

KIAMBU eDAMS

ADMINISTRATOR MANUAL



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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.

The screenshot shows the user management interface. The left sidebar contains a menu with the following items: Dashboard, Statistics, Applications, Tasks, Services, Billing, **Users** (highlighted in orange), Reviewers, and Reporting. The main content area shows the 'Users / List of registered users' page. At the top, there is a search bar and an 'Advanced Search' button. Below the search bar, there is a breadcrumb trail 'YOU ARE HERE: Home / Users'. A navigation bar with letters A-Z is visible. Below that, there is a '+ Add User' button and a search input field. A 'Select Status' dropdown menu is also present. The main table lists the following users:

#	Full Name	Email Address	User ID	Created On	Last Login	Status	Action
1	ADAMS ONYANGO	onyiams@gmail.com	ADAMS.ODHIAMBO	2016-09-26 09:25:03	2016-09-28 12:49:32	Active	
2	ADAMS ONYANGO ODHIAMBO	odhiams@yahoo.com	ADAMS	2016-09-26 07:21:31	2016-09-27 06:13:59	Active	
3	Aggy waithera	aggywaithera@gmail.com	aggywaithera	2016-09-26 09:14:12	2016-09-30 06:09:58	Active	
4	Agnes muthanje	agnesmuthanje@gmail.com	Agnes.muthanje	2016-09-26 08:44:21	2016-09-26 13:34:11	Active	
5	Alice Menya	alicemenya@gmail.com	alice.menya	2016-09-26 08:36:22	2016-09-27 09:45:33	Active	
6	AMOS KIBE WACHIRA	kiffeaf@gmail.com	25117918	2016-05-14 14:14:55	2016-05-14 18:32:56	Inactive	
7	Andrew Gremley	andy@pharosarchitects.com	andrewgremley	2016-09-26 13:48:38		Inactive	
8	AntoG	gichiraanthony@yahoo.com	klhpkj	2016-09-26 07:28:40	2016-09-27 05:10:56	Active	
9	antony.manyeki	antony.manyeki@gmail.com	tonig	2016-09-26 08:44:02		Active	

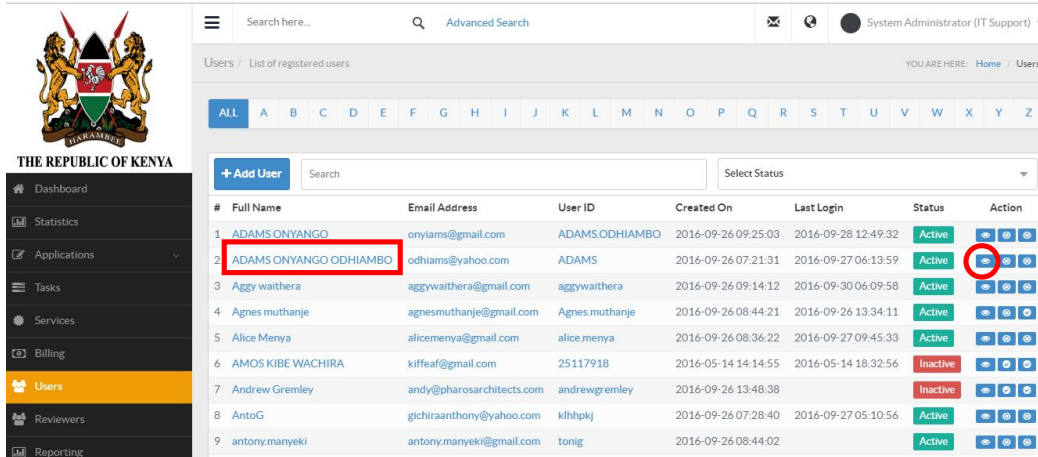
This page manages the architects (front end users) who have registered on the e-construction permit website. The following can be done on the user’s data.




























- 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.



#	Full Name	Email Address	User ID	Created On	Last Login	Status	Action
1	ADAMS ONYANGO	onyiams@gmail.com	ADAMS.ODHIAMBO	2016-09-26 09:25:03	2016-09-28 12:49:32	Active	  
2	ADAMS ONYANGO ODHIAMBO	odhiams@yahoo.com	ADAMS	2016-09-26 07:21:31	2016-09-27 06:13:59	Active	  
3	Aggy waithera	aggywaithera@gmail.com	aggywaithera	2016-09-26 09:14:12	2016-09-30 06:09:58	Active	  
4	Agnes muthanje	agnesmuthanje@gmail.com	Agnes.muthanje	2016-09-26 08:44:21	2016-09-26 13:34:11	Active	  
5	Alice Menya	alicemenya@gmail.com	alice.menya	2016-09-26 08:36:22	2016-09-27 09:45:33	Active	  
6	AMOS KIBE WACHIRA	kiffear@gmail.com	25117918	2016-05-14 14:14:55	2016-05-14 18:32:56	Inactive	  
7	Andrew Gremley	andy@pharosarchitects.com	andrewgremley	2016-09-26 13:48:38		Inactive	  
8	AntoG	gchiraanthony@yahoo.com	klhpkj	2016-09-26 07:28:40	2016-09-27 05:10:56	Active	  
9	antony.manyeki	antony.manyeki@gmail.com	tonig	2016-09-26 08:44:02		Active	  










1.1.1.2 Activate / Deactivate User

- 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.

Show entries Search:

#	MembersNo	FullNames	Email	Address	Town	Actions
A1000		ARCH. LAWRENCE IGNATIUS NDIACHA	kibe@otbafrica.com	NAKURU	NAIROBI	
A1001		ARCH. SHADRACK KIPKETER TULON	info@tegparch.co.ke	68035-00200	NAIROBI	
A1003		ARCH. EMMANUEL J. O. GONO	ejogono@yahoo.com	14531-00100	NAIROBI	
A1004		ARCH. ALLY ABOUD RAFROUF	alraff@yahoo.co.uk	99350-80107	MOMBASA	
A1006		ARCH. JOSPHAT MUENDO NGUNDO	mue2000@yahoo.com	20 - 00511	ONGATA RONGAI	
A1008		ARCH. NJAGAH MICHAEL NJAGAH	michaelnjagah@gmail.com	39188-00623	NAIROBI	
A1009		ARCH. JAMES NJOROGE KAMAU		11620-00100	NAIROBI	
A1010		ARCH. OINO EVANS JUMA	ejumaoino@hotmail.com	74060-00100	NAIROBI	
A1011		ARCH. STEPHEN MUNENE	itumasm@gmail.com	3108-60200	MERU	

1.1.2 Manage Reviewers

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

Reviewers / List of backend reviewers

YOU ARE HERE: [Home](#) / [Reviewers](#)

ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

+ Add Reviewer Select Status

#	Full Name	Email Address	Username	Status	Action
1	BUILDING INSPECTOR	inspector@otbafrica.com	inspector	Active	View Edit
2	COUNTY ENGINEER	county_engineer@otbafrica.com	county_engineer	Active	View Edit
3	COUNTY DIRECTOR PHYSICAL PLANNING	cdpp@otbafrica.com	cdpp	Active	View Edit
4	COUNTY PLANNING TECHNICAL COMMITTEE	chair_cptc@otbafrica.com	chair_cptc	Active	View Edit
5	DEVELOPMENT CONTROL	control@otbafrica.com	development_control	Active	View Edit
6	GATUNDU NORTH	north_inspector@otbafrica.com	north_inspector	Active	View Edit
7	GATUNDU SOUTH	south_inspector@otbafrica.com	south_inspector	Active	View Edit
8	GATUNDU NORTH PLANNER	north_planner@otbafrica.com	north_planner	Active	View Edit
9	GATUNDU NORTH HEALTH	north_health@otbafrica.com	north_health	Active	View Edit
10	GATUNDU SOUTH PLANNER	south_planner@otbafrica.com	south_planner	Active	View Edit

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.

#	Full Name	Email Address	Username	Status	Action
1	BUILDING INSPECTOR	inspector@otbafrica.com	inspector	Active	✎ ✖
2	COUNTY ENGINEER	county_engineer@otbafrica.com	county_engineer	Active	✎ ✖
3	COUNTY DIRECTOR PHYSICAL PLANNING	cdpp@otbafrica.com	cdpp	Active	✎ ✖
4	COUNTY PLANNING TECHNICAL COMMITTEE	chair_cptc@otbafrica.com	chair_cptc	Active	✎ ✖
5	DEVELOPMENT CONTROL	control@otbafrica.com	development_control	Active	✎ ✖
6	GATUNDU NORTH	north_inspector@otbafrica.com	north_inspector	Active	✎ ✖
7	GATUNDU SOUTH	south_inspector@otbafrica.com	south_inspector	Active	✎ ✖
8	GATUNDU NORTH PLANNER	north_planner@otbafrica.com	north_planner	Active	✎ ✖
9	GATUNDU NORTH HEALTH	north_health@otbafrica.com	north_health	Active	✎ ✖
10	GATUNDU SOUTH PLANNER	south_planner@otbafrica.com	south_planner	Active	✎ ✖

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.

Confirm Password

Department: Select Department...

Groups:

- Select Department...
- Planning Section, Planning and architecture Department
- Planning and architecture Department
- Rates Department
- Banking Hall Department
- Valuation Department
- Internal Audit Department
- City Manager's Department
- Planning Section Department
- Physical Planning Office, Ministry of Lands
- Ministry of Lands(Cashiering)
- Engineering Department
- Chief Valuer Department

Street

Zip Code

Country

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.

Department: Select Department...

Groups Showing all 63

Filter

- AAK
- Authorized Legal Officer (City Manager's Office)
- Building Inspectors (Building Inspectorate)
- Cashier (Banking Hall)
- Change of Land Use(Error) Copy 2014-09-30 01:09:10
- Chief Architect (Architecture Section, PAD)
- Chief Building Inspector (Building Inspectorate)

Empty list

Filter

Street











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.

The screenshot shows a user profile page for 'clerk engineering'. The page is divided into three main sections: GENERAL, ACCOUNT SETTINGS, and SECURITY. The GENERAL section includes links for Account Settings, Email Addresses, and Phone Numbers. The ACCOUNT SETTINGS section contains input fields for First Name (clerk), Last Name (engineering), Department (Engineering Department), City, Country, Designation, and Man Number. A 'Change Picture' button is located to the right of the input fields. At the bottom of the ACCOUNT SETTINGS section, there are two buttons: 'Save' (highlighted with a red box) and 'Delete User'.

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.

