KIAMBU eDAMS

ADMINISTRATOR MANUAL

WORLD BANK GROUP
Trade & Competitiveness

OTB
AFRICA

Table of Contents

Revision History

Name	Date	Reason For Changes	Version
Collins Wekesa	06/10/2016	Initial draft	1.0 draft 1

CHAPTER 1: USER MANAGEMENT

User Management

There are four types of users that can be managed from the backend:

a. Architects/Clients/Registered Users

b. Reviewers

c. Planners

d. Engineers

1.1 MANAGE ARCHITECTS/CLIENTS, REVIEWERS, PLANNERS AND ENGINEERS

1.1.1 Manage Architects/Registered Users

This can be accessed by clicking on the "Users" Menu as shown below.

This page manages the architects (front end users) who have registered on the e-construction permit website. The following can be done on the user's data.

- View User

- Activate/Deactivate User

🎬 Delete User

1.1.1.1 View User Details

To view a client's details, click on the name of user or on the "View" icon as shown below.

1.1.1.2 Activate / Deactivate User

1. To activate or deactivate a user, click on the "activate" or "deactivate" icons as show below. A Tick under the "Active?" Column means that the client is activated and they can login. A Tick under the "Validated?" column means the client has confirmed their email address.

1.1.1.2 Deleting an Architect, Engineers and Planners

While on the client's page you can click on the delete button on the right side to delete a user as shown below.

1.1.2 Manage Reviewers

This can be accessed by clicking on the "Reviewers" Menu as show below.

1.1.2.1 Creating New Reviewers

This page manages the backend users who are created by the administrator of the system. Let us create our first reviewer. To create a new reviewer,

1. Click on the "Add New Reviewer" button as shown below.

This action will open the New Reviewers Details page.

2. Edit the various fields by filling in the details of the new reviewer.
3. You will use the drop down list to select the department that reviewer belongs to.

NB: Assigning the reviewer to a department restricts the reviewer to the information and applications that belong to that department.

4. You will also need to assign a reviewer to a group.

NB: Assigning reviewers to groups gives them the credentials which enable them to access various parts of the system. For example, the administrator has access to all parts of the system.

1.1.2.3 Editing a reviewer

We can also edit the reviewers' details.

To edit a reviewer:

1. Go to the "Reviewers" menu and click on the "View" button or the name of the reviewer you want to edit as shown below.

1	CLERK ENGINEERING	clerk_eng3@otbafrica.com	clerk_eng3	Active	👁 ⊚
2	CLERK_ENG2 CLERK_ENG2	clerk_eng2@otbafrica.com	clerk_eng2	Active	👁 ⊚
3	AAK AAK	aak@otbafrica.com	aak	Active	👁 ⊚
4	AUTHORIZED LEGAL OFFICER (CITY MANAGER'S OFFICE) CITY MANAGER'S OFFICE	auth_legal_officer@gmail.com	auth_legal_officer	Active	👁 ⊚
5	BUILDING INSPECTOR	inspector@otbafrica.com	inspector	Active	👁 ⊚

2. This takes you to the Reviewers details page, where you can edit the details you wish to modify.

3. Click on the "Save" button to save the changes you have made.

1.1.2.4 Deleting a reviewer record

Note that you should only delete a reviewer record in specific cases such as when a reviewer record has been created by mistake, otherwise, the deactivation feature (see the following section) should be used.

To delete a reviewer record click delete button on the reviewers details page as shown below.

NB: Reviewers who have information that is associated with them on the system, cannot be deleted.

1.1.2.5 Deactivating a reviewer

To deactivate a reviewer:

- Go to Reviewers
- Search for the specific reviewer by name, email address or phone number.
- Click the 'Deactivate Reviewer' button on the far right of the reviewer record that appears as shown below.
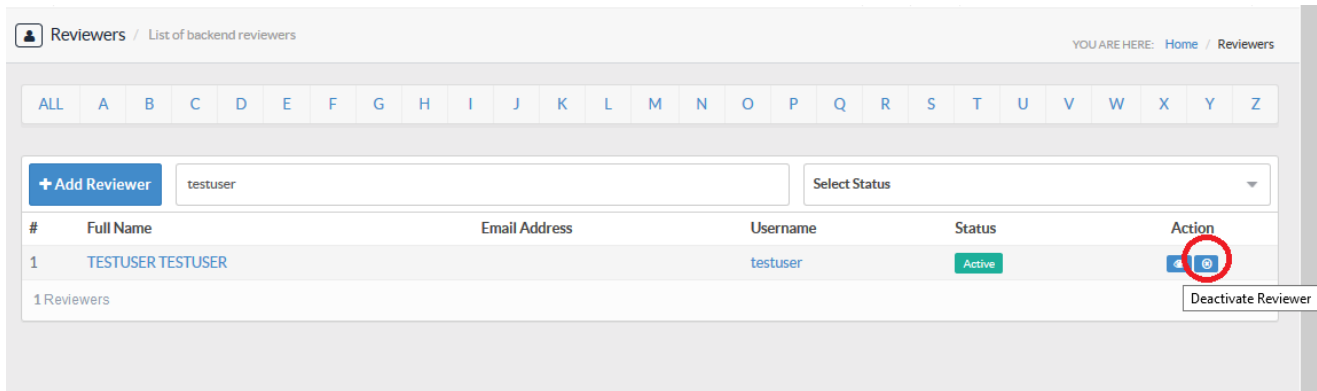
1.1.2.6 Activating a reviewer

To activate a reviewer who is inactive:

- Go to Reviewers
- Select 'Inactive' in the Status dropdown as shown below
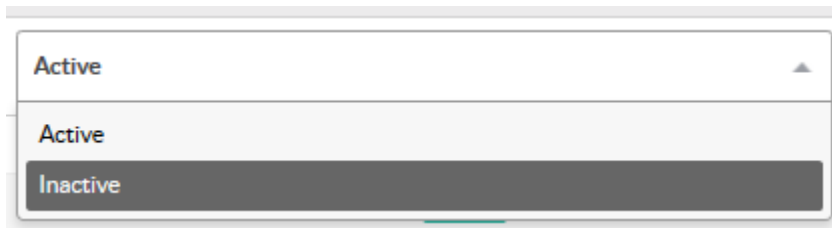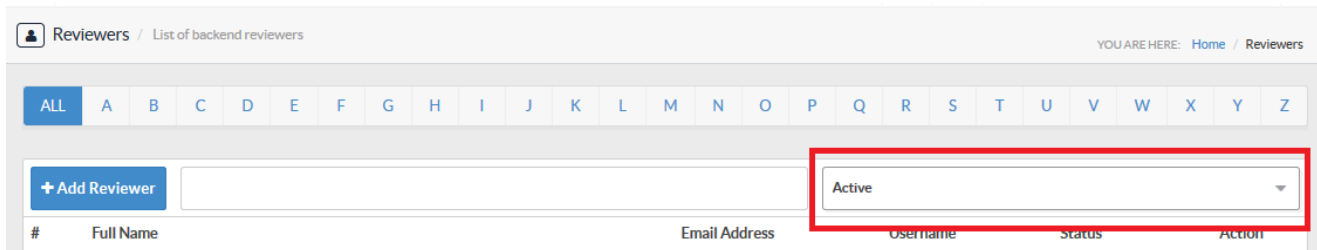
- Click the 'Activate Reviewer' button on the far right of the reviewer record that you want to activate as shown below.

1.1.2.7 Allocating Use A sub-county

Under reviewers, click on a reviewer to view details. Under "Allowed Sub-counties", assign a sub-county.

1.1.3 Managing Groups

Assigning reviewers to groups gives them the credentials which enable them to access various parts of the system. Groups defines what sections of the system the user has access to and what the user can do in these sections.

To access the manage groups page;

1. Click on the System Settings Menu as shown below.
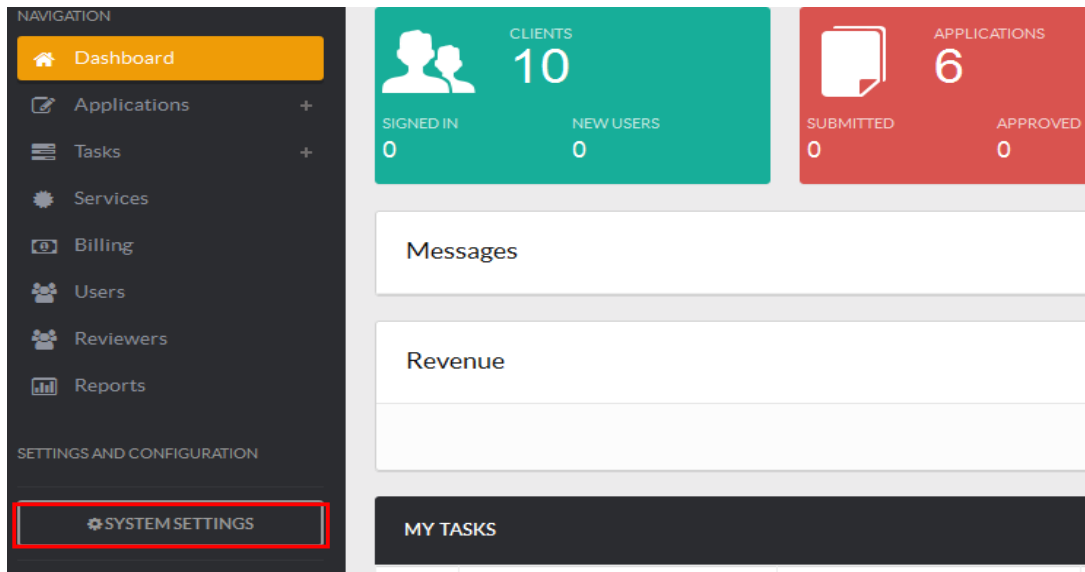
2. This will give the System Settings and Configuration menu. Select Security and choose Groups as shown
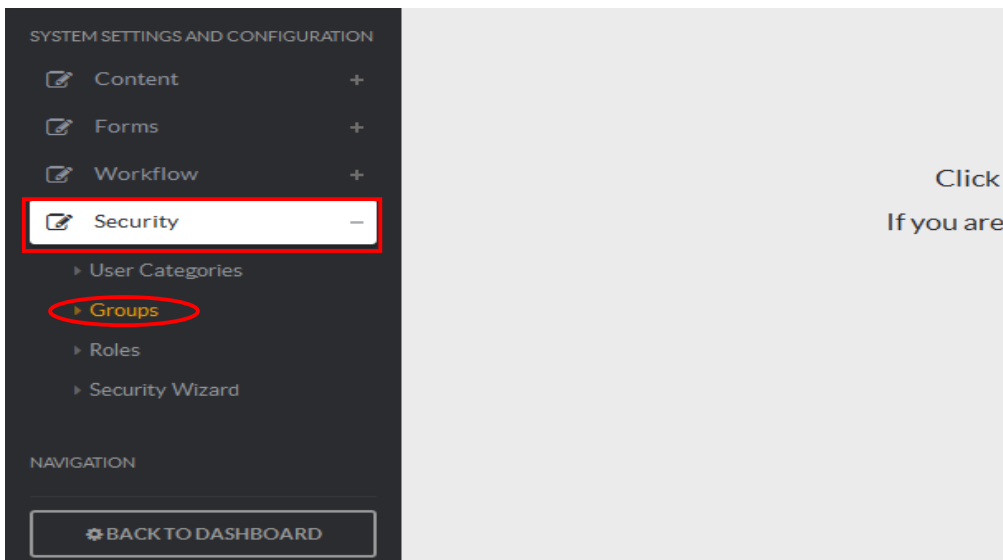
This will give you a list of all the groups currently in the system.

1.1.3.1 Creating a new Group

To create a new group;

1. Click on the "New Group" button. This action will take us to the new group page.

2. Fill in the fields in the new group page by clicking on the presented items.

3. Select the reviewers that will belong to the group by clicking on the reviewers from the list provided on the left side column. Users you select will appear on the right side column.

4. Select the roles/permissions that reviewers in the group will have by clicking on the roles from the list provided on left side column. Roles chosen will appear on the right side column.

5. Click Submit to save the changes and go back to the list of groups to see the new group that you have just created.

1.1.3.2 Deleting a Group

1. To delete a group click on the delete icon against the group record.

NB: Groups with members cannot be deleted.

CHAPTER 2: WEB CONTENT MANAGEMENT

Web page updating has been simplified by the inclusion of a generic Content Management System that covers all the basics of editing and updating page information. Being at its infancy stage, the editable pages are present leaving you with the simple task of update only.

2.1 MANAGE WEB PAGES

News can be created by the administrator conveying important information updates to the front end users of the system.

2.1.2 View Web Page

To view the existing web pages, click on the "System Settings" button at the bottom, click on the "Content" menu and then select "Web Pages".
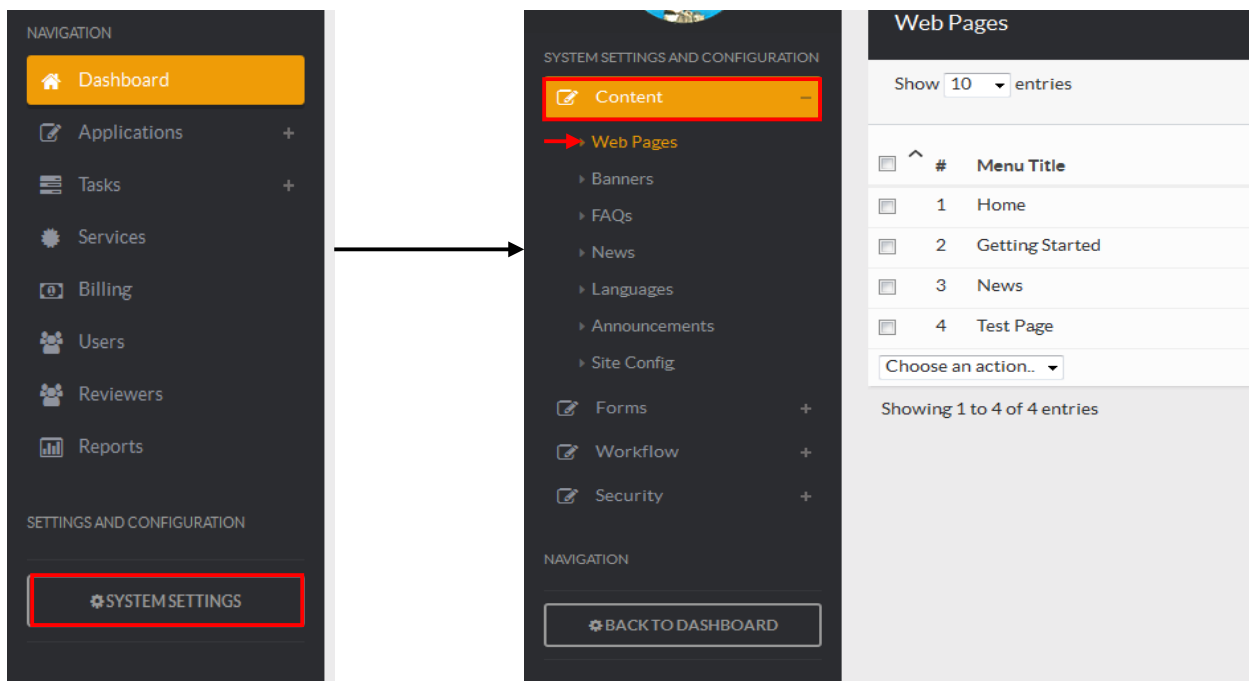
2.1.3 Add a Web Page

To add a new web page:

1. Click on the new "New Webpage" button
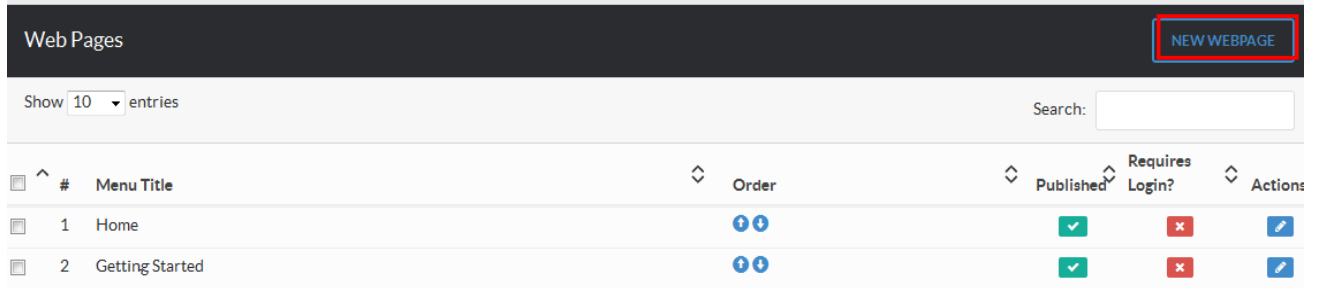
This will open the "New WebPage" page.
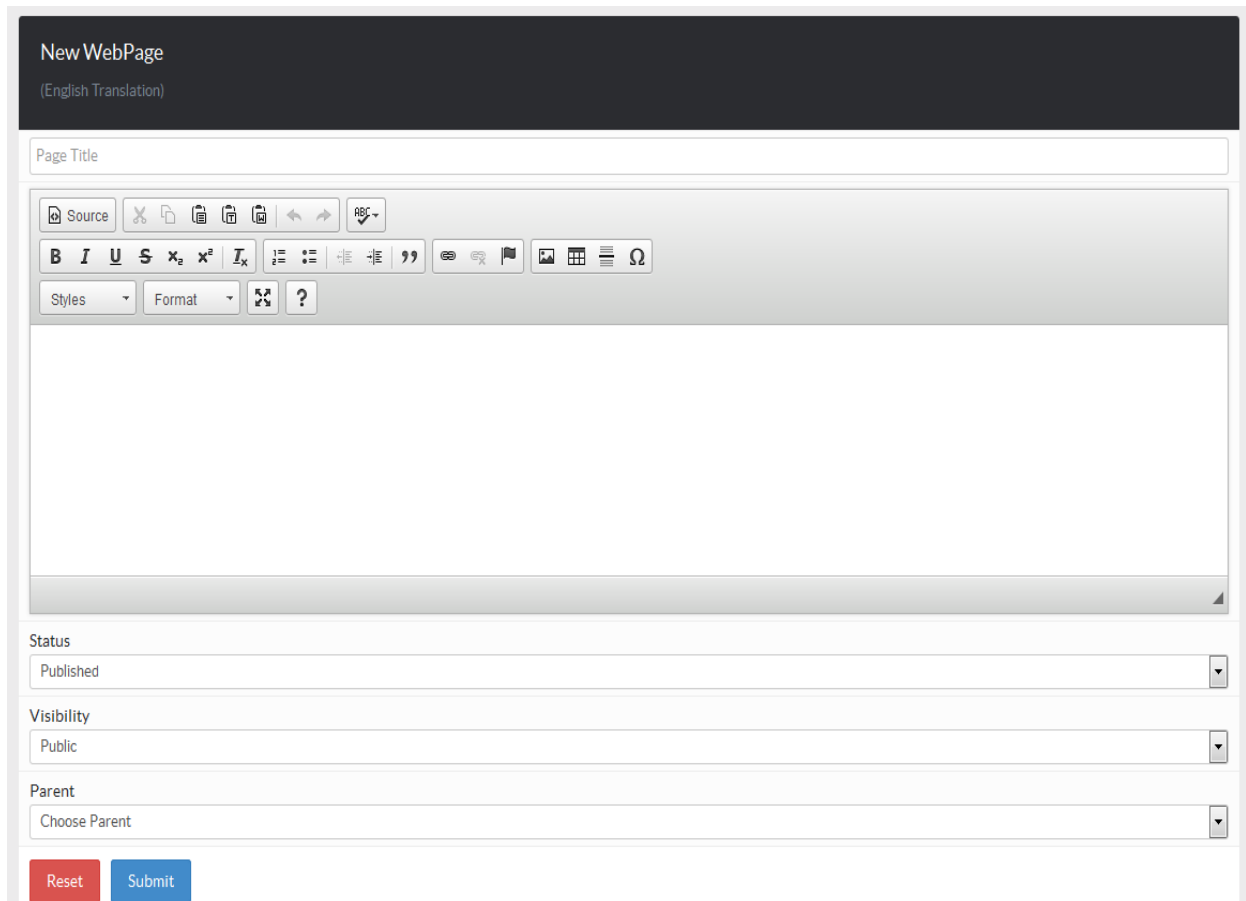
2. Enter details of the new web page and click "Submit" when done

NB: The web page has a text editor plugin that allows you to format your text as you please.

2.1.4 Edit Web Page

To edit a "web page" click on the edit icon on the web page record and edit the record.

