



KN

A Guide to KaiNexus
User Types

SUPERUSER

Typically
< 1%
of Users

Who are these people?

Superusers are your Continuous Improvement (CI) Coaches or/and KaiNexus Champions. They are responsible for working with the KaiNexus team to configure and maintain, along with updating the system to utilize updates and enhancements.

Because they can access everything in KaiNexus, their views of the system will be detailed with the ability to customize and configure everything.

Typical Login Frequency: Daily

Can do EVERYTHING in KaiNexus.

VIEW

- Detailed
- No configuration limitations
- Top Navigation Bar

RECOMMENDED PERMISSIONS

ITEMS

- Submit, view, edit, and delete any item
- View and assign any new items
- View Private items
- Award Honor Roll status to any item
- Delete any item
- Import Charts

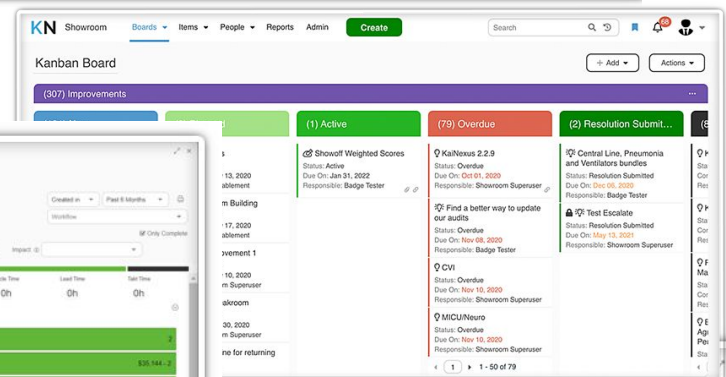
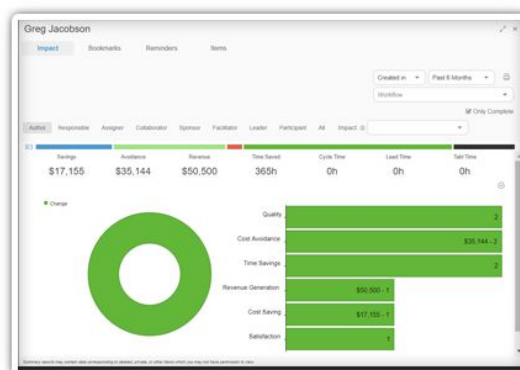
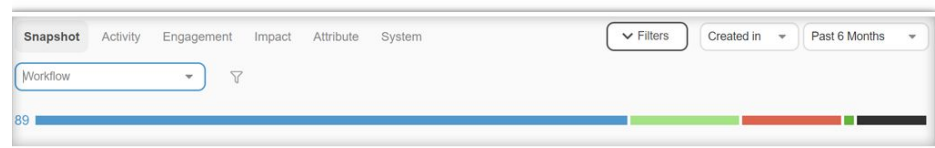
REPORTS

- View all Reports
- View Impact on any board or item

ADMIN

- Board Admin
- User Admin
- Quality Admin*
- System Admin*
- API Admin*
- X-Matrix Admin*
- Comment Admin*
- Timeline Admin*

* Permission Restricted to Superusers ONLY



User	Total	Complete Chan...	Change (%)	Status Bar
Greg Jacobson	93	3	100%	[Progress Bar]
Jeff Roussel	52	1	100%	[Progress Bar]
Harold Ramis	29	21	100%	[Progress Bar]
Becky Mitchum	22	1	20%	[Progress Bar]
Blake Wheeler	12	4	100%	[Progress Bar]

GENERAL

Most Common Type of User

VIEW

Can customize the view & access using Roles and permissions.

Increase the amount the User can do in KaiNexus to make Advanced General Users.

Can view Boards they have permissions for

Optional top navigation bar.

AVAILABLE PERMISSIONS

ITEMS

- View, edit, and delete any item they have permission for
- Create any Items they have correct roles for

REPORTS

- View/access Reports they have permissions for

ADMIN

- By default, they cannot create their own Boards or Cards unless they have permission to do so

Who are these people?

General Users are people that will manage work in KaiNexus. They are your most common user type, and will need to have access to a computer or mobile device at work. Their permissions are highly configurable at the Role level, enabling you to have advanced General Users that can do everything listed on the left while basic General Users have more limited, simplified views.

Typical Login Frequency

- Advanced General Users: Daily to Weekly
- Basic General Users: Weekly to Annually

Are the major drivers of improvement work in KaiNexus, but aren't necessarily the technology or improvement methodology experts.

The screenshot displays the KaiNexus user interface. On the left, a dashboard titled 'My Dashboard > Team Results' features a line chart for 'Improvement Cases' and a pie chart for 'At Risk' and 'On Track' items. On the right, a 'Create Improvement' modal form is open, showing a 'Title' field with a red border and error message 'Required' and 'This field is required.', and a 'Description' field with a red border and error message 'Required'. Below the modal, a 'Comments' section shows a comment from 'Showroom Superuser' dated 'Feb 01, 2022 2:07 PM' with the text 'This looks good!' and options to 'Reply', 'Pin', 'Edit', and 'Delete'.

CAPTURE

Used to Promote
Widespread
Engagement

Who are these people?

