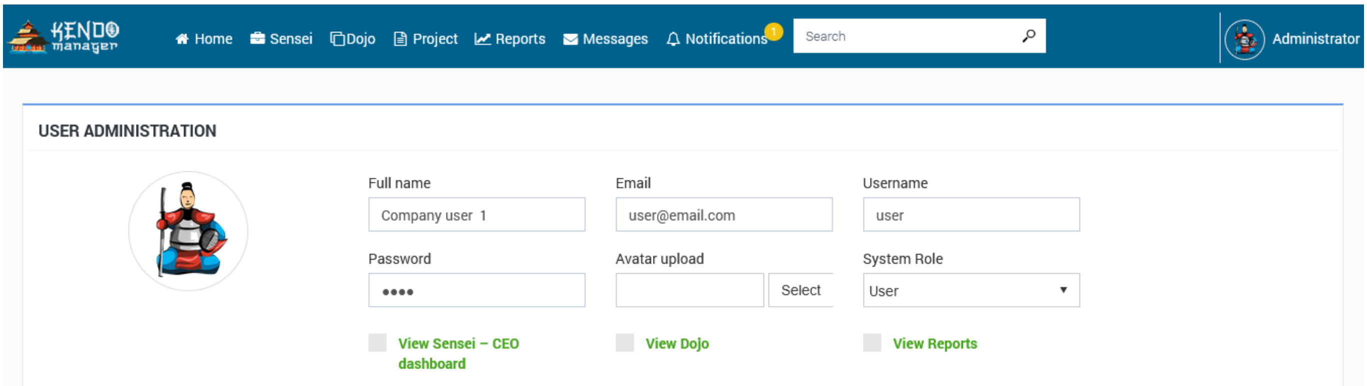
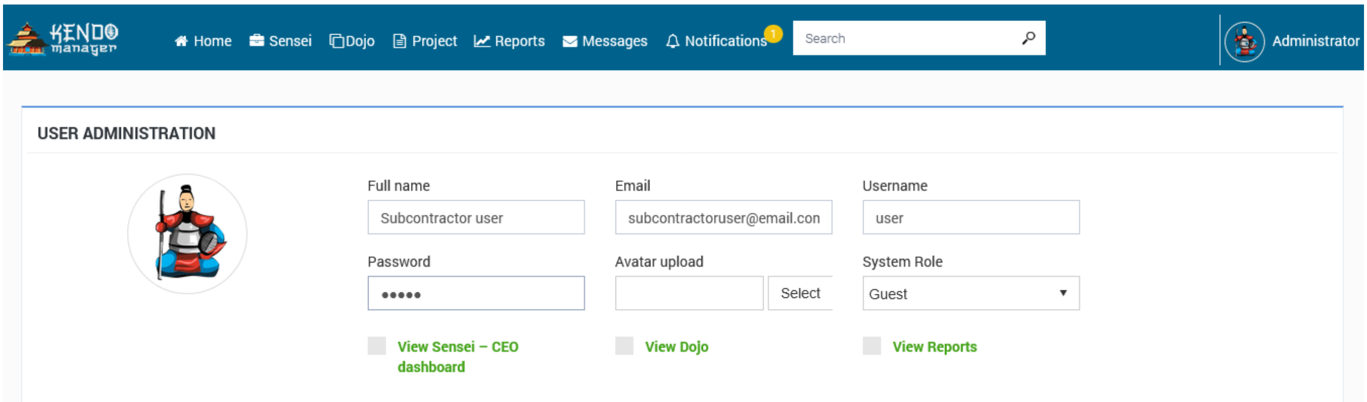
Kendo Manager: Quick Start Guide

Step 1. – Create user account . User accounts are created with admin account

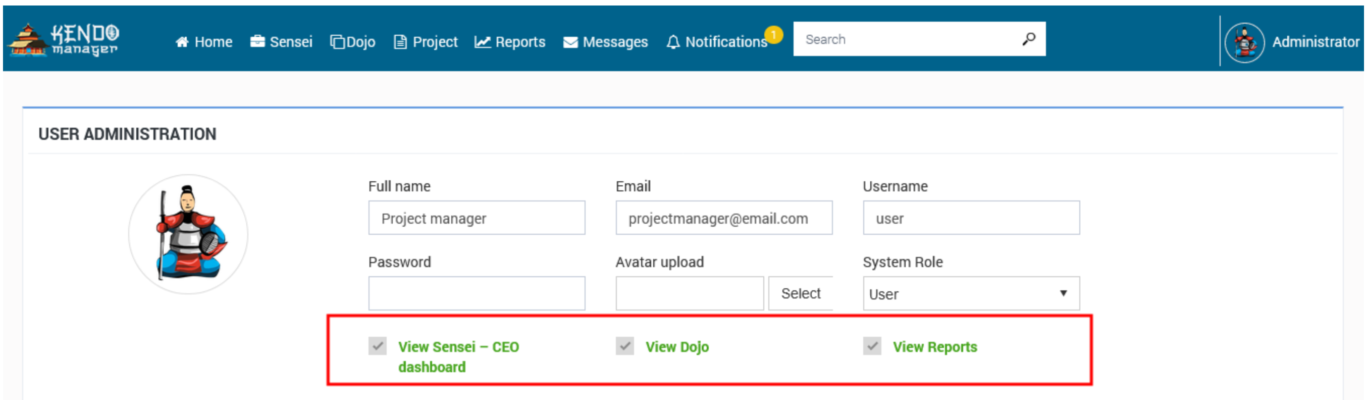
- **Creating employee accounts** - Employees are assigned a **User** System Role.



- **Creating user accounts for External Stakeholders** – External Stakeholders (clients or customers, investors and shareholders, suppliers, government agencies and other) are assigned a **Guest System Role**. Each External Stakeholder user account sees only the projects to which the company has assigned them.

