Customer require to provide details to Doerpreneur Soft for create an account:

1) Corporate or Company's name
2) Corporate or Company's Setup
3) Number of users
4) Package chosen
5) 1 **Email representative** from customer
6) Is the email registered by the user is the company's owner?

After the details given to Doerpreneur Soft, Doerpreneur Soft will proceed to create an account for the customer.

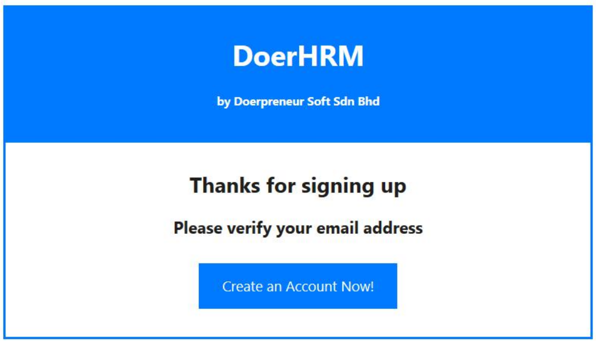
In this Document, we will be covering topics that guide users to know the steps on how to proceed on creating the OKR setup.

Part 1: **Email Representative** Registration
Part 2: Setting up the environment
Part 3: How to use OKR

Part 1: Email Representative Registration

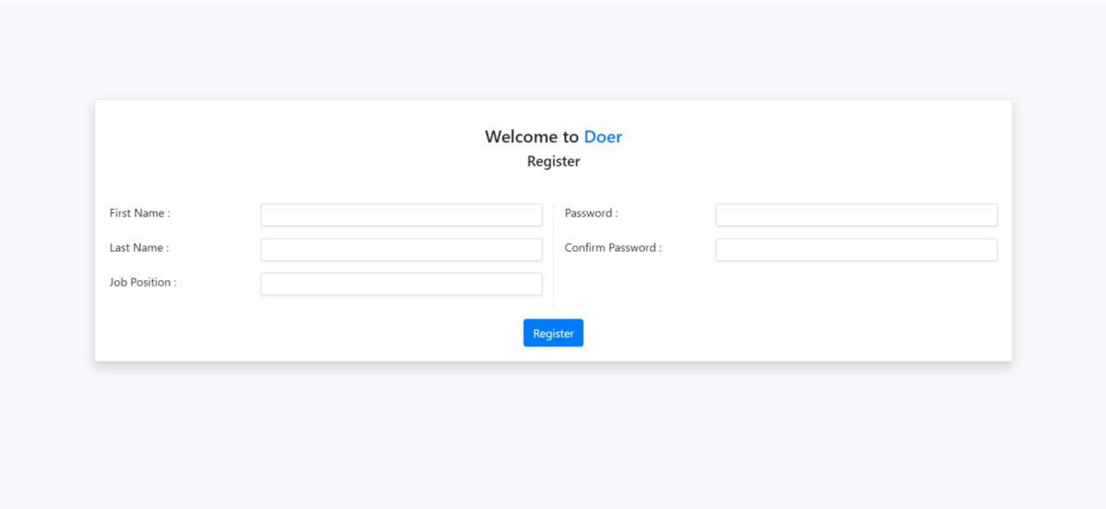
In this part, only the owner of Email representative needs to do this step.
(Owner representative will register as Admin first, can modify after Part 1)

1) **Email representative** will later receive an email like below,



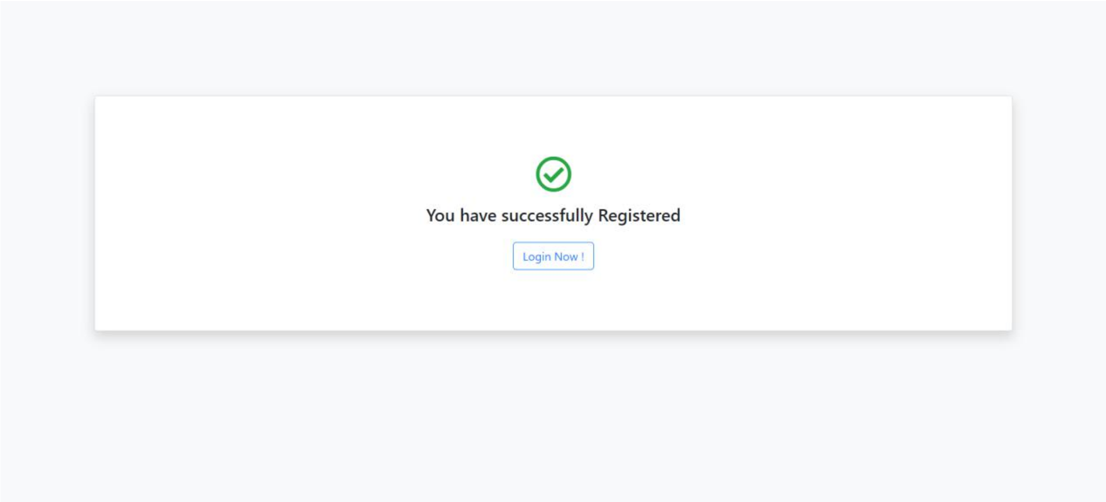
2) Click the "Create an Account" Button to proceed. (If button not working, simply copy the URL link and paste it to browser).

