



Kendo Manager Administration

Software for project managing and project management

www.kendomanager.com

Version 1.0

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KENDO ADMINISTRATION

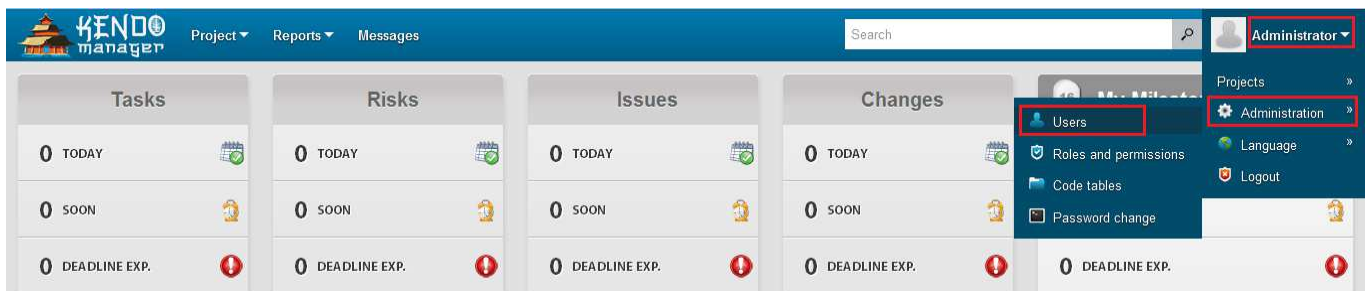
1. Creation a user

Creation a user in the application is performed using the **Admin profile**.