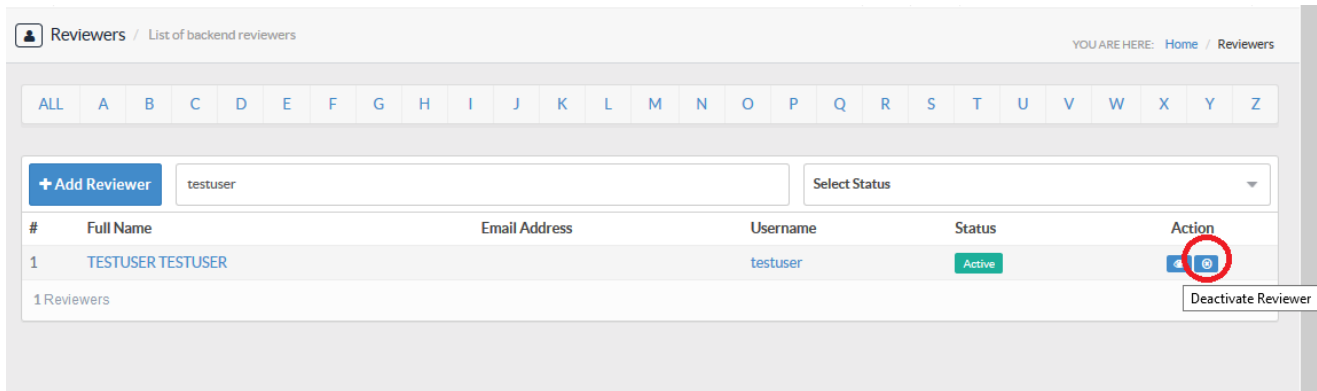
This screenshot is identical to the one above, showing the user profile page for 'clerk engineering'. However, in this version, the 'Delete User' button at the bottom of the ACCOUNT SETTINGS section is highlighted with a red box, while the 'Save' button is no longer highlighted.

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:

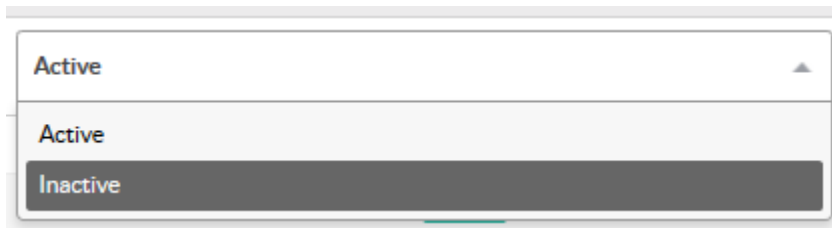
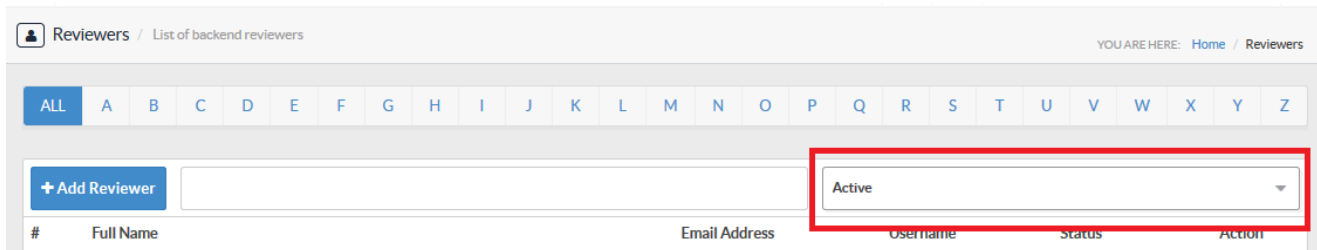
- Go to Reviewers
- Search for the specific reviewer by name, email address or phone number.
- Click the 'Deactivate Reviewer' button on the far right of the reviewer record that appears as shown below.



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.

The screenshot shows the 'Reviewers' page with a list of three reviewers. The 'Action' column for the first reviewer, 'CLERK ENGINEERING', has a blue circular button with a white plus sign, which is circled in red. A tooltip labeled 'Activate Reviewer' is visible over this button.

#	Full Name	Email Address	Username	Status	Action
1	CLERK ENGINEERING		clerk_eng3	Inactive	
2	CLERK_ENG2 CLERK_ENG2		clerk_eng2	Inactive	
3	AUTHORIZED LEGAL OFFICER (CITY MANAGER'S OFFICE) CITY MANAGER'S OFFICE		auth legal officer	Inactive	

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.

The screenshot shows the 'View reviewer details' page for a 'Building Inspector'. The 'Allowed Sub-counties' dropdown menu is open, and 'Thika Town' is selected and highlighted with a red box. The dropdown list includes 'Kiambu', 'Juja', and 'Ruiru'.

THE REPUBLIC OF KENYA

- Dashboard
- Statistics
- Applications
- Tasks
- Services
- Billing
- Users
- Reviewers**
- Reporting

Profile / View reviewer details

Building Inspector

GENERAL

- Account Settings
- Email Addresses
- Phone Numbers

ACCESS MANAGEMENT

- User Groups

SECURITY

- Change Password
- Activity Log

ACCOUNT SETTINGS

First Name: Building

Last Name: Inspector

Department: SUB-COUNTY PHYSICAL PLANNING

Allowed Sub-Counties: **Thika Town**, Kiambu, Juja, Ruiru

City:

Country:

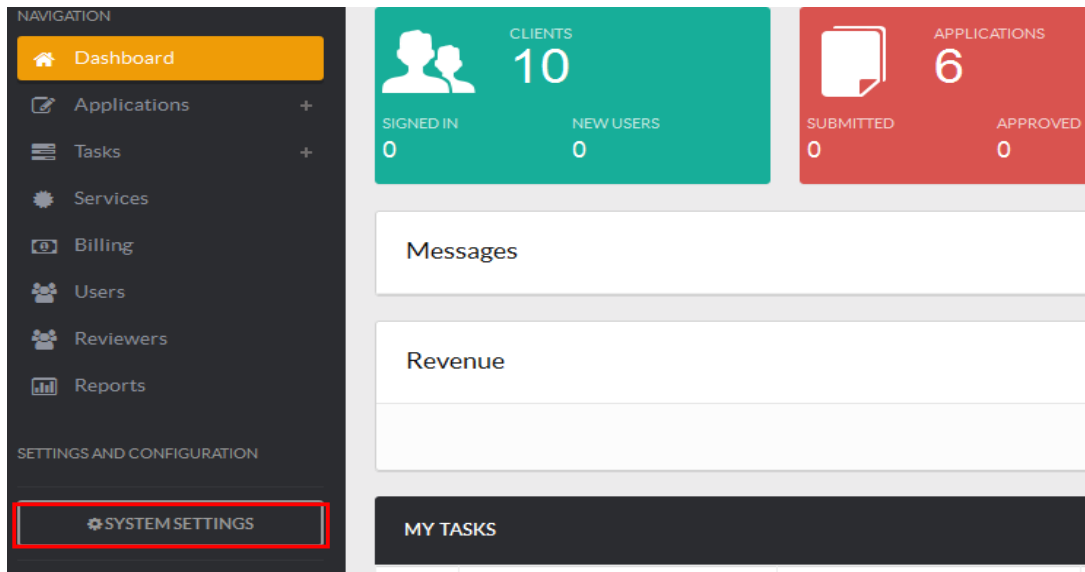
Designation:

1.1.3 Managing Groups

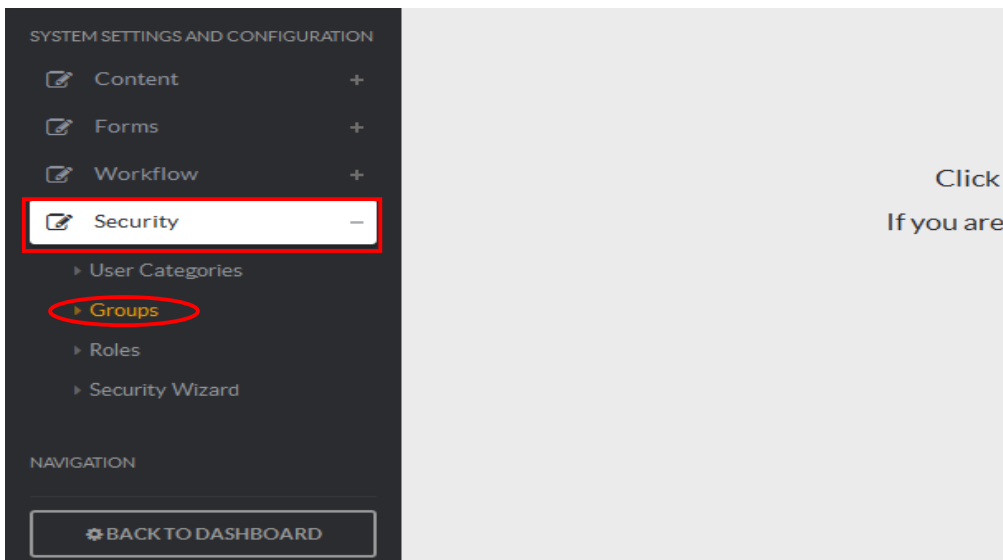
Assigning reviewers to groups gives them the credentials which enable them to access various parts of the system. Groups defines what sections of the system the user has access to and what the user can do in these sections.

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.

ID	Name	Description	Actions
63	sub-county architects	sub-county architects	[edit] [add] [delete]
62	Sub County Development officers	Sub County Development officers	[edit] [add] [delete]
61	Sub-county fire	Sub-county fire	[edit] [add] [delete]
60	Sub-County Building Inspectors	Sub-County Building Inspectors	[edit] [add] [delete]
59	County Physical Planners	County Physical Planners	[edit] [add] [delete]
58	County Planning Technical Committee	County Planning Technical Committee	[edit] [add] [delete]
57	Defence ministry	Defence ministry	[edit] [add] [delete]
56	KAA	KAA	[edit] [add] [delete]
55	KRC	KRC	[edit] [add] [delete]
54	NEMA	NEMA	[edit] [add] [delete]
53	Sub-County valuers	Sub-County valuers	[edit] [add] [delete]

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.










ID	Name	Description	Actions
87	Technical Officer(Fire Office)	Technical Officer(Fire Office)	[edit] [add] [delete]
86	Technical Officer(Public Health)	Technical Officer(Public Health)	[edit] [add] [delete]
85	Technical Officer PAD	Technical Officer PAD	[edit] [add] [delete]

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.

Groups				NEW GROUP
Show 10 entries		Search:		
<input type="checkbox"/>	^ #	◇ Name	◇ Description	◇ Actions
<input type="checkbox"/>	87	Technical Officer(Fire Office)	Technical Officer(Fire Office)	  
<input type="checkbox"/>	86	Technical Officer(Public Health)	Technical Officer(Public Health)	  
<input type="checkbox"/>	85	Technical Officer PAD	Technical Officer PAD	  

NB: Groups with members cannot be deleted.