3) After click , **Email representative** will able to view the page below to register

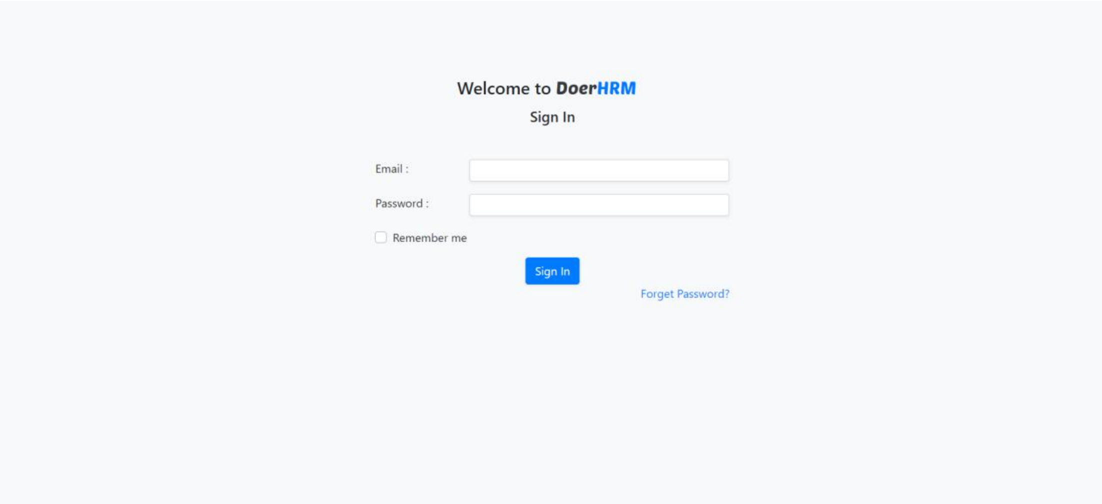


4) Fill in the blanks above according to the user's information to register
   a) First Name: Requires only Alphabet
   b) Last Name: Requires only Alphabet
   c) Job position: Requires to fill in according to the user's job position
   d) Password & Confirm Password: Requires big and small letters, numbers and special characters such as @, #.

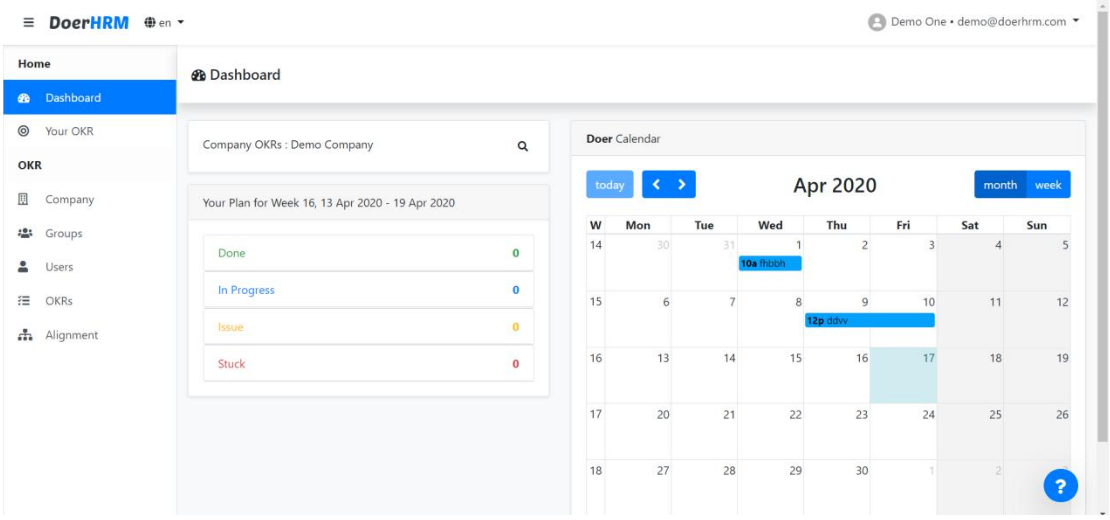
5) After filling in the user's details, the page below will show up if all the entries were successful. Click the "Login Now!" button to proceed.



6) After clicking the "Login Now!" button, the login page will show.



7) When you successfully reach the login page, you are required to key in the email and password that you filled in during registration to login.