1.1. Login the application using the Admin profile

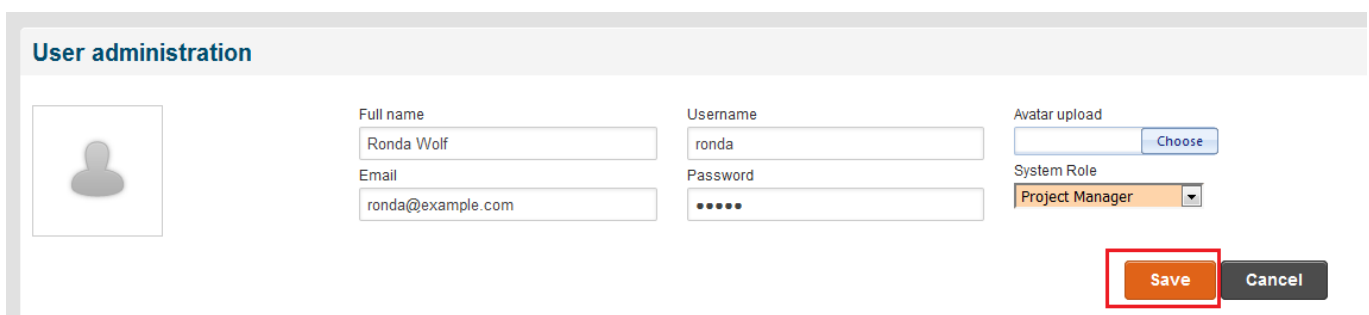


1.2. Click on **Administrator-Administration-Users** at the right side.



1.3. Fill the data into the form for **Creation a user** and select **Project Management system role**.

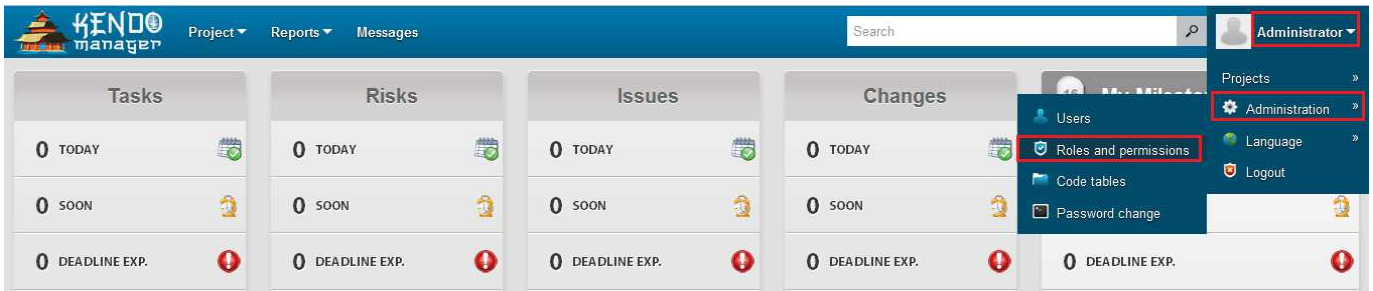
Project Manager is the basic redefined system role that is delivered to the user. Click the button **Save**. Forward respecting user data to the user. System does not automatically send these information .



2. Roles and permissions

Roles and permissions are used for defining of user's permissions in the application.

2.1. Log in the application with own **Admin Profile**. Click on **Administrator-Administration-Role and permission**



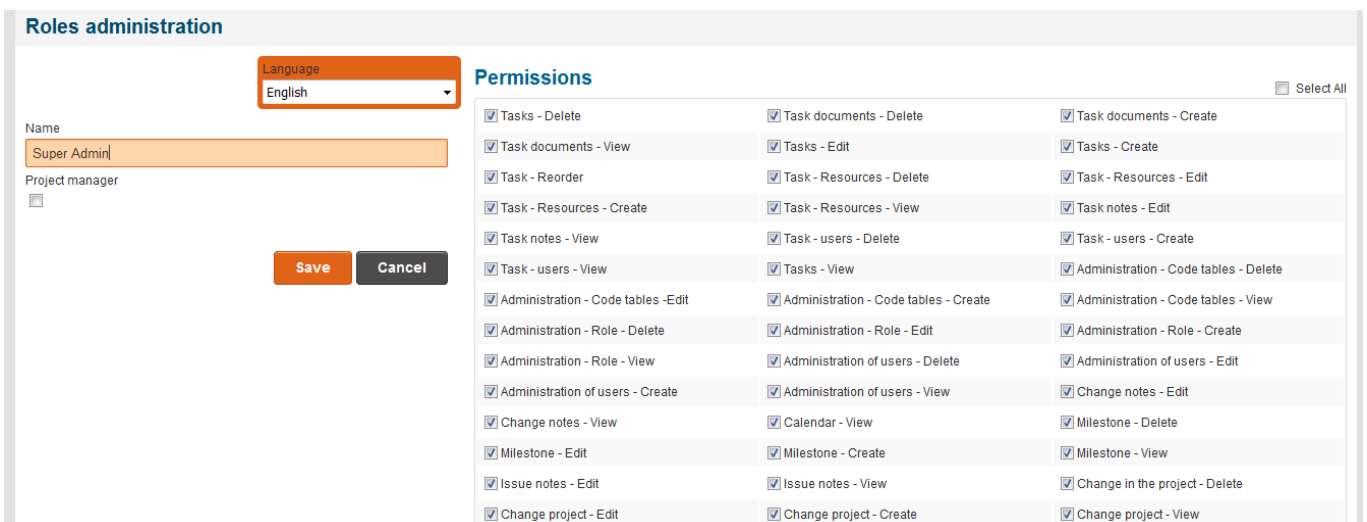
2.2. After clicking on Role and permission, the following section will be open-Administration role **where you can create a new role and also to group the permissions that defining the user's rights within the application.**

2.3. Redefined roles

In favour of easier operating , Kendo Manager has already created and adjusted basic project roles. Permissions are adjusted according to Users' functions on projects

Role name	
Super Admin	Edit
Project Manager	Edit
Team member	Edit
Project overview	Edit
Software tester	Edit
Team leader	Edit

Image 1. Admin role example



Note:

Roles define the role of the user within the project. The roles are assigned to the user when creating Project team responsible for project realization. (**User guide 3.6.1. Creating Project team-** defining of the members and their roles/functions in project).