2.1.5 Delete a Web Page

To delete a web page, mark the check box of the web page/pages to delete. At the bottom of the record, select "Set as Deleted" from the drop down tool as shown.

2.2 MANAGE NEWS

News can be created by the administrator conveying important information updates to the front end users of the system.

2.2.2 View News Article

To view the existing news articles, click on the "System Settings" button at the bottom, click on "Content" menu and then select on "News"
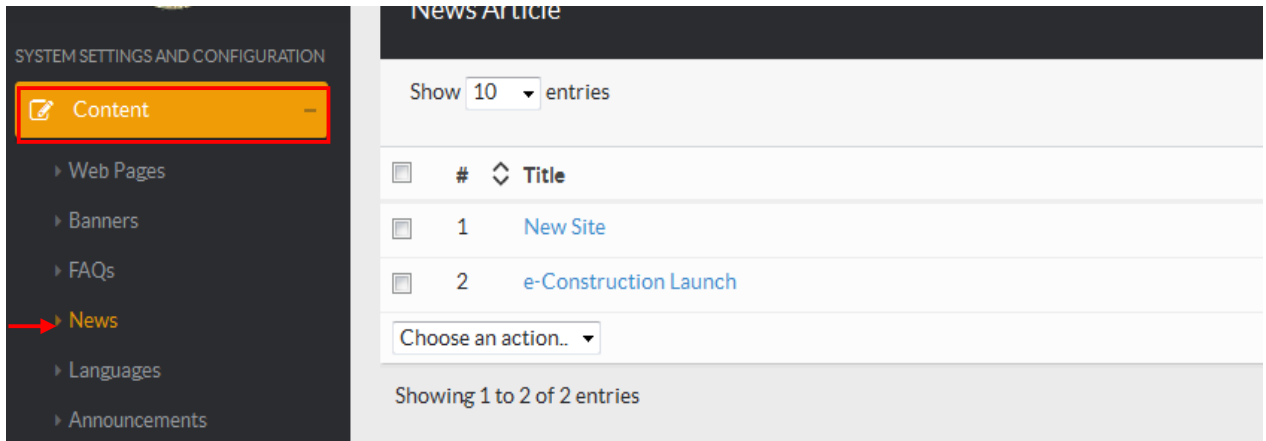
2.2.3 Add a News Article

To add a new news article:

1. Click on the new "New News Article" button.
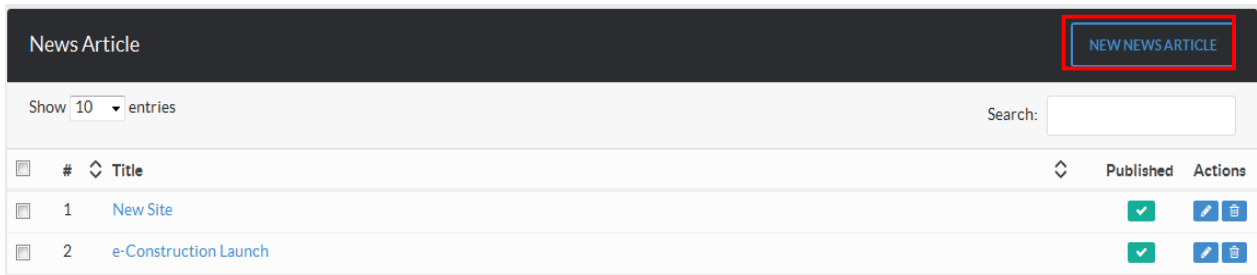
This will open the "New News Article" page

Edit the details and click on Submit when you're done.

NB: The news article has a text editor plugin that allows you to format your text as you please.

2.2.4 Edit news Article

To edit a "news article" click on the edit icon on the news article record and edit the record.

2.2.5 Delete news Article

To delete a news article, mark the check box of the article/articles to delete. At the bottom choose "Set as Deleted" form the drop down tool as shown

2.3 MANAGE BANNERS

2.2.1 View Banners

To view all banners uploaded in the site, go to "System Settings", click on the "Content" menu and select "banners"
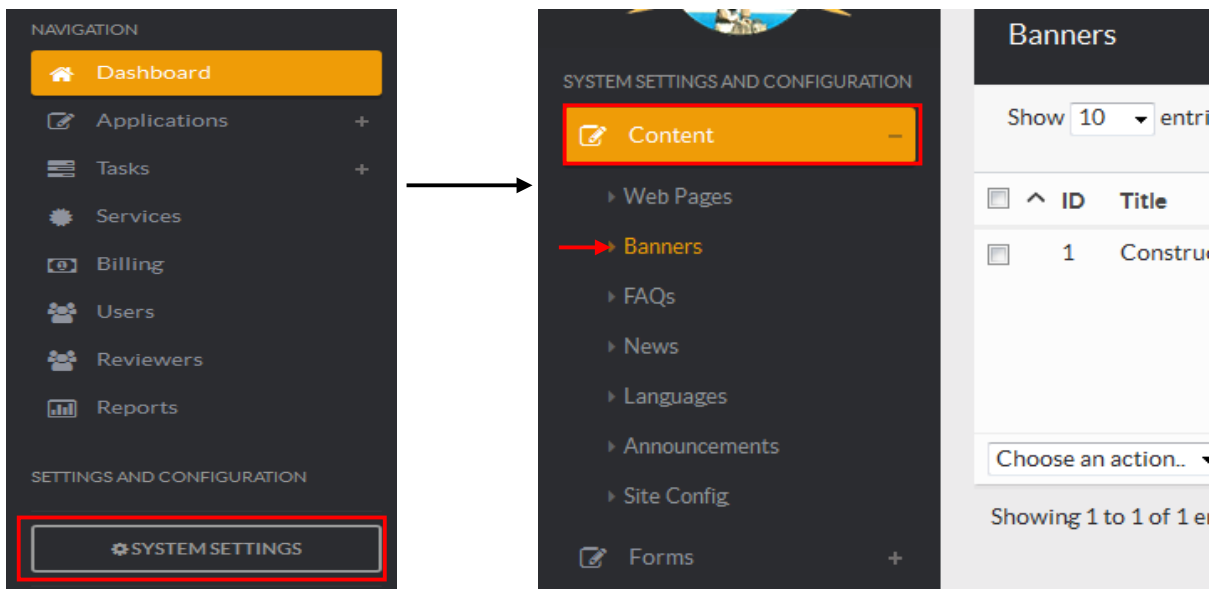
You will be presented with a list of all banners in the system.

2.2.2 Add a new Banner

Click on the "New Banner" button as shown
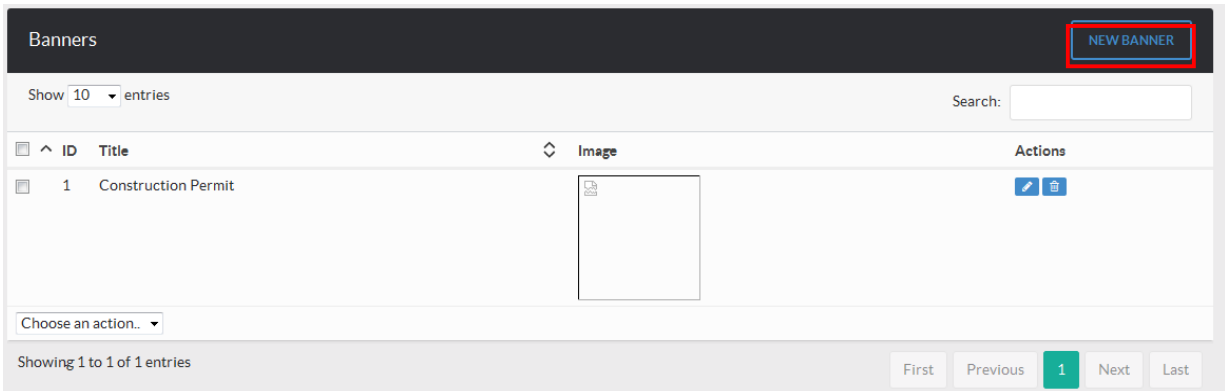
You will be presented with a "New Banner" page where you will enter the details and upload the banner image.
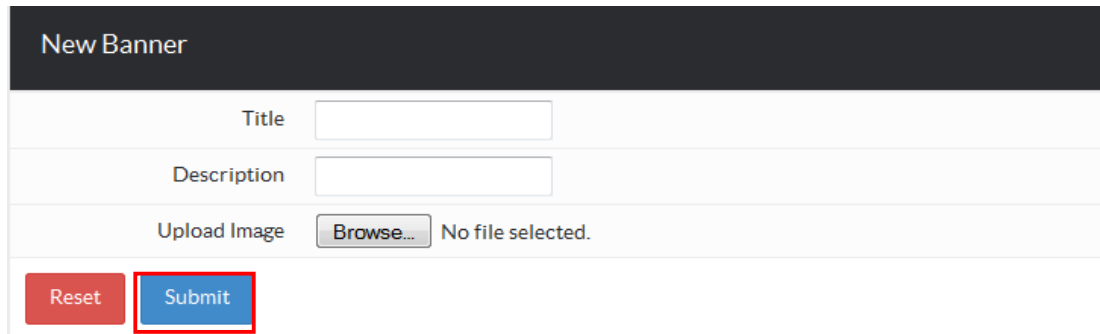
Click "Submit" once you have finished.

2.2.3 Edit a banner

Go to the banners page and click on the "edit" icon for the banner you want to make changes.
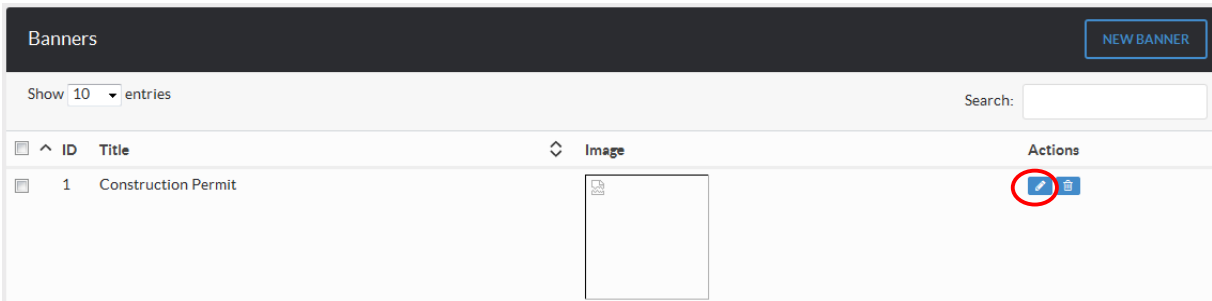
2.2.4 Delete a Banner

Go to the banners page and click on the "delete" icon for the banner you want to delete.
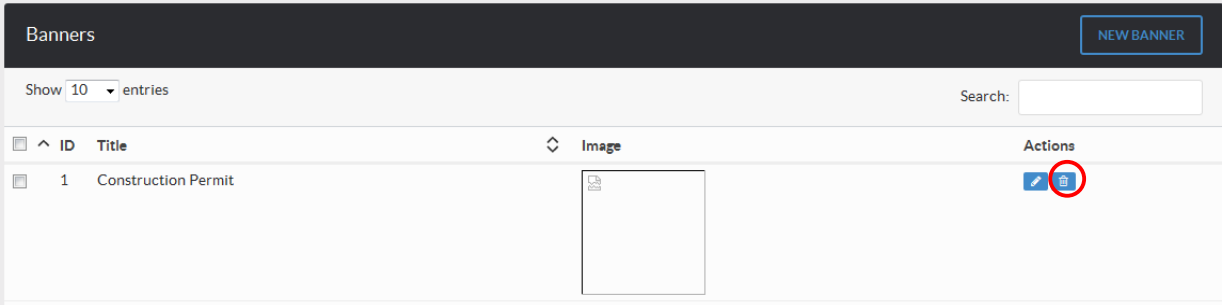
CHAPTER 3: SETTING UP THE BASIC PERMIT COMPONENTS

Before delving into Permit Management, it would be prudent to get the components on the permit into the system. These components are the Departments, Comment Fields, Comment Sheet, Stages of approval (Menus and Submenus), Notifications and Buttons (For each stage of approval).

When adding new details in the system it's a good idea to add them in this order. Start with departments and end with the comment sheet and then continue to the stages of approval and so on.

3.1 DEPARTMENTS

You can access the departments by clicking on the "System Settings" button at the bottom, then clicking on the "Other settings" menu and then selecting "Departments" as shown below.
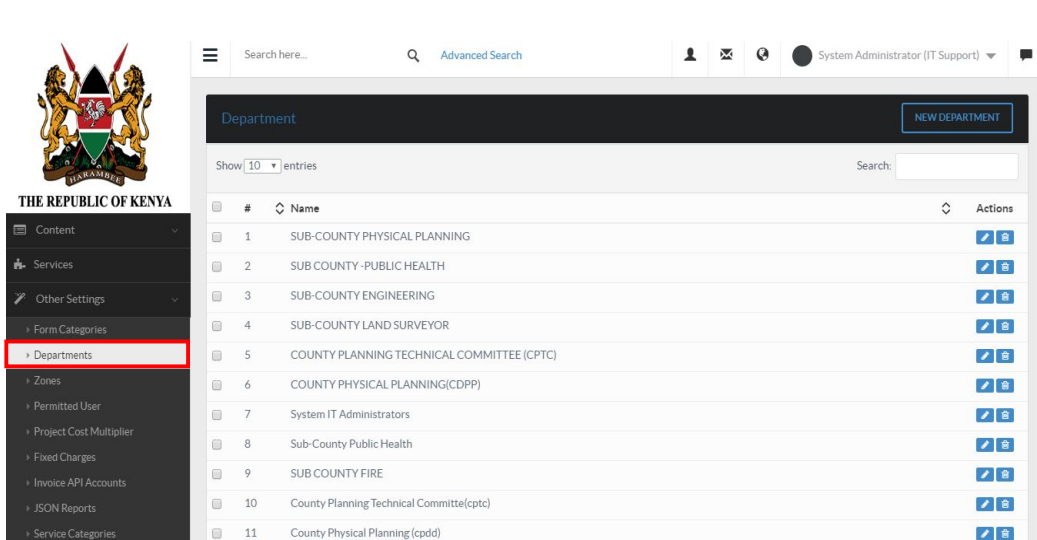
You will be presented with a list of all departments currently in the system as shown below.

3.1.2 Adding Departments

1. To add a new department, click on the "New Department" button.

3. Enter the department details on the form and click on the "Submit" button.

3.1.3 Editing Departments

1. Click on the edit button for a department as shown below.
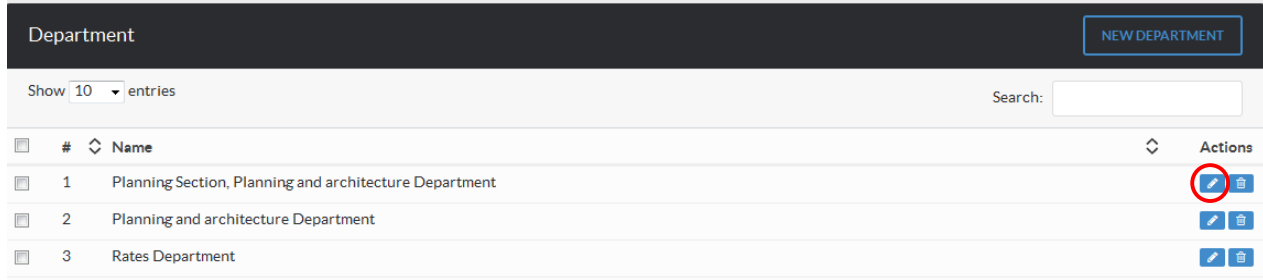
2. Edit the department name and click on the "Submit" button to update the details.
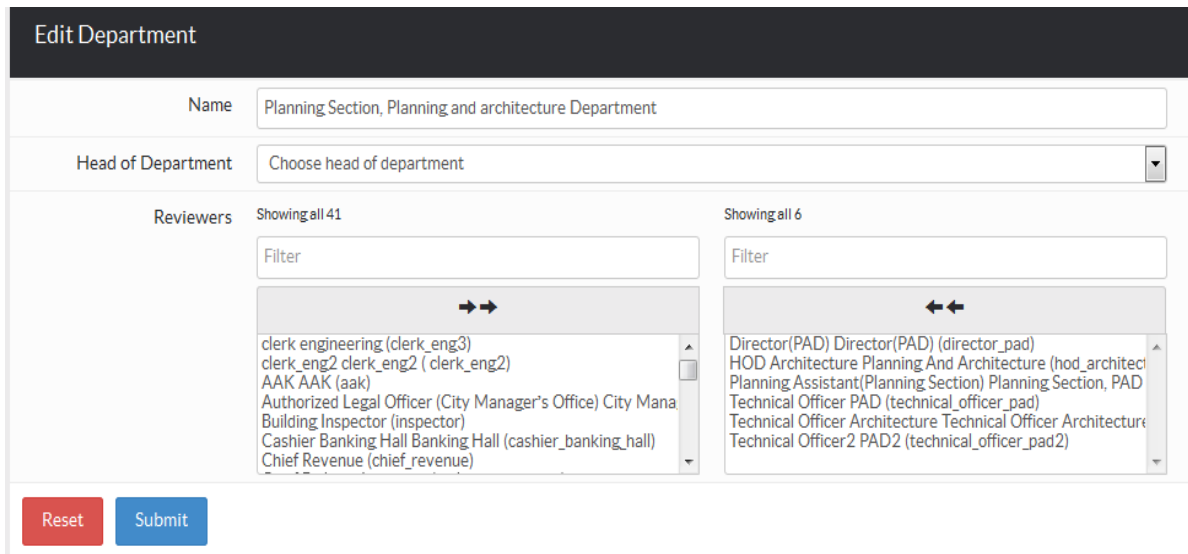
3.2 STAGES OF APPROVAL

The stages of approval for the application are created by setting up menus and sub-menus which act like stages and sub-stages respectively. Stage groups are used to group together many stages e.g. "Stage 1" has many stages including: Invoicing, Invoicing communication, Payment and Confirm Payment. So in this case, "Stage 1" is a Stage Group and "Invoicing" is a stage.

3.2.1 Managing Stage Groups

This page can be accessed by clicking on the "System Settings" then "Services" button at the bottom, then click on a service.A dialogue opens and click on workflow.
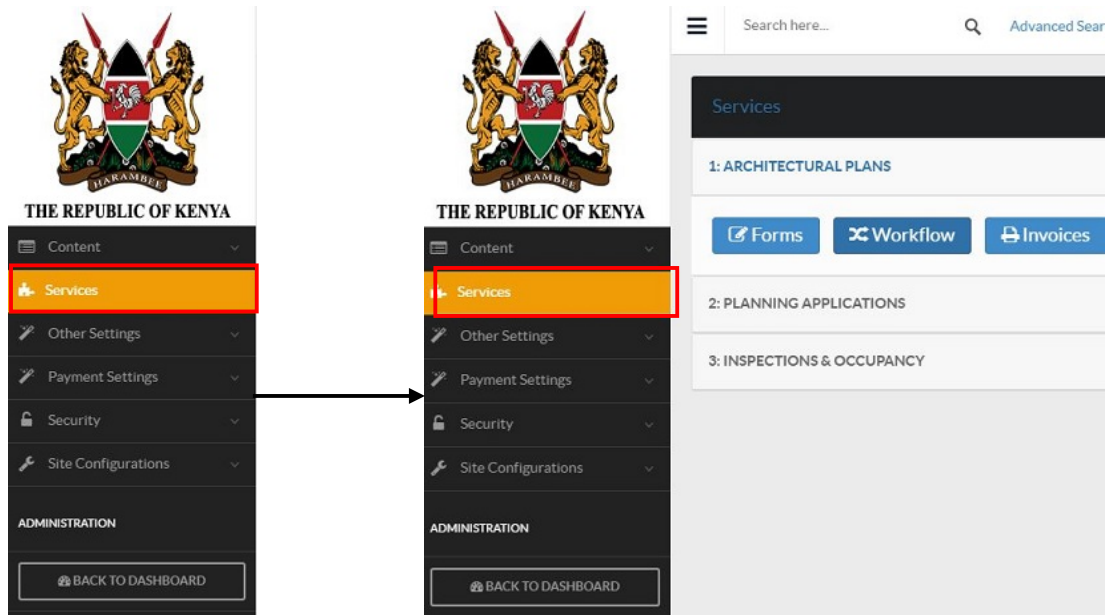
You will be presented with a list of all the stage groups currently available in the system as shown below

3.2.1.1 Adding a new Stage Group

1. Click on the "Add New Stage" button as shown below.
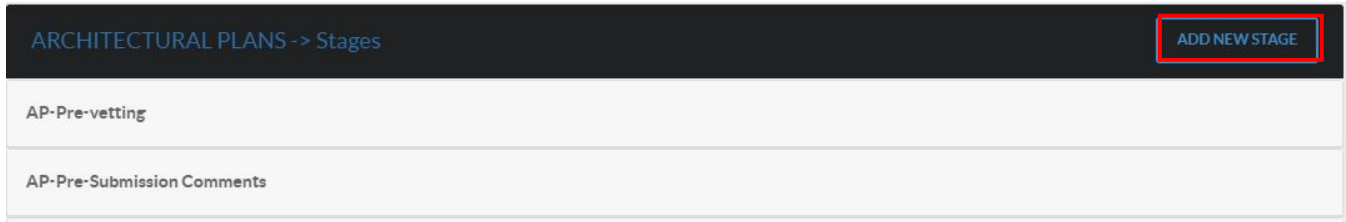
3. Enter the title of the stage group and select the group of reviewers and users that will access this stage group.Click on the three tabs (i.e Stage Details,Actions and Permissions) for details. Click on submit once you finish.