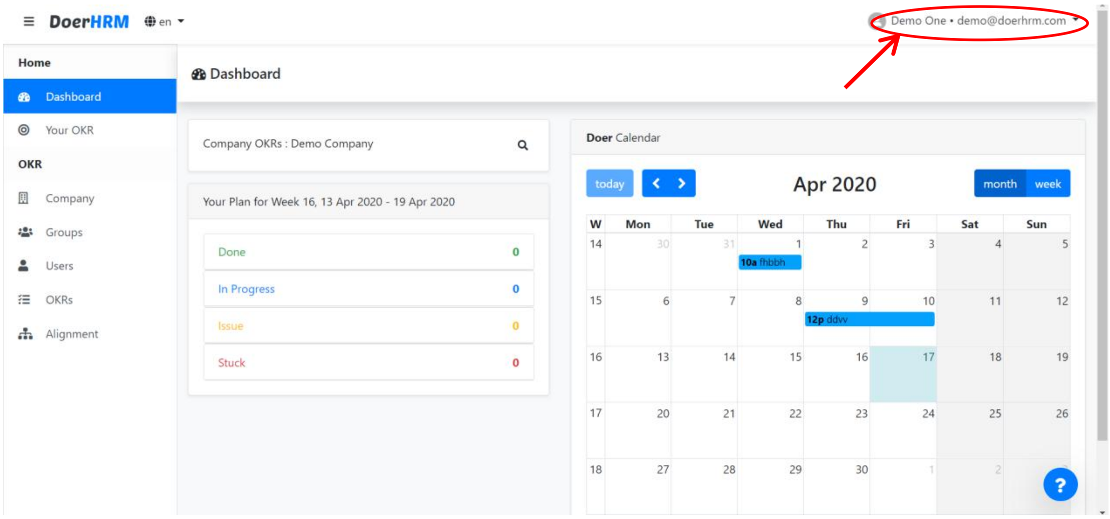


8) Congratulation, you are now successfully login into DoerHRM.

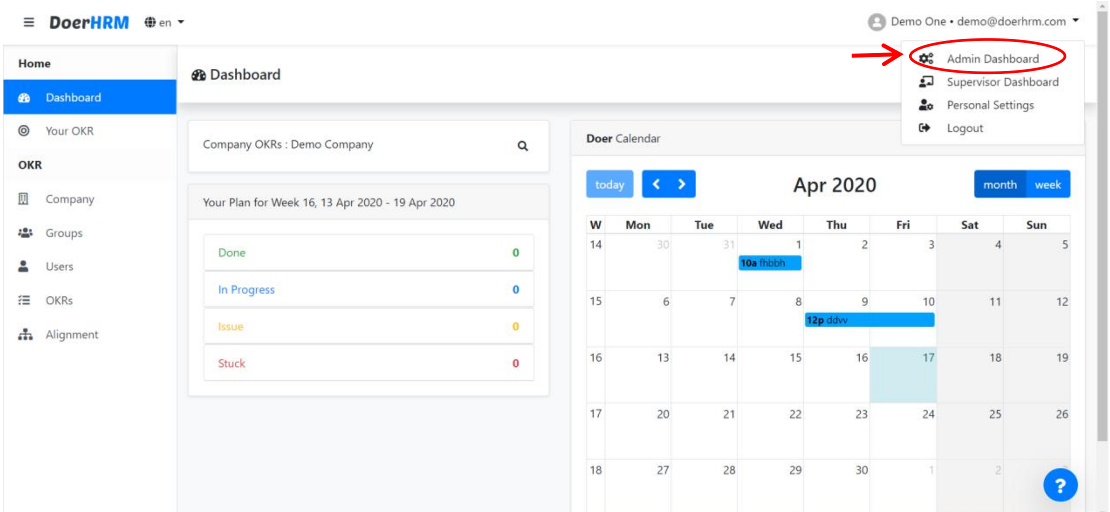
<u>Part 2: Setup the environment</u>

In this part, owner of email representative needs to setup the environment.
(For those who becomes an admin after that can also do this part)

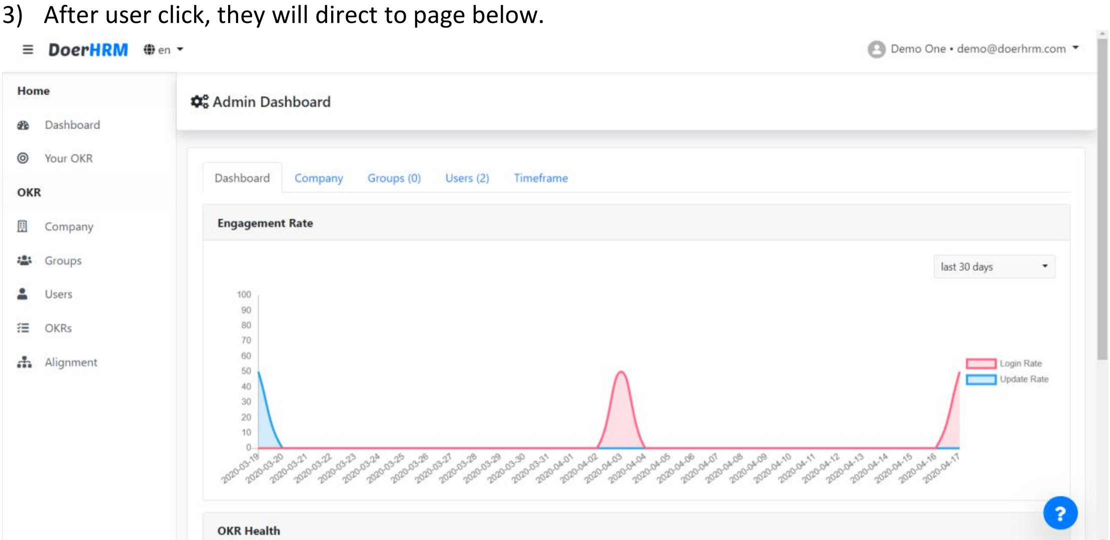
1) After user first login, the user needs to go to “Admin Dashboard” to setup the company’s environment. In order to go Admin Dashboard, user needs to go to the circle at the image below and click.