Image 1. Creating Project team

Avatar	Full name	Project role	Email	
	David Wolf	Project Manager	david@example.com	Edit Delete
	Jhon	Team member	john.d@nesto.com	Edit Delete

Overview of redefined roles within the project:

- **Project manager** - has all the rights over the project and all the processes within. He is allowed to create, to modify and erase all the processes at the project (tasks, resources, problems, changes, risks, documents, costs and spent time, to post the comments...)
- **Team member** -the most frequently role delivered to the users. Member of the team is allowed to check the contents on project, to add and erase his comments, to upload the documents at project processes.

Task: **Public consultation workshops**

Basic data
Team members
Resources
Comments
Documents
Subactivities/Reordering

Comments

Write a comment

Font Name: Size: A Apply CSS Cl...

Choose

Notify Users

Save Cancel

Note: User defined as **team member** is allowed to **add and delete his comments** and to upload documents. He is allowed to check and other cards (**basic data, members of a team and resources**), but he can't change or to delete the content posted by **Project manager**.

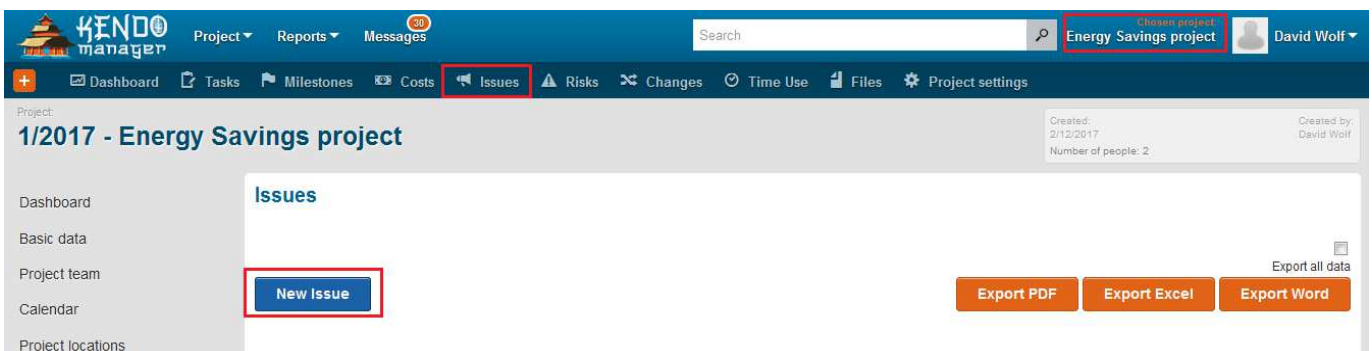
- **Project preview** –is delivered to the people who do not directly participate in project realization (e.g. client, director, Mayor of the Municipality...) This person can see the content but he can't modify or delete it.

- **Team leader**- has the same function as **project manager**, excluding the right to change the items in **project menu at the left side**.

Team leader can create, modify and erase all the processes at the project (tasks, resources, issues, changes, risks, documents, costs and to post the comments) .

Team leader is commonly used in greater projects and this function is given to the person who performs the part of the tasks being within the domain of project manager or team leader is deputy manager.