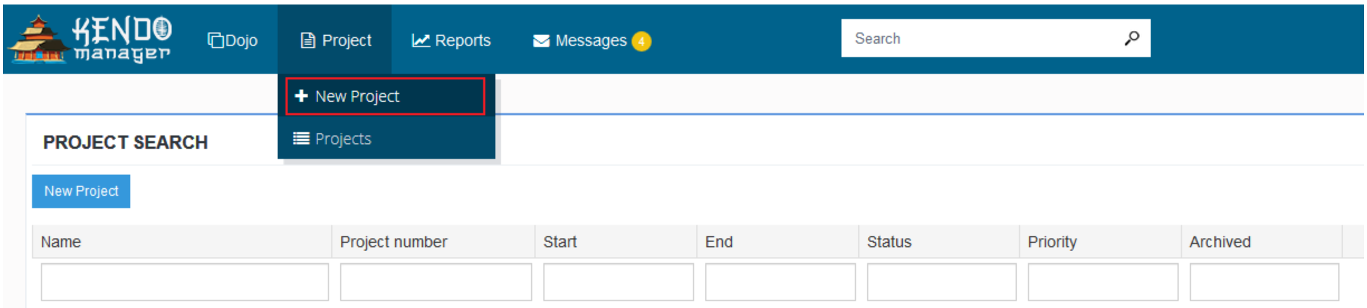


- **Creating user accounts for Project manager, top management company owner**- Add project portfolio dashboards (Dojo and Sensei) and Reports. Optional Dojo portfolio and Sensei -CEO dashboard reports can be approved by users