2) After user click, a dropdown will show. Go to "Admin Dashboard" and click



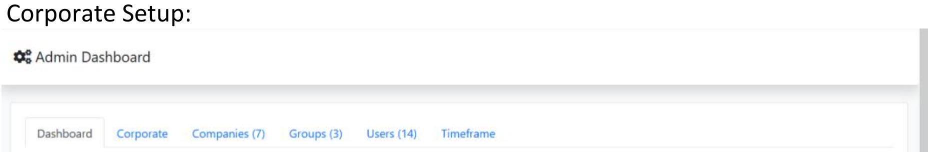
3) After user click, they will direct to page below.



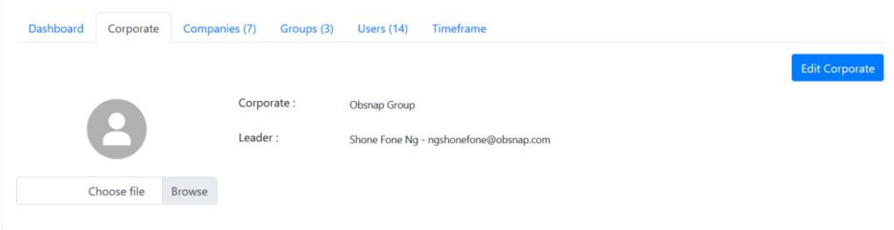
4) In this section, it will be the explanation for "Admin Dashboard".

Setup	Tabs
Corporate	Dashboard, Corporate, Companies, Groups, Users, Timeframe
Company	Dashboard, Company, Groups, Users, Timeframe

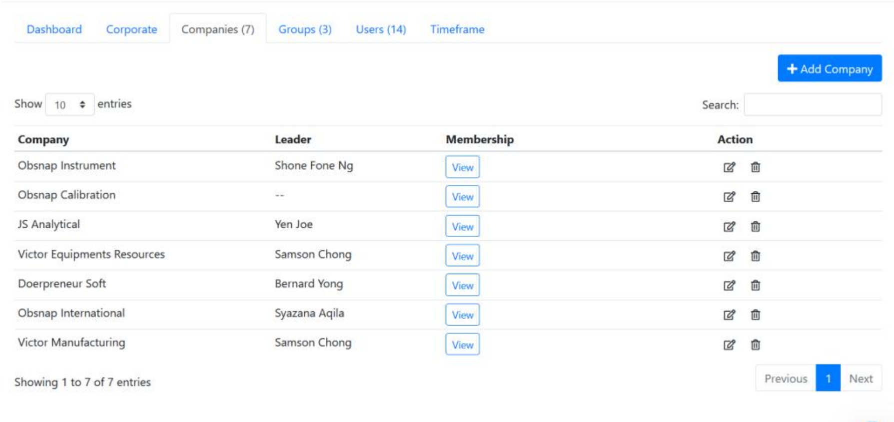
A) Corporate Setup:



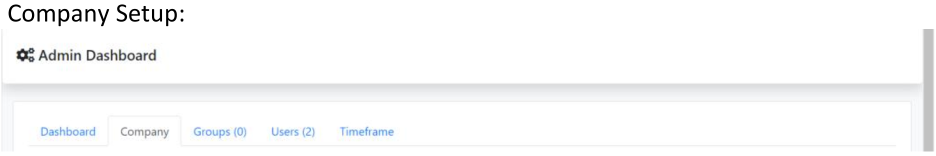
i. As for Corporate tab, you can edit the corporate detail.



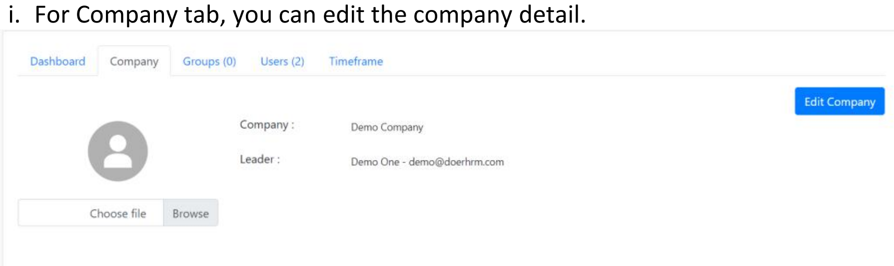
ii. As for Company tab, there will be a list of company.