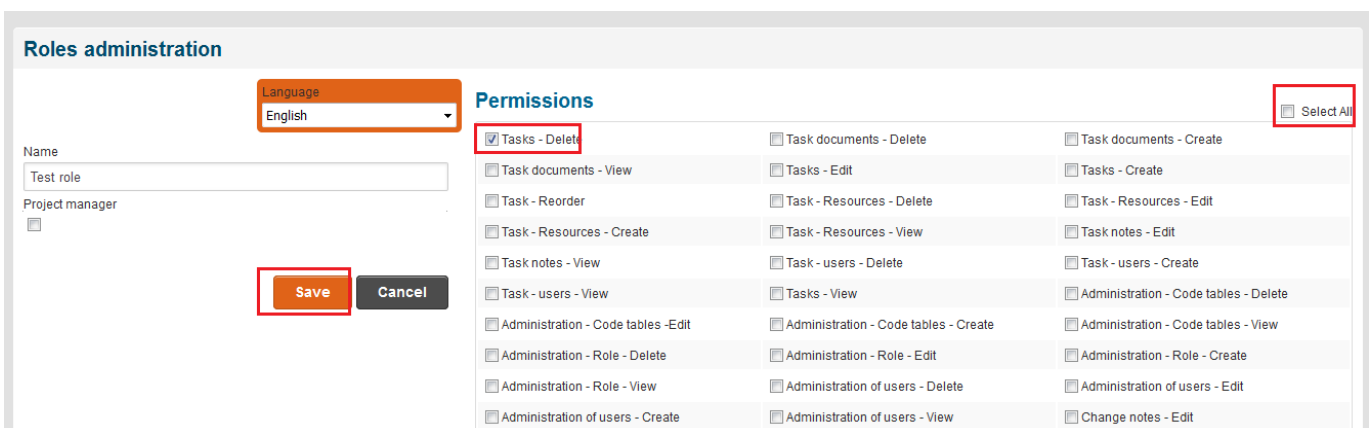
- Software tester –used at software projects. The role is aimed to the persons who **test the application accuracy** within the software development process. **Software tester** has the same rights as each team member and he can **create an issue(bug)** and **deliver it to the person** (the most often to the programmer) in order to correct it.



2.4. Creation of a new role in Kendo manager

Login the application using own **Admin profile**. Click at **Administrator-Administration-Role and permission**.

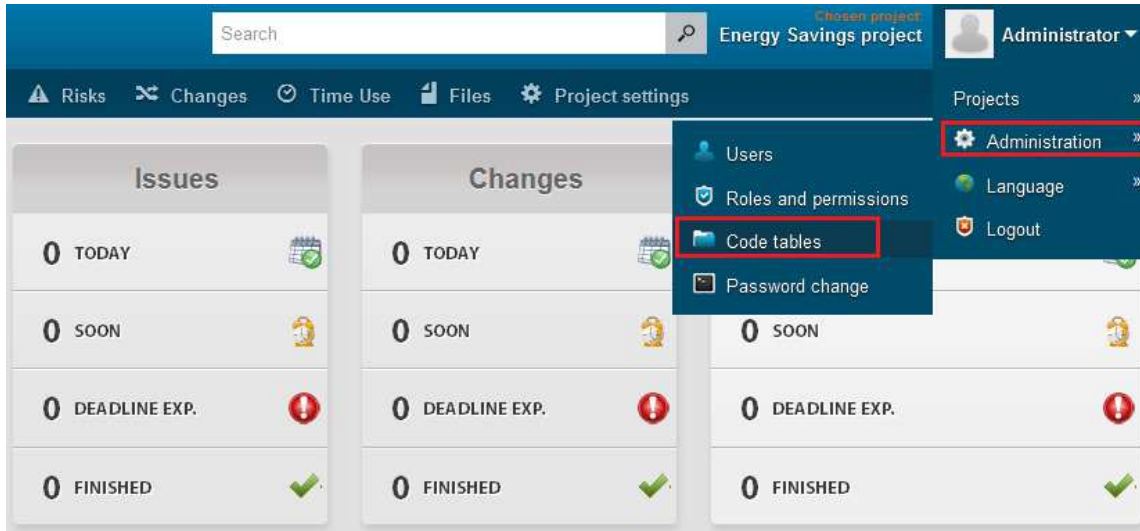
Enter the Role title and **mark the permissions you want to give to the user in projects when you assign to him the Role**. Click at the button **Save** to save the **new role**.



3.Code Table

The purpose of the Codebooks is to predefine the specific item often used within the application(e.g. company title). Data is entered for the first time. The data are saved for **further use**.

