

# KaiNexus Team Types

## Permissions and Notifications

All Templates in KaiNexus will have one of four Team Types: Advanced, Simple, Standard, or Author-Only.

The Team Type determines which Team Roles are available on the Item **and** which permissions and notifications people receive when assigned one of those Team Roles.

Use this guide to learn which permissions and notifications accompany each Team Role based on the Team.

<a href="#">Advanced Team Permissions</a> .....	2
<a href="#">Advanced Team Notifications</a> .....	3
<a href="#">Standard Team Permissions</a> .....	4
<a href="#">Standard Team Notifications</a> .....	5
<a href="#">Simple Team Permissions</a> .....	6
<a href="#">Simple Team Notifications</a> .....	7
<a href="#">Author-Only Team Permissions</a> .....	8
<a href="#">Author-Only Team Notifications</a> .....	9
<a href="#">More Information</a> .....	10

# Advanced Team Permissions

	Sponsor	Facilitator	Leader	Participant	Follower
<b>Manage</b>					
Edit Details	✓	✓	✓		
Edit Location(s)	✓	✓	✓		
Edit Team	✓	✓	✓		
Change Status	✓	✓	✓		
Complete - Resolution not enabled		✓			
Edit Create and Complete Dates <sup>1</sup>	✓	✓	✓		
Edit Start & Due Dates	✓	✓	✓		
Edit Review By Date	✓	✓	✓		
Archive	✓	✓	✓		
<b>Collaborate</b>					
Add Comments	✓	✓	✓	✓	✓
Attach/Remove Files & Links	✓	✓	✓	✓	
<b>Resolution</b>					
Edit Target and Forecast	✓	✓	✓		
Submit Resolution	✓	✓	✓		
Resolve		✓			
<b>Organize</b>					
View Nested Items <sup>2</sup>	✓	✓	✓	✓	✓
Add Nested Items	✓	✓	✓	✓	
Edit Nested Items	✓	✓	✓		
<b>Misc.</b>					
Make Private	Sponsors, Facilitators, and Leaders can delete the Item or make it private if the permission is ALSO included in their System Role.				
Delete					

<sup>1</sup> Must be enabled at the template level.

<sup>2</sup> Private nested Items are not visible unless the "Allow Team to see Private Nested Items" checkbox is enabled in the Template's configuration and selected.

# Advanced Team Notifications

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

	Sponsor	Facilitator	Leader	Participant	Follower
<b>Manage</b>					
Edit Detail	☰ ●	☰ ●	☰ ●		
Edit Team	☰ ●	☰ ●	☰ ●		
Edit Dates	☰ ●	☰ ●	☰ ●		
Change Status*	☰ 🚩	☰ 🚩	☰ 🚩	☰ 🚩	☰ 🚩
<b>Collaborate</b>					
Comments	☰ ● 🚩	☰ ● 🚩	☰ ● 🚩	☰ ● 🚩	☰ ● 🚩
Added to Team	☰ ●	☰ 🚩 ✉	☰ 🚩 ✉	☰ ●	☰ ●
<b>Organize</b>					
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		☰ 🚩	☰ 🚩		
<b>Misc</b>					
Make Private	☰ ●	☰ ●	☰ ●	☰ ●	☰ ●
Delete	✉	✉	✉	✉	✉

\*When an Item is in Overdue Status, the notification will be sent to the Team every day until it is no longer Overdue.

# Standard Team Permissions

	Responsible	Assigner	Author	Collaborator	Follower
<b>Manage</b>					
Edit Details	✓	✓	✓	✓	
Edit Location(s)		✓			
Edit Team	✓	✓	✓	✓	
Change Status		✓			
Complete - Resolution not enabled	✓	✓			
Edit Create and Complete Dates <sup>1</sup>	✓	✓	✓	✓	
Edit Start and Due Dates		✓			
Edit Review By Date	✓	✓	✓	✓	
Archive	✓	✓	✓	✓	
<b>Collaborate</b>					
Add Comments	✓	✓	✓	✓	✓
Attach/Remove Files & Links	✓	✓	✓	✓	
<b>Resolution</b>					
Edit Target and Forecast	✓	✓	✓	✓	
Submit Resolution	✓				
Resolve <sup>2</sup>	✓	✓			
<b>Organize</b>					
View nested Items <sup>3</sup>	✓	✓	✓	✓	✓
Add nested Items	✓	✓	✓	✓	
Edit nested Items	✓	✓	✓	✓	
<b>Misc.</b>					
Make Private	The Author, Assigner, Responsible, and Collaborator can delete the Item or make it private if the permission is ALSO included in their System Role.				
Delete					

<sup>1</sup> Must be enabled at the template level.

<sup>2</sup> If the "Require Resolution Approval" checkbox is enabled on the Template and selected, then only the Assigner can Resolve.

<sup>3</sup> Does not grant access to view private nested Items.

# Standard Team Notifications

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

	Author	Assigner	Responsible	Collaborator	Follower
<b>Manage</b>					
Edit Team			☰ ●		
Edit Date		☰ ●	☰ ●		
Edit Due Date		☰ 🚩	☰ 🚩		
Change Status*	☰ 🚩	☰ 🚩	☰ 🚩	☰ 🚩	☰ 🚩
<b>Collaborate</b>					
Comments	☰ ● 🚩	☰ ● 🚩	☰ ● 🚩	☰ ● 🚩	☰ ● 🚩
Added to Team	☰ 🚩 ✉	☰ 🚩 ✉	☰ 🚩 ✉	☰ 🚩	☰ 🚩
<b>Organize</b>					
Complete Nested Item	☰ 🚩	☰ 🚩	☰ 🚩	☰ 🚩	☰ 🚩
<b>Misc.</b>					
Made Private		☰ ●	☰ ●		
Delete	✉	✉	✉	✉	✉
Honor Roll	☰ 🚩	☰ 🚩	☰ 🚩	☰ 🚩	☰ 🚩

\* When an Item is in Overdue Status, the notification will be sent to the Team every day until it is no longer Overdue.