CHAPTER 2: WEB CONTENT MANAGEMENT

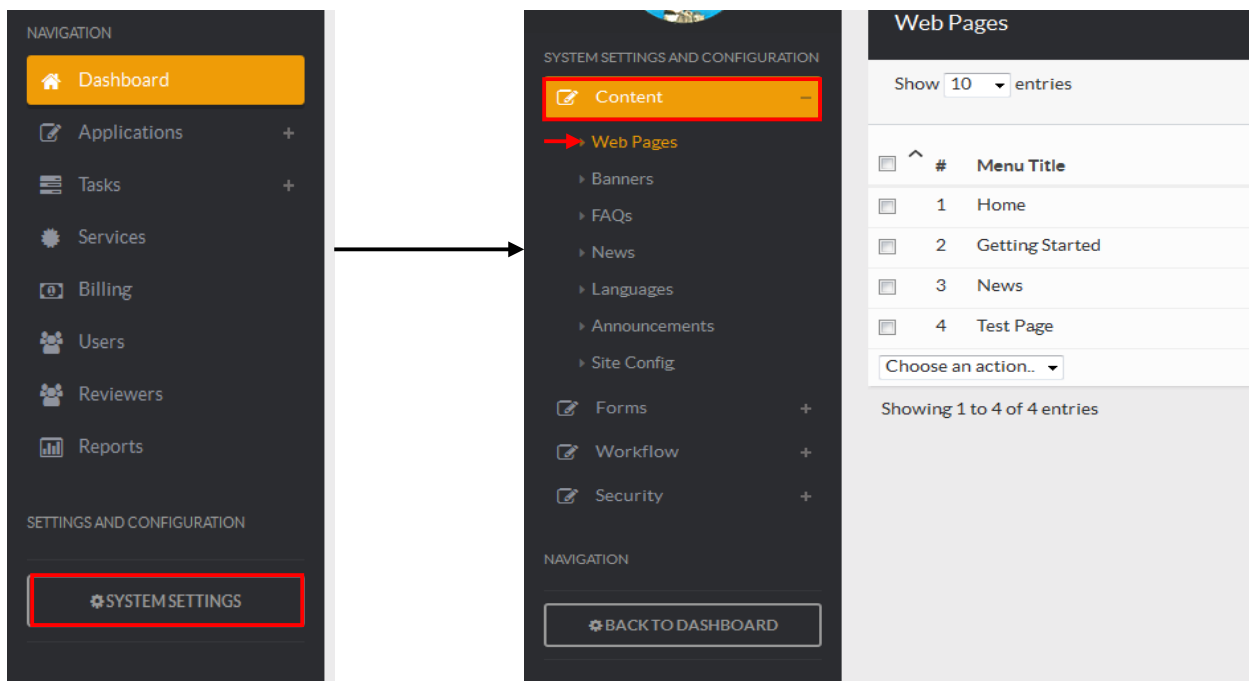
Web page updating has been simplified by the inclusion of a generic Content Management System that covers all the basics of editing and updating page information. Being at its infancy stage, the editable pages are present leaving you with the simple task of update only.

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

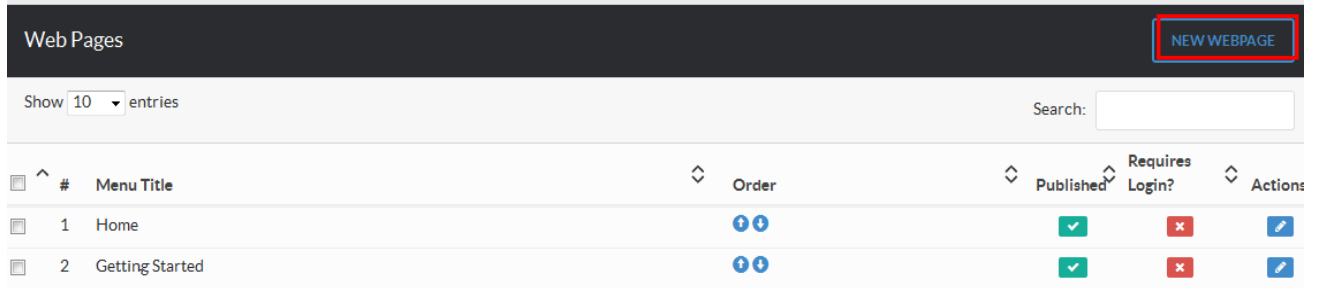
To view the existing web pages, click on the “System Settings” button at the bottom, click on the “Content” menu and then select “Web Pages”.



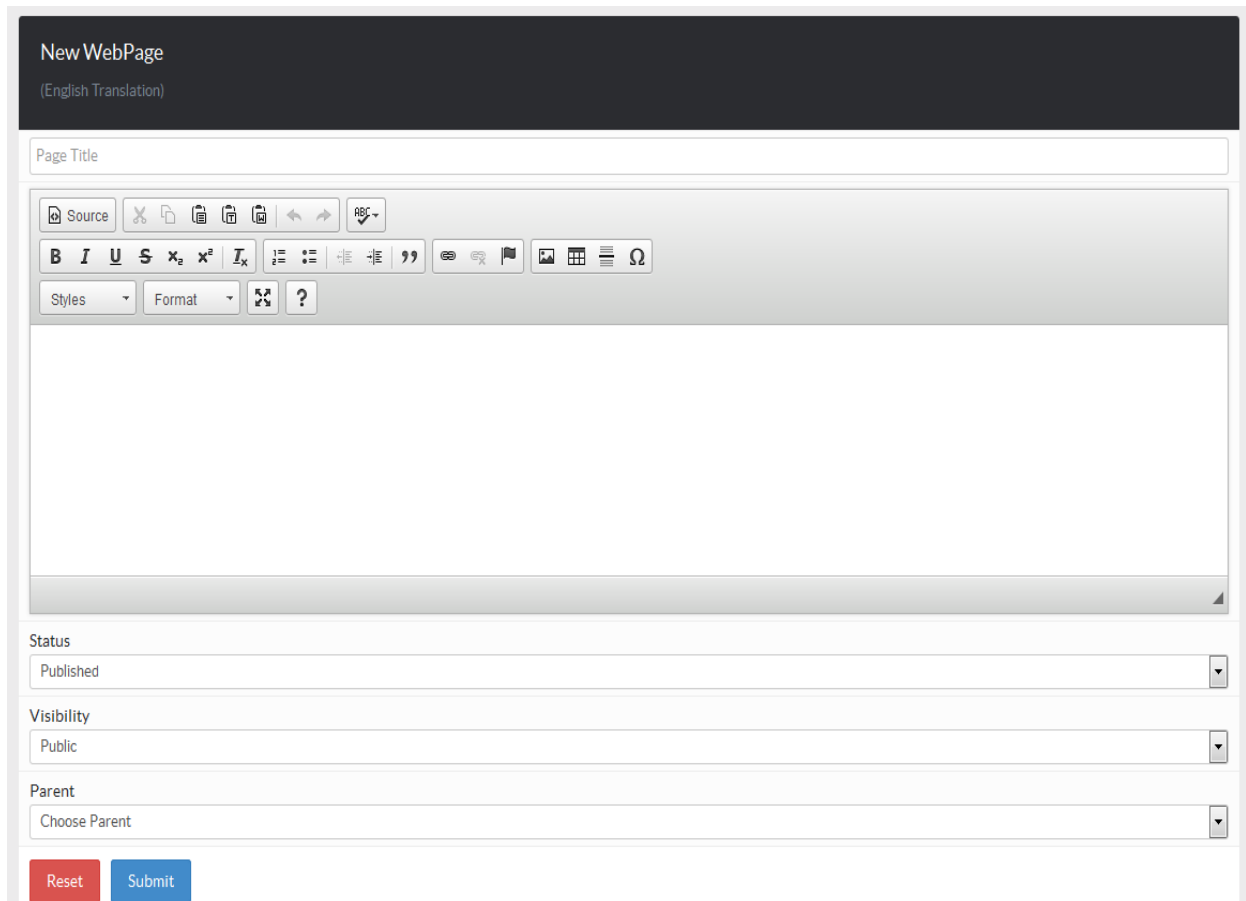
2.1.3 Add a Web Page

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.

	^ #	Menu Title	Order	Published	Requires Login?	Actions
<input type="checkbox"/>	1	Home	↑ ↓	✓	✗	
<input type="checkbox"/>	2	Getting Started	↑ ↓	✓	✗	
<input type="checkbox"/>	3	News	↑ ↓	✓	✓	

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.

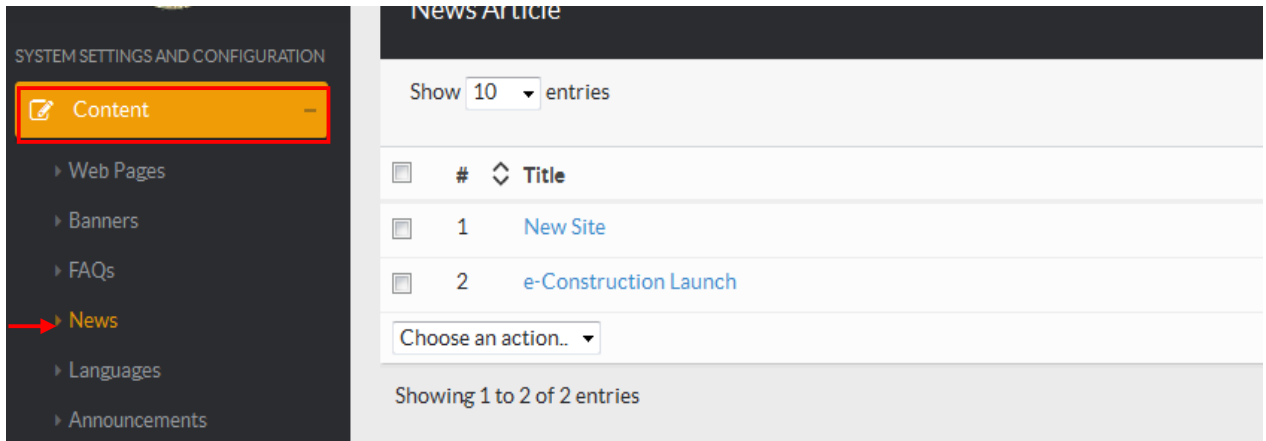
	^ #	Menu Title	Order	Published	Requires Login?	Actions
<input type="checkbox"/>	1	Home	↑ ↓	✓	✗	
<input checked="" type="checkbox"/>	2	Publications	↑ ↓	✓	✗	<div style="border: 1px solid gray; padding: 2px;"> Choose an action... <ul style="list-style-type: none"> Choose an action... <li style="background-color: #f0f0f0;">Set As Deleted </div>
<input type="checkbox"/>	3	Help	↑ ↓	✓	✓	

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

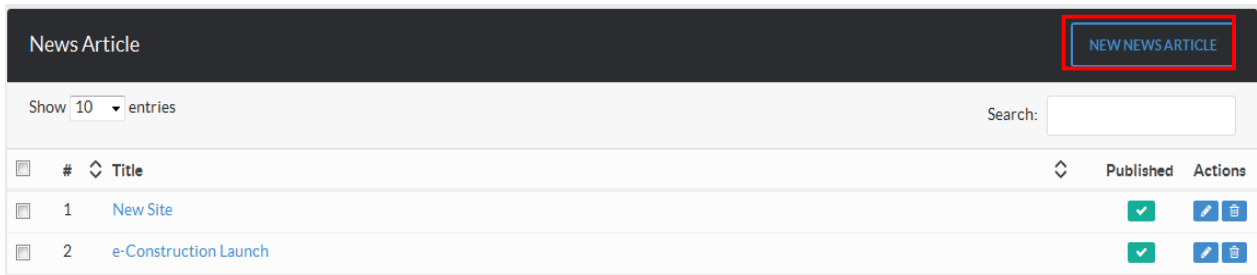
To view the existing news articles, click on the “System Settings” button at the bottom, click on “Content” menu and then select on “News”



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.

