KaiNexus

Your access as a KaiNexus Champion

As a KaiNexus Champion, you have access to most areas of KaiNexus and can make many updates yourself. However, there are some configurations that require help from your Customer Success Manager. Use this guide to reference what you can do yourself versus what requires KaiNexus staff.

Do it yourself:

- Manage your organization's Boards, including creating Boards, editing the Cards on a Board, and more
- Create and share Item Lists
- Manage users, including adding new users, editing user profiles, and inactivating users
- Manage System Roles, such as creating Roles and assigning them to users
- Create Goals for your organization
- Manage the Attribute Values available for each of your organization's Attributes
- Manage Impact Values, Standard Work, and Weighted Scores
- Manage your Network, including creating new Locations, changing their nesting structure, and assigning them to users
- View and create Reports
- Create Login Notices
- Add translations
- Update general settings, such as your organization's name, logo, legal notice, colors, and Digest & Subscription Days
- Manage your organization's User Attributes, including Titles, Positions, Employment Statuses, and Certifications
- Import Charts with the Multi Chart Importer

Requires KaiNexus staff:

- Create and update Templates, including adding and removing Fields and Attributes from them
- Manage your organization's Workflows
- Create Fields and Attributes
- Create No Change Reasons, Impact Types, and Investment Types and add them to Templates
- Create Custom Statuses and Custom Team Roles and add them to Templates
- Update Resolution and Team Terminology
- Configure your organization's currencies and languages
- Bulk Import Items, People, and Translations
- Configure security settings, including SSO configuration
- Configure Escalations, Milestones, and Stage Gates
- Create Custom Badges
- Update branding settings