3.2.1.2 Editing a Stage Group

To edit a stage group, click on the "edit" icon as shown below.
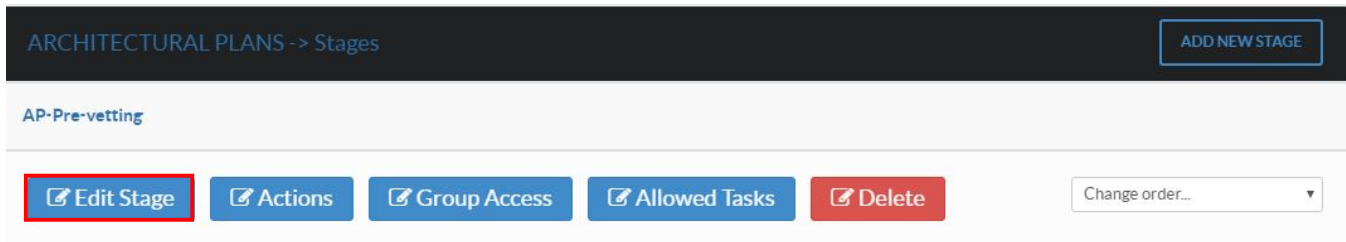
From the edit page, change the details you wish to change. Click on the "Submit" button to save the changes.

3.2.1.3 Deleting a Stage Group

To delete a stage group, click on the "delete" icon as shown below.

3.2.2 MANAGING STAGES

This page can be accessed through the stage groups by click "Actions" button of a Stage Group as shown below

You will be presented with a list of any stages available under that stage group as shown below.
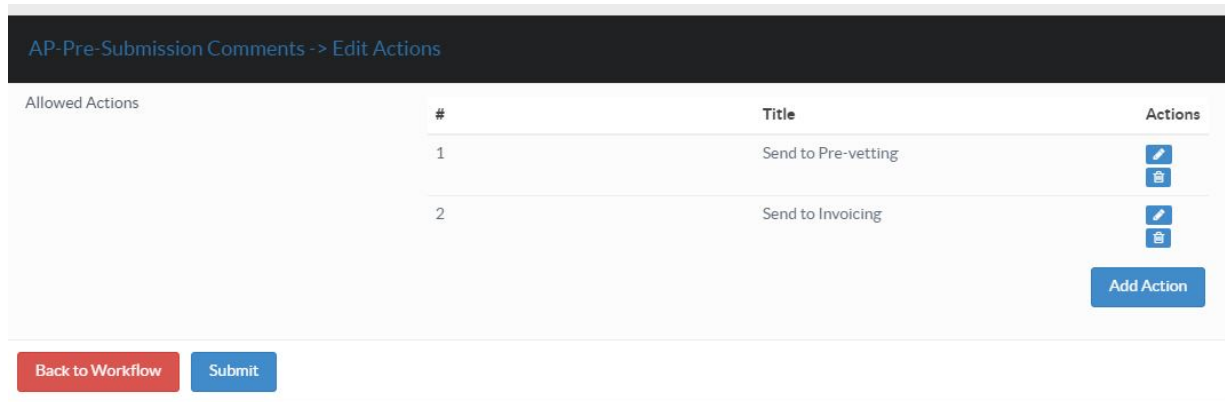
3.3.3 MANAGING ACTIONS

Actions are the buttons responsible for moving an application from one stage of approval to another e.g. "Send to Invoicing", " Send to Circulations", "Approve" are examples of actions.

3.4.3.1 Adding a new Action

To add a new action:

- Go to **System Settings->Services->**
- Select the workflow you want to add the action to and click the "Actions" button as shown below
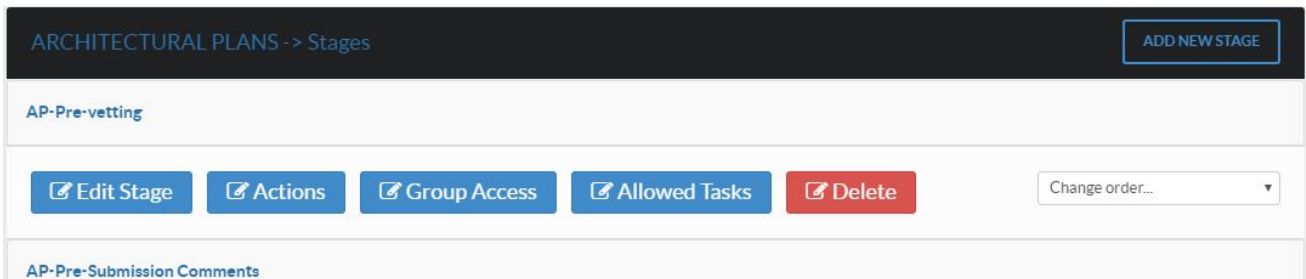
- Select the stage you want to add the action to and click on the edit button as shown below
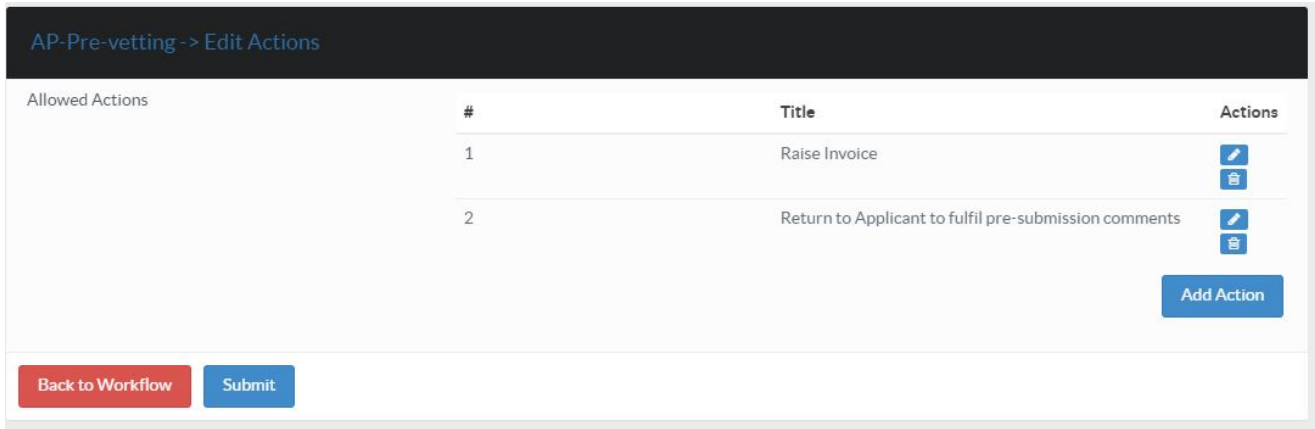
- Click the 'Actions' tab and click on the 'Add Action' button to add a new action as shown below
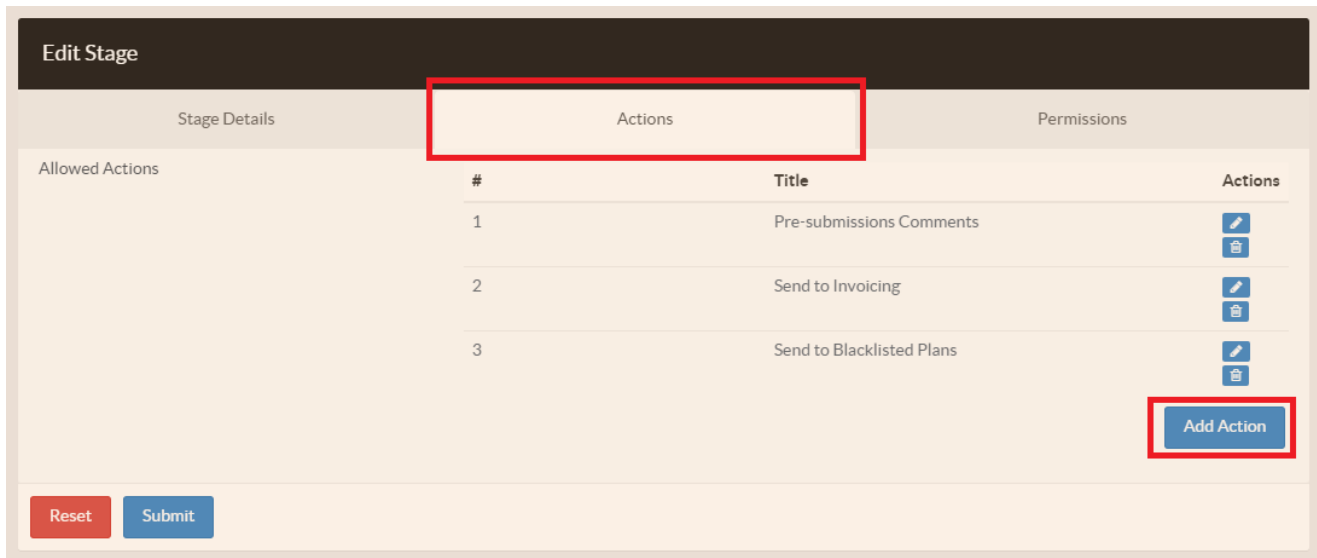
- Enter a name for the action
- Choose the type of action which can be:
  - Move to another stage - This moves the application to another stage.
  - Reject - This is an action that results in the rejection of the application.
  - Back to Client - This action sends the application back to the applicant with comments
  - Approve - This is an action that results in the approval of the application.
- Choose the next stage that this application will go to once this action is taken
- Choose the user group that will have access to this action
- Click on the Submit button once done

3.4.3.2 Editing an Action

To edit an action:

- Go to **System Settings->Services->,**then select a service and click on **Wokflows**
- Select the workflow for which you want to edit the action and click the view button on the right
- Select the stage for which you want to edit the action and click on the edit button
- Click the 'Actions' tab
- Click on the Edit icon on the right of the action to edit it as shown below
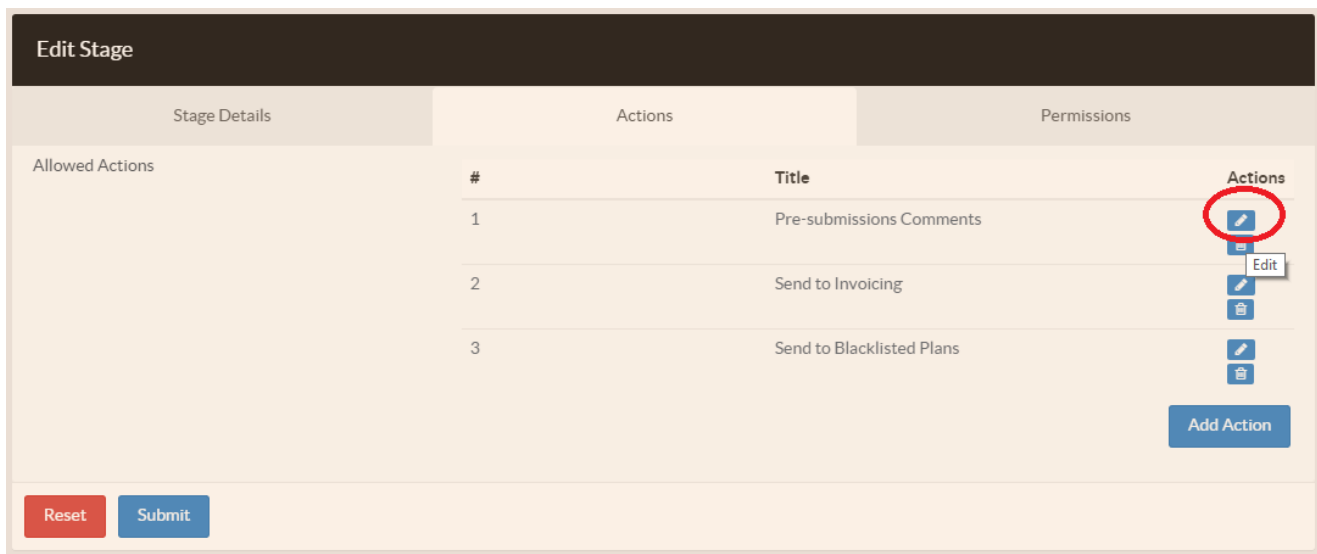
- Make your desired changes on the action and click on 'Submit' when done as shown below:

3.4.3.3 Deleting an Action

To delete an action:

- Go to **System Settings->Services->**then select a service the click on **Workflows**
- Select the workflow for which you want to delete the action and click the view button on the right
- Select the stage for which you want to delete the action and click on the edit button
- Click the 'Actions' tab
- Click on the delete icon on the right of the action to delete it as shown below
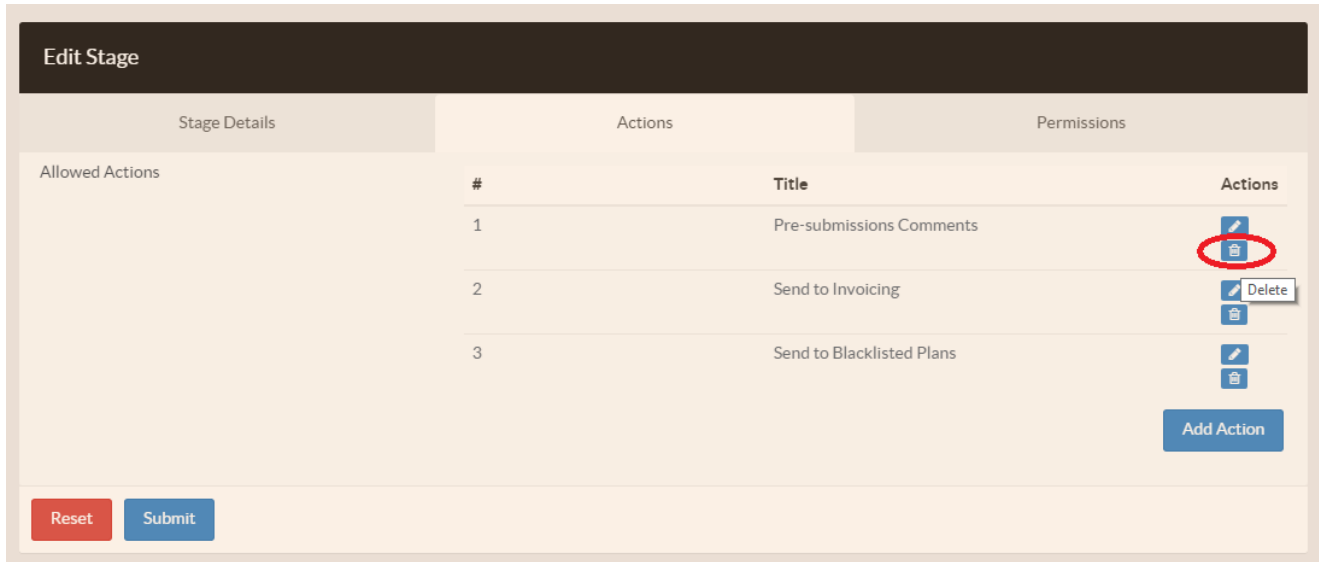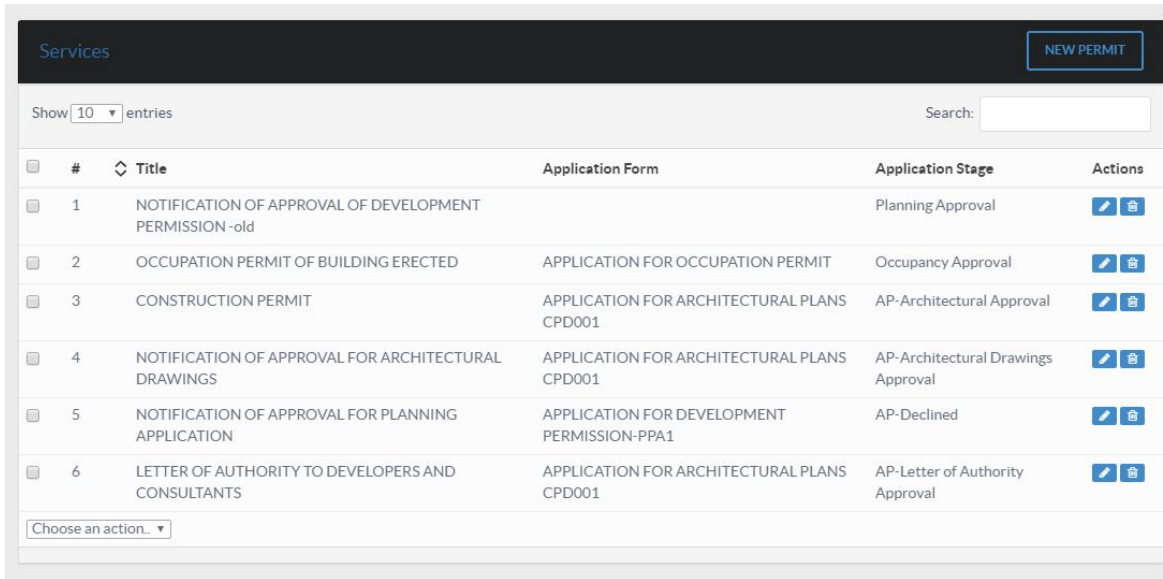
3.5 PERMITS

Permits are the pdf documents/certificates that are generated when an application reaches a certain stage of approval.

This page can be accessed by clicking on the "System Settings" button at the bottom, clicking on the "Services" menu and then selecting a service thereafter click "Permits" button as shown below.

You will be presented with a list of permits as shown below.

3.5.1 Adding a Permit

To add a permit click on the "New Permit" button as shown below

You will be presented with a form divided into three major sections

Section 1: Allows you to enter general permit details.

New Permit

Title

Permit No Identification

0

Permit Type

Service for Clients and Reviewers

Application Form

Stage at which this permit is generated

Maximum number of days before expiration

0

Content

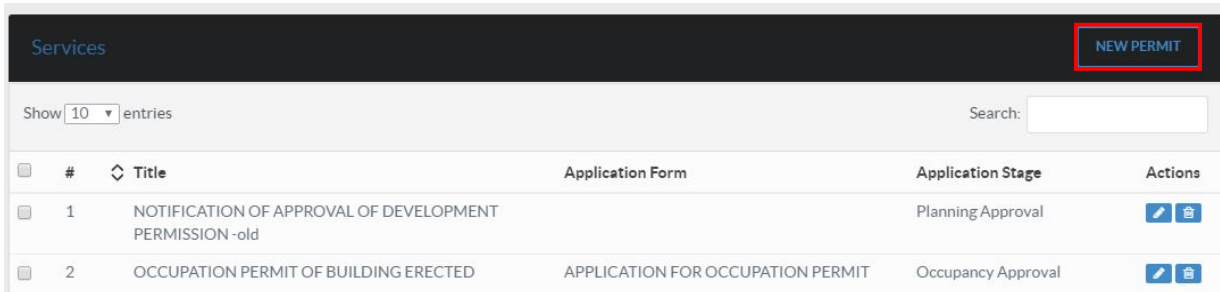| Source | ✂ 🗋 📋 📋 📋 ↶ ↷ | ABC▾ |

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Styles ▾ | Format ▾ | ⤢ | ?

1. Title - Give the title of the permit
2. Permit No. Identification – assign the permit an identification number
3. Permit type – choose the permit type. Whether it will be a service for clients or reviewers or both
4. Application form – choose the application form that results to the permit,
5. Stage – select the stage at which the permit is generated.
6. Days before Expiration – set the maximum number of days before expiration
7. Content – enter the content of the permit in the workspace provided.

Section 2: Enter details for remote updates to the permit if any

Remote Updates

Remote URL (Update a remote database with the data from this permit)

Remote Post Data (Actual data to be posted remotely)

Remote Username (Username if the remote url requires authentication)

Remote Password (Password if the remote url requires authentication)

View available user/form fields

You can view available user forms/fields by clicking on the "View available user/form field" button

Section 3: Here you will give the conditions for the permit. To add a condition, click on the "New Condition" button

After you have entered all the details, click on "Submit" button.