Capture Users have a highly simplified view of KaiNexus that allows them to submit improvements and participate in the work, and see what others are working on.

They don't necessarily log in as often as General Users, but they have the opportunity and are encouraged to participate in the improvement culture.

Typical Login Frequency: Weekly to Annually

Can participate in improvement, but not lead it.

VIEW

- Simplified
- Only see a list of their improvements
- Limited to need-to-know

AVAILABLE PERMISSIONS

CAN SUBMIT ITEMS VIA

- Mobile App
- Desktop
- Kiosk
- Email

CAN CREATE

- Improvements
- Tasks
- Incidents (if enabled in your account)

ACTIVITY

- Comment on their Items
- Search and view any Item
- Search for People & View User Profiles
- Can only access Lists of their own authored Items

The screenshot displays the KaiNexus user interface. At the top, there is a search bar with a magnifying glass icon and a refresh icon. Below the search bar, a 'Comments' section is visible, containing a text input field with the text 'This looks good!' and a 'Post' button. To the right of the 'Post' button is a checkbox labeled 'Email Now'. The main content area shows a task titled '2. Approve and implement patient throughput plan #1718' with a 'DRAFT' status. Below the task title, there are tabs for 'All', 'Comments', 'Tasks', and 'Timeline'. The 'Comments' tab is active, showing a 'Leave a comment...' input field. To the right of the task, there is a 'Team' section with the author 'Showroom Superuser' and a '+ Follow' button. A user profile card for 'Greg Jacobson' is overlaid on the bottom right. The profile card includes a profile picture, a 'View Badges' button, a 'View Activity' button, and a list of user details: Username: greg, User Type: Superuser, Network Location: Austin, Roles: Superuser, Location Leader, Hire Date: Mar 13, 2012, Physical Location: Texas, Work Phone: 555-555-0000, Mobile Phone: 555-555-1234, Pager: 555-555-4321, and Certifications: Kata Coach. At the bottom of the profile card, it shows 'Last Login: Jan 27, 2022 2:45 PM' and 'Last Updated: Feb 12, 2019 5:39 PM'.

WALLBOARD

Increase Entire Organization Knowledge of Improvement Work

Who are these people?

Wallboard Users, available with the Wallboard Module, are essentially "Read-Only" users.

This is ideal for situations where you want to leave one account signed into KaiNexus all day in a public location - such as displaying various Boards at a Kiosk - but don't want people making updates and changes to the system.

Typical Login Frequency: Weekly to Annually

Can only interact in KaiNexus in a "read-only" mode

VIEW

- Has "Read Only" access to Boards
- No Navigation Bar by default

AVAILABLE PERMISSIONS

CAN SUBMIT ITEMS VIA

- N/A

CAN CREATE

- N/A

ACTIVITY

- Access certain Boards they have permission to see - in read-only mode only

The screenshot displays the KaiNexus Wallboard interface. At the top, there is a navigation bar with "Welcome! > Standard Boards > Location Summary" and buttons for "+ Add" and "Actions". The main content area is divided into several sections:

- (77) My Long-Term Projects:** A list of projects under the "Locations" category, including "Lean Certification", "Class 5: Black Belt Projects", "Class 1: Initial Green Belt Training", "Basic Project", "Team Huddle Project", "Joan's Test Project", "RTRT", and "Test 1Apr (HB)".
- (111) My Open Tasks:** A list of tasks with details such as "Call HR", "Email manager", "Take pic of current parts presentation and put in attachment area", "Ask Ft. Hamilton location about their ergo chairs", and "Critical Success Factors".
- (352) My Rapid Improvements / Action Items:** A table with columns for Status, Template, Title, Responsible, Champion, Created Date, Start Date, Due Date, Completed, and Priority. It lists several items like "7. Staffing", "8. Post Go-Live Action Items", and "MICU/Neuro".
- (124) Charts:** Two charts are visible: "Employee Sat Scores - Austin" (a bar chart) and "Incident Tracking" (a line and bar chart).

KIOSK

Promotes Simple
Item Submission

VIEW

- Only has access to the submission screen

AVAILABLE PERMISSIONS

CAN SUBMIT ITEMS VIA

- Desktop
- Kiosk

CAN CREATE

- Improvements Only

ACTIVITY

- Submitting Items within the system

Who are these people?

Kiosk Users, available with the Kiosk Module, are solely focused on submitting Items within the system.

The Kiosk module that enables users to easily submit select templates from a kiosk without having to log into KaiNexus.

This is a great way to remove technical barriers and allow more people to participate in continuous improvement, regardless of whether or not they use a computer in their daily work.

Typical Login Frequency: Ideally, it is always logged in on a shared machine so it is always available

Can submit Items, but cannot participate in any other improvement work.

The image shows two overlapping screenshots of the KaiNexus system. The background screenshot is the login page, featuring the 'KN KaiNexus Demo' logo, a search bar with the placeholder text 'Search for your name to begin...', and a 'Continue' button. The foreground screenshot is a 'Create Improvement' modal form. It has a 'Title:' field with a red border and a 'Required' label, accompanied by a red error message: 'This field is required.' Below it is a 'Description:' field, also with a red border and a 'Required' label. At the bottom of the modal are three buttons: 'Create', 'Save as Draft', and 'Cancel'. There are also icons for a link and a refresh in the bottom right corner of the modal.