3.1. Login Kendo manager using own Admin profile. Click **Administrator-Administration-Codebooks**.



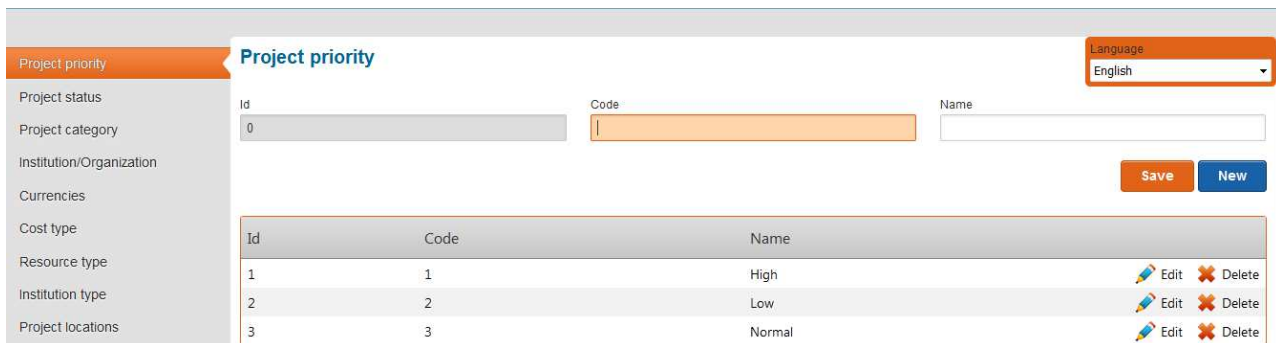
3.2 Code tables overview in application

Following code tables in Kendo manager:

3.2.1 Project priority

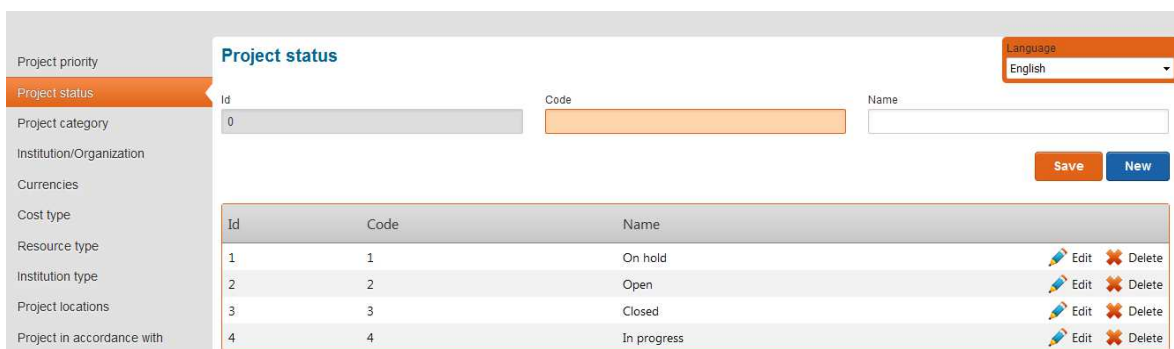
If you wish to add the new priority, fill the form for priority creation and click the button **Save**.

Note : Project dashboard shows only high, medium, low priority



3.2.2. Project status

If you would like to add new **project status**, fill the form for creation new status and click the button **Save**.



3.2.3. Project category

To add the **new project category**, fill the form for creation of new category and click the button **Save**.

Project category

Language: English

Id: 0 Code: Name:

Save New

Id	Code	Name	Edit	Delete
1	1	Social projects		
2	2	Economic projects		
3	3	Commercial projects		
4	4	Marketing Projects		
5	5	Software projects		
6	6	Public projects		
7	7	Social projects		
8	8	Other projects		

3.2.4. Institution/organization- Define the institution,company or organization funded by the project.

If you wish to add the **new company**, fill the form for creation of new institution/organization and click the button **Save**.

Institution/Organization

Language: English

Id: 0 Code: Name:

Type: Choose

Address: Contact person: Phone: Email:

Save New

Id	Code	Name	Type	Address	Contact person	Phone	Email	Edit	Delete
3	1	Soft info	Company		David	1234556			
4	2	Spider Soft	Company	a	a	1	soft@spider.com		
5	3	UN	Government						

3.2.5. Currencies

Adjusting of the basic currency used in Kendo manager is performed in section Currencies.