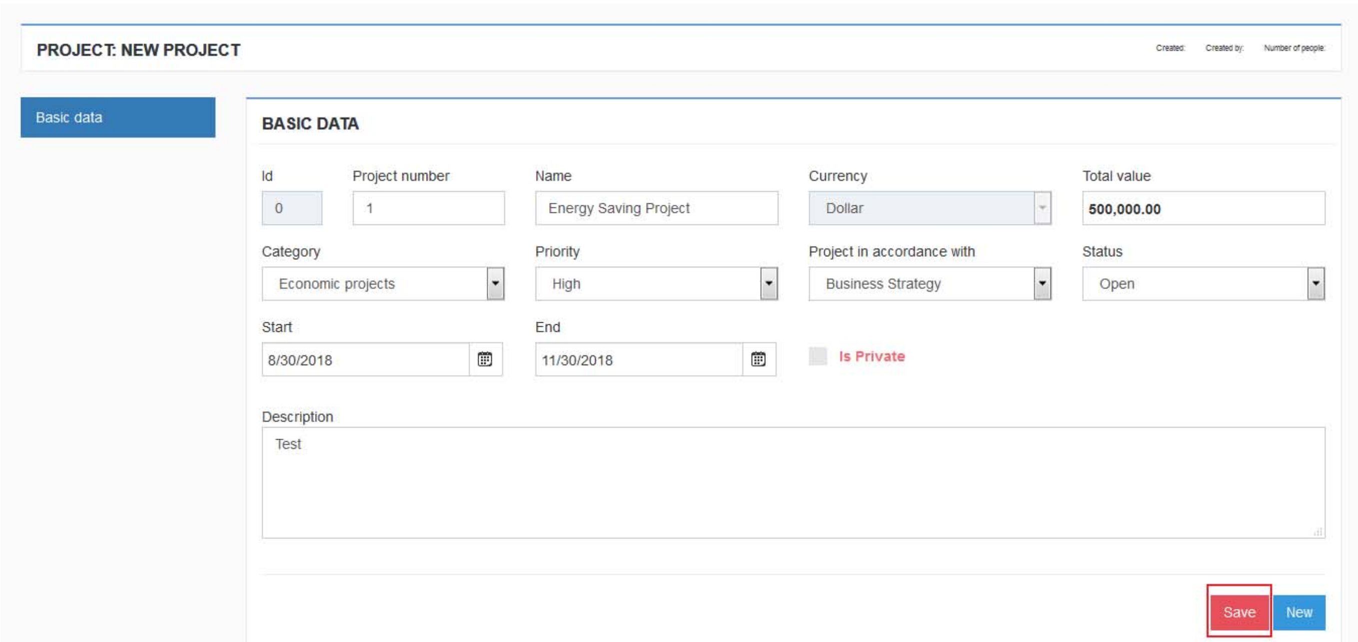


Step 2. Creating a project

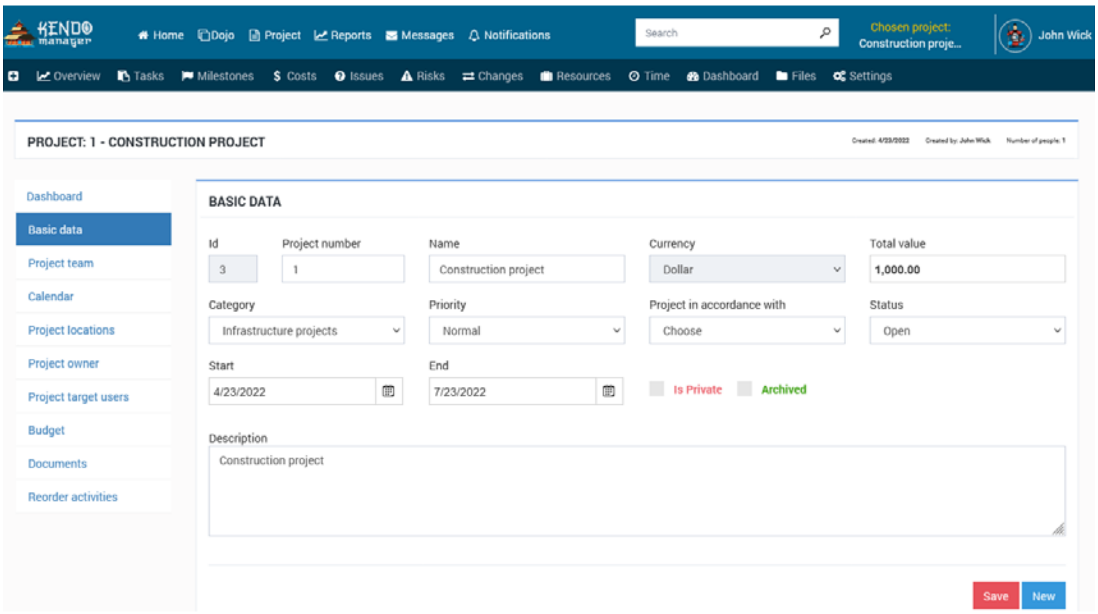
- **Create project**



- **Fill form and click Save**

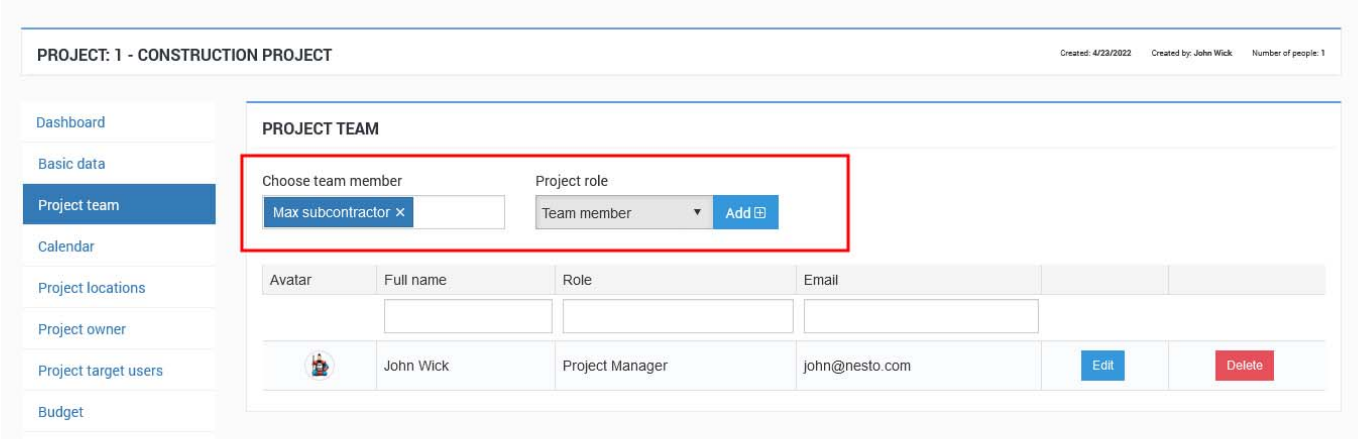


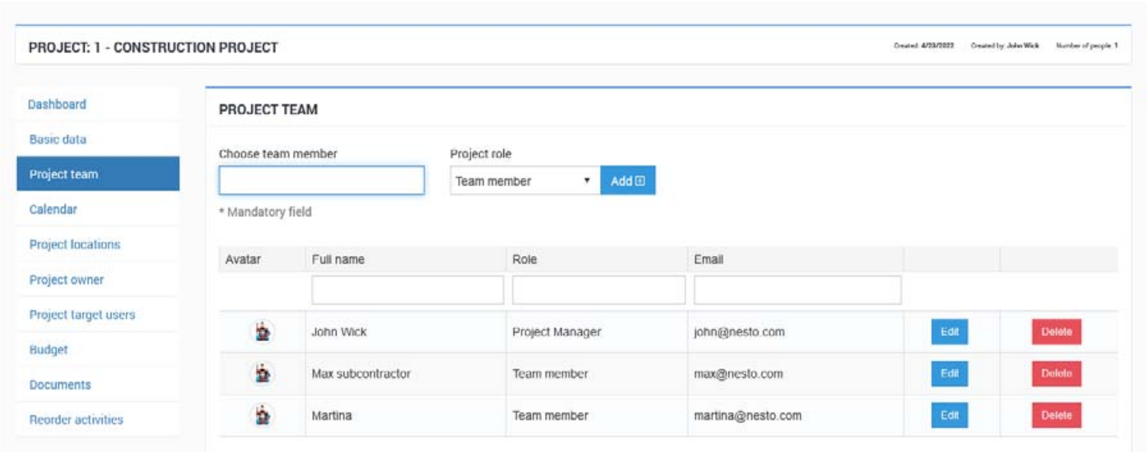
- **After you created new project on the left side, you get Project menu with additional options and top menu with project options**



Step 3. Create Team

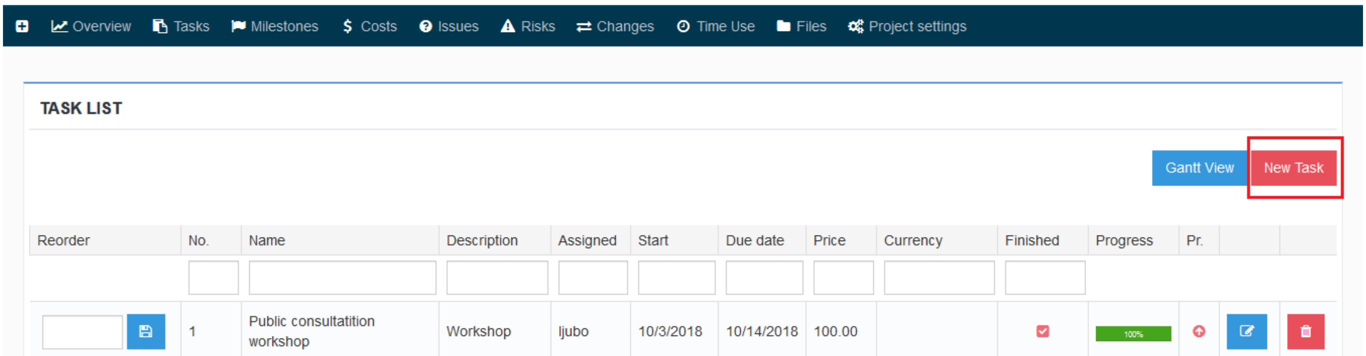
- **Add all user on project. Users are usually assigned the team member Project role. More info (https://www.kendomanager.com/project-team-collaboration/).**