# Simple Team Permissions

	Responsible	Assigner	Author	Collaborator	Follower
<b>Manage</b>					
Edit Details	✓	✓	✓	✓	
Edit Location(s)	✓	✓	✓	✓	
Edit Team	✓	✓	✓	✓	
Change Status	✓	✓	✓	✓	
Complete - Resolution not enabled	✓	✓	✓	✓	
Edit Create and Complete Dates <sup>1</sup>	✓	✓	✓	✓	
Edit Start and Due Dates	✓	✓	✓	✓	
Edit Review By Date	✓	✓	✓	✓	
Archive	✓	✓	✓	✓	
<b>Collaborate</b>					
Add Comments	✓	✓	✓	✓	✓
Attach/Remove Files & Links	✓	✓	✓	✓	
<b>Resolution</b>					
Edit Target and Forecast	✓	✓	✓	✓	
Submit Resolution	✓				
Resolve		✓			
<b>Organize</b>					
View nested Items <sup>2</sup>	✓	✓	✓	✓	✓
Add nested Items	✓	✓	✓	✓	
Edit nested Items	✓	✓	✓	✓	
<b>Misc.</b>					
Make Private	The Author, Assigner, Responsible, and Collaborator can delete the Item or make it private if they ALSO have the permission in their System Role.				
Delete					

<sup>1</sup> Must be enabled at the Template level.

<sup>2</sup> Does not grant access to view private nested Items.

# Simple Team Notifications

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

	Author	Assigner	Responsible	Collaborator	Follower
<b>Manage</b>					
Edit Team			☰ ●		
Edit Date		☰ ●	☰ ●		
Edit Due Date		☰ 🚩	☰ 🚩		
Change Status	☰ 🚩	☰ 🚩	☰ 🚩	☰ 🚩	☰ 🚩
<b>Collaborate</b>					
Comments	☰ ● 🚩	☰ ● 🚩	☰ ● 🚩	☰ ● 🚩	☰ ● 🚩
Added to Team	☰ 🚩 ✉	☰ 🚩 ✉	☰ 🚩 ✉	☰ 🚩	☰ 🚩
<b>Organize</b>					
Complete Nested Item	☰ 🚩	☰ 🚩	☰ 🚩	☰ 🚩	☰ 🚩
<b>Misc.</b>					
Made Private		☰ ●	☰ ●		
Delete	✉	✉	✉	✉	✉
Honor Roll	☰ 🚩	☰ 🚩	☰ 🚩	☰ 🚩	☰ 🚩

\* When an Item is in Overdue Status, the notification will be sent to the Team every day until it is no longer Overdue.

# Author-Only Team Permissions

	Author	Follower
<b>Manage</b>		
Edit Details	✓	
Edit Team	✓	
Edit Location(s)	✓	
Change Status	✓	
Complete - Resolution not enabled	✓	
Edit Create and Complete Dates <sup>1</sup>	✓	
Edit Start and Due Dates	✓	
Edit Review By Date	✓	
Archive	✓	
<b>Collaborate</b>		
Add Comments	✓	✓
Attach / Remove Files & Links	✓	
<b>Resolution</b>		
Edit Target and Forecast	✓	
Resolve	✓	
<b>Organize</b>		
View nested Items <sup>2</sup>	✓	✓
Add nested Items	✓	
Edit nested Items	✓	
<b>Misc.</b>		
Make Private	The Author can delete the Item or make it private if the permission is ALSO in their System Role.	
Delete		

<sup>1</sup> Must be enabled at the Template level

<sup>2</sup> Does not grant access to view private nested Items.



# Author-Only Team Notifications

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

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

\* When an Item is in Overdue Status, the notification will be sent to the Team every day until it is no longer Overdue.

# More Information

Learn More at [Support.KaiNexus.com](https://Support.KaiNexus.com)

[Notifications](#) | [Advanced Team](#) | [Simple Team](#) | [Standard Team](#) | [Author-Only Team](#)

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

## Examples of Notification Types:

### RED FLAG



**O2 Regulators** Idea #2850  
Author Showroom Master  
Assigner Showroom Master Responsible Showroom I  
Due Date May 11, 2020

 This is Overdue. Due: May 11, 2020

### BLUE DOT



**Metric Review Meetings for Ne**  
Author Showroom Master  
Assigner Showroom Master Responsible Bill Urban  
Due Date Jun 15, 2020

  Bill Urban updated the Title.

### EMAIL DIGEST



**KaiNexus**

**Digest**

 **Update Total Financial Impact** Task #492598  
 Total Financial Impact (Monthly)  
Author Matt Banna  
Complete Date Jun 02, 2020

 Status changed to Complete.

12:47 pm Matt Banna reopened this because it is a Recurring Item.  
12:47 pm Matt Banna completed this.

### IMMEDIATE EMAIL



**KaiNexus**

You are now the Responsible

 [Documentation about how to properly manage spread / adding a new group within a live instance](#) #619750

**ACTIVE** Improvement

Responsible Maggie Millard  
Assigner Jeff Roussel  
Due Date Aug 31, 2020

[VIEW DETAILS](#)