B) Company Setup:

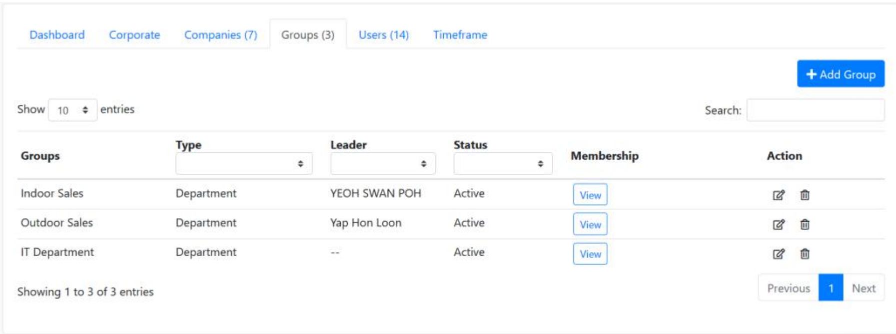


i. For Company tab, you can edit the company detail.

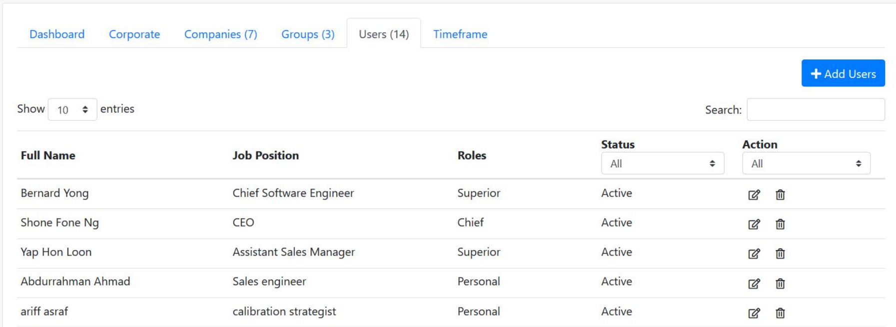


C) As for Groups tab, Users tab and Timeframe tab, both setup are identical.

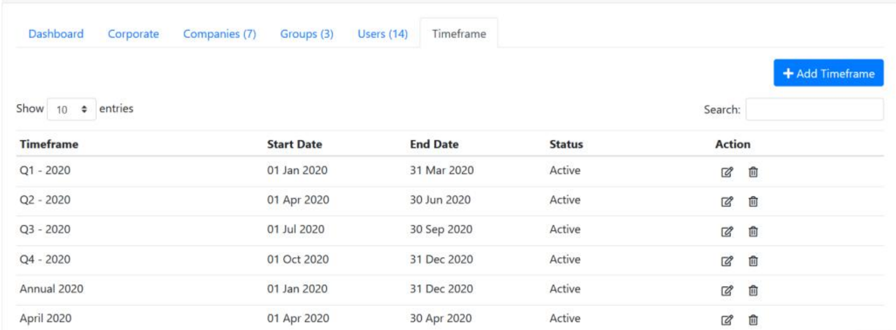
i. For Group tab, admins can manage the department's or team's OKR in your corporate or company.



ii. For User's tab, admins can manage user in corporate or company.

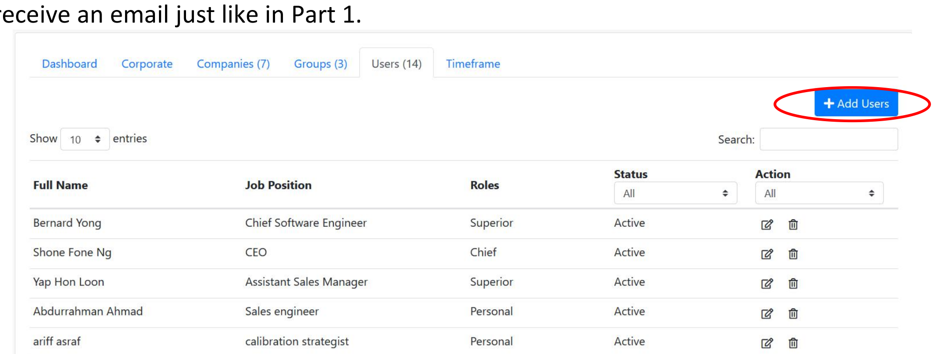


iii. For Timeframe tab, you can manage timeframe which is use by setting the OKR.