3.5.2 Editing a Permit

Click on the "edit" button of the permit as shown below.

Edit the information you would like to change.

When you are done click on Submit to save the information.

3.6 NOTIFICATIONS

Notifications are the messages (emails and sms) that are sent out to the architect and/or reviewer(s) whenever an application moves from one stage to another. These messages can be customized from the backend.

3.6.1 Adding a new Notification for a client/applicant
To add a new notification for a client/architect:

- Go to **System Settings->Services-> .**Select a service then click on **Workflows**

- Select the workflow for which you want to add a notification and click the view button on the right
- Select the stage for which you want to add a notification and click on the edit button
- Click the 'Stage Details' tab as shown below:

Edit Stage

Stage Details	Actions	Permissions

Title	CP-Prevetting
Maximum duration of time an application is allowed in this stage (Days)	2
Send expired application to another stage	No
Change Application Number	Yes
Application Number Properties	New Application Number Identifier e.g. CPF- — INV-MSA- Application Number Starting Point e.g. AAA0001 — AAA0001
Type of Stage	Default
Send notification to user when application enters this stage?	Yes

- In the drop down with the question " Send notification to user when application enters this stage?", select **Yes** as shown below:

Send notification to user when application enters this stage?	Yes
Notification	Mail Subject — Application Received: {ap_application_id} Mail Content — Dear {sf_fullname}, SMS Content — Dear {sf_fullname}, Your application has been received and assigned a reference number {ap_application_id}. Kindly go to Send Options — Send notification automatically View available user/form fields

- Enter content for the email notification and for the SMS notification and click the 'Submit' button at the bottom of the page once you are done.

- Note that you can include variables such as application number, invoice number, client name etc. in the notification by copying values from a list that appears when you click on 'View available user/form fields'

3.6.2 Adding a new Notification for a reviewer

To add a new notification for a reviewer:

- Go to **System Settings->Workflow->Workflows**
- Select the workflow for which you want to add a notification and click the view button on the right
- Select the stage for which you want to add a notification and click on the edit button
- Click the 'Stage Details' tab as shown below:

Edit Stage

Stage Details	Actions	Permissions

Title	CP-Prevetting
Maximum duration of time an application is allowed in this stage (Days)	2
Send expired application to another stage	No
Change Application Number	Yes
Application Number Properties	New Application Number Identifier e.g. CPF- : INV-MSA-
	Application Number Starting Point e.g. AAA0001 : AAA0001
Type of Stage	Default
Send notification to user when application enters this stage?	Yes

- In the drop down marked " You can also optionally send notification to reviewers when an application is in this stage", select **Yes** as shown below:

- Enter content for the email notification and for the SMS notification
- Select the user groups that you want to receive this notification as shown below.
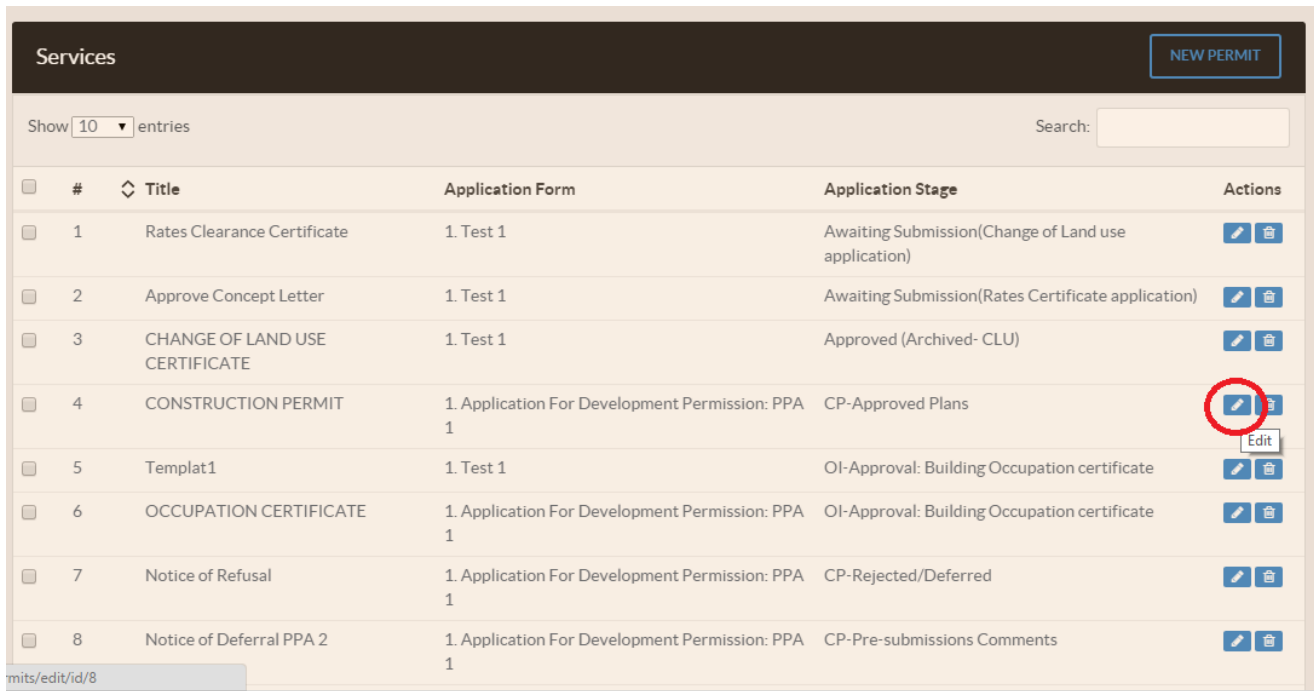
- Click the 'Submit' button at the bottom of the page once you are done.

3.7 CONDITIONS OF APPROVAL

Conditions of approval are the conditions on which a permit has been approved and should appear on the permit that is final issued to the client.

3.7.1 Adding a new condition of approval

To add a new condition of approval:

- Go to **System Settings->Services.** Select a service then click on **->Permits**
- Select the permit for which you want to add conditions of approval and click the edit button on the right as shown below

- Scroll down to the Conditions form and click on the button 'NEW CONDITION' as shown below:

- In the form that appears;
  - Select the permit that the condition belongs to
  - Select the department that will be responsible for assigning this condition to the permit
  - Give a short name for the condition
  - Give a description of the condition
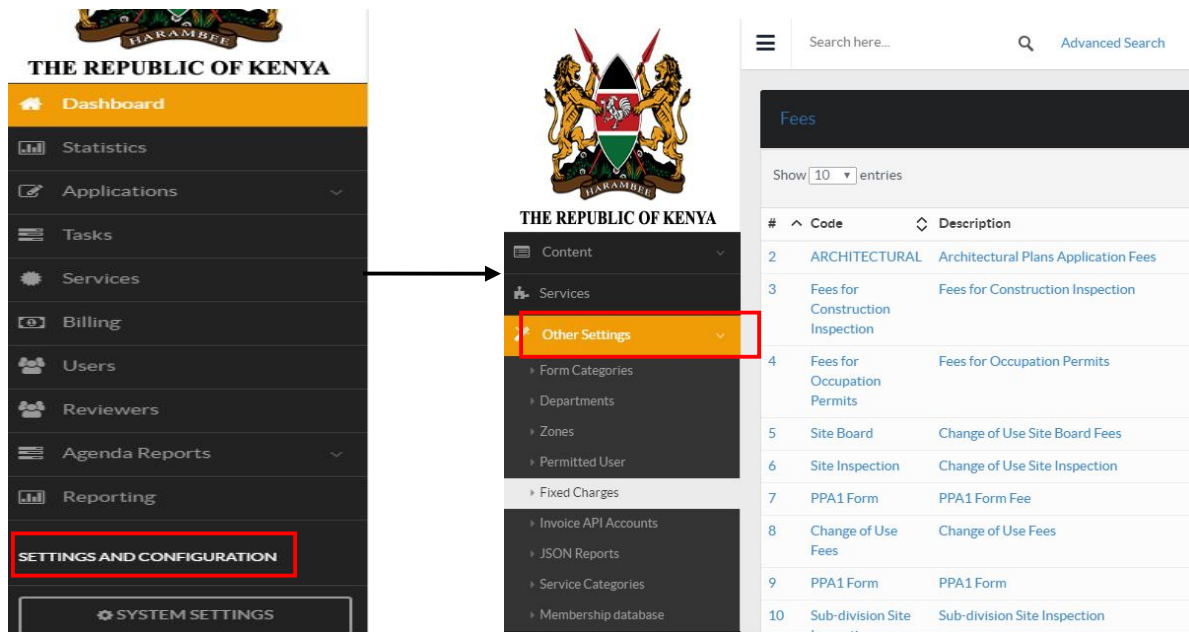- Click the 'Submit' button once done

CHAPTER 4: PAYMENT HANDLING
4.1 MANAGING FEES

4.1.1 Manage Fixed Charges

These are fixed fees that are constant for every application.

You can access this page by clicking on the "System Settings" button, clicking on the "Other Settings" menu and then selecting "Fixed Charges".
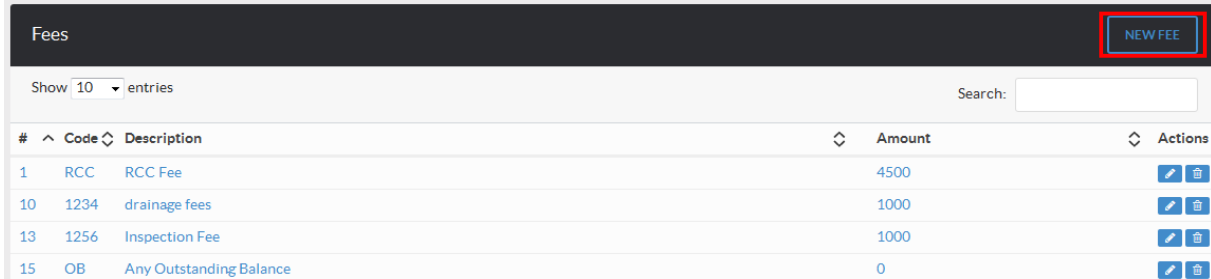

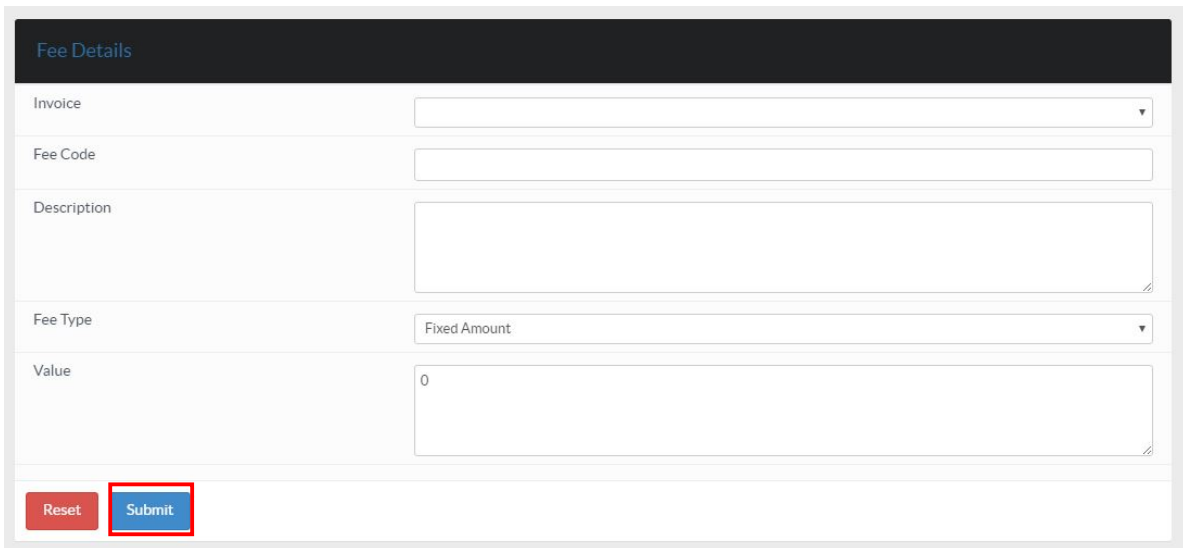You will be presented with a list of all fixed charges available in the system

4.1.1.1 Adding a new Fee

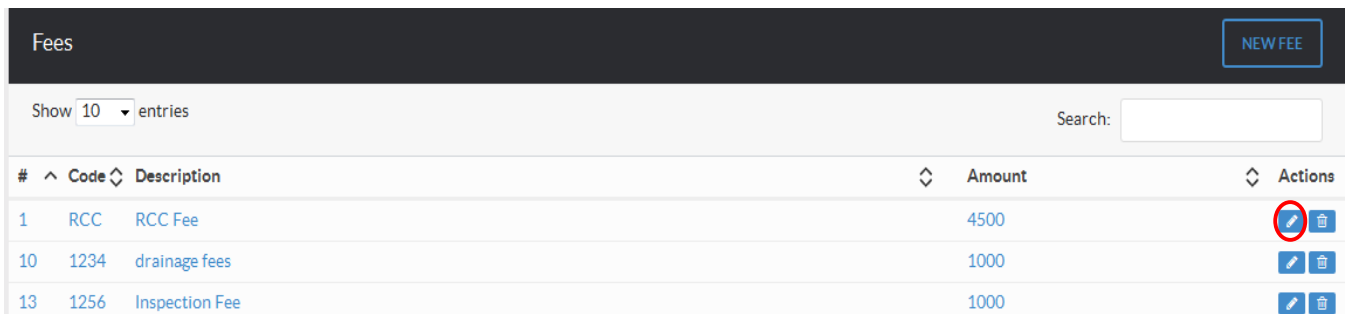1. Click on the "New Fee" button.

2. Enter the fee details;

You will need to choose the invoice, enter the Fee Code, Add a description of the new fee, Select the Base Field from the list provided. Select the fee type and add the amount. Click on Submit when done.

4.1.1.2 Editing a Fee

Click on the "edit" icon for the fee as shown below.

4.1.1.3 Deleting a Fee

Click on the "delete" icon for the fee as shown below.

4.1.2 FEE RANGES

These are the fee ranges applied to applications. These fee ranges are based on the Fee type (Architectural, Structural or Inspection), the minimum and maximum values of project and the location.

This page can be accessed by clicking on the "System Settings" button on the top right, Clicking on the "Other Settings" menu and then clicking on "Fixed Charges" then click on "NEW FEE" button on top right corner as shown

You will be presented with a list of all the fee ranges currently available in the system.

4.1.2.1 Adding a New Fee Range

1. Click on the "New Fee" button.Under fee type select "Range Fixed" then click on "New Fee Range" button.

2. Enter the details for the new fee range and click on "Submit"

4.1.2.3 Editing Fee Range

Click on the "edit" button for the fee you wish to edit as shown below.

4.1.3 INVOICE TEMPLATES

This allows you to create templates for the invoices that will be issued by the system.

To access this page, Go to "System Settings", click on the "Services" menu,select a service and select "Invoices" as shown below.
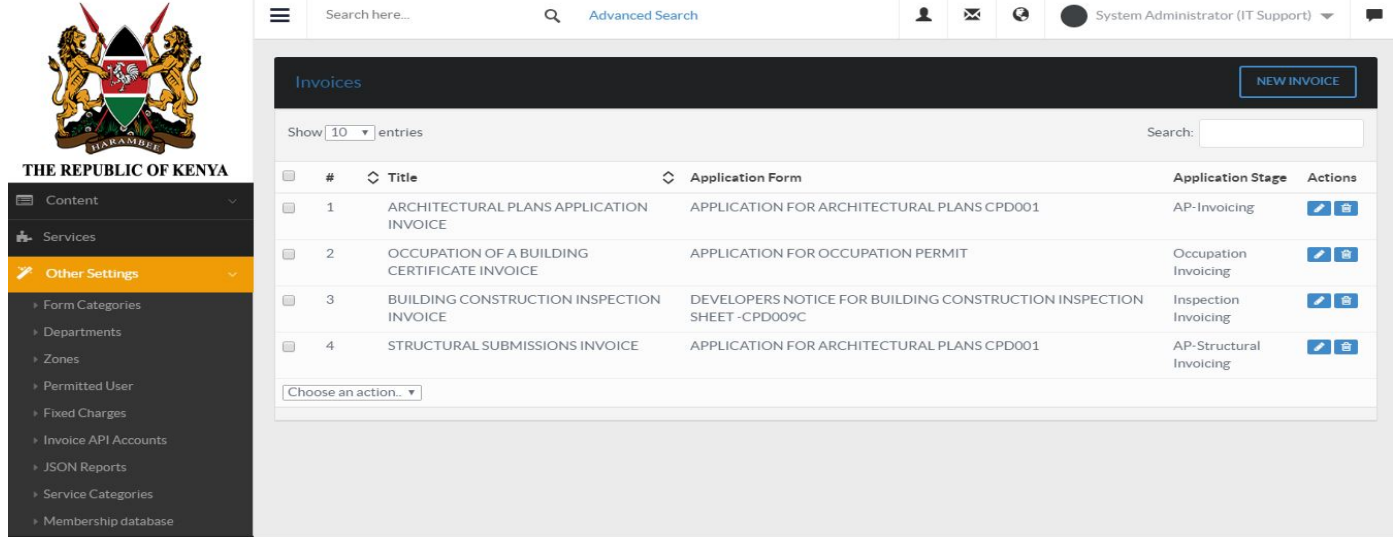
You will be presented with the Invoices page with a list invoice templates currently in the system.

4.1.3.1 Adding a new Invoice Template

Click on the "New Invoice" button
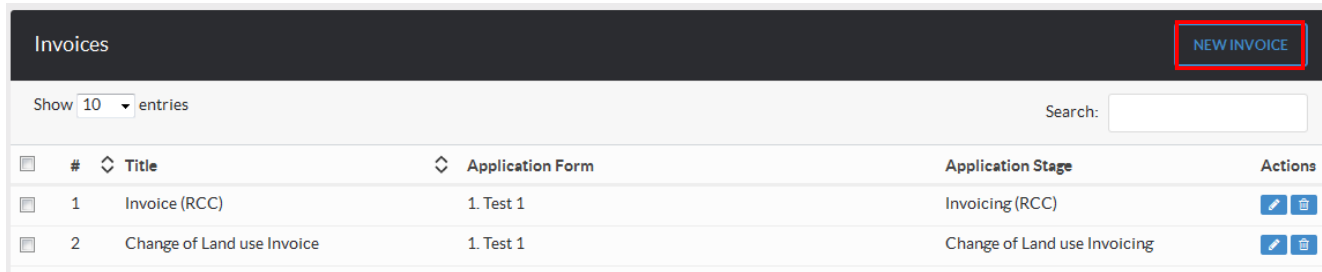
Enter the details for the new invoice template in the form provided.

Click on Submit when you are done.

4.1.3.2 Edit an Invoice Template

Click on the "edit" icon for the Invoice template you wish to edit.