	#	Title	Published	Actions
<input type="checkbox"/>	1	New Site	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>
<input type="checkbox"/>	2	e-Construction Launch	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

2.2.5 Delete news Article

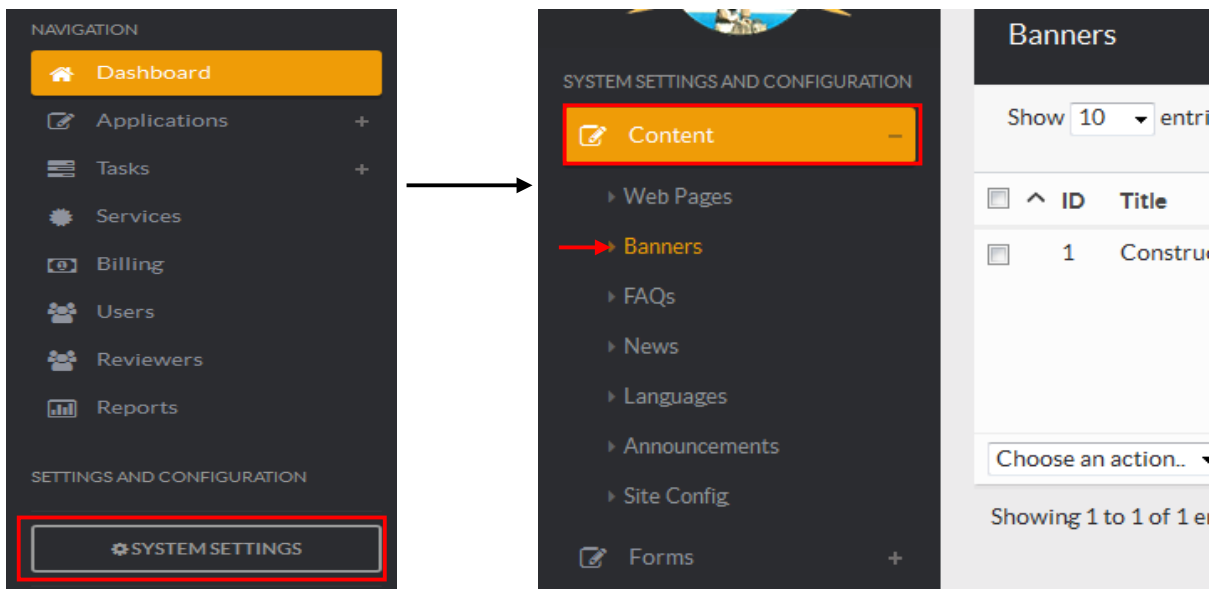
To delete a news article, mark the check box of the article/articles to delete. At the bottom choose “Set as Deleted” form the drop down tool as shown



2.3 MANAGE BANNERS

2.2.1 View Banners

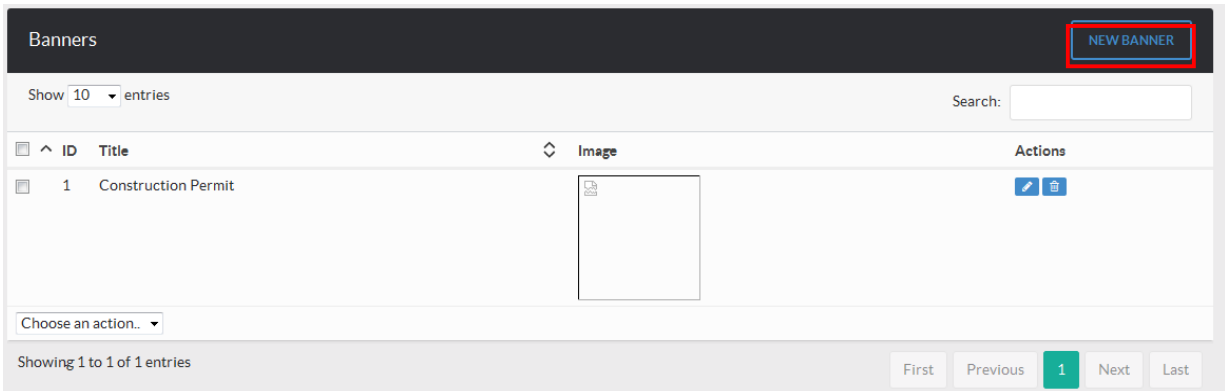
To view all banners uploaded in the site, go to “System Settings”, click on the “Content” menu and select “banners”



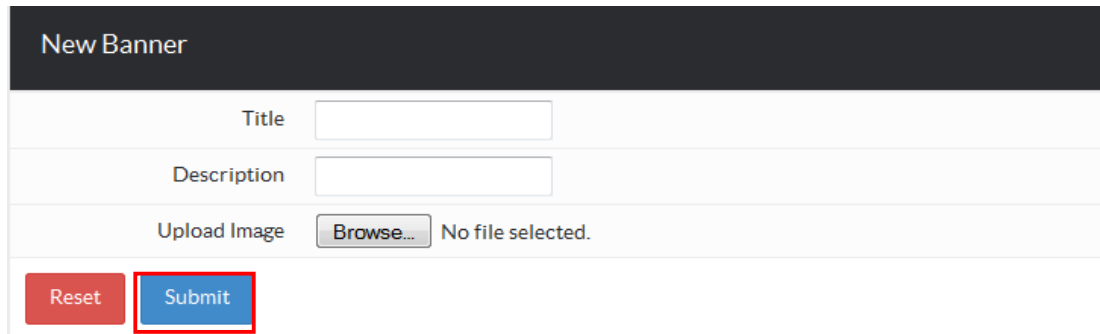
You will be presented with a list of all banners in the system.

2.2.2 Add a new Banner

Click on the “New Banner” button as shown



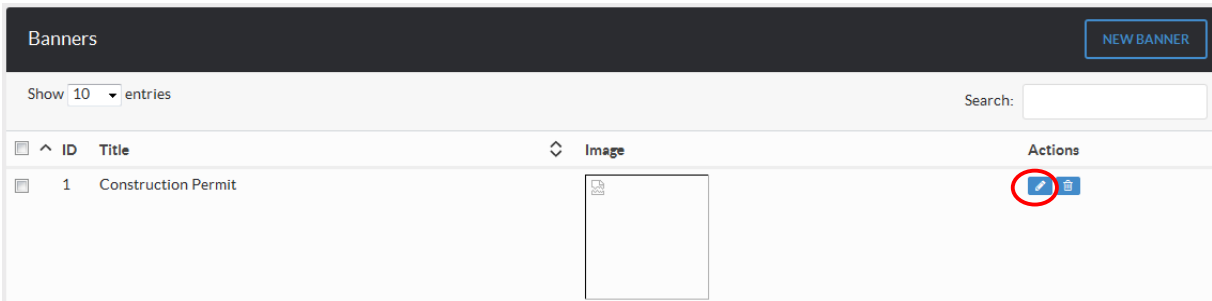
You will be presented with a “New Banner” page where you will enter the details and upload the banner image.



Click “Submit” once you have finished.

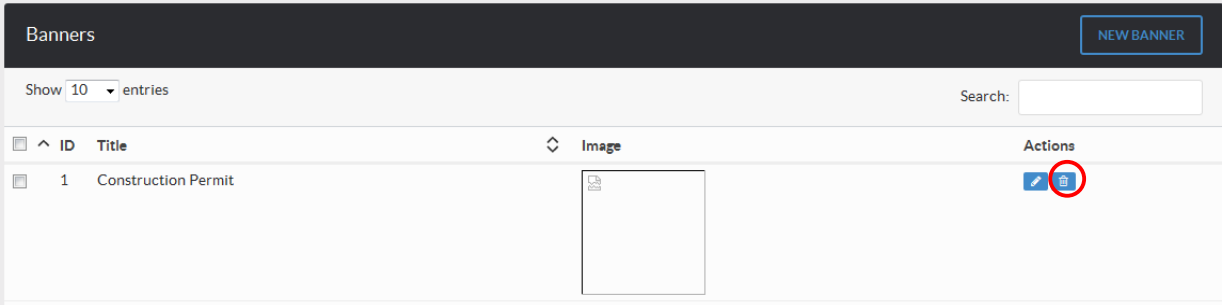
2.2.3 Edit a banner

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.



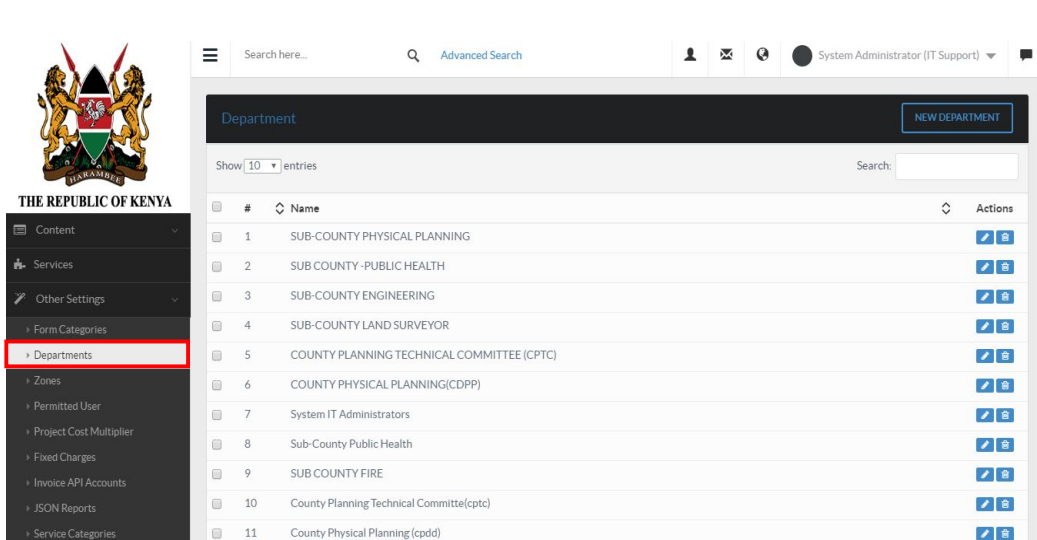
CHAPTER 3: SETTING UP THE BASIC PERMIT COMPONENTS

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.