Currencies

Language: English

Id: 0 Code: Name: Rate: Symbol: Alternative code:

Save New

Id	Code	Name	Symbol	Alternative code	Rate	Default	Edit	Default	Delete
1	KM	Convertible Mark	KM	BAM	1.00	No			
2	EUR	Euro	€	EUR	0.51	No			
3	USD	Dollar	\$	USD	1.00	Yes			
4	GBP	British Pound	£	GBP	0.42	No			
5	RSD	Serbian dinar	RSD	RSD	59.71	No			
6	HRK	Croatian kuna	kn	HRK	3.92	No			

Click the option default currency and this will be set as the basic currency for managing projects in application.

Note:

In case of additional change of basic currency(symbol) in application, this will change just the currency symbol at all the projects in application but not the monetary amounts of specific items in projects.

The screenshot shows the 'Osnovni podaci' form with the following fields: Id (50046), Broj projekta (1), Naziv (Test finalne verzije), Valuta (Konvertibilna marka), Ukupna vrednost (10.000,00), Kategorija (Ekonomski projekti), Prioritet (Visok), Projekat u skladu sa (Strategijom razvoja), Status (Otvoren), Početak (28.12.2016.), and Kraj (28.3.2017.). The 'Valuta' dropdown menu is highlighted with a red box.

3.2.6 Defining of Currency rate

Currency rates define converted value compared with the main application currency. The currency value can be changed depending on needs.

The screenshot shows the 'Currencies' management interface. It includes a sidebar with navigation options, a top navigation bar with 'Language' set to 'English', and a table of currencies. The 'Save' button is highlighted with a red box.

Id	Code	Name	Rate	Symbol	Alternative code
4	GBP	British Pound	0.42	£	GBP

Id	Code	Name	Symbol	Alternative code	Rate	Default	Actions
1	KM	Convertible Mark	KM	BAM	1.00	No	Edit Default Delete
2	EUR	Euro	€	EUR	0.51	No	Edit Default Delete
3	USD	Dollar	\$	USD	1.00	Yes	Edit Delete
4	GBP	British Pound	£	GBP	0.42	No	Edit Default Delete
5	RSD	Serbian dinar	RSD	RSD	59.71	No	Edit Default Delete
6	HRK	Croatian kuna	kn	HRK	3.92	No	Edit Default Delete

Note:

Converted currency value is used in **option the costs** if is necessary to express the costs in some other currency (example: machine imported from abroad). **The costs in other currency** can be found at the form the costs . In order to use this option, fill the **auxiliary form** (the cost in other currency). Based on the inserted parameters, the form will automatically convert the value.

The screenshot shows the 'Alternative cost' form. It includes a 'Type' dropdown menu with 'Travel and accommodation' selected, a 'Description' text area, and a 'Costs in different currency' checkbox which is checked. Below this, there is a section for 'Alternative cost' with fields for 'Currency' (British Pound), 'Price per unit' (2,380.95), 'Tax Amount' (238.10), 'Amount without tax' (4,761.90), and 'Amount' (5,000.00). The 'Save' button is highlighted with a red box.

3.2.7 .Type of the costs-define the categories of costs in project

If you wish to enter the new **type of the cost** , fill the form for creation of new type of the costs and click the button **Save**.

Cost type

Language: English

Id: 0 Code: Name:

Save New

Id	Code	Name	Edit	Delete
1	1	Personnel expenses		
2	2	Travel and accommodation		
3	3	Overhead costs		
4	4	Consultants		
5	5	Meetings and events		
6	6	Promotion costs		
7	7	Equipment		
8	8	Financial expenses		
9	9	Other expenses		

3.2.8. Resource type

If you want to add the **Resource type**, fill the form for creation of new type of the cost and click the button **Save**.