4.1.3.3 Delete an Invoice Template

Click on the "Delete" icon for the invoice template you wish to remove

	#	Title	Application Form	Application Stage	Actions
☐	1	Invoice (RCC)	1. Test 1	Invoicing (RCC)	✏ 🗑
☐	2	Change of Land use Invoice	1. Test 1	Change of Land use Invoicing	✏ 🗑
☐	3	CONSTRUCTION PERMIT INVOICE	1. Application For Development Permission: PPA 1	CP-Invoicing	✏ 🗑

Invoices

NEW INVOICE

Show 10 entries

Search:

CHAPTER 5: FORM MANAGEMENT
FORMS

This page be accessed by clicking on the "System Settings" button at the bottom, clicking on the "Services".Select a service and click on "Forms".
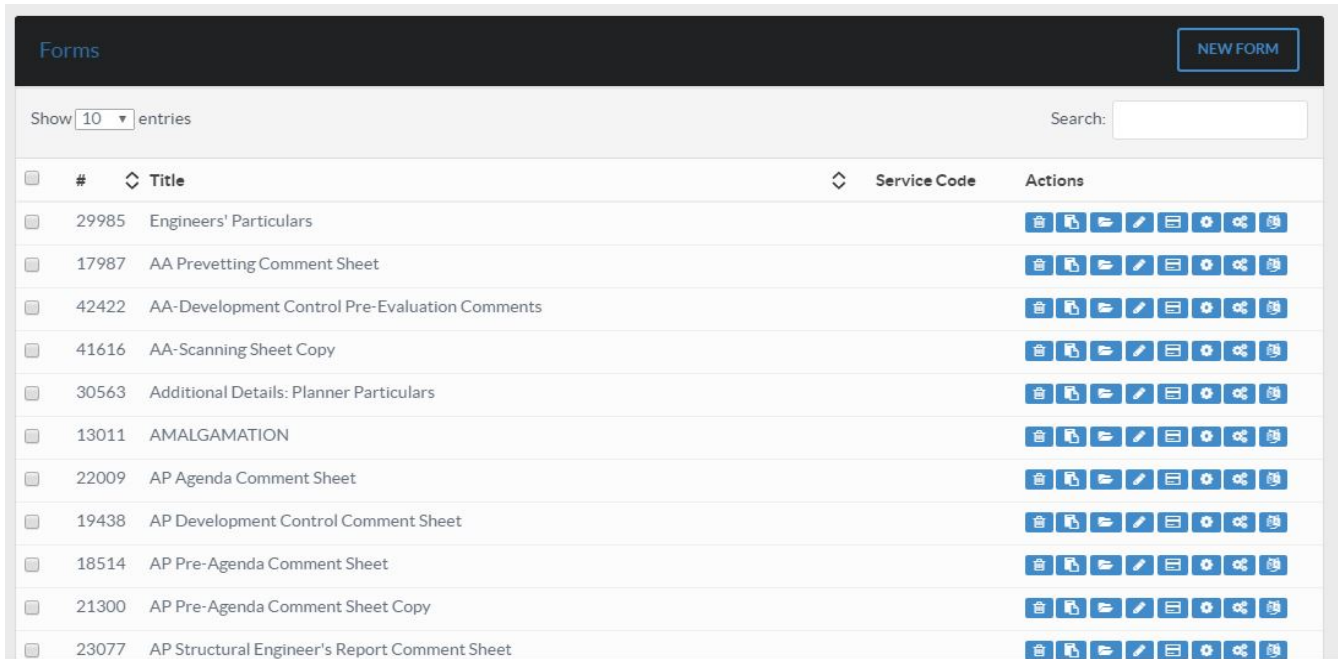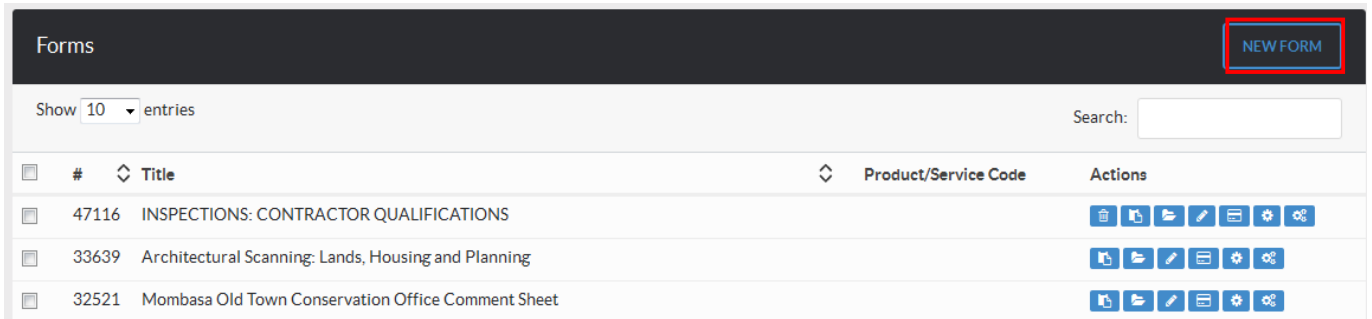
Menu and then selecting on "Forms" as shown below

You will be presented with a list of forms available in the system. This list mostly includes fixed forms that can only be edited but cannot be deleted.

5.1 Creating a new Form
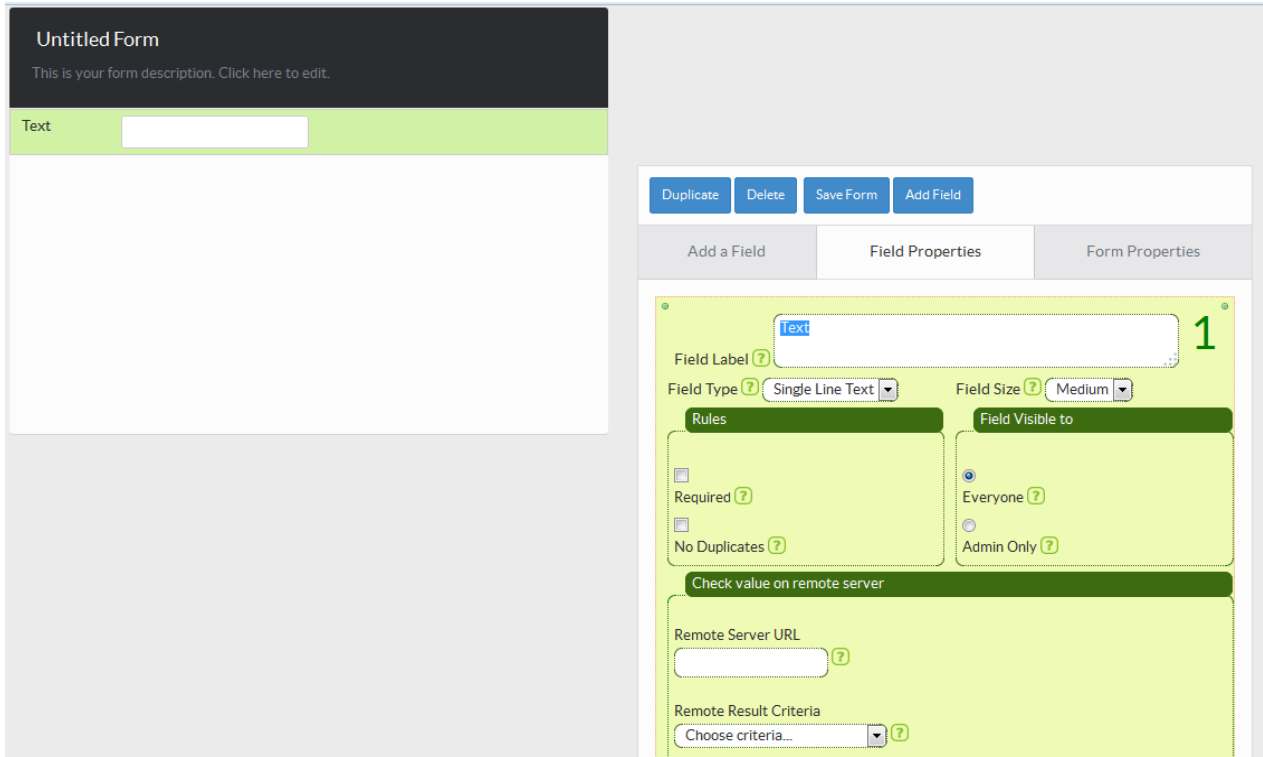
Click on the "New Form" button.

On the page that appears, you are provided with various tools on the right that allow you to create different form elements including: text-fields, text-areas, drop-downs, address fields, multiple choices e.t.c. On the left you are provided with the form area where you can organize/arrange the form elements you will create.
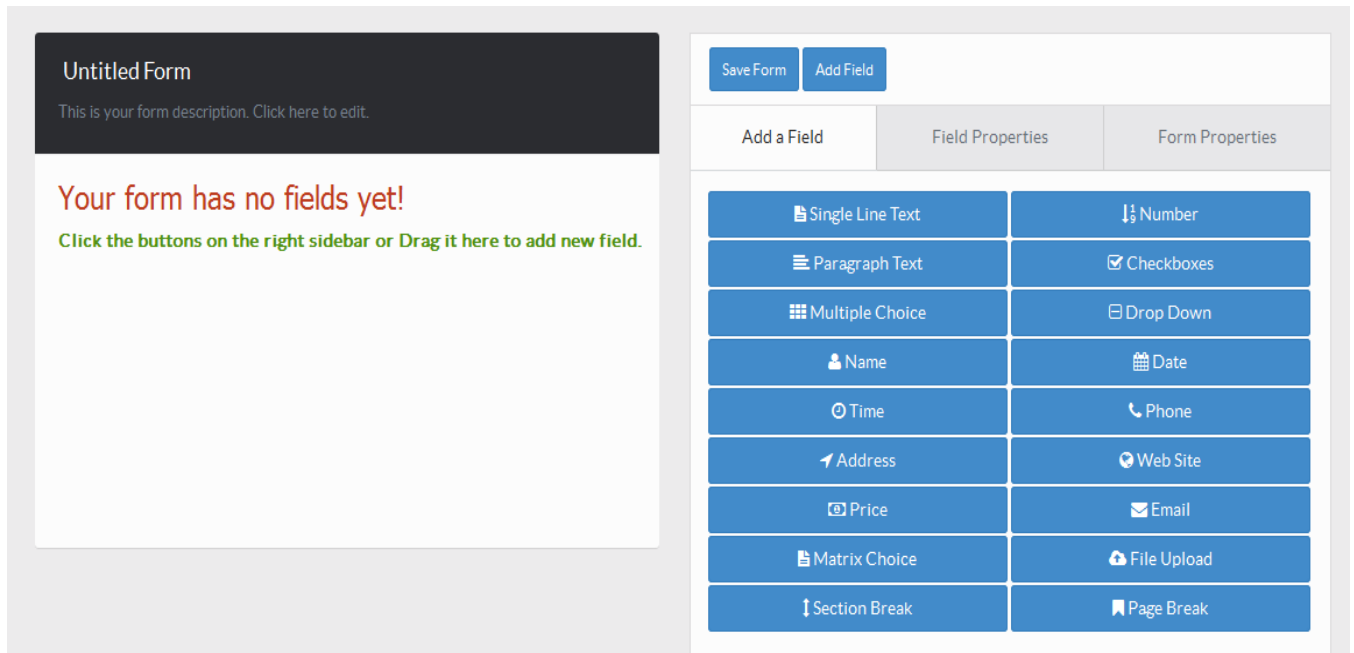
To create a form element e.g. a text-field, click on the "Single Line Text" button on the right. This will add a new text-field to the form as shown.
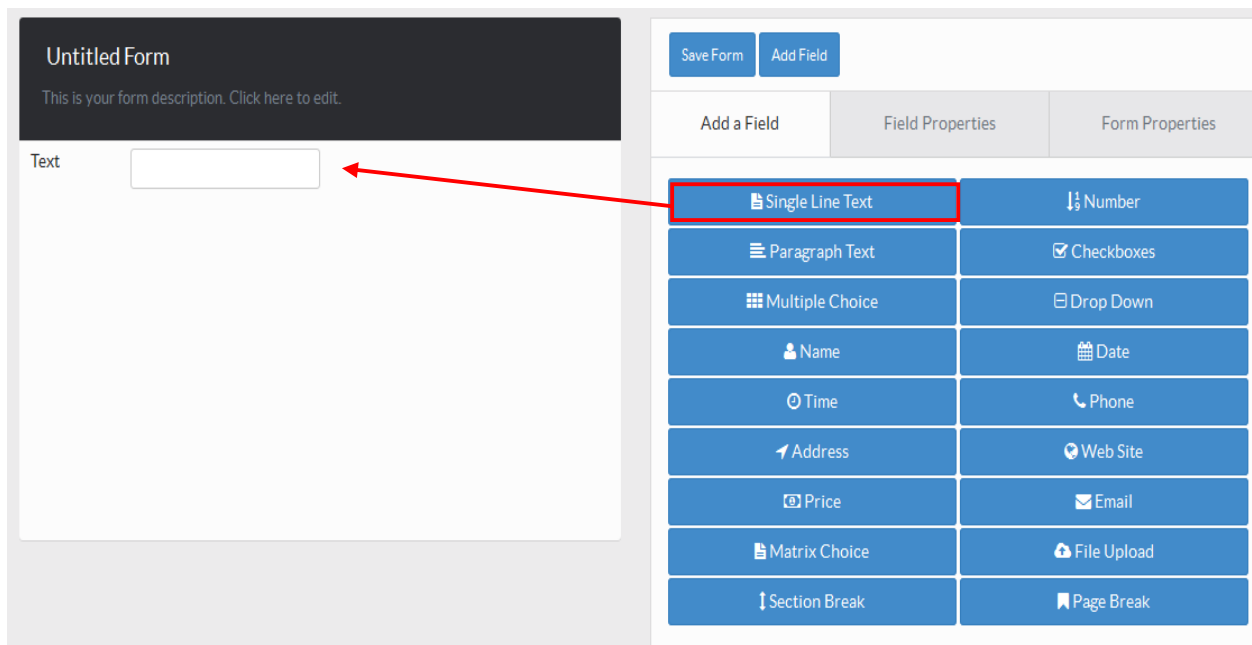
Click on the newly created text-field. This will display the text-field properties on the right which will allow you edit the text-field's title, its length e.t.c
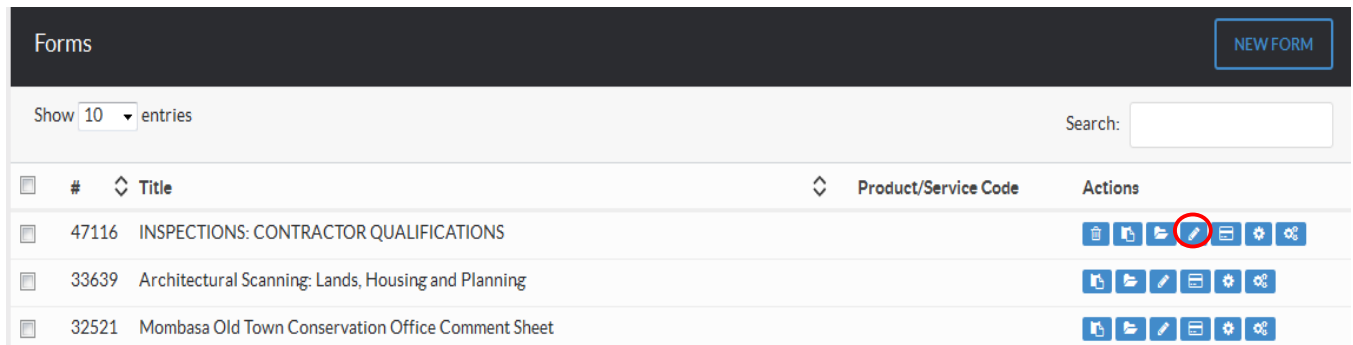
Do the same for any other form element.

Tip: Use the three Tabs will help you navigate in order to Add a field, its properties and also the form properties.
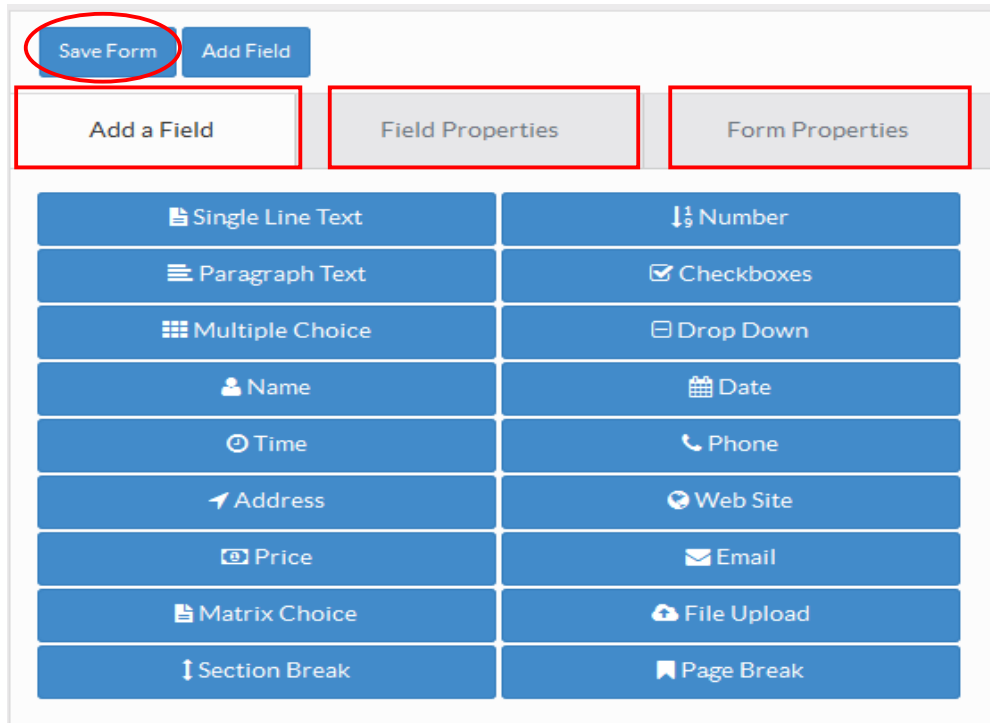
When you're done creating your form, click on the "Save Form" button.

5.2 Editing a Form

Go to the forms page and click on the "edit" button of the form you wish to edit as shown below.

Edit any form elements you want by clicking on the form element and editing the details from the property area on the right as we did when creating a new form above.
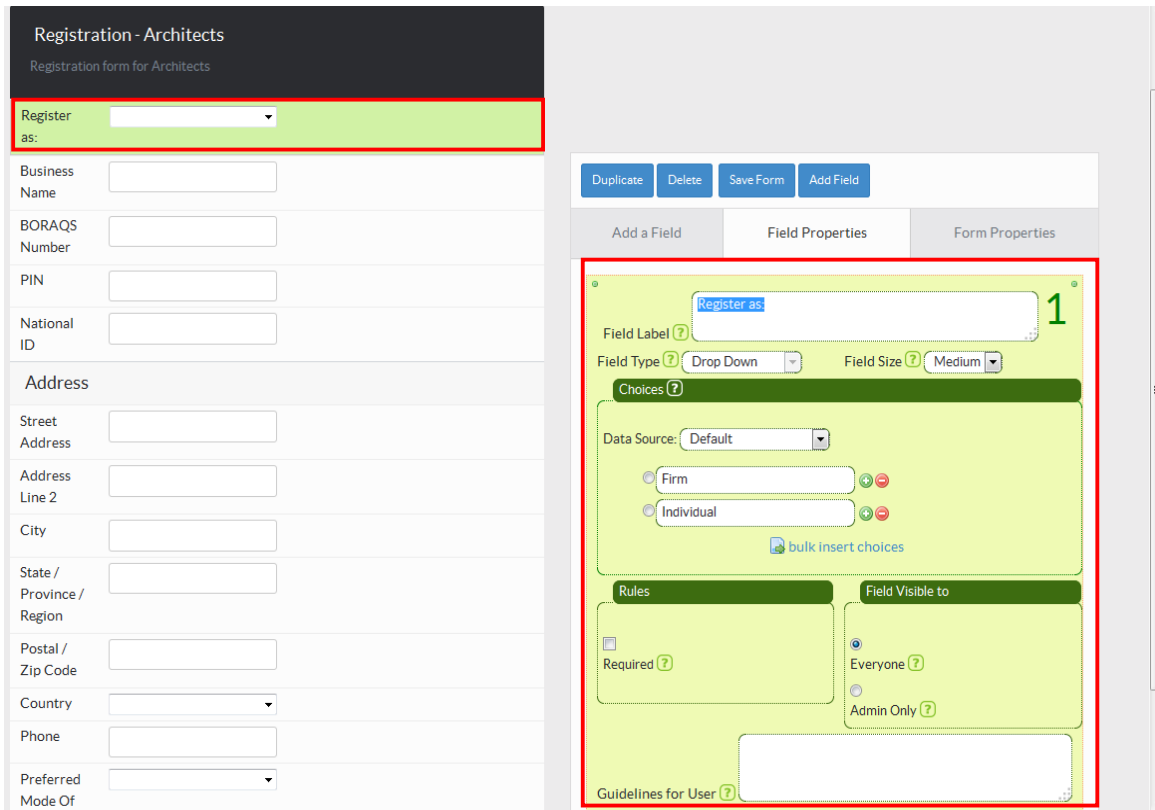
To delete a form element, select the element and click on the "delete" button at the top section as shown
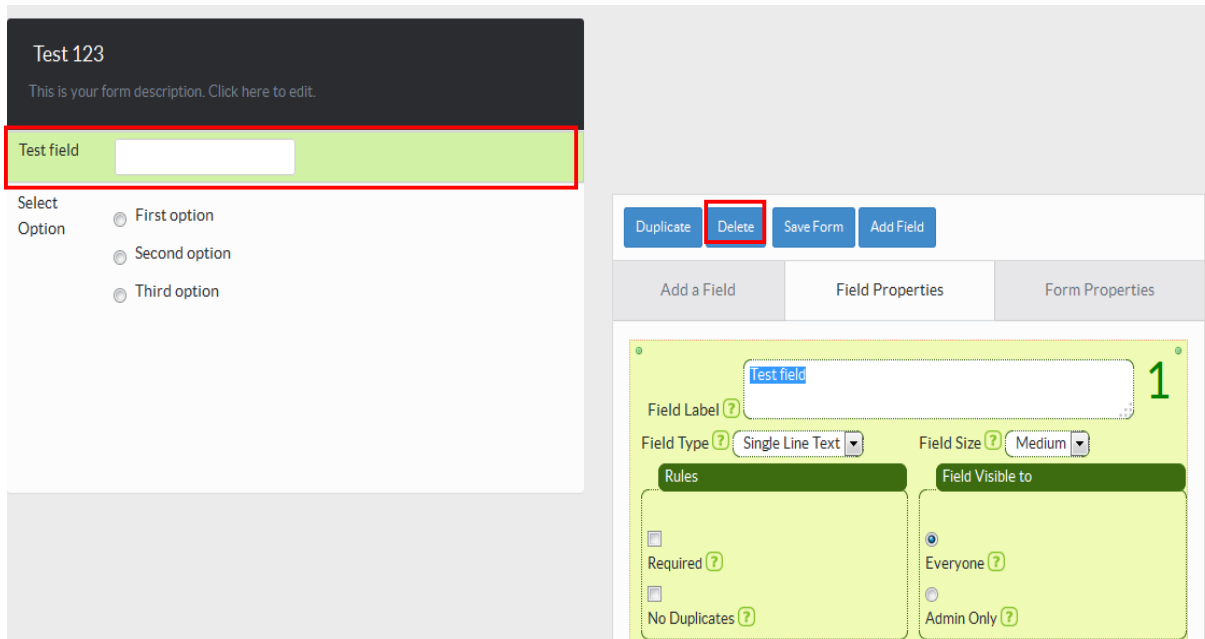
NB: You can change the position of a form-element in a form by dragging it up and down the form area.
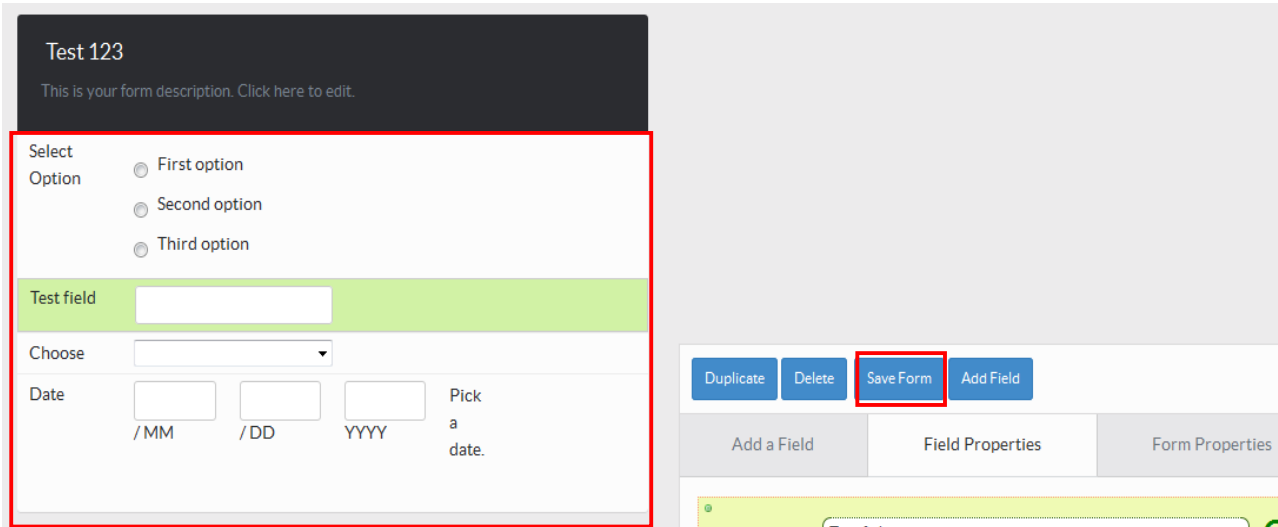
When you're done editing, click on the "Save Form" button

