🏠 Getting Started — Your First 10 Minutes

Kadratis Cheat Sheet

Dashboard → Profile → Scope Filters → Tasks → Contributor Profile

① Your Dashboard

Dashboard — your personal landing page.

Tile	What it shows
My Tasks	Assigned tasks by urgency (overdue, this week, later)
Projects I Lead	Projects where you're Lead or Sponsor
Projects I Contribute To	Projects where you're a team member
My Time Last Week	Hours logged, breakdown, top projects
Recently Viewed	Items you recently opened
New Requests	Recent portfolio requests

Quick Actions: Create Task · Log Time (top of dashboard).

Customize: click ⚙️ to show/hide tiles.

② Profile & Notifications

Avatar (top-right) → Settings

Profile tab: Name, Job Title, Phone.

Notifications tab: Master toggle + per-workspace controls (Portfolio, Tasks, Budget).

Weekly Review Email

A periodic digest of your activity and upcoming items.

Setting	What to configure
Day	Which day (e.g. Monday)
Time	What hour
Timezone	Your local timezone

Click **Preview email** to test it.

> 💡 The weekly email surfaces forgotten tasks and upcoming deadlines. Set it up once, let it work for you.

③ Scope Filters — The Key Concept

Every major list has a scope filter at the top:

Scope	Shows
My [items]	Items you own or are assigned to
My Team's	Items from anyone on your Portfolio team
All [items]	Everything in the organization

Works on: **Tasks** · **Apps** · **Projects** · **Requests**.

> ⚠️ See nothing? You're probably on "My [items]" with nothing assigned yet. Switch to "All". The filter **remembers your last choice**.

> ℹ️ "My Team's" requires a team assignment via **Portfolio → Contributors**. If grayed out, ask your admin.

④ Tasks

Portfolio → Tasks

Create: Dashboard quick action *or* Tasks page → New.

Minimum fields: Title + Assignee + Due Date.

Link to context: Project, OPEX, Contract, or CAPEX item. Or leave standalone.

Statuses

Status	When
Open	Not started (default)
In Progress	Work has begun
Done	Completed (time must be logged for project tasks)
Cancelled	No longer needed

Log Time: Open task → Log Time → Category (IT/Business) + Date + Hours.

> 💡 **Send Link** — click it in any workspace header to email a direct link to colleagues. Works on tasks, projects, apps, contracts — everything.

⑤ Contributor Profile

Portfolio → Contributors → find your name.

Setting	What it does
Team	Enables "My Team's" filters everywhere
Availability	Days/month for projects → feeds roadmap & capacity
Skills	What you know + proficiency (0–4)

Proficiency: 0 No knowledge · 1 Basic · 2 With support · 3 Autonomous · 4 Expert.

> ⚠️ Be realistic with availability. Account for meetings, BAU, holidays. 20 days/month = zero non-project time.

How It All Connects

Dashboard — pulls from your tasks, project roles, and time logs.

Scope Filters — ownership + team = personalized views everywhere.

Capacity Planning — your availability + time logs feed the roadmap generator.

Notifications — weekly email + real-time alerts keep you in the loop.

Want to go further?

If you work with…	Read the…
Apps, servers, infra	IT Ops Fast Track
Requests, projects, planning	Portfolio Fast Track

Quick Reference

I want to…	Go to…
See my overview	Dashboard
Create a task	Dashboard → Create Task
Log time	Dashboard → Log Time
See all my tasks	Portfolio → Tasks (scope: My Tasks)
Update my profile	Avatar → Settings → Profile
Set up notifications	Avatar → Settings → Notifications
Weekly review email	Settings → Notifications → Weekly Review
Set my availability	Portfolio → Contributors → your name
Add my skills	Contributors → Skills tab
Share a link	Any workspace → Send Link
Customize dashboard	Dashboard → ⚙️