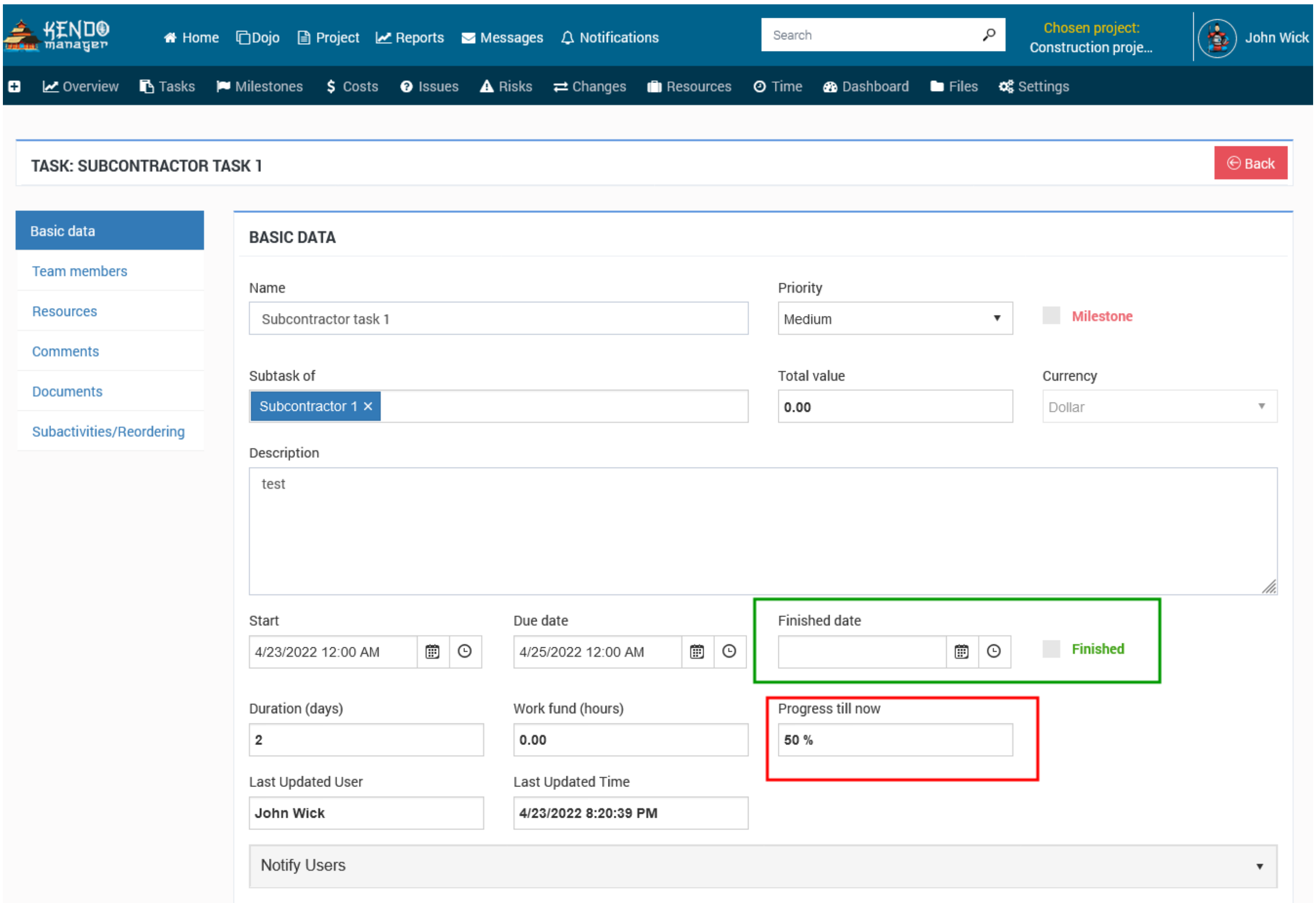


Step 4. Create Task list

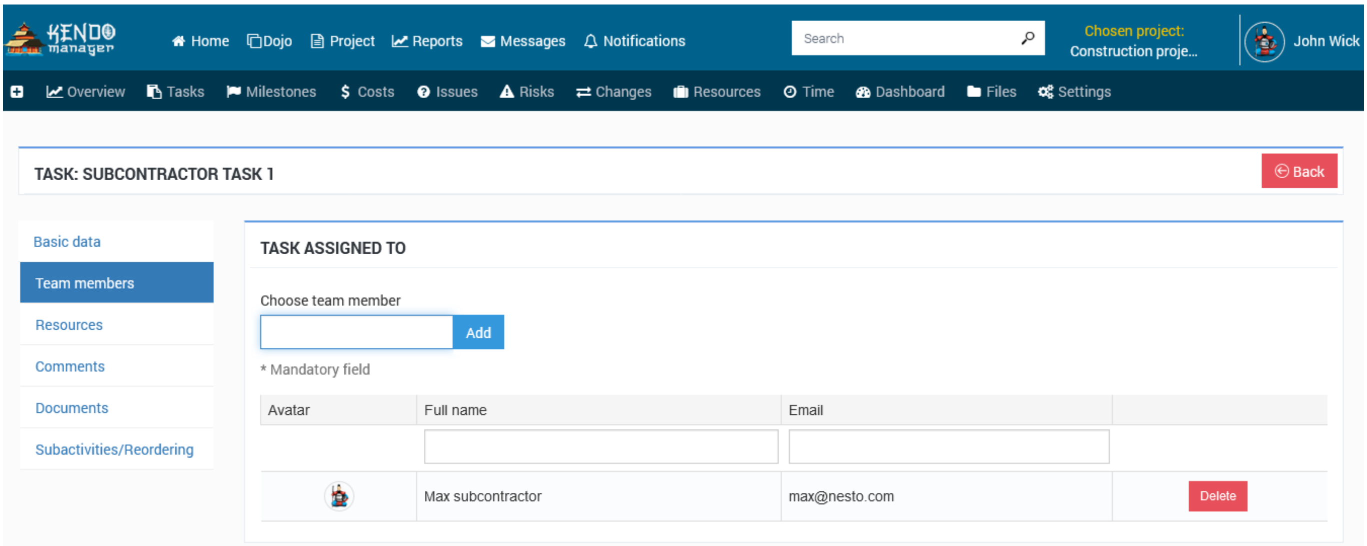
- **Go to Tasks and Click the button New task from the list of tasks to create the new task .**