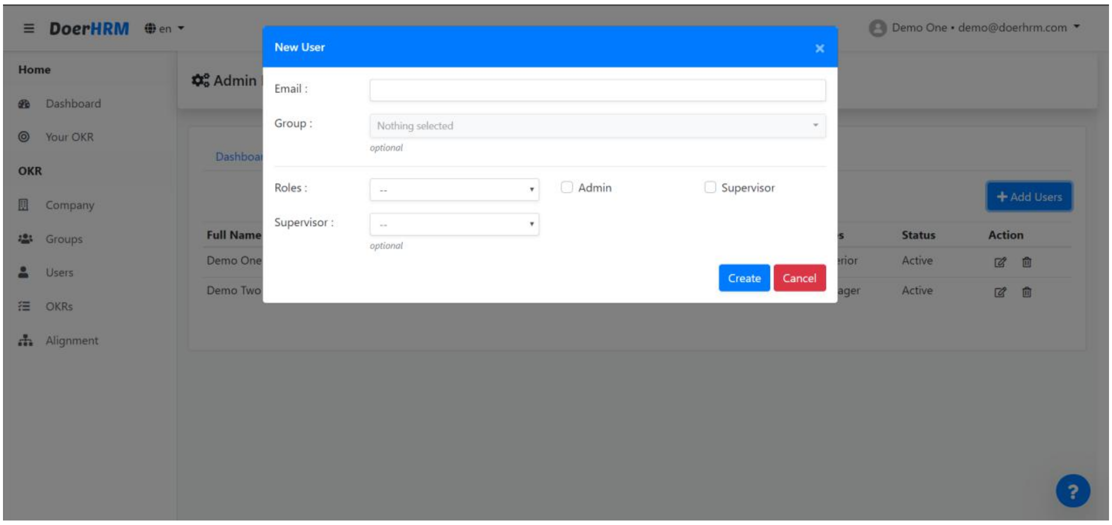
5) In order to setup the environment, you need to:

a) Add users into corporate or company by going to Users tab >> "+ Add Users" button. After that the admin can add a new user with email, the targeted user's email account should receive an email just like in Part 1.

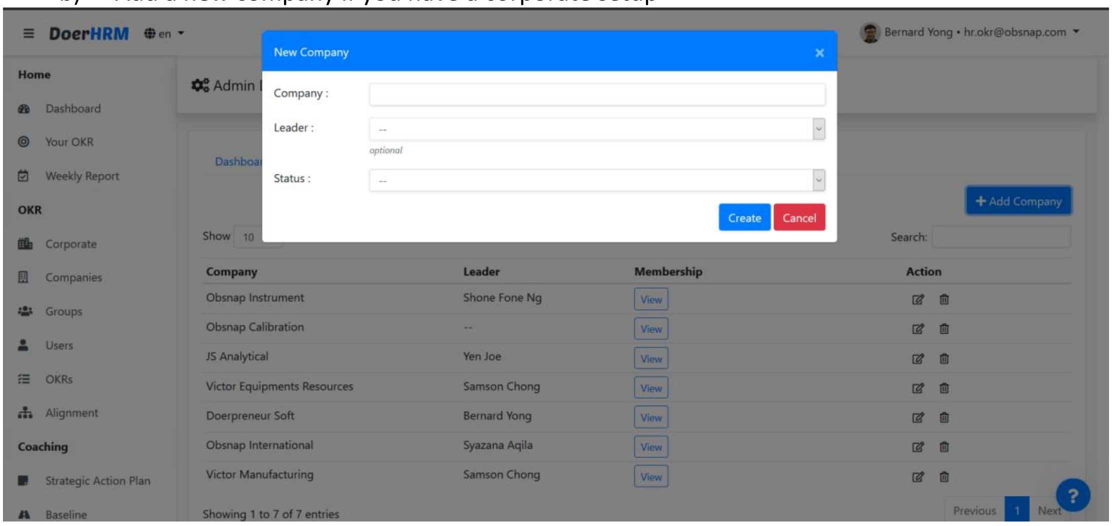


For this part, users has 4 roles in corporate setup and 3 roles in company setup.

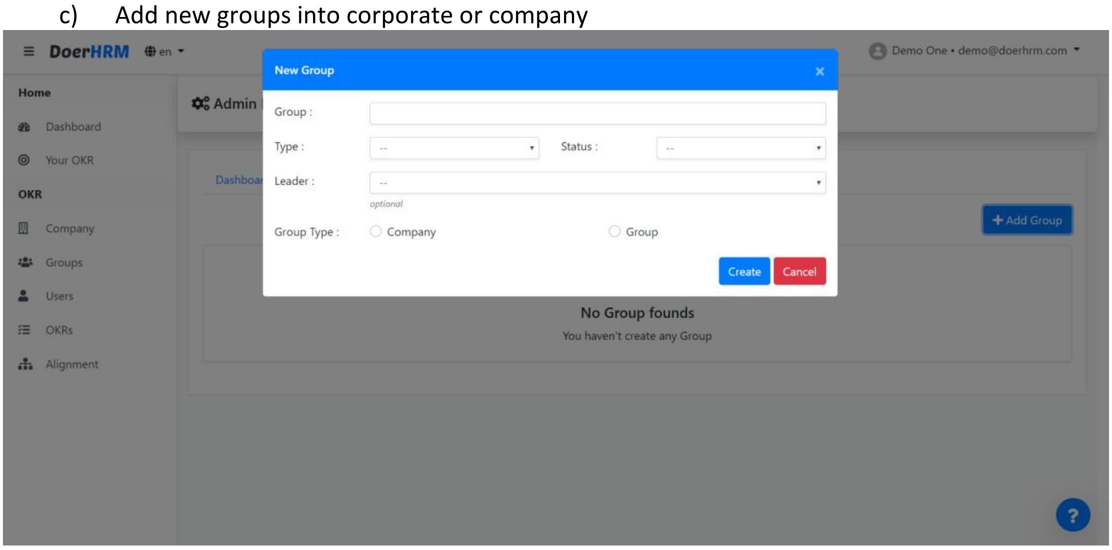
	Corporate	Company	Description
Chief	Yes	No	Can create corporate level OKR. Usually CEO
Superior	Yes	Yes	Can create company level OKR. Usually director
Manager	Yes	Yes	Can create group level OKR. Usually manager or team leader
Personal	Yes	Yes	Can create personal level OKR. Usually normal staff