5.3 Deleting a form

In the "Forms" page, click on the "delete" icon of the form you wish to delete.
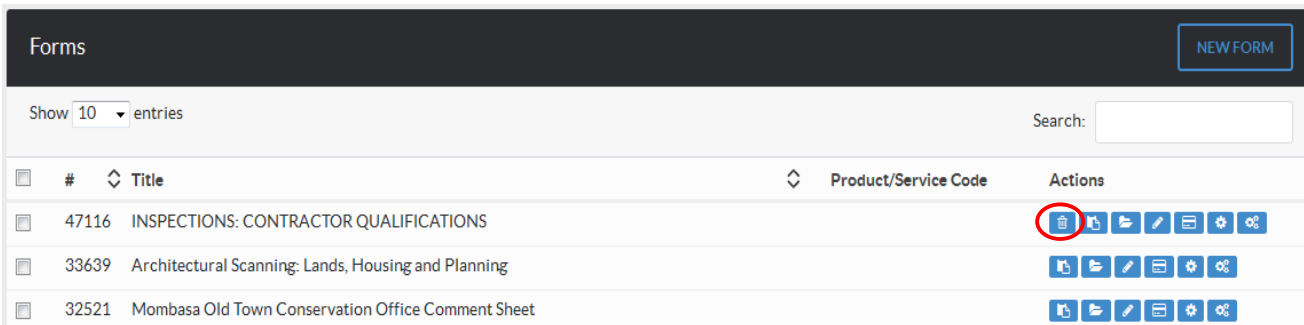
5.4 ASSIGNING A FORM TO A WORKFLOW

A form can be assigned to a workflow when you are editing a comment sheet and when you are editing stages. Check the previous sections for more details.

CHAPTER 6: OTHER ADMINISTRATIVE TASKS

6.1 Managing FAQS (Frequently Asked Questions)

This page can be accessed by clicking the "System Settings" button on at the bottom, Clicking on the "Content" menu and then selecting "FAQs" as shown below
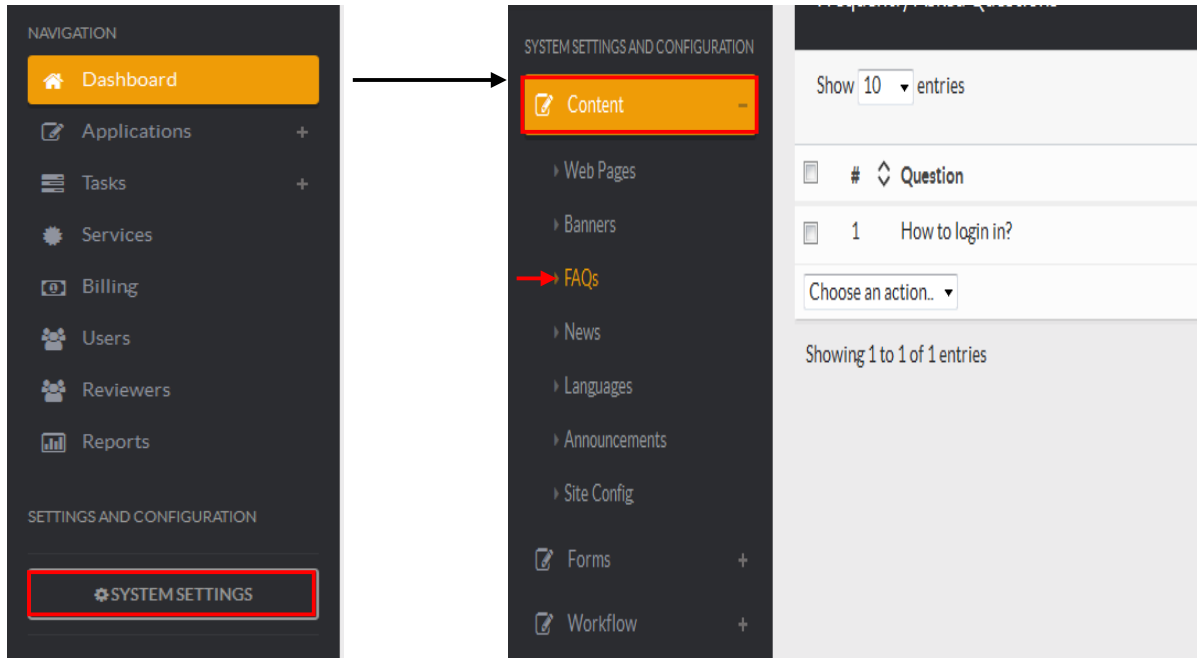
You will be presented with a list of all the FAQs currently available in the system.
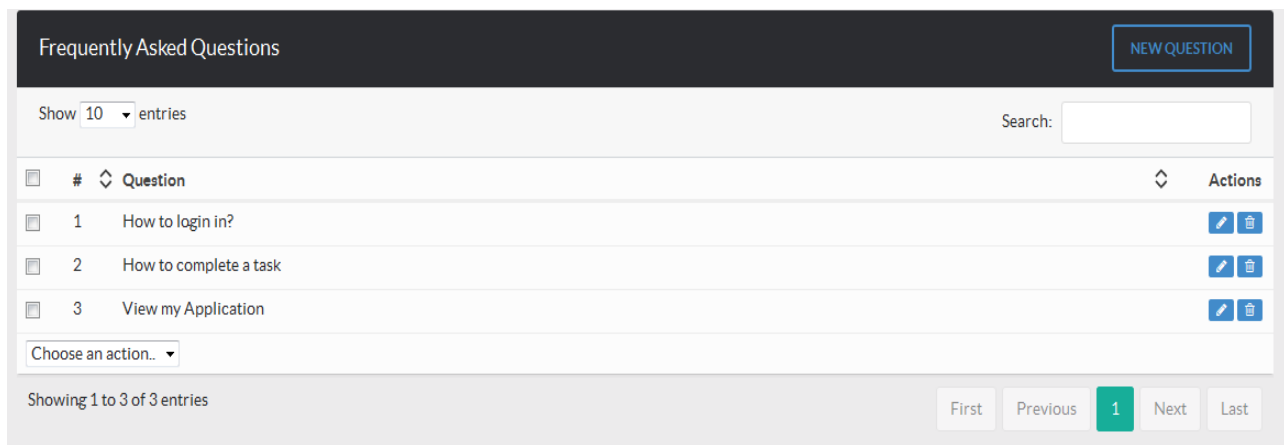
6.1.1 Adding a new FAQ

Click on the "New Question" button
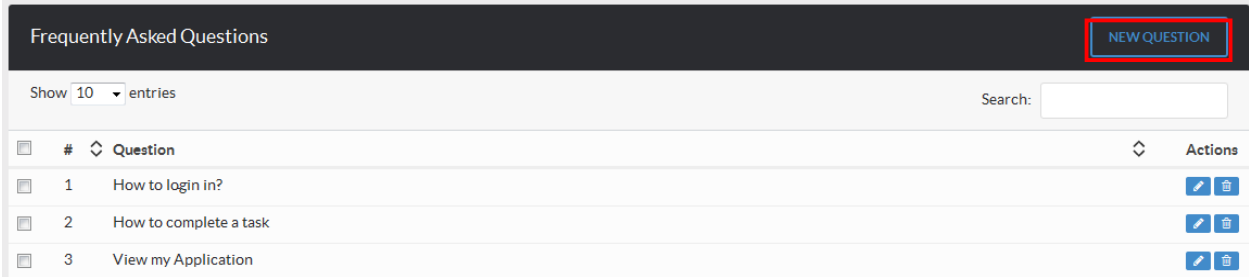
Enter a Question and its Answer in the text boxes provided then click "Submit"
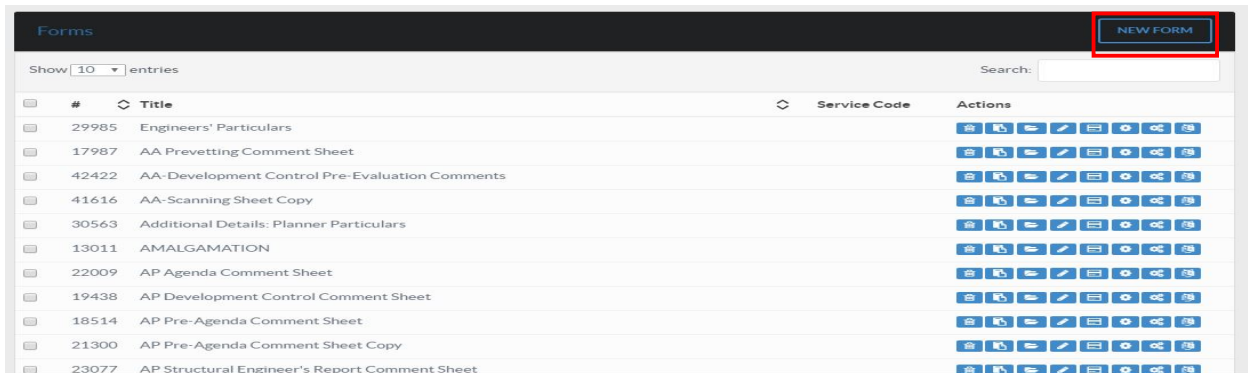
6.1.2 Editing a FAQ

Click on the "edit" icon of the FAQ you wish to change.
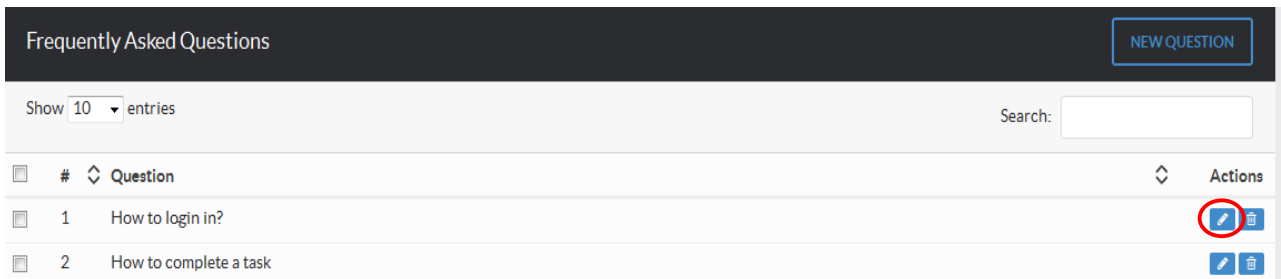
Edit the contents you wish to change and click on the "Submit" button when done.
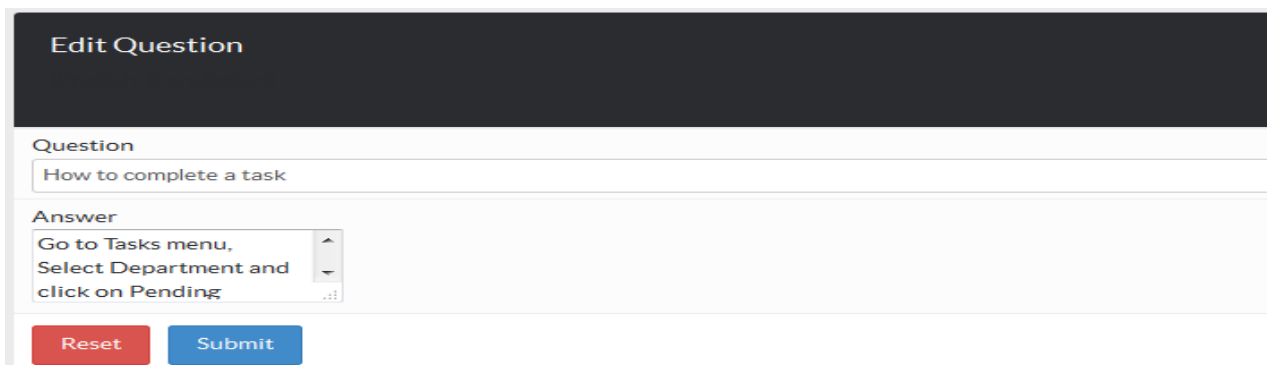
6.1.3 Deleting a FAQ

Click on the "delete" button of the FAQ you wish to delete.

6.2 Site Configuration

To edit the site configurations, go to "Systems Settings", Click on "Site Configuration" menu and select "Update Settings"

Edit the fields you want to change then click on "Submit" to save changes.