Resource type

Language: English

Id: 0 Code: Name:

Save New

Id	Code	Name	Edit	Delete
1	1	Material resources		
2	2	Human resource		

3.2.8. Institution type - define the organization/company type

Institution type

Language: English

Id: 0 Code: Name:

Save New

Id	Code	Name	Edit	Delete
1	1	Municipality		
2	2	NGO		
3	3	Government		
4	4	Company		
5	5	Agency		

Image1.

Institution/Organization

Language: English

Id: 0 Code: Name:

Address: Contact person: Phone:

Type: Choose

- Choose
- Municipality
- NGO
- Government
- Company
- Agency

3.2.9. Project location

Codebook is used to define the geographic location for project implementation.

Project locations

Language: English

Id: 0 Code: Name:

Id	Code	Name		
1	1	Europe		
2	2	USA		
4	4	Africa		

3.2.10 . Project in accordance with

This option serves to redefine the business strategies or organizations.

Project in accordance with

Language: English

Id: 0 Code: Name:

Id	Code	Name		
1	1	Development Strategy		
2	2	Marketing strategy		
3	3	Business Strategy		

3.2.11. Project Applied

Define the **project owner** i.e. who started the project (**company title, organization title, department title...**). Fill the data and click the button **Save**.

Project applied

Language: English

Id: 0 Code: Name: Type: Izaberi

Address: Contact person: Phone: Email:

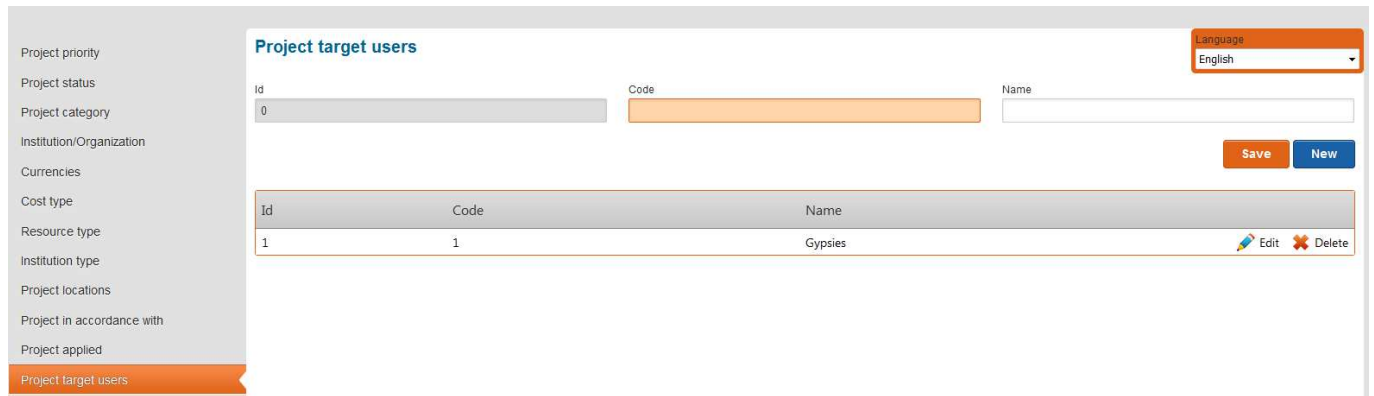
Id	Code	Name	Type	Address	Contact person	Phone	Email		
1	1	Test	Municipality	Test	Test		test@nesto.com		
2	2	Spajder doo	Company	n	n	1	spider@nesto.com		
3	3	Climate Change Department	Government	Ministry of Environment	John D.				

The data are imported for the first time. The data are saved for further use.

3.2.12. Project target users –Define the users of project funds

Codebook is used to define the end-users of project i.e. which target group will benefit from the project. (**Example:** Assistance to Roma people through promotion of energy efficiency in Roma settlements). Fill the data and click the button **Save**.

Project target users are imported for the first time. The data are saved for further use.