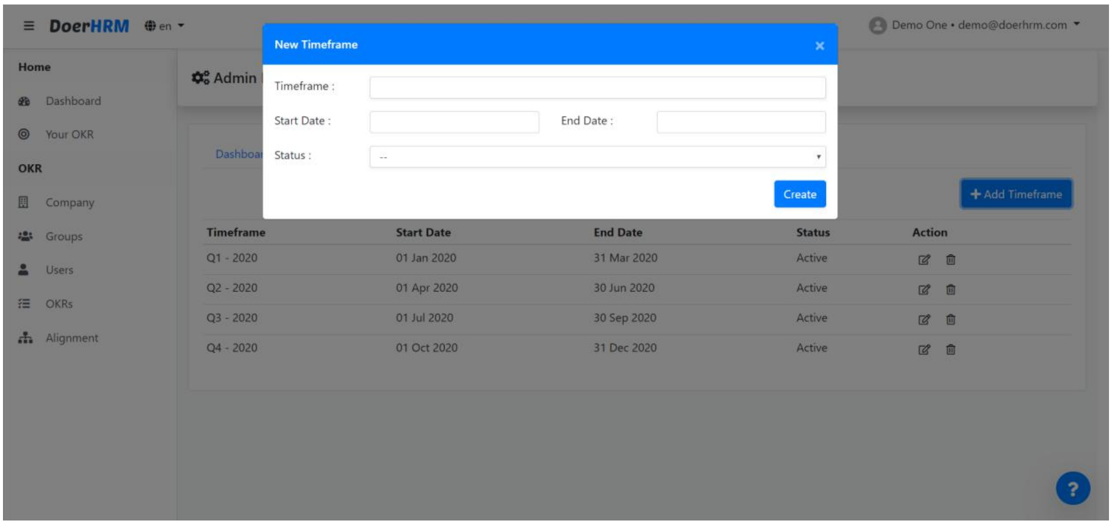
b) Add a new company if you have a corporate setup



c) Add new groups into corporate or company



d) Add a timeframe into corporate or company



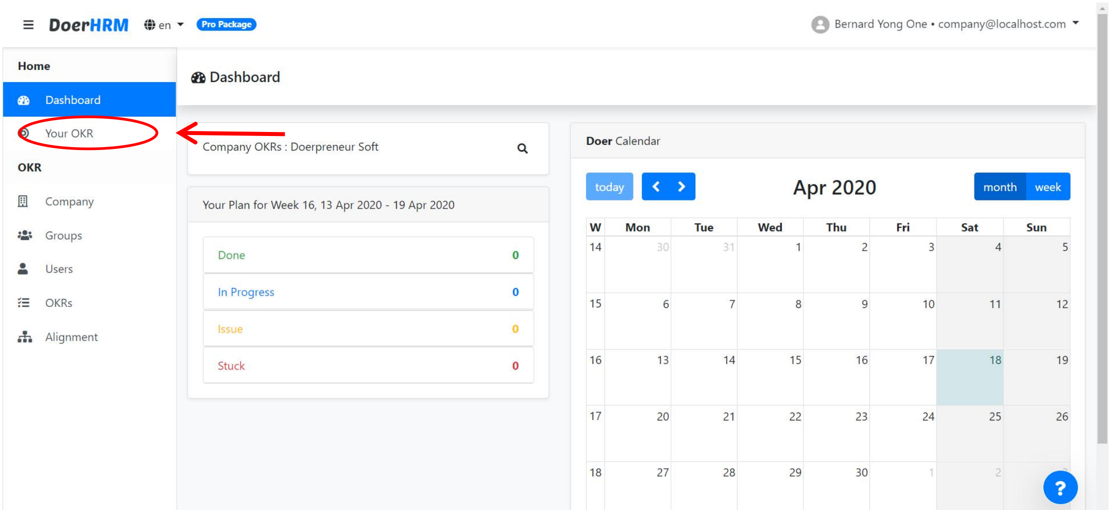
Part 3: How to use OKR

In this part, users can learn how to manage OKR.
(In order to start Part 3, Environment need to be setup first at Part 2)

