KaiNexus Workflow Team
Permissions & Notifications

There are four types of Teams in KaiNexus: Simple Team, Standard Team, Advanced Team, and Author-Only Team. Each Team type is designed to give you a unique but complementary approach to your improvement work. Learn about what people assigned to each Team type can do in KaiNexus and what notifications they'll receive as specific actions are taken.

KaiNexus Simple Team Permissions

	Responsible	Assigner	Author	Collaborator	Follower
Manage					
Edit Details	✓	✓	✓	✓	
Edit Location(s)	Must have the Assign System Role permission.				
Edit Team	✓	✓	✓	✓	
Change Status		✓			
Edit Create Date *	✓	✓	✓	✓	
Edit Start Date	Must have the Assign System Role permission.				
Edit Due Date	Must have the Assign System Role permission (Responsible can edit if given permission by Assigner - this is an optional template configuration)				
Edit Complete Date *	✓	✓	✓	✓	
Edit Review By Date	✓	✓	✓	✓	
Edit Milestone Dates	✓	✓	✓	✓	
Archive	✓	✓	✓	✓	
Edit Target & Forecast	✓	✓	✓	✓	
Make a Copy					
Request					
Accept/Deny a Request					
Collaborate					
Share					
Add Comments	✓	✓	✓	✓	✓
Attach/Remove Files & Links	✓	✓	✓	✓	
Submit Resolution	✓				
Resolve		✓			
Organize					
Add Nested Items	✓	✓	✓	✓	

Misc.	
Make Private	The Author, Assigner, and Responsible can Delete Improvements or make them Private IF ALSO enabled on their System Role permissions.
Delete	

* Must be enabled at the template level

KaiNexus Simple Team Notifications

≡ **Digest** | ● **Blue Dot** | ⚑ **Flag** | ✉ **Immediate Email**

	Author	Assigner	Responsible	Collaborator	Follower
Manage					
Edit Team			≡ ●		
Edit Date		≡ ●	≡ ●		
Edit Due Date		≡ ⚑	≡ ⚑		
Change Status	≡ ⚑	≡ ⚑	≡ ⚑	≡ ⚑	≡ ⚑
Collaborate					
Comments	≡ ● ⚑	≡ ● ⚑	≡ ● ⚑	≡ ● ⚑	≡ ● ⚑
Added to Team	≡ ⚑ ✉	≡ ⚑ ✉	≡ ⚑ ✉	≡ ⚑	≡ ⚑
Organize					
Complete Nested Item	≡ ⚑	≡ ⚑	≡ ⚑	≡ ⚑	≡ ⚑
Misc.					
Made Private		≡ ●	≡ ●		
Delete	✉	✉	✉	✉	✉
Honor Roll	≡ ⚑	≡ ⚑	≡ ⚑	≡ ⚑	≡ ⚑

KaiNexus Standard Team Permissions

	Responsible	Assigner	Author	Collaborator	Follower
Manage					
Edit Details	✓	✓	✓	✓	
Edit Location(s)	Must have the Assign System Role permission.				
Edit Team	✓	✓	✓	✓	
Change Status		✓			
Edit Create Date *	✓	✓	✓	✓	
Edit Start Date	Must have the Assign System Role permission.				
Edit Due Date	Must have the Assign System Role permission (Responsible can edit if given permission by Assigner - this is an optional template configuration)				
Edit Complete Date *	✓	✓	✓	✓	
Edit Review By Date	✓	✓	✓	✓	
Edit Milestone Dates	✓	✓	✓	✓	
Archive	✓	✓	✓	✓	
Edit Target & Forecast	✓	✓	✓	✓	
Make a Copy					
Collaborate					
Share					
Add Comments	✓	✓	✓	✓	✓
Attach/Remove Files & Links	✓	✓	✓	✓	
Submit Resolution	✓				
Resolve		✓			
Organize					
Add Nested Items	✓	✓	✓	✓	
Misc.					
Make Private	The Author, Assigner, and Responsible can Delete Improvements or make them				

Delete	Private IF ALSO enabled on their System Role permissions.

* Must be enabled at the template level

KaiNexus Standard Team Notifications

≡ Digest | ● Blue Dot | ⚑ Flag | ✉ Immediate Email

	Author	Assigner	Responsible	Collaborator	Follower
Manage					
Edit Team			≡ ●		
Edit Date		≡ ●	≡ ●		
Edit Due Date		≡ ⚑	≡ ⚑		
Change Status	≡ ⚑	≡ ⚑	≡ ⚑	≡ ⚑	≡ ⚑
Collaborate					
Comments	≡ ● ⚑	≡ ● ⚑	≡ ● ⚑	≡ ● ⚑	≡ ● ⚑
Added to Team	≡ ⚑ ✉	≡ ⚑ ✉	≡ ⚑ ✉	≡ ⚑	≡ ⚑
Organize					
Complete Nested Item	≡ ⚑	≡ ⚑	≡ ⚑	≡ ⚑	≡ ⚑
Misc.					
Made Private		≡ ●	≡ ●		
Delete	✉	✉	✉	✉	✉
Honor Roll	≡ ⚑	≡ ⚑	≡ ⚑	≡ ⚑	≡ ⚑