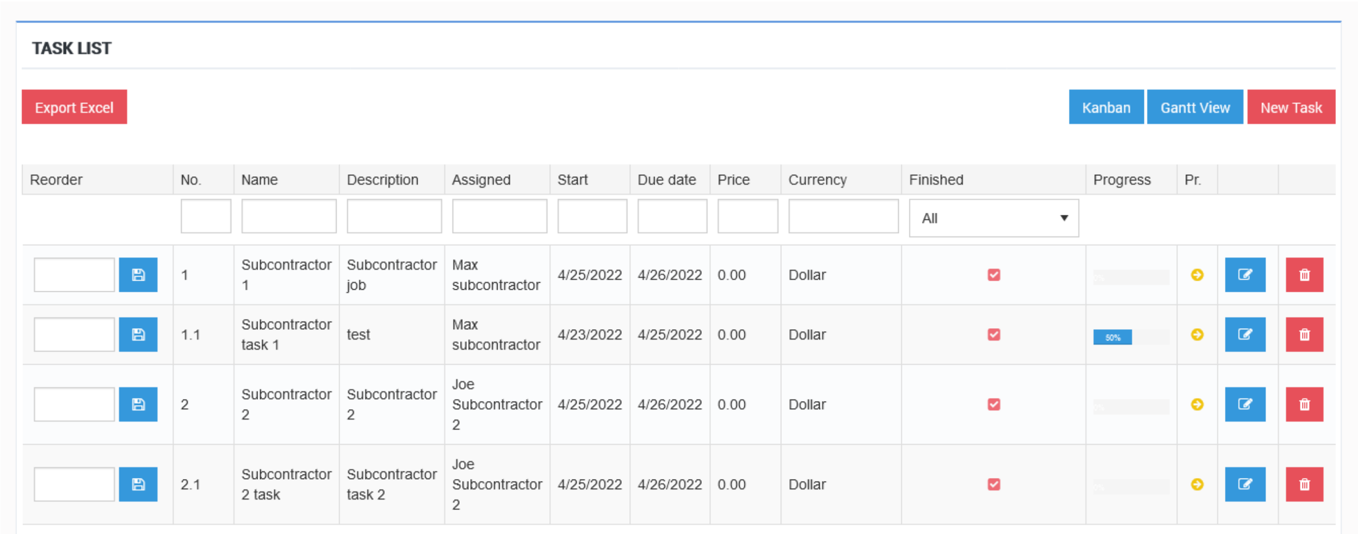
- **Create Task Example:**



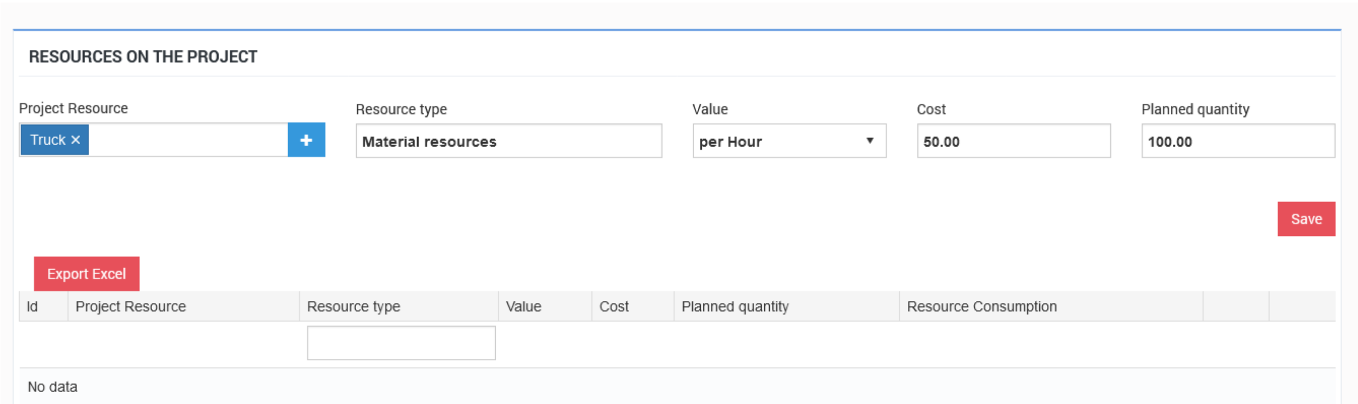
- **Assign the created task to the person responsible for its realization**