Department				NEW DEPARTMENT
Show	10	entries	Search:	<input type="text"/>
#	Name			Actions
1	Planning Section, Planning and architecture Department			✎ ✕
2	Planning and architecture Department			✎ ✕
3	Rates Department			✎ ✕
4	Banking Hall Department			✎ ✕
5	Valuation Department			✎ ✕
6	Internal Audit Department			✎ ✕
7	City Manager's Department			✎ ✕
8	Planning Section Department			✎ ✕
9	Physical Planning Office, Ministry of Lands			✎ ✕
10	Ministry of Lands(Cashiering)			✎ ✕
Choose an action.. ▾				
Showing 1 to 10 of 23 entries				First Previous 1 2 3 Next Last

3.1.2 Adding Departments

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

Department				NEW DEPARTMENT
Show	10	entries	Search:	<input type="text"/>
#	Name			Actions
1	Planning Section, Planning and architecture Department			✎ ✕
2	Planning and architecture Department			✎ ✕
3	Rates Department			✎ ✕
4	Banking Hall Department			✎ ✕

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

New Department

Name

Head of Department

Reviewers Showing all 41

Filter

→→

- cashier cashier (cashier)
- Cashier (Payment Counter,MOL) (cashier(PC,MOL))
- Chief Revenue (chief_revenue)
- Chief Fire (chiefire)
- City Manager (CM)
- Clerk (City Manager) (clerk(CM))
- cp_dep_assistant cp_dep_assistant (cp_dep_assistant)

Empty list

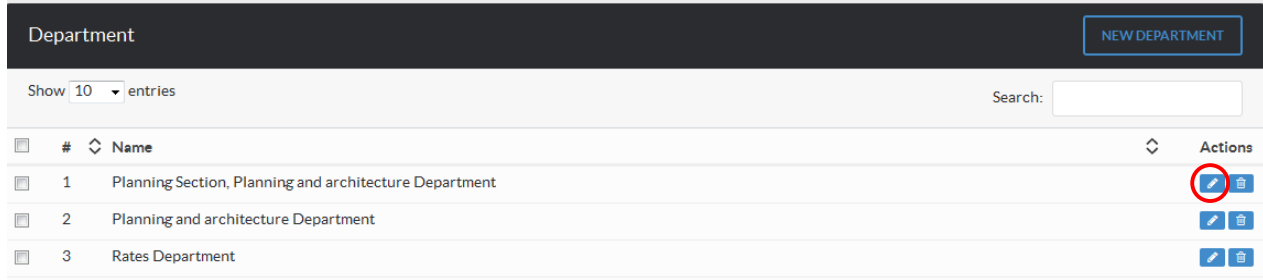
Filter

←←

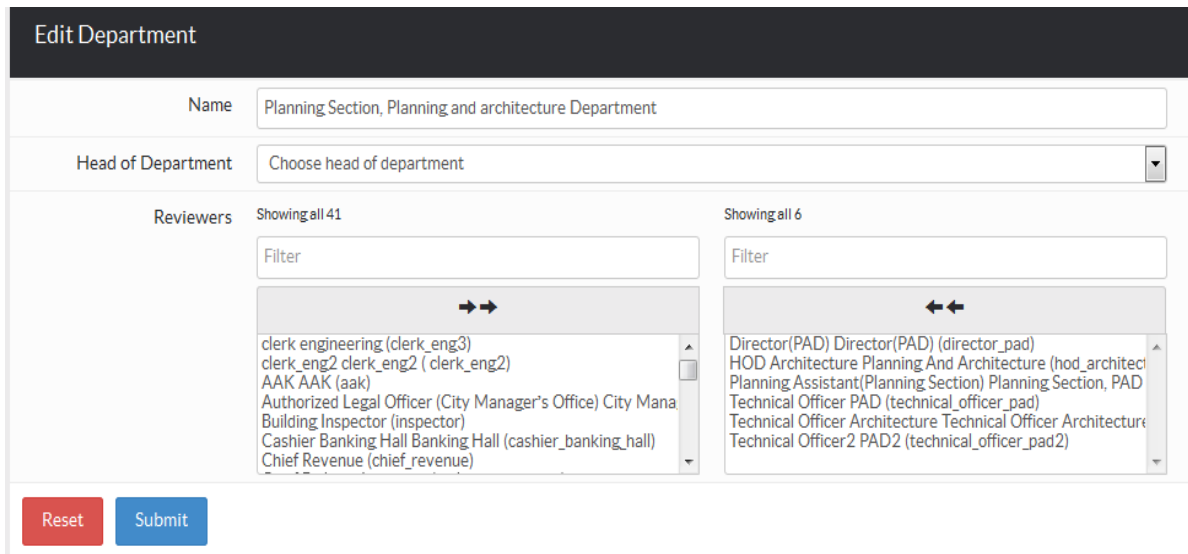
Reset
Submit

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.

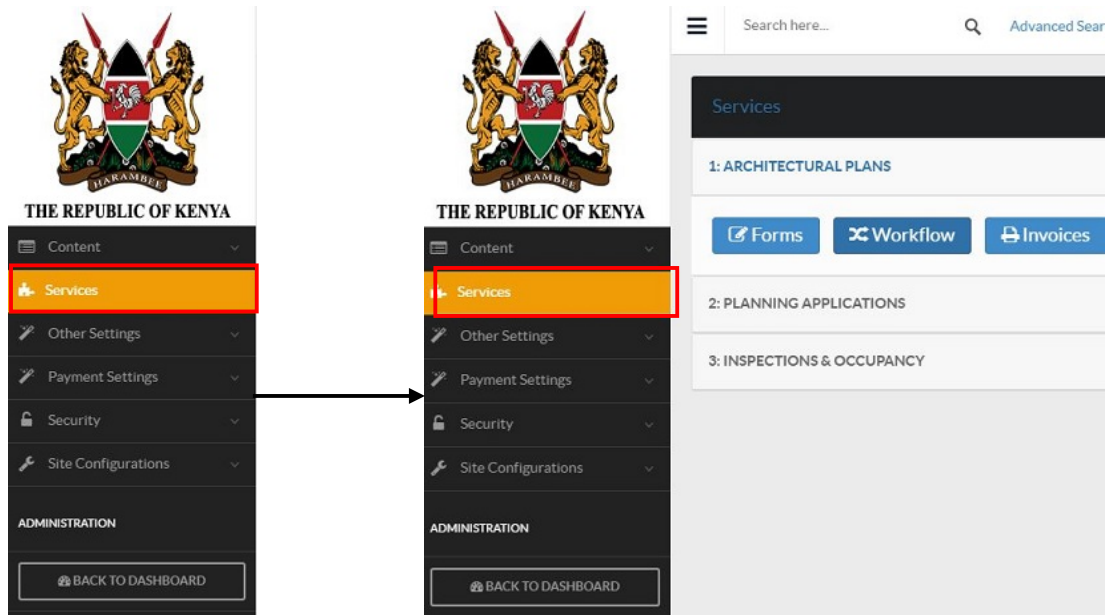


3.2 STAGES OF APPROVAL

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.

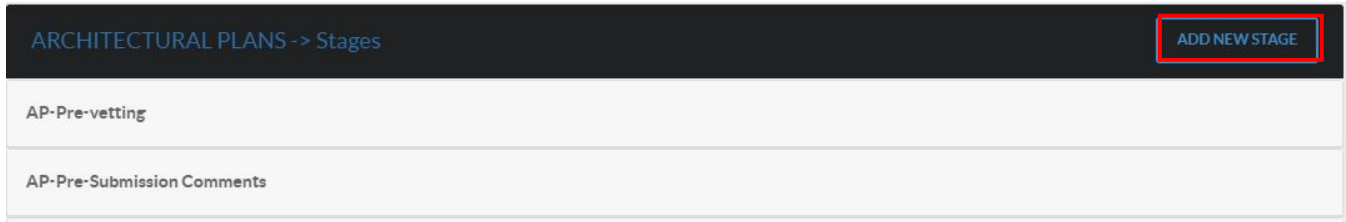


You will be presented with a list of all the stage groups currently available in the system as shown below

ARCHITECTURAL PLANS -> Stages		ADD NEW STAGE
AP-Pre-vetting		
AP-Pre-Submission Comments		
AP-ReSubmitted Plans		
AP-Invoicing		
AP-Client Invoice Communication		
AP Expired Applications		
AP-Submission		
AP-Circulation		
AP-Plans from Other Directorates		
AP-Letter of Authority Approval		

3.2.1.1 Adding a new Stage Group

1. Click on the “Add New Stage” button as shown below.



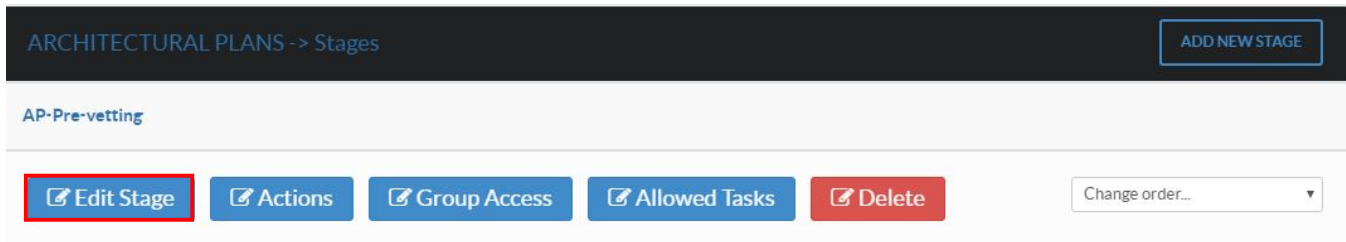
3. Enter the title of the stage group and select the group of reviewers and users that will access this stage group. Click on the three tabs (i.e Stage Details, Actions and Permissions) for details. Click on submit once you finish.