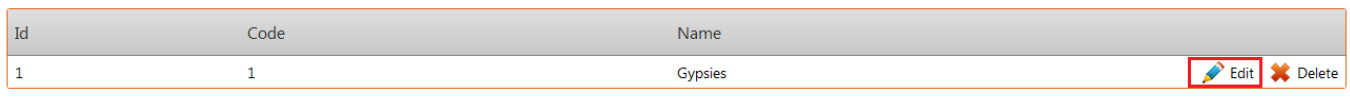


4. Multiple languages

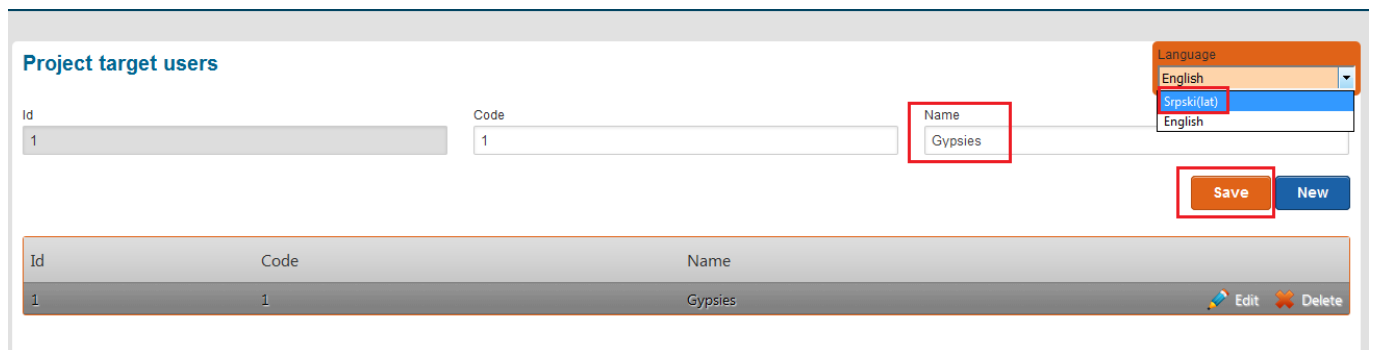
Kendo manager currently supports English language and Serbian (Latin alphabet) language . During the installation of application , it is given the selection of basic language with the data shown in it.

If we want to add for some item in the Codebook and Serbian (secondary) title, the procedure is as follows:

- **Choose** the item in Codebook being imported previously and click on button **Change**.

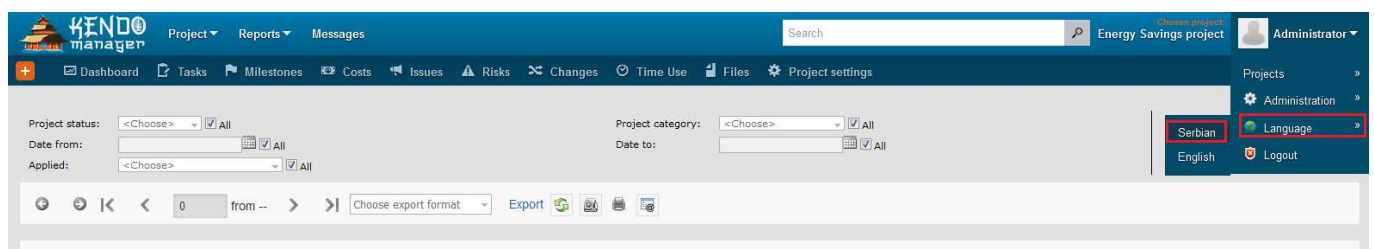


- Choose English language and change the titles into the English language in the form. Click **Save** in order to save the data in English.



Note :

Unless the data are not imported in second language, in Kendo manager is shown the basic language. We are allowed to change the language in Kendo manager from the application in case we want to show or print report in Serbian language,for example.



5.APPENDIX : Basic steps for Kendo manager operation

In order to enable the users to operate with Kendo manager, Administrator has to adjust the following options:

1. **Defining of Basic valute of the application (Codebooks - Currencies)**
2. **Creating of users**

Note : **Basic options** in Kendo Manager are already adjusted for the work on projects according to the recommendations and project methodology.