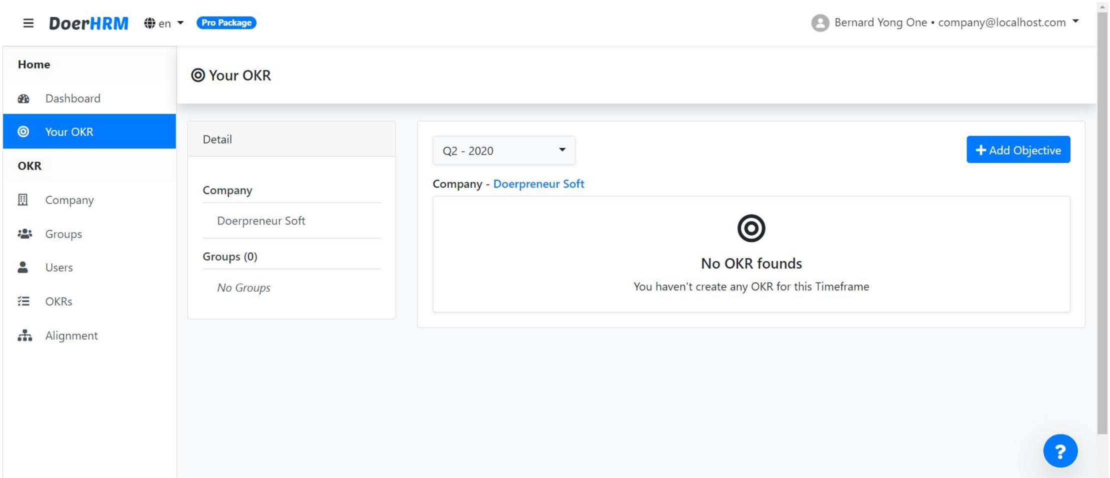
To create a OKR, every user need to have their role. For those who are leader of corporate, company, department and team, their setup need to be finish first.

If the setup is done, you can start create OKR.

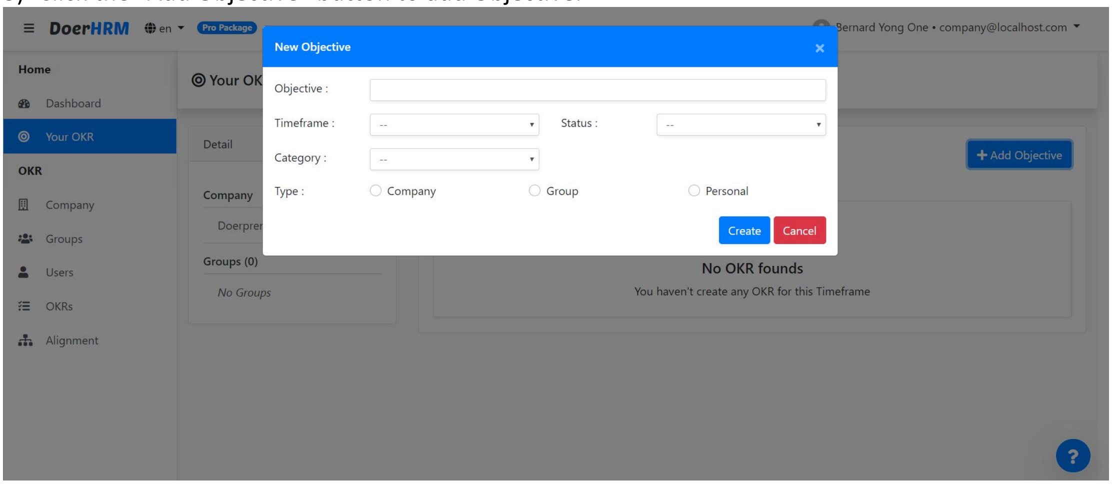
1) First, go to "Your OKR" page, to view your own OKR.



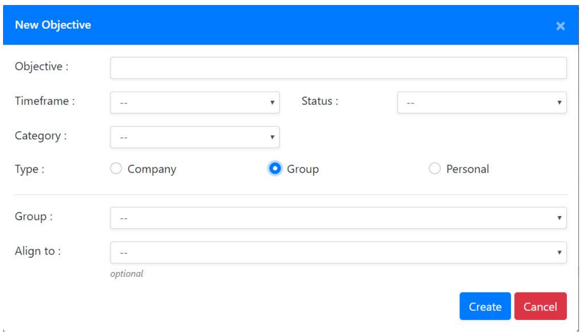
2) In this page, when you want to add a OKR, make sure that admin had added at least one timeframe mention at Part 2.



3) Click the “Add Objective” button to add Objective.



Objective: The objective description
Timeframe: Which timeframe is your Objective?
Status: There are 3 choices which are Active, Plan and Draft
Category: Committed / Aspirational (Committed - 100% Expectation / Aspirational - 70% Expectation)
Type: Choose OKR level. (the type will change with user’s role when you added users at Part 2)



Group: Who’s the owner of the Objective?
Align to: List of Objective that this objective may need to contribute to.