New Stage

Stage Details	Actions	Permissions
Title	<input type="text"/>	
Maximum duration of time an application is allowed in this stage (Days)	<input type="text" value="0"/>	
Is Stage First (i.e. Pre-vetting?)	<input type="text" value="No"/> <small>Used in appending sub-county code and INV on submitted plans</small>	
Is Agenda Stage	<input type="text" value="No"/> <small>Used in identifying stage as an agenda stage. All applications in this stage will appear under agenda report</small>	
Send expired application to another stage	<input type="text" value="No"/>	
Send expired application to stage as declined	<input type="text" value="No"/>	
Change Application Number	<input type="text" value="No"/>	
Type of Stage	<input type="text" value="Default"/>	
Send notification to user when application enters this stage?	<input type="text" value="No"/>	
<small>You can also optionally send notification to reviewers</small>	<small>Send Notification</small>	

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.

This form allows administrators to configure notifications for reviewers. It includes a 'Send Notification' dropdown set to 'Yes', and text input fields for 'Mail Subject for Reviewers', 'Mail Content for Reviewers', and 'SMS Content for Reviewers'. Below these is a section to 'Select groups you want to receive the notification at this stage', featuring two filterable lists: 'Showing all 18' and 'Empty list'. The 'Showing all 18' list contains items like 'County Physical Planners', 'County Planning Technical Committee', 'Defence ministry', 'KAA', 'KRC', and 'NEMA'. At the bottom, there are 'Reset' and 'Submit' buttons, and a 'Change Language' dropdown.

3.2.1.3 Deleting a Stage Group

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

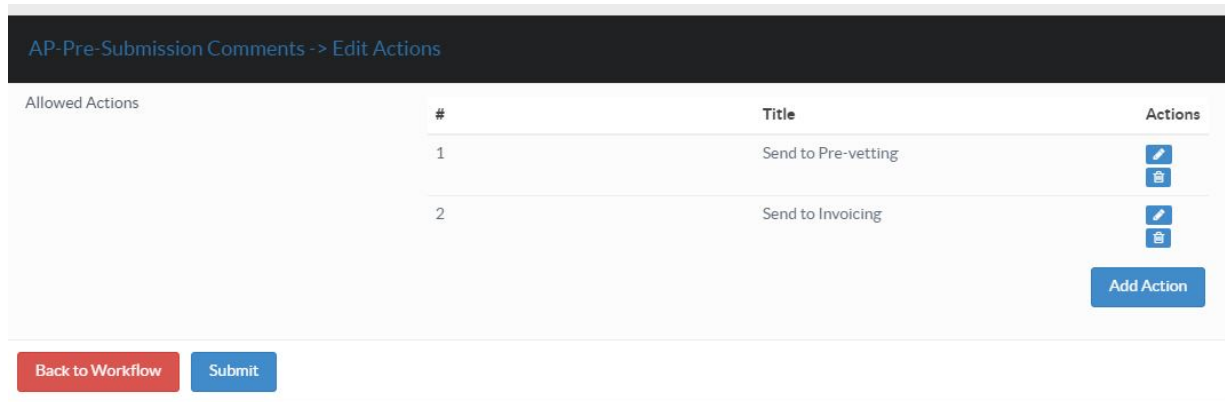
The screenshot shows the 'ARCHITECTURAL PLANS -> Stages' interface. At the top right is an 'ADD NEW STAGE' button. Below the header, the stage 'AP-Pre-vetting' is displayed. A row of action buttons is shown: 'Edit Stage', 'Actions', 'Group Access', 'Allowed Tasks', and 'Delete'. The 'Delete' button is highlighted in red. A 'Change order...' dropdown is also visible.

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

The screenshot shows the 'ARCHITECTURAL PLANS -> Stages' interface. At the top right is an 'ADD NEW STAGE' button. Below the header, the stage 'AP-Pre-vetting' is displayed. Below it, the stage 'AP-Pre-Submission Comments' is shown. A row of action buttons is shown: 'Edit Stage', 'Actions', 'Group Access', 'Allowed Tasks', and 'Delete'. The 'Actions' button is highlighted in red. A 'Change order...' dropdown is also visible.

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



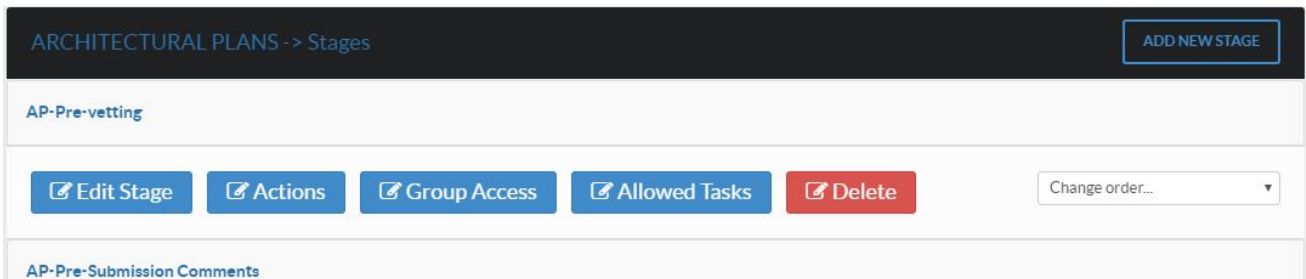
3.3.3 MANAGING ACTIONS

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.

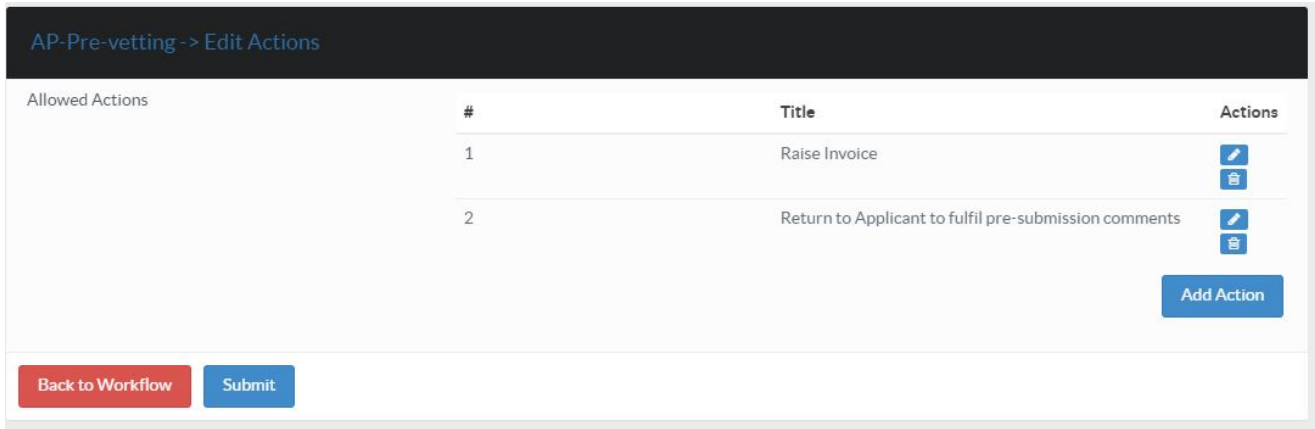
3.4.3.1 Adding a new Action

To add a new action:

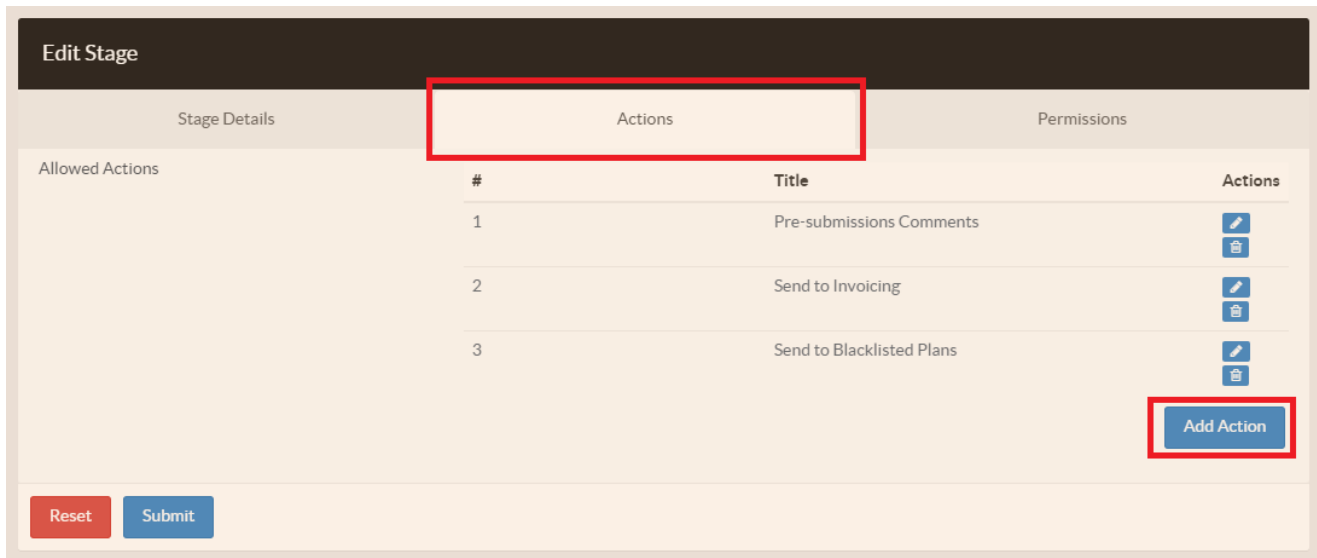
- Go to **System Settings->Services->**
- Select the workflow you want to add the action to and click the “Actions” button as shown below