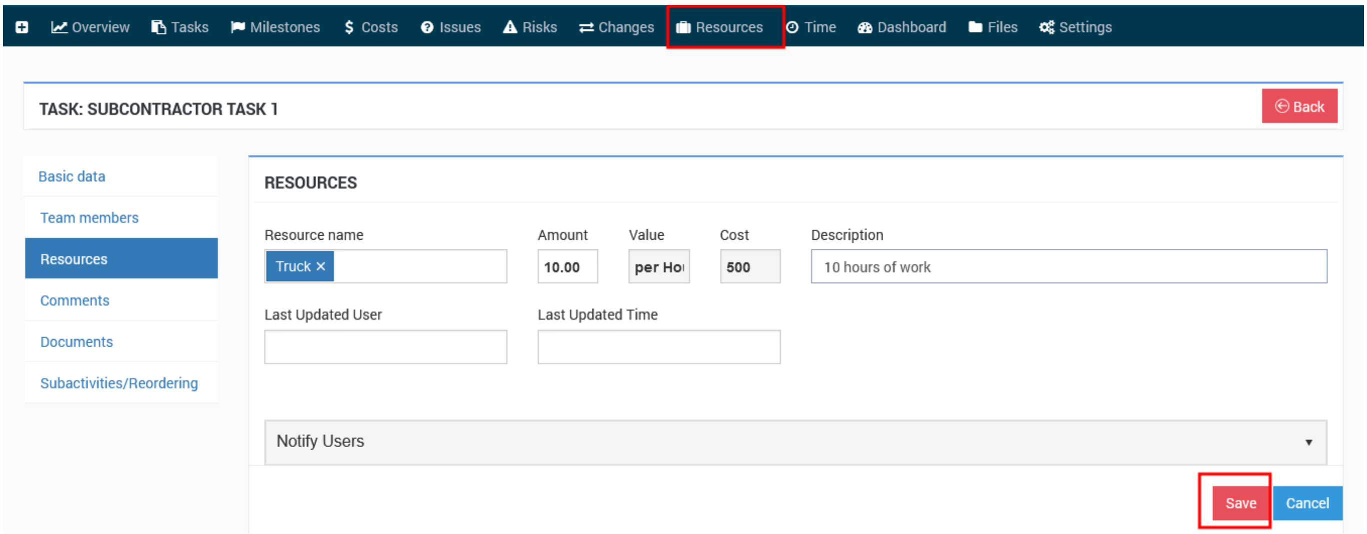
- **Task list example**



Step 5. - Defining a list of resources to be used on the project



Step 6. Add resources to tasks

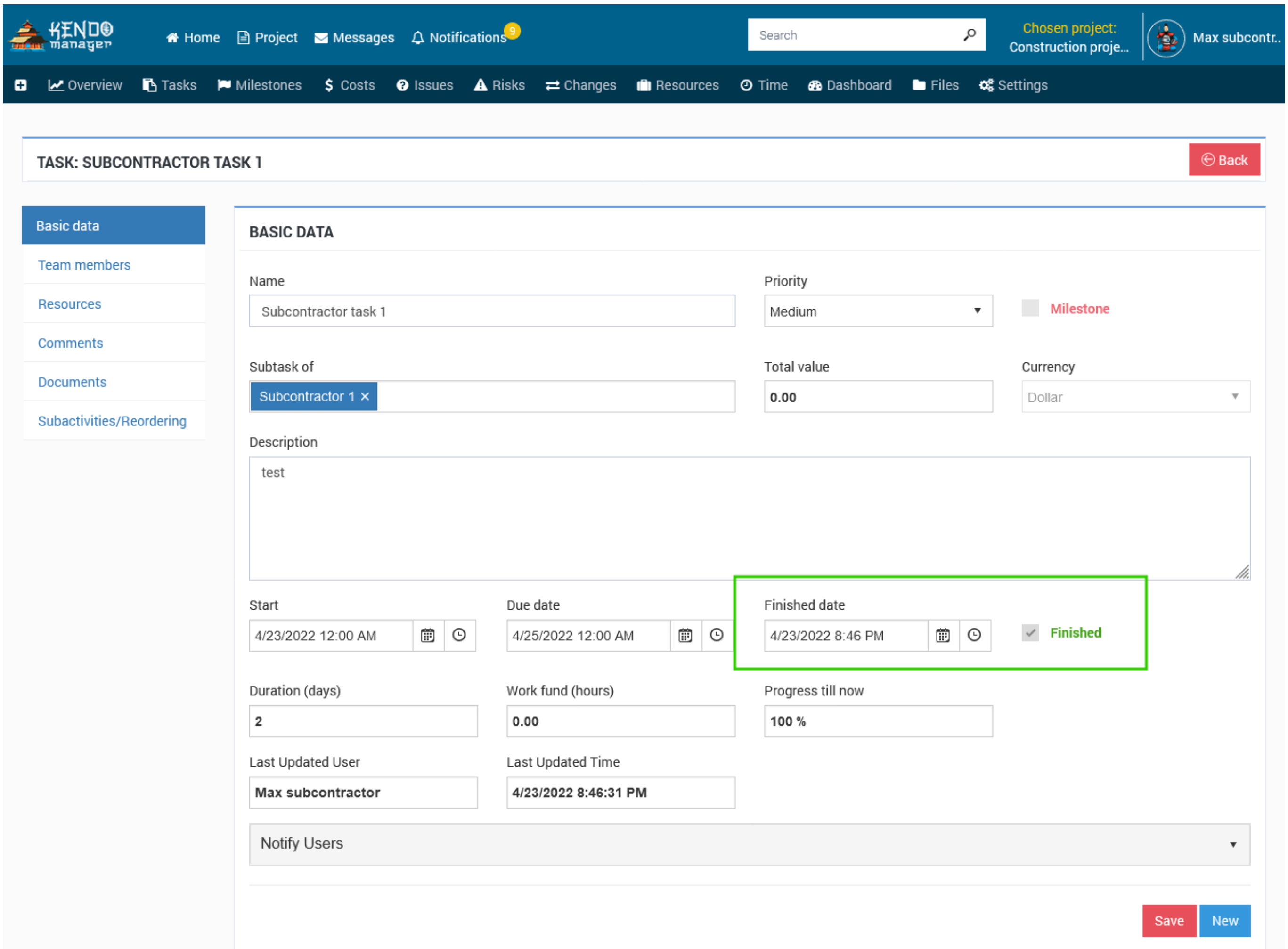


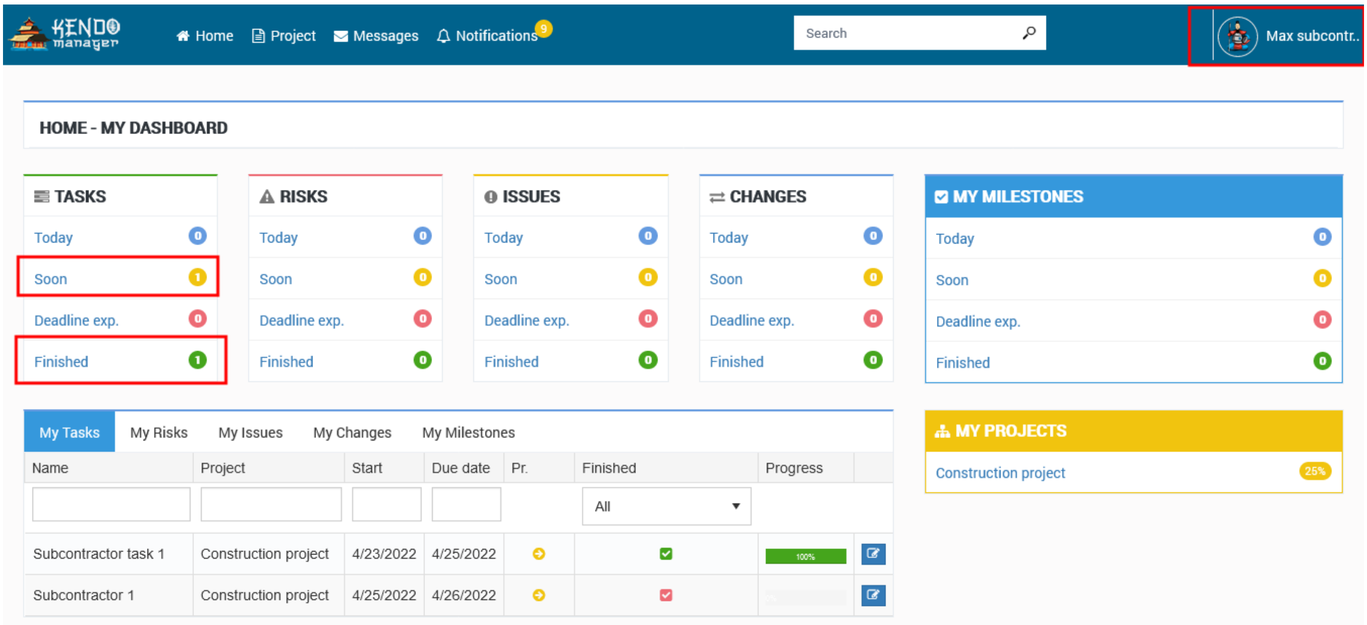
Step 7. My Dashborad

- **Each user has a personal dashboard where they can see all the tasks assigned to them**

Note: All tasks, depending on whether completed, expired, or expired, are displayed on time lists.