KaiNexus Advanced Team Permissions

	Sponsor	Facilitator	Leader	Participant	Follower
Manage					
Edit Details	✓	✓	✓		
Edit Location(s)	✓	✓	✓		
Edit Team	✓	✓	✓		
Change Status	✓	✓	✓		
Edit Create Date *	✓	✓	✓		
Edit Start & Due Dates	✓	✓	✓		
Edit Complete Date *	✓	✓	✓		
Edit Review By Date	✓	✓	✓		
Edit Milestone Dates	✓	✓	✓		
Archive	✓	✓	✓		
Edit Target & Forecast	✓	✓	✓		
Make a Copy					
Collaborate					
Share					
Add Comments	✓	✓	✓	✓	✓
Attach/Remove Files & Links	✓	✓	✓	✓	
Submit Resolution	✓	✓	✓	✓	
Resolve		✓			
Organize					
Add Nested Items	✓	✓	✓	?	
Misc.					
Make Private	Facilitators can Delete Projects or make them Private IF ALSO enabled on their System Role permissions.				
Delete					

* Must be enabled at the template level

KaiNexus Advanced Team Notifications

≡ Digest | ● Blue Dot | 🚩 Flag | ✉ Immediate Email

	Sponsor	Facilitator	Leader	Participant	Follower
Manage					
Edit Detail	≡ ●	≡ ●	≡ ●		
Edit Team	≡ ●	≡ ●	≡ ●		
Edit Dates	≡ ●	≡ ●	≡ ●		
Change Status	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩
Collaborate					
Comments	≡ ● 🚩	≡ ● 🚩	≡ ● 🚩	≡ ● 🚩	≡ ● 🚩
Added to Team	≡ ●	≡ 🚩 ✉	≡ 🚩 ✉	≡ ●	≡ ●
Organize					
Add Nested Item		≡ 🚩	≡ 🚩		
Remove Nested Item		≡ 🚩	≡ 🚩		
Assign Nested Item		≡ 🚩	≡ 🚩		
Complete Nested Item	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩	≡ 🚩
Change Status Nested Item		≡ 🚩	≡ 🚩		
Honor Roll on Nested Item		≡ 🚩	≡ 🚩		
Delete Nested Item		✉	✉		
Comment on Nested Item		≡ 🚩	≡ 🚩		
Misc					
Make Private	≡ ●	≡ ●	≡ ●	≡ ●	≡ ●
Delete	✉	✉	✉	✉	✉

KaiNexus Author-Only Team Permissions

	Author	Follower
Manage		
Edit Details	✓	
Edit Team	✓	
Edit Location(s)	✓	
Assign & Request	✓	
Change Status	✓	
Edit Create Date *	✓	
Edit Start Date	✓	
Edit Due Date	✓	
Edit Complete Date *	✓	
Edit Review By Date	✓	
Edit Milestone Dates	✓	
Archive	✓	
Edit Target & Forecast	✓	
Make a Copy		
Collaborate		
Share		
Add Comments	✓	✓
Attach / Remove Files & Links	✓	
Submit Resolution & Resolve	✓	
Organize		
Add Nested Items	✓	

Misc.	
Make Private	The Author can Delete Charts or make them Private IF ALSO enabled on their System Role permissions.
Delete	

* Must be enabled at the template level

KaiNexus Author-Only Team Notifications

☰ **Digest** | ● **Blue Dot** | 🚩 **Flag** | ✉ **Immediate Email**

	Author	Follower
Manage		
Change Status	☰ 🚩	☰ 🚩
Collaborate		
Comments	☰ ● 🚩	☰ ● 🚩
Added to Team	☰ 🚩	☰ 🚩
Organize		
Add Nested Item	☰ 🚩	☰ 🚩
Remove Nested Item	☰ 🚩	☰ 🚩
Complete Nested Item	☰ 🚩	☰ 🚩
Misc.		
Delete	✉	✉

More Information

Learn More at Support.KaiNexus.com

[Notifications](#) | [What is a Team?](#) | [Advanced Team](#) | [Standard Team](#) | [Simple Team](#) | [Author-Only Team](#)

Need to disable some default Team role-based email notifications? [Learn more here](#).
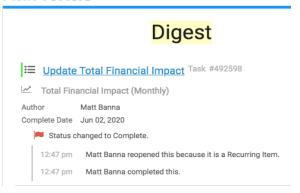
Examples of Notification Types:

RED FLAG

BLUE DOT

EMAIL DIGEST

IMMEDIATE EMAIL