- 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

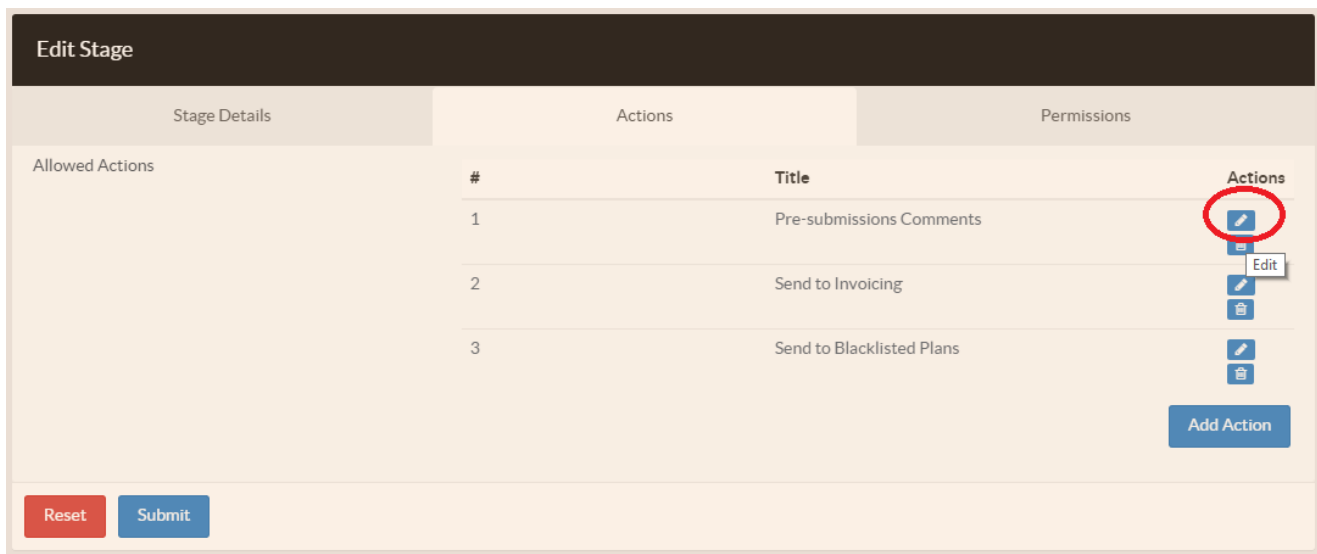


- Enter a name for the action
- Choose the type of action which can be:
 - Move to another stage - This moves the application to another stage.
 - Reject - This is an action that results in the rejection of the application.
 - Back to Client - This action sends the application back to the applicant with 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:

Edit Action

Title: Pre-submissions Comments

Link: /backend.php/forms/decline?moveto=46

OR Choose an action from below: None

Select Submenu if above action requires moving along workflow: CP-Prevetting

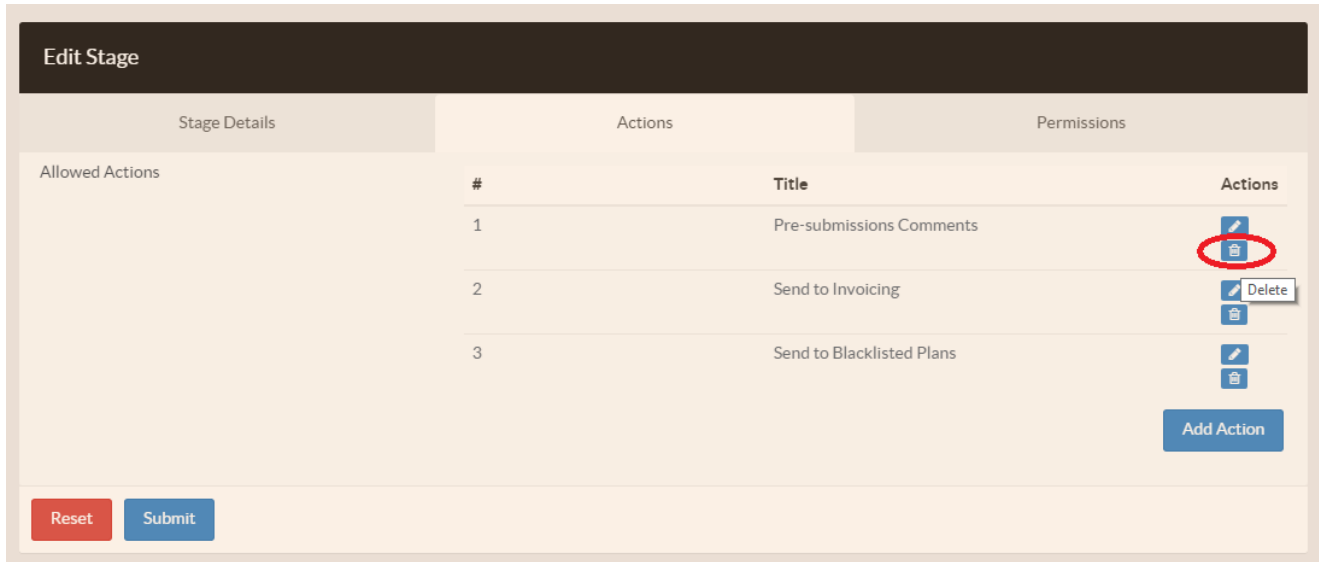
Allowed Groups: ASSISTANT ACHITECTS, ASSISTANT BUILDING INSPECTORATE, Authorized Legal Officer (City Manager's Office), Building Inspectors (Building Inspectorate)

Reset Submit

3.4.3.3 Deleting an Action

To delete an action:

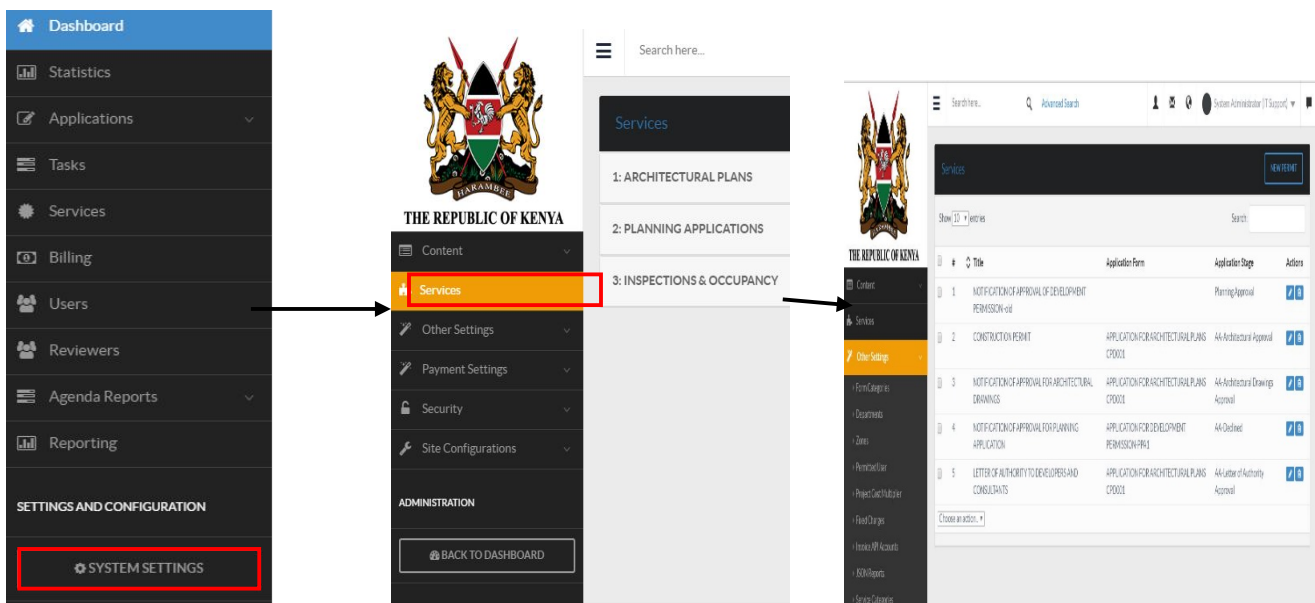
- Go to **System Settings->Services->**then select a service the click on **Workflows**
- Select the workflow for which you want to delete the action and click the view button on the right
- Select the stage for which you want to delete the action and click on the edit button
- Click the 'Actions' tab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



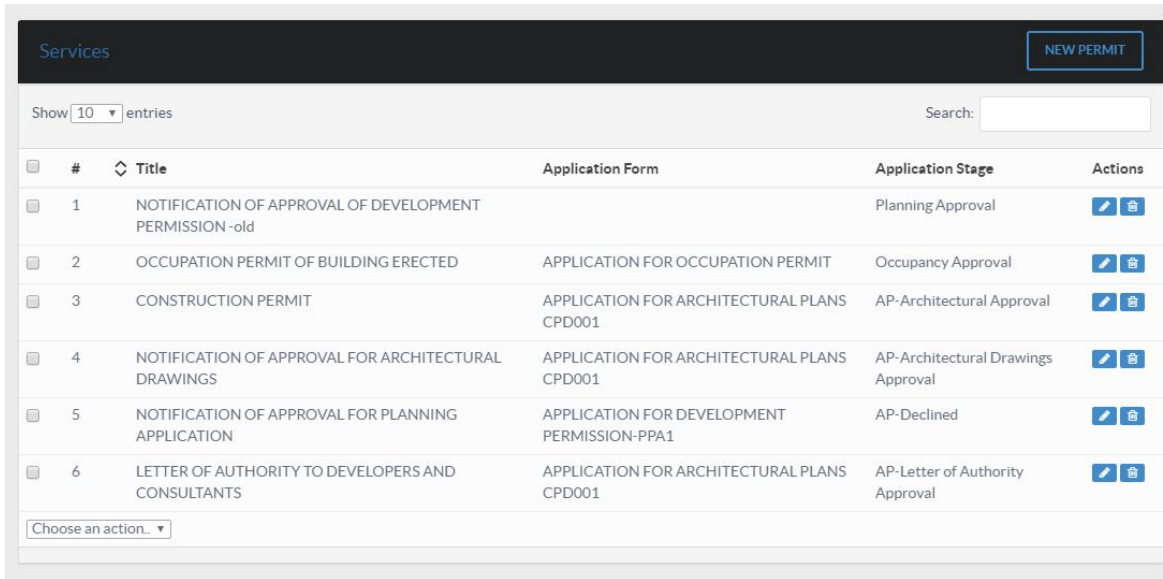
3.5 PERMITS

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.

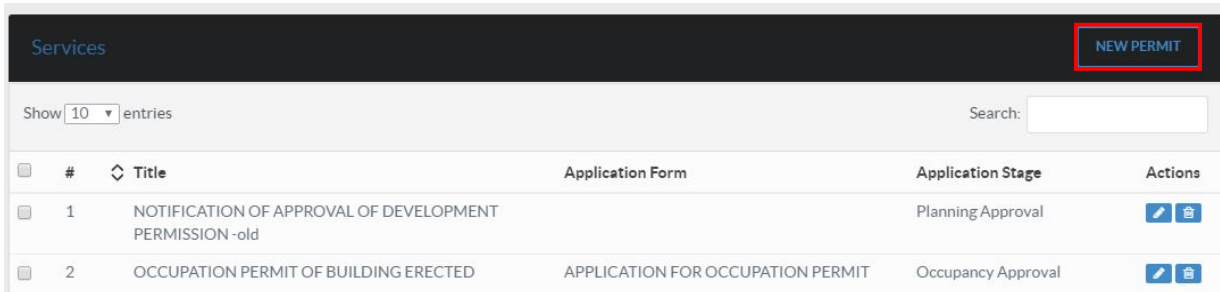


The screenshot shows the 'Services' page with a 'NEW PERMIT' button in the top right corner. Below the button is a search bar and a 'Show 10 entries' dropdown. The main content is a table with the following data:

#	Title	Application Form	Application Stage	Actions
1	NOTIFICATION OF APPROVAL OF DEVELOPMENT PERMISSION -old		Planning Approval	[edit] [delete]
2	OCCUPATION PERMIT OF BUILDING ERECTED	APPLICATION FOR OCCUPATION PERMIT	Occupancy Approval	[edit] [delete]
3	CONSTRUCTION PERMIT	APPLICATION FOR ARCHITECTURAL PLANS CPD001	AP-Architectural Approval	[edit] [delete]
4	NOTIFICATION OF APPROVAL FOR ARCHITECTURAL DRAWINGS	APPLICATION FOR ARCHITECTURAL PLANS CPD001	AP-Architectural Drawings Approval	[edit] [delete]
5	NOTIFICATION OF APPROVAL FOR PLANNING APPLICATION	APPLICATION FOR DEVELOPMENT PERMISSION-PPA1	AP-Declined	[edit] [delete]
6	LETTER OF AUTHORITY TO DEVELOPERS AND CONSULTANTS	APPLICATION FOR ARCHITECTURAL PLANS CPD001	AP-Letter of Authority Approval	[edit] [delete]

3.5.1 Adding a Permit

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



The screenshot shows the 'Services' page with the 'NEW PERMIT' button highlighted by a red box. The table below it is identical to the one in the previous screenshot.