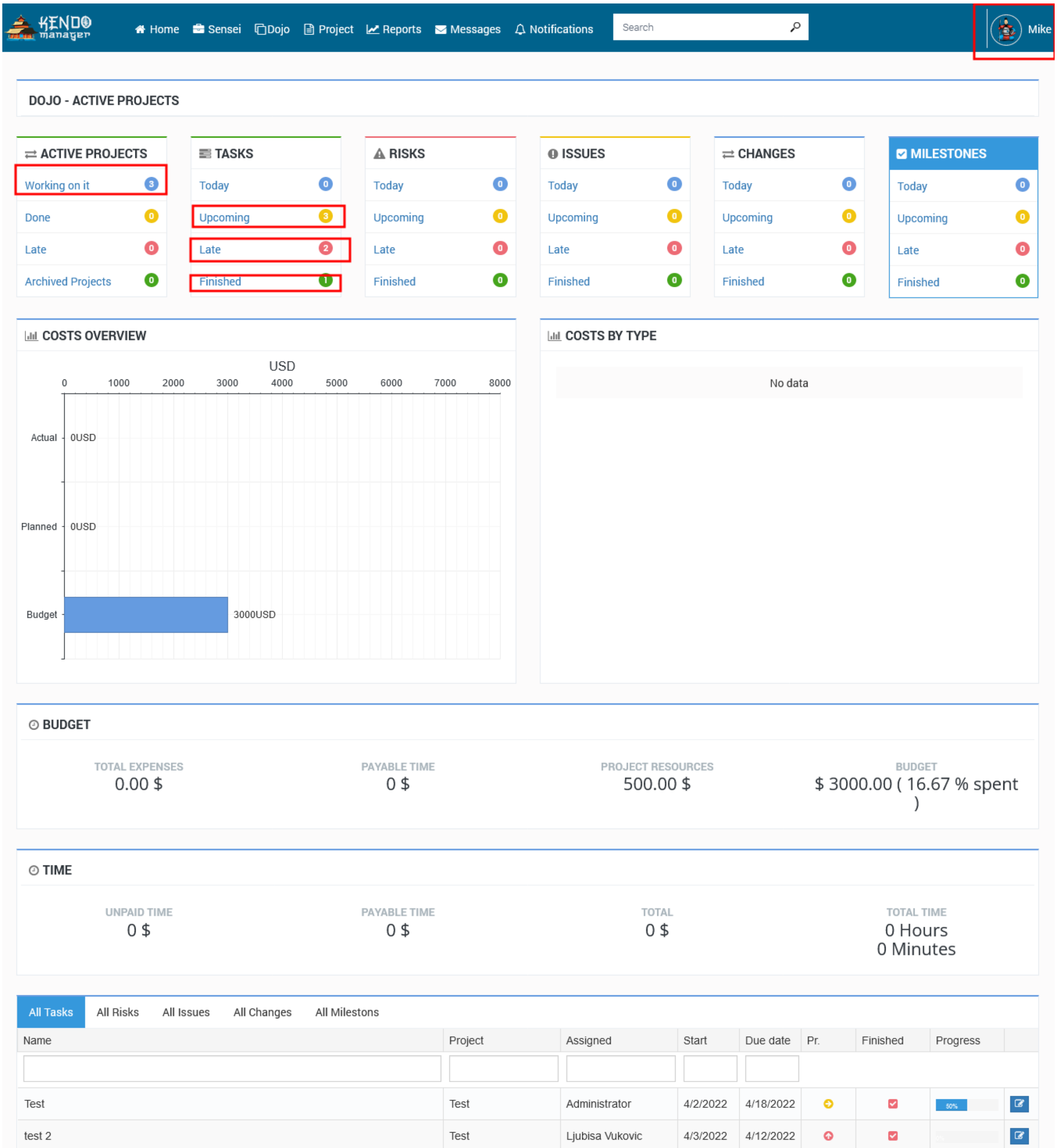
- If the user completes the task, it is necessary to check the **finshed box or date**. On dashboards, this task will automatically go to the finshed list and team memebers receive a notification.
- Depending on the organization of the project, optionally the project manager can also mark that the task is completed after checking.





