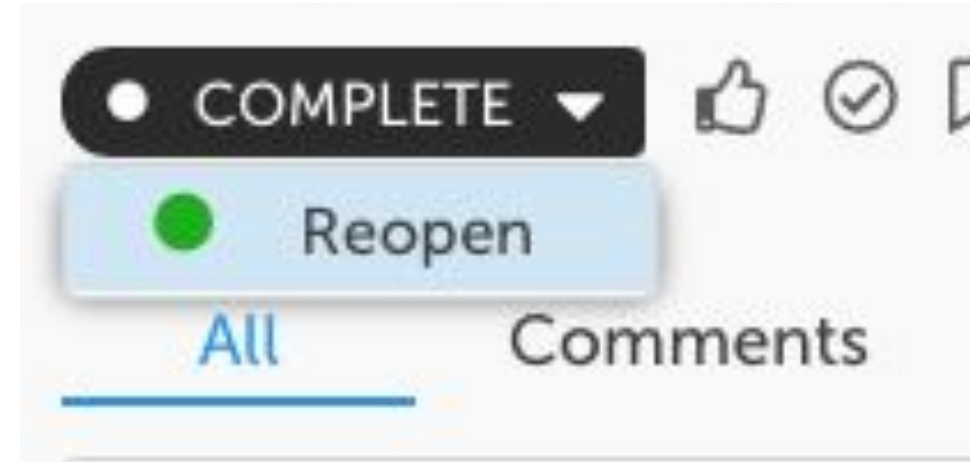
# Complete a Task:



The image shows a sequence of steps to complete a task. On the left, a task card for 'Submit Ce' is shown with a status of 'ACTIVE'. A dropdown menu is open, showing options: 'Make New', 'Plan', 'Complete', and 'Defer'. A blue arrow points from the 'Complete' option to a 'Complete' dialog box. The dialog box has a title 'Complete' and a 'Comment:' field with a sub-label 'Optional'. Below the field are 'Complete' and 'Cancel' buttons. A large grey arrow points from the dialog box towards the right, where the text 'Fill in any required fields (and optional ones, if desired).' is located.

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.



The image shows a close-up of the task status picker. The status is currently 'COMPLETE'. A dropdown menu is open, showing the 'Reopen' option with a green dot next to it. Below the menu, the text 'All Comments' is visible.

# Need More Help?

Visit [support.kainexus.com](https://support.kainexus.com) to search, browse, or request assistance.

**KaiNexus** [Submit a Ticket](#) [Sign in](#)

## KaiNexus Support

 **Search**

Coaching

Working with Your Items

Lists of Items and People

The Admin Area

KaiNexus Updates

The Basics

Boards and Cards

Reports

Additional Modules and Customization