

# KaiNexus Item Imports

## Instructions & Tips

**Gray Columns** = You do not need to fill those out, they will be filled out by our team.

**Red Columns** = **REQUIRED** for every Item.

**Green Columns** = These are **OPTIONAL**, consisting of Fields and Attributes from your Idea template. Add information to these cells to make sure your imported Ideas have all of the necessary information.

**\*\* NOTE: Attributes values must match exactly with an existing Attribute within KaiNexus \*\***

**Blue Columns** = These are **OPTIONAL** and need only be completed if applicable to your use case. The Parent column only needs to be completed if you want an Item to be nested under an Item that already exists in KaiNexus.

**Orange Columns** = These are **REQUIRED**, but are only for certain Items:

	NEW	PLANNED	OVERDUE	ACTIVE	RESOLUTION SUBMITTED	COMPLETE	DEFERRED
ID	✓	✓	✓	✓	✓	✓	✓
Summary (Title)	✓	✓	✓	✓	✓	✓	✓
Status	✓	✓	✓	✓	✓	✓	✓
Originating Location(s)	✓	✓	✓	✓	✓	✓	✓
Responsible Location(s)	✓	✓	✓	✓	✓	✓	✓
Facilitators / Author	✓	✓	✓	✓	✓	✓	✓
Authored / Created Date	✓	✓	✓	✓	✓	✓	✓
Last Updated	✓	✓	✓	✓	✓	✓	✓
Responsible			Improvements, Tasks, Incidents	✓	✓	✓	
Assigner			Improvements, Tasks, Incidents	✓	✓	✓	
Activate Date (Start Date)			✓	✓	✓	✓	
Assigned Date			✓	✓	✓	✓	

	NEW	PLANNED	OVERDUE	ACTIVE	RESOLUTION SUBMITTED	COMPLETE	DEFERRED
Due Date			✓	✓	✓	✓	
Resolution Submit Date					✓	✓	
Resulted in a Change (Y/N)							
Complete Date						✓	
Review Date							✓

## CRITICAL NOTES:

- Adhoc Fields cannot be imported and will need to be entered manually.
- Weighted Scores cannot be imported
- Status must match up with one of the KaiNexus statuses (**New**, **Planned**, **Active**, **Resolution Submitted**, **Complete**)
- Users included in the import must match EXACTLY with their Usernames within KaiNexus. Any misspellings, typos, etc. will result in the import failing.
- Originating and Responsible Locations must match EXACTLY with an existing Network Location within KaiNexus. Any misspellings, typos, etc. will result in the import failing.
- The "*Template Name* - Impact" sheet only needs to be filled out for Completed Items for which you need to record an Impact.