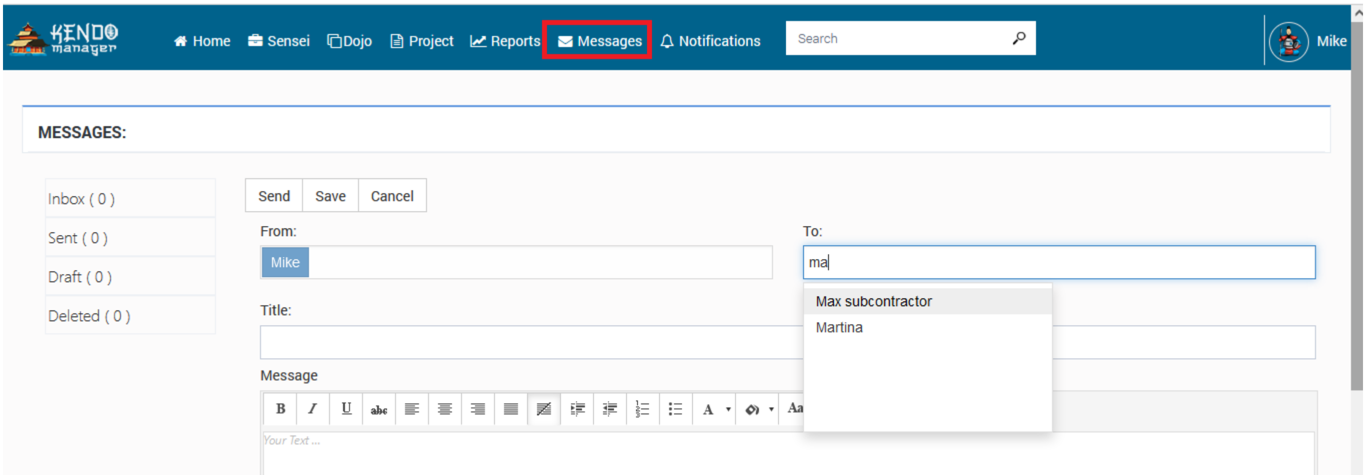
Step 8 . Dojo Protfolio dashboard - All active projects monitoring

- With **Kendo Manager Dojo portfolio** dashboard option that gives you simple yet powerful overview of all active projects and all active processes across all projects in real-time. At all times you have an insight into all the processes and their progress.



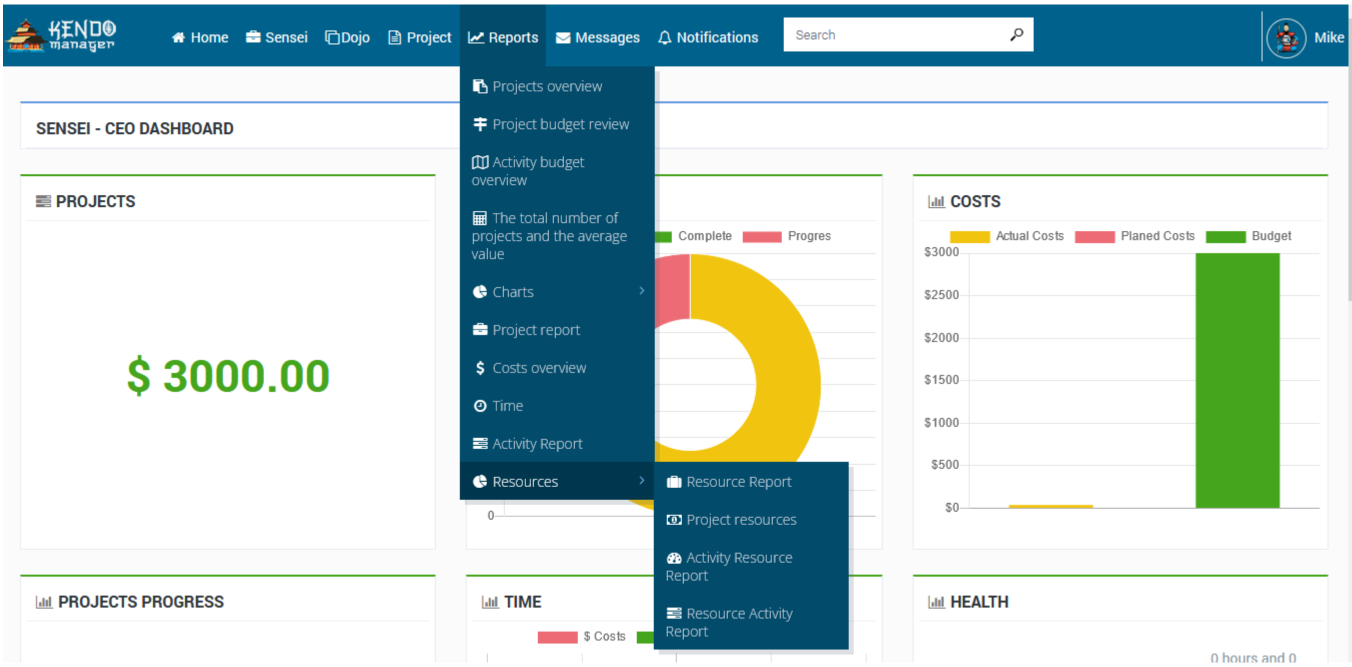
Step 9. Communication on the project

- Kendo manager has a complete system of messages and notifications. You can send messages to employees, stakeholders and other participants.



Step 10. Reporting

- **Kendo has many reports that you can create at any time**



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