6.3 Other Settings

6.3.1 Form Categories

Click on "System Settings" then "Other Settings".Then click on "Form Categories".List of form categories will be displayed as shown below.
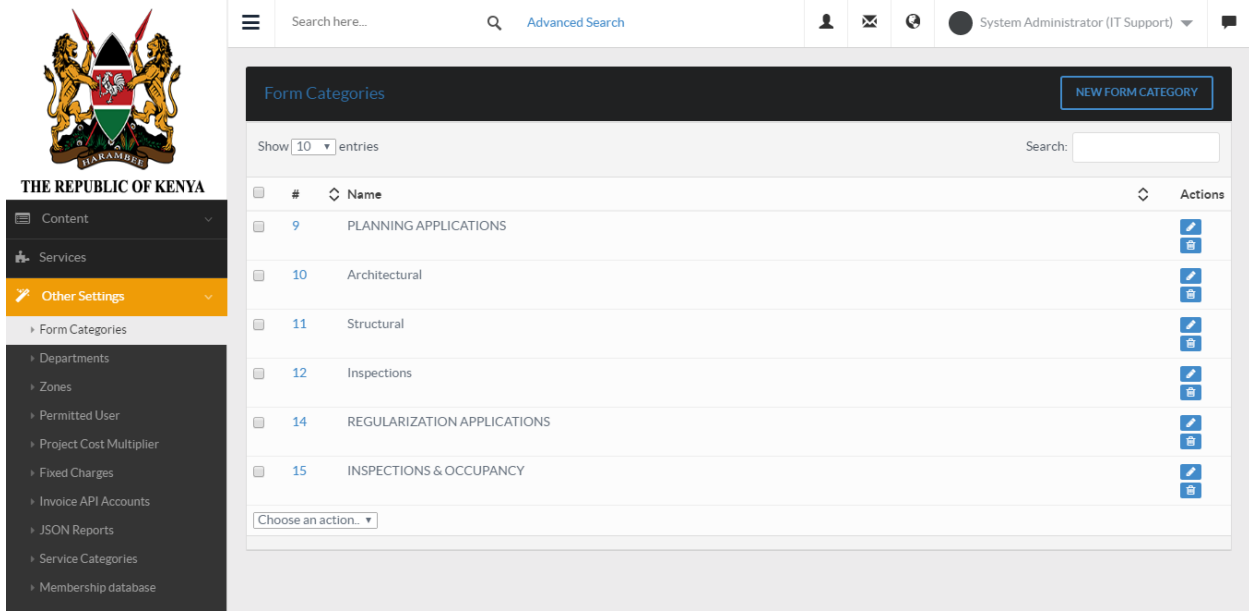
To add a new category click on "NEW FORM CATEGORY" button as shown.
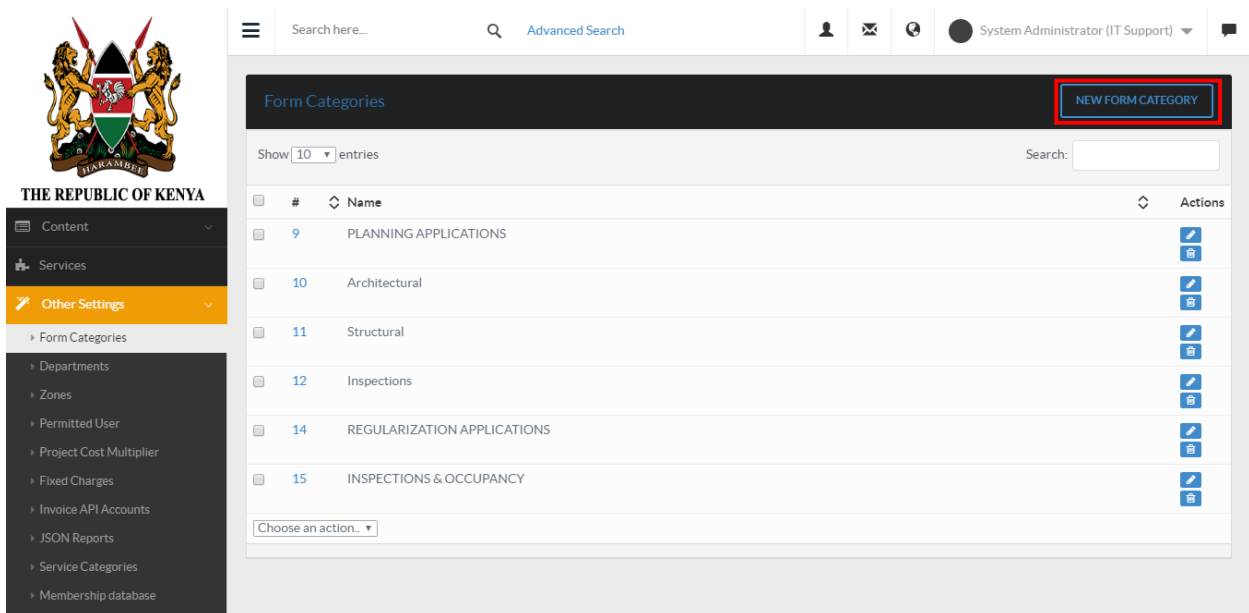
A form will appear, fill and click submit button:
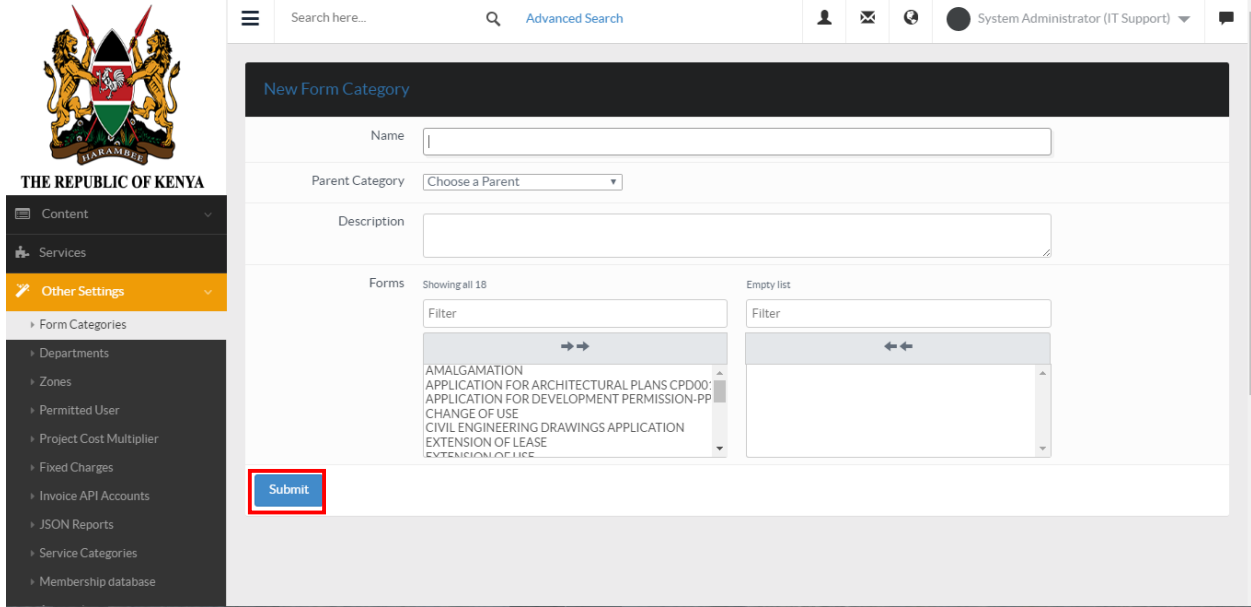
To edit a form, click on the edit button as shown.Make changes and click submit to save.
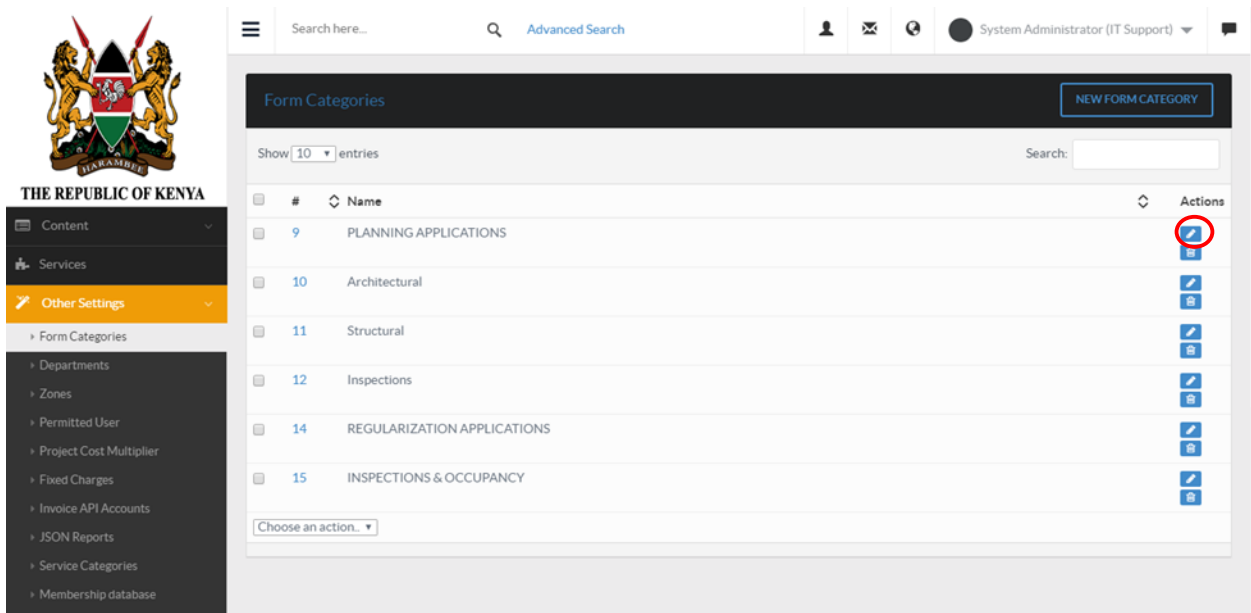
To edit a form, click on the delete button as show below
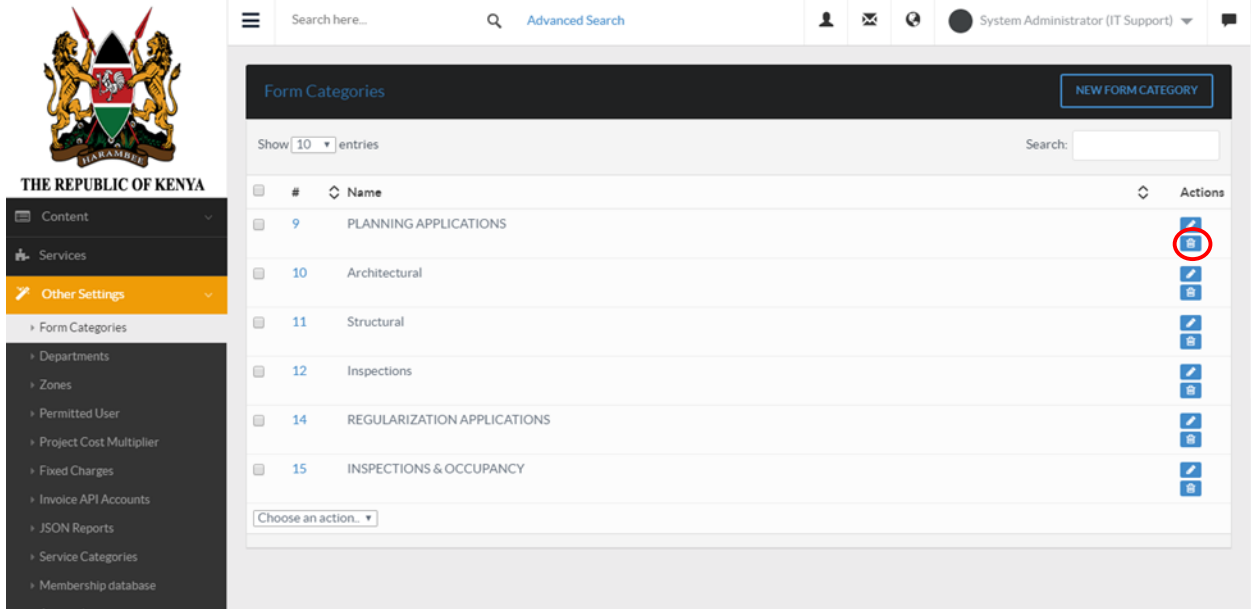
6.3.2 Zones

Go to "System Settings" the click on "Other Settings" then select "Zones" . The available zones will be displayed as shown below:
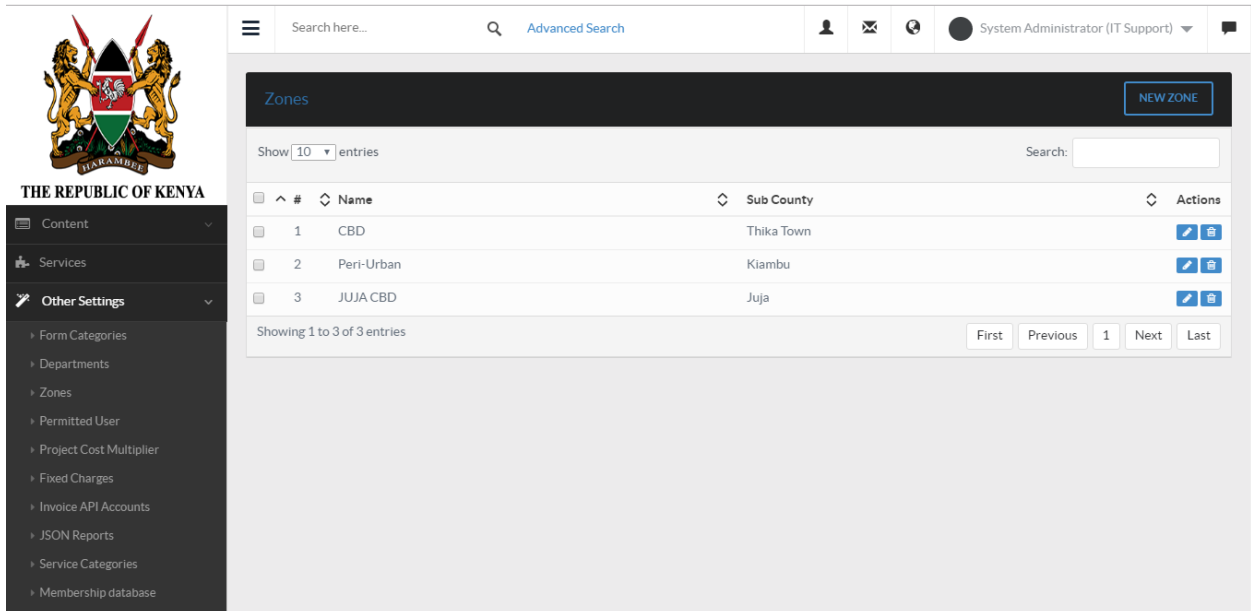
To add a new zone click on "NEW ZONE" button as shown

Fill the form and click submit button to save details.

To edit a zone click on the edit button to the zone you want to edit as shown below.
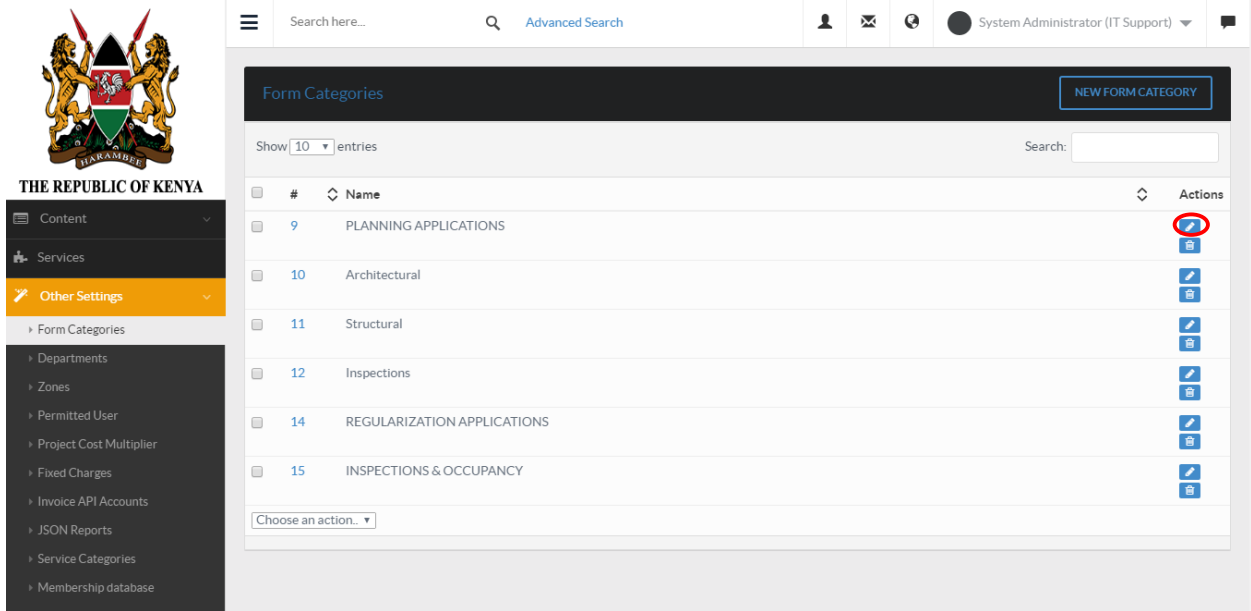
To delete a zone, select a zone and click on the delete button as shown.
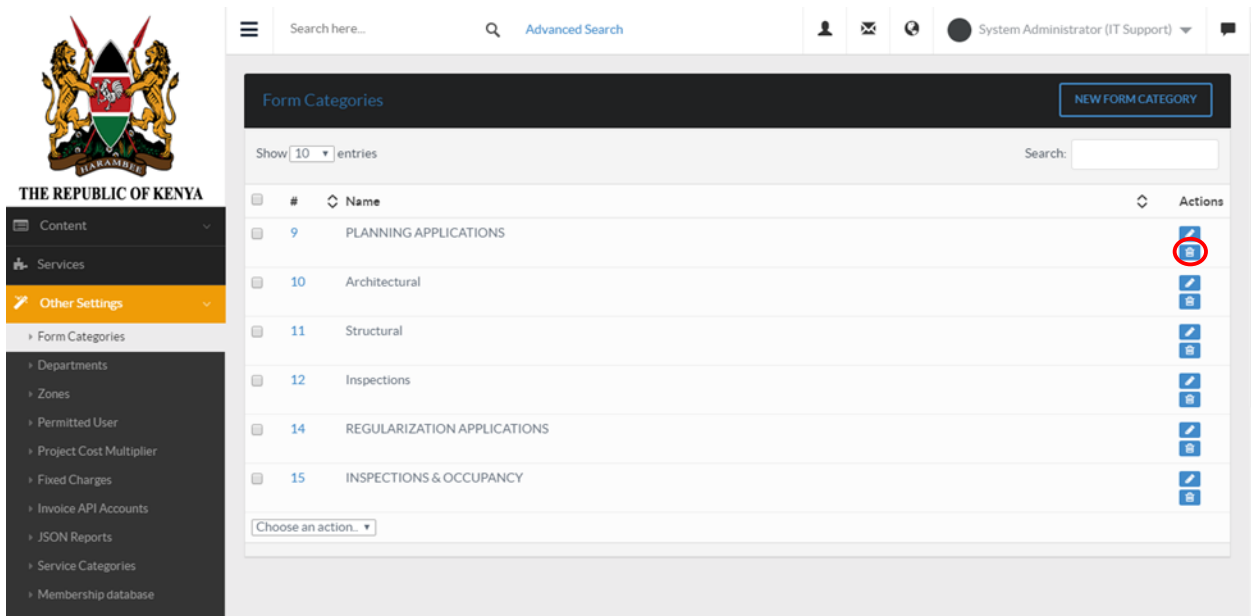
6.3.3 Permitted User

Click on "System Settings" then "Other Settings". Select "Permitted User". A list of permitted users will appear as shown below.

To edit a user, go to actions and click on edit button as shown.

To delete a user, go to actions and click on delete button as shown below:

To add a new user, click on "NEW PERMIITED USER" button as shown.

Fill the form and click submit button to save.

6.3.4 Counties

Click on "System Settings " then go to content and navigate to "Counties". A list of sub-counties will be shown as below:

To add a new sub-county, click on "NEW SUB-COUNTY " button as show below.

A form will appear, fill it and click submit button to save details.

To edit a sub-county, go to actions and click edit button as shown below:

To delete a sub-county, go to actions and click on delete button as shown below.

6.3.5 Membership Database

Go to "Settings" then click on "Other Settings".Navigate to membership database. The following window will open.

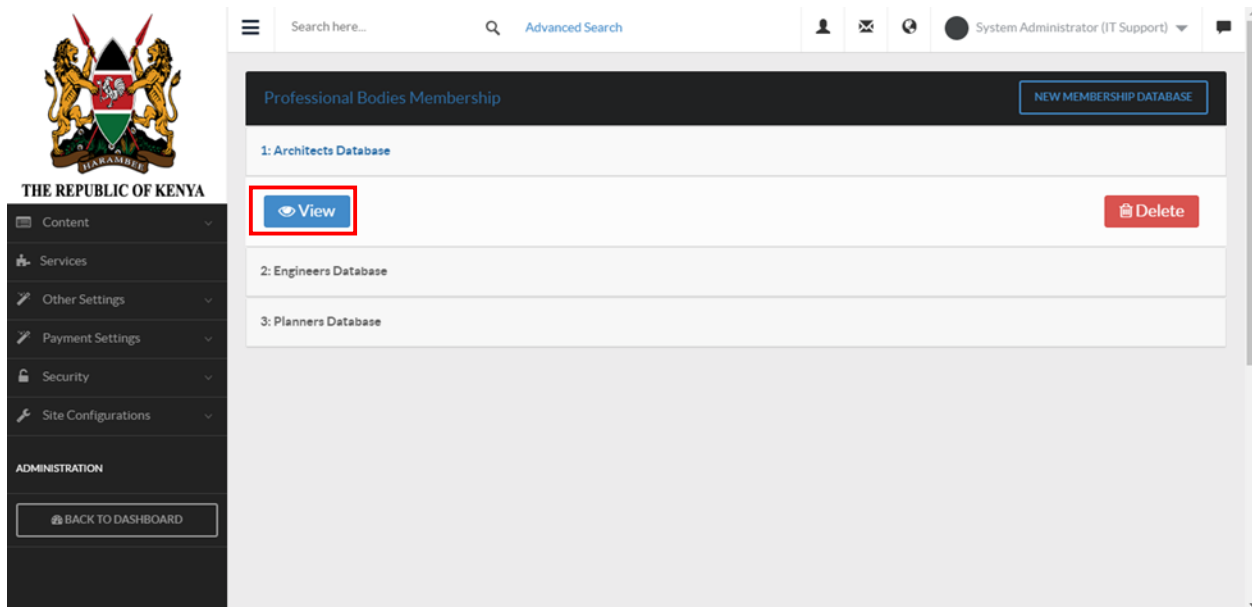To add a new membership, click on "NEW MEMBERSHIP DATABASE" as shown below:
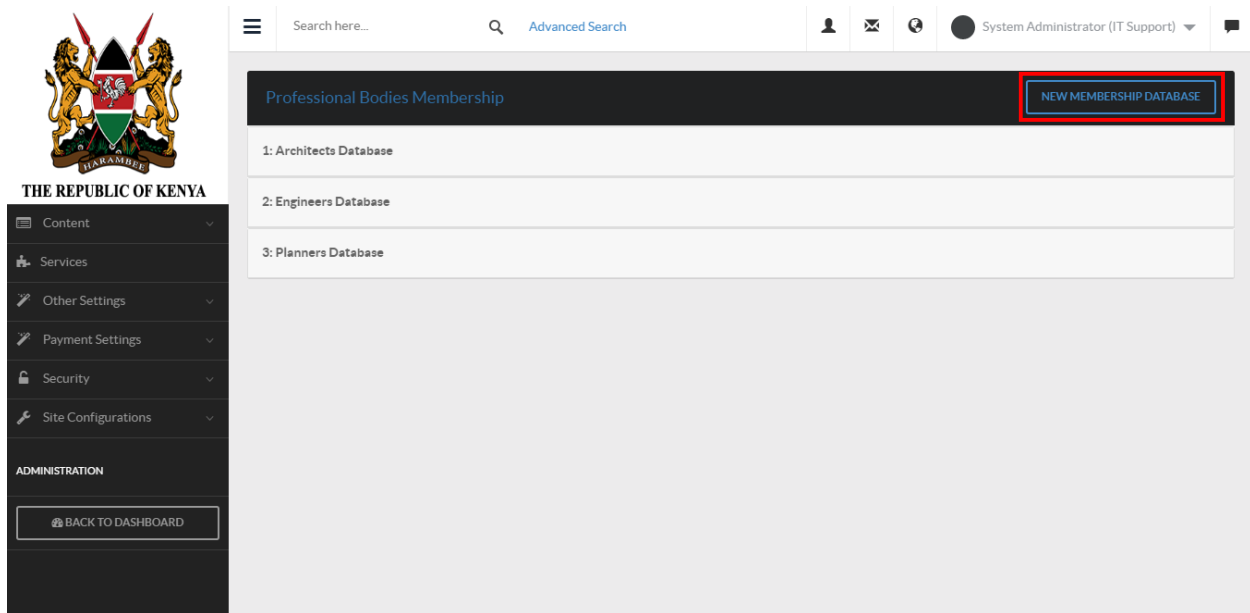
Fill the fields and click submit button to save details.

To view members, select either "Architects Database","Engineers Database" or "Planner Database".
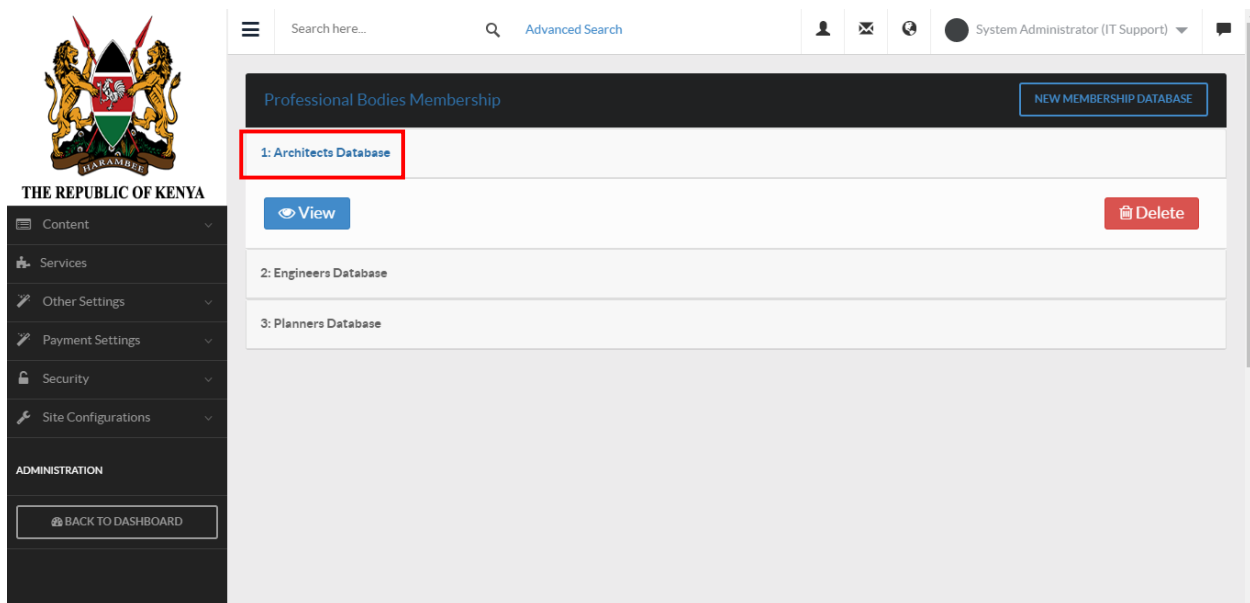
Click view button to view the members in the selected category:

This will be the outcome:
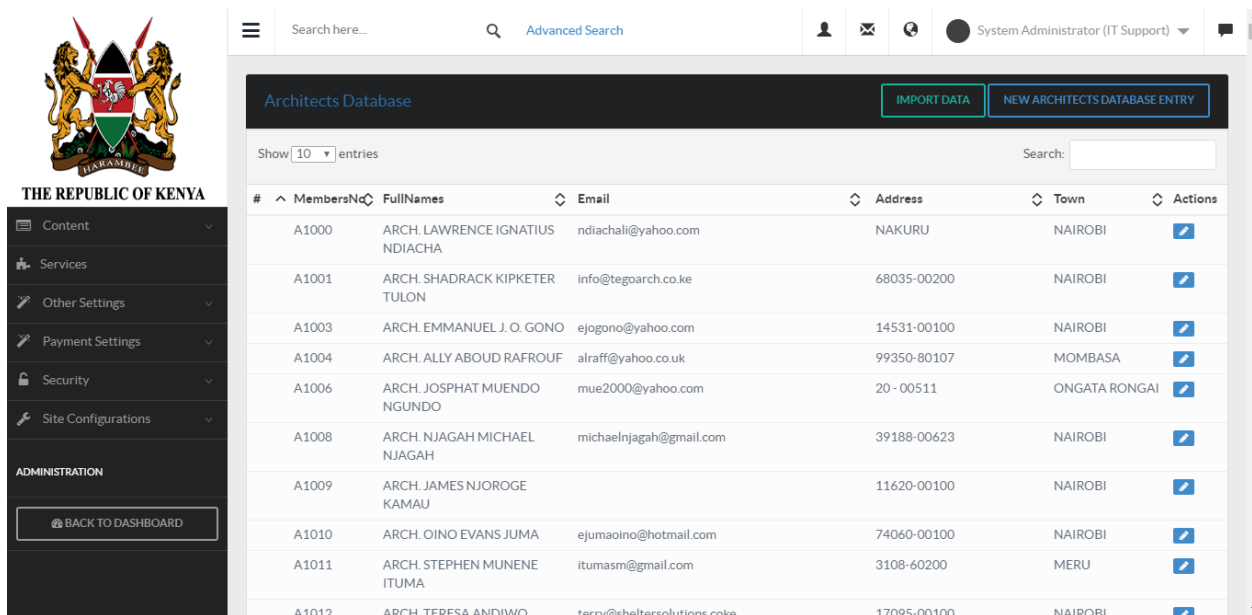
To add a new architect entry, click on "NEW ARCHITECTS DATABASE ENTRY".

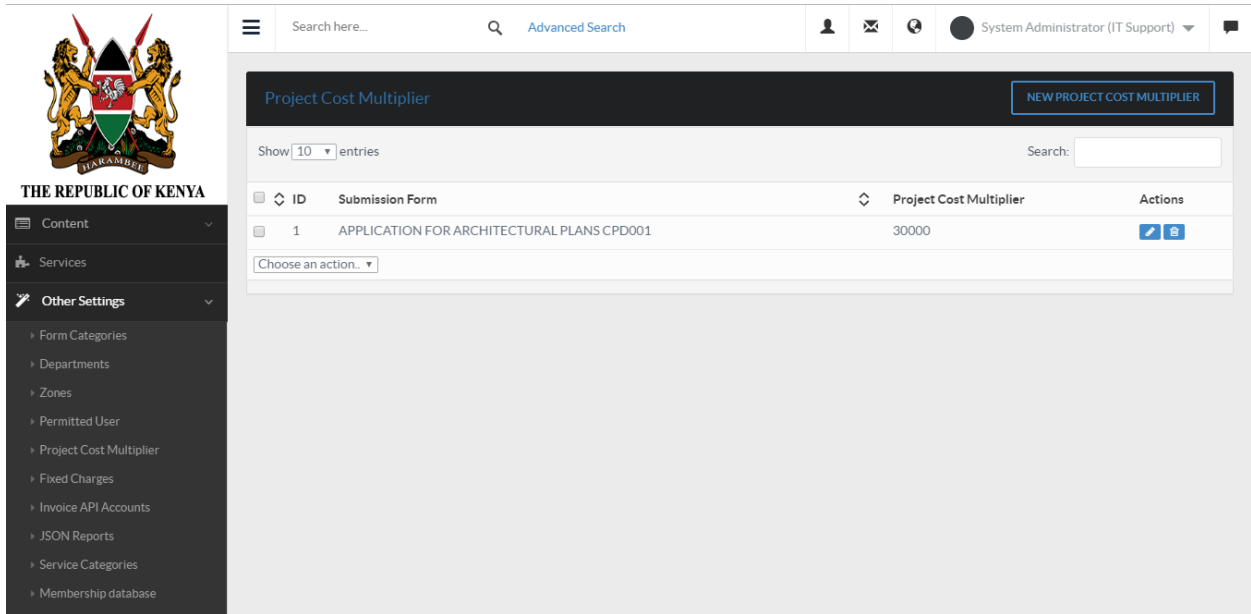To edit, go to actions, click the edit button.

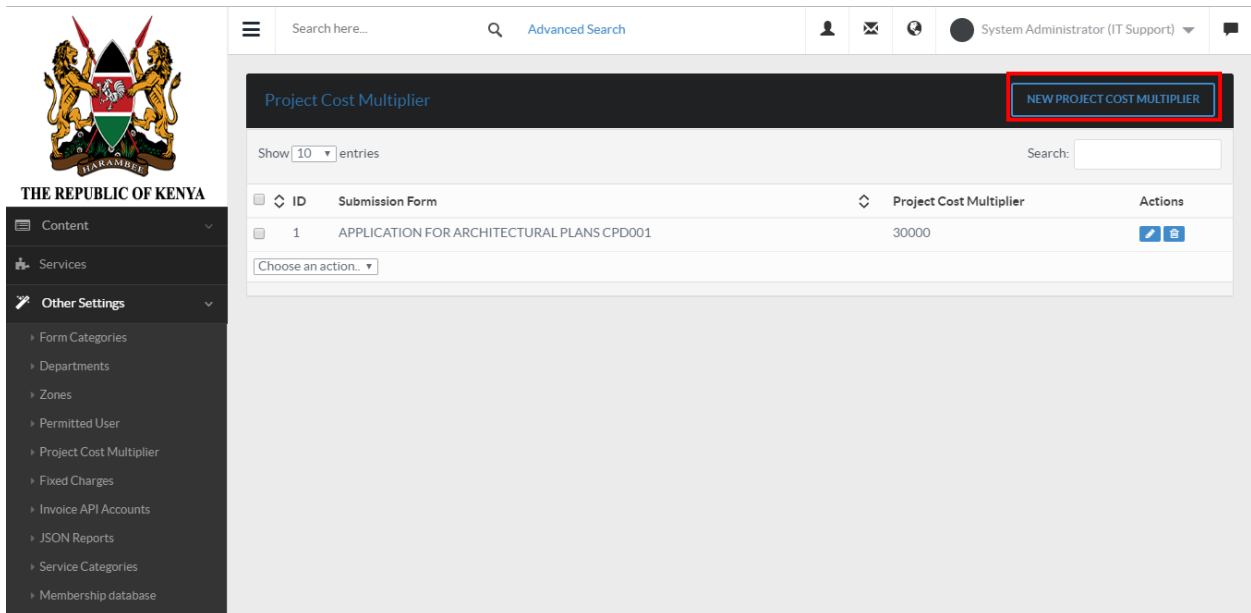To delete database, select a membership database and click "DELETE".

N/B: These steps will done in similar way with engineers and planners.
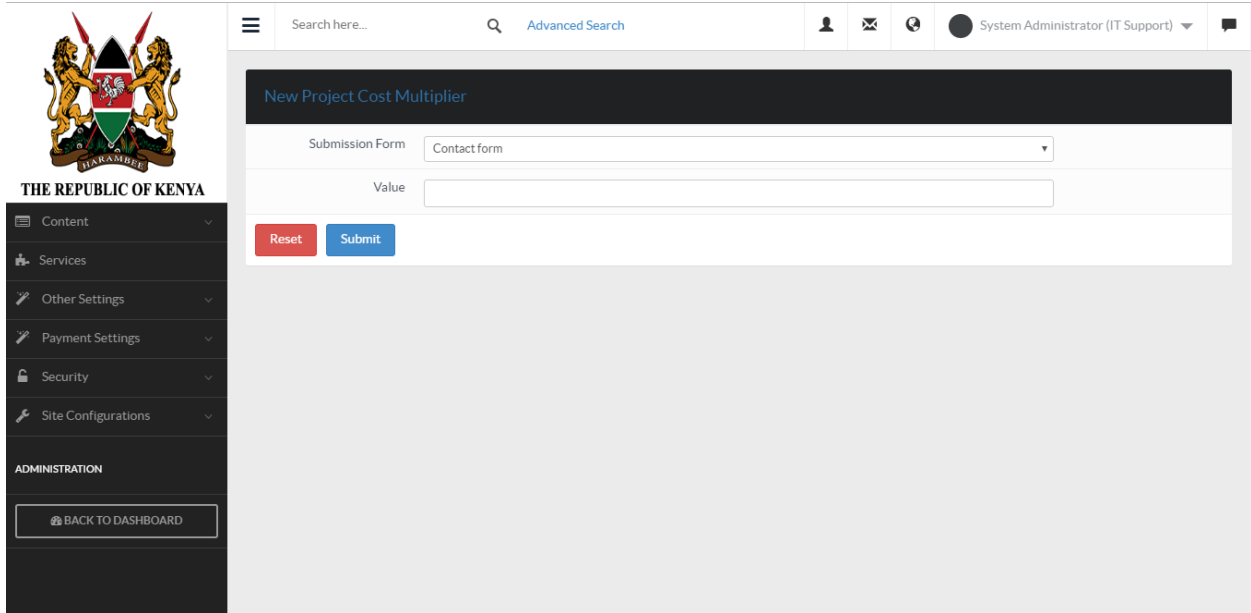
6.3.6 Project Cost Multiplier

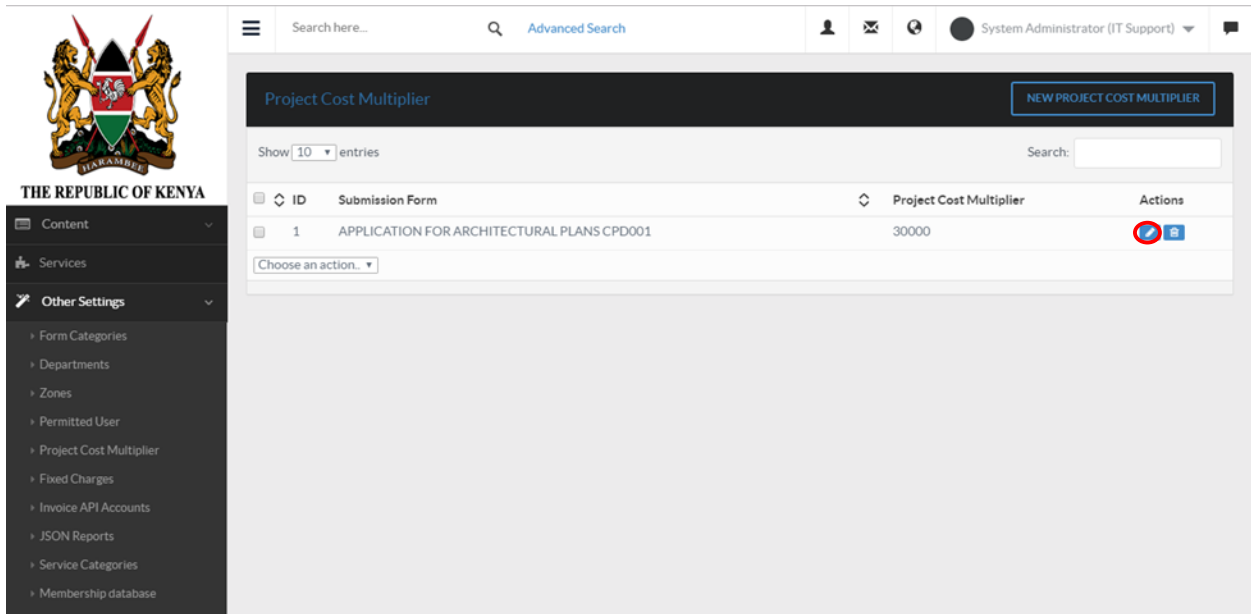Click "System Settings" then navigate to "Other Settings".Click on "Project Cost Multiplier " menu item.

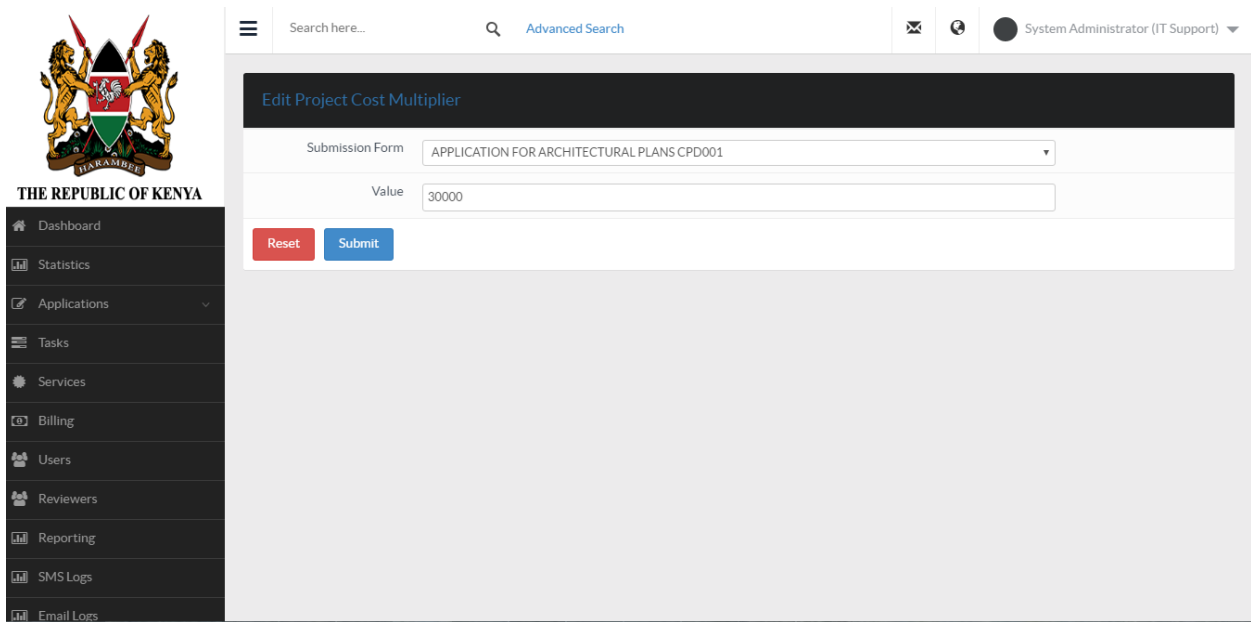To add a new project cost multiplier, click on "NEW PROJECT COST MULTIPLIER" .

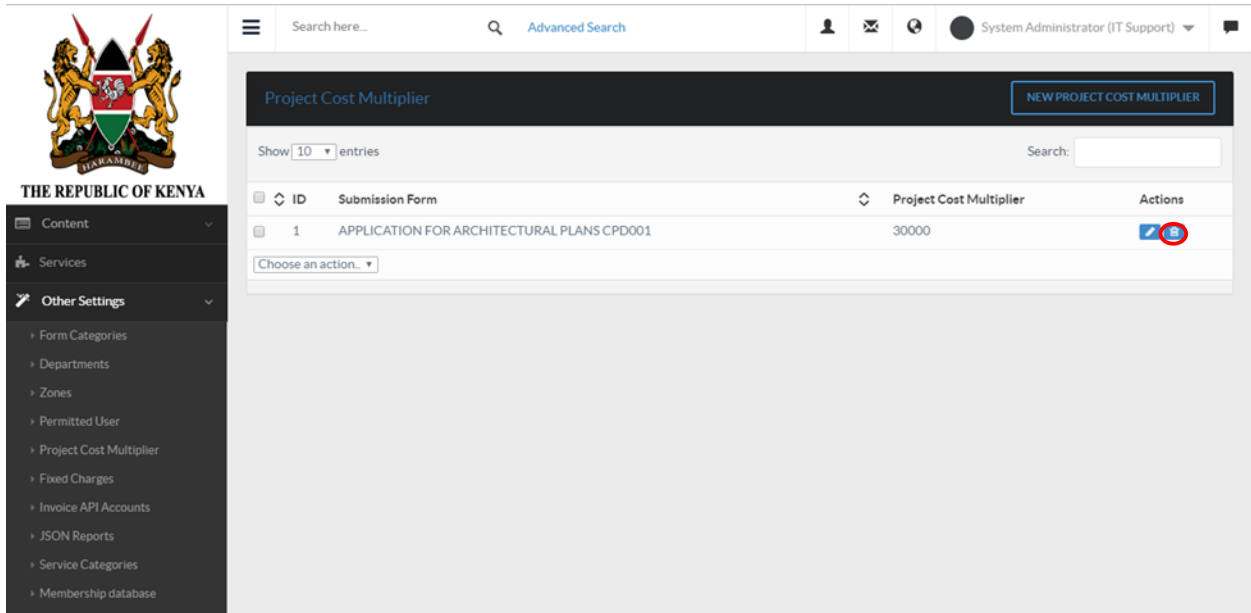The following form will appear. Fill and click submit button.

To edit a project cost, go to actions and click on the edit button as shown below. Make your changes and click submit button to save the changes.

To delete a project cost, go to actions and click on the delete button as shown.