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, Copy, Paste, Undo, Redo, Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Quote, Link, Unlink, Image, Table, Horizontal Line, Undo, Redo, Styles, Format, Help

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

Conditions

Show 10 entries Search:

#	Short name	Description	Actions
No data available in table			

Choose an action..

Showing 0 to 0 of 0 entries

First Previous Next Last

Reset Submit







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.

Services

Show 10 entries Search:

#	Title	Application Form	Application Stage	Actions
1	Rates Clearance Certificate	1. Test 1	Awaiting Submission(Change of Land use application)	 
2	Approve Concept Letter	1. Test 1	Awaiting Submission(Rates Certificate application)	 
3	CHANGE OF LAND USE CERTIFICATE	1. Test 1	Approved (Archived- CLU)	 

Edit the information you would like to change.

Edit Permit

Title
CONSTRUCTION PERMIT

Permit No Identification
CP/AAA/0001

Permit Type
Service for Clients and Reviewers

Application Form
1. Application For Development Permission: PPA 1

Stage at which this permit is generated
CP-Approved Plans

Maximum number of days before expiration
365

Content

Source Undo Redo Bold Italic Underline Strikethrough Text Color Background Color Bulleted List Numbered List Link Unlink Quote Image Table Link

Styles Format ?

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

8 VII) The development must be certified and inspected by a building inspector for the City and material to be used must be certified by the City Engineer or his assignee at all stages of the construction;

9 VIII) Approval granted subject to ratification by City Planning Committee and adopted by the City Board;

10 X) Approval granted subject to conducting an Environmental Impact Assessment on the proposed development.

Choose an action..

Showing 1 to 10 of 10 entries

First Previous 1 Next Last

Reset Submit

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:

The screenshot shows the 'Edit Stage' interface. At the top, there are three tabs: 'Stage Details', 'Actions', and 'Permissions'. The 'Stage Details' tab is highlighted with a red border. Below the tabs, the form contains several fields:

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:

This screenshot shows the notification configuration section of the 'Edit Stage' form. The 'Send notification to user when application enters this stage?' dropdown is set to 'Yes'. Below this, there are fields for configuring email and SMS notifications:

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:

The screenshot shows the 'Edit Stage' interface with three tabs: 'Stage Details', 'Actions', and 'Permissions'. The 'Stage Details' tab is highlighted with a red border. The form contains the following fields:

Field	Value
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:

You can also optionally send notification to reviewers when an application is in this stage (Note: Reviewers with access to this stage will receive notifications)

Send Notification: Yes

Mail Subject for Reviewers: Application Received: {ap_application_id}

Mail Content for Reviewers: Dear Reviewer,

SMS Content for Reviewers: Dear Reviewer, An application with reference number {ap_application_id} has been received in the Pre-vetting stage. Kindly go to {ap_backend_application_link} to check the information provided by the client.

Select groups you want to receive the notification at this stage

Showing all 86: Filter

- AAK
- Architectures
- ASSISTANT ARCHITECTS
- ASSISTANT BUILDING INSPECTORATE
- Authorized Legal Officer (City Manager's Office)
- Building Inspectors (Building Inspectorate)
- Cashier (Banking Hall)

Showing all 2: Filter

- CBI (Chief Building Inspectorate)
- EXECUTIVE ADMINISTRATION

Reset Submit Languages

- 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.

You can also optionally send notification to reviewers when an application is in this stage (Note: Reviewers with access to this stage will receive notifications)

Send Notification: Yes

Mail Subject for Reviewers: Application Received: {ap_application_id}

Mail Content for Reviewers: Dear Reviewer,

SMS Content for Reviewers: Dear Reviewer, An application with reference number {ap_application_id} has been received in the Pre-vetting stage. Kindly go to {ap_backend_application_link} to check the information provided by the client.

Select groups you want to receive the notification at this stage

Showing all 86: Filter

- AAK
- Architectures
- ASSISTANT ARCHITECTS
- ASSISTANT BUILDING INSPECTORATE
- Authorized Legal Officer (City Manager's Office)
- Building Inspectors (Building Inspectorate)
- Cashier (Banking Hall)

Showing all 2: Filter

- CBI (Chief Building Inspectorate)
- EXECUTIVE ADMINISTRATION

Reset Submit Languages

- Click the 'Submit' button at the bottom of the page once you are done.

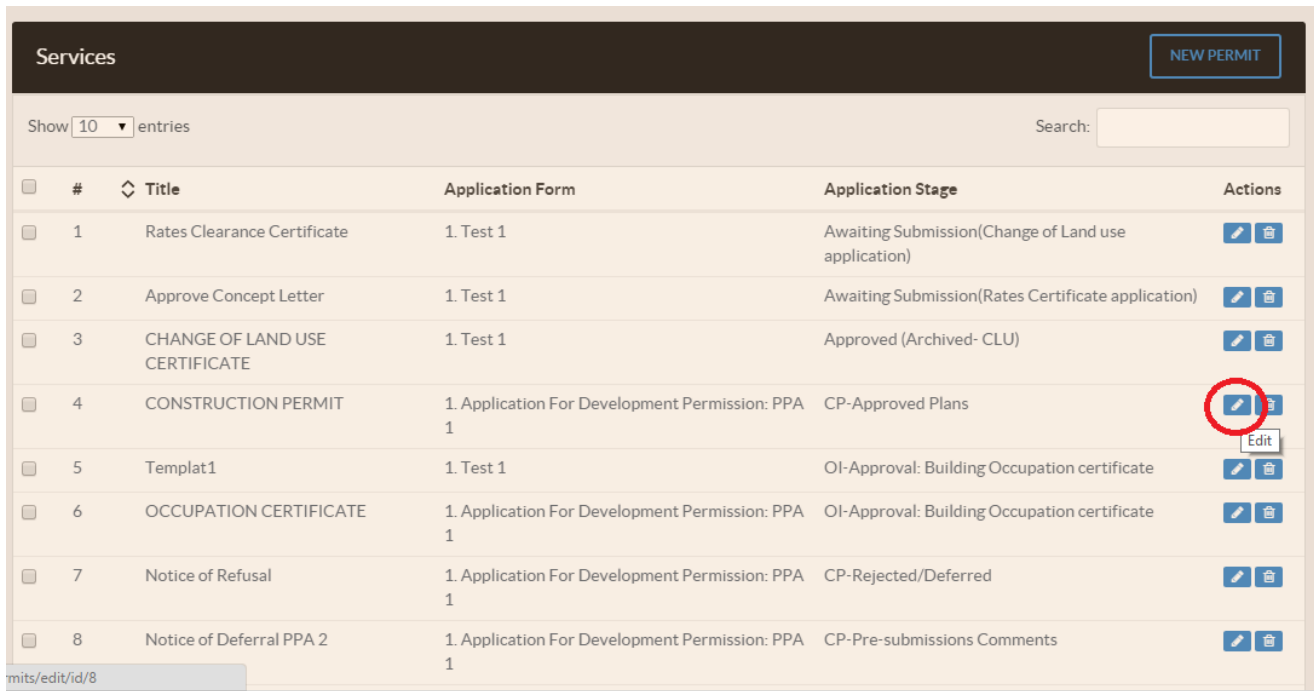
3.7 CONDITIONS OF APPROVAL









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



#	Title	Application Form	Application Stage	Actions
1	Rates Clearance Certificate	1. Test 1	Awaiting Submission(Change of Land use application)	 
2	Approve Concept Letter	1. Test 1	Awaiting Submission(Rates Certificate application)	 
3	CHANGE OF LAND USE CERTIFICATE	1. Test 1	Approved (Archived- CLU)	 
4	CONSTRUCTION PERMIT	1. Application For Development Permission: PPA 1	CP-Approved Plans	  
5	Templat1	1. Test 1	OI-Approval: Building Occupation certificate	 
6	OCCUPATION CERTIFICATE	1. Application For Development Permission: PPA 1	OI-Approval: Building Occupation certificate	 
7	Notice of Refusal	1. Application For Development Permission: PPA 1	CP-Rejected/Deferred	 
8	Notice of Deferral PPA 2	1. Application For Development Permission: PPA 1	CP-Pre-submissions Comments	 

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

Conditions				NEW CONDITION
Show 10 entries		Search:		
#	Short name	Description	Actions	
1		Notify the County Government in writing 48 hours prior to commencing of construction		
2		To execute the proposal in strict conformity with the architectural and structural plans approved by the Director of Planning and County Engineer respectively		
3		Building works to commence on site after the structural drawing have been approved by the County Engineer		
4		Not constituting part of public land earmarked for repossession or private land with ownership disputes		
5		A board indicating plan no, the name of consulting Planner, Architect, Engineers minute no of the approved plan must be placed at the site before any construction begins		
6		No construction should commence on site unless EIA project report is prepared , submitted and approved by NEMA as per EMCA provisions of 1999		
7		Satisfying any legal requirement of your application.	Languages ▾	
8		The work should be inspected by building inspector from county government during construction		
9		To start construction within 12 months and completing such in 24 months otherwise the approval lapses		
10		Undertake adequate consultations with neighbors and neighborhood		
11		All buildings under construction MUST be inspected by the proponets Registered Engineer and Architect otherwise the Council will not accept anv responsibility for stabilitv or anv work or other shortcoming in the building(Legal Notice No. 135 Rezulation 38 of 1998)		

- 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

New Condition

Permit	<input type="text" value="CONSTRUCTION PERMIT"/>
Department	<input type="text"/>
Short name	<input type="text"/>
Description	<input style="height: 40px;" type="text"/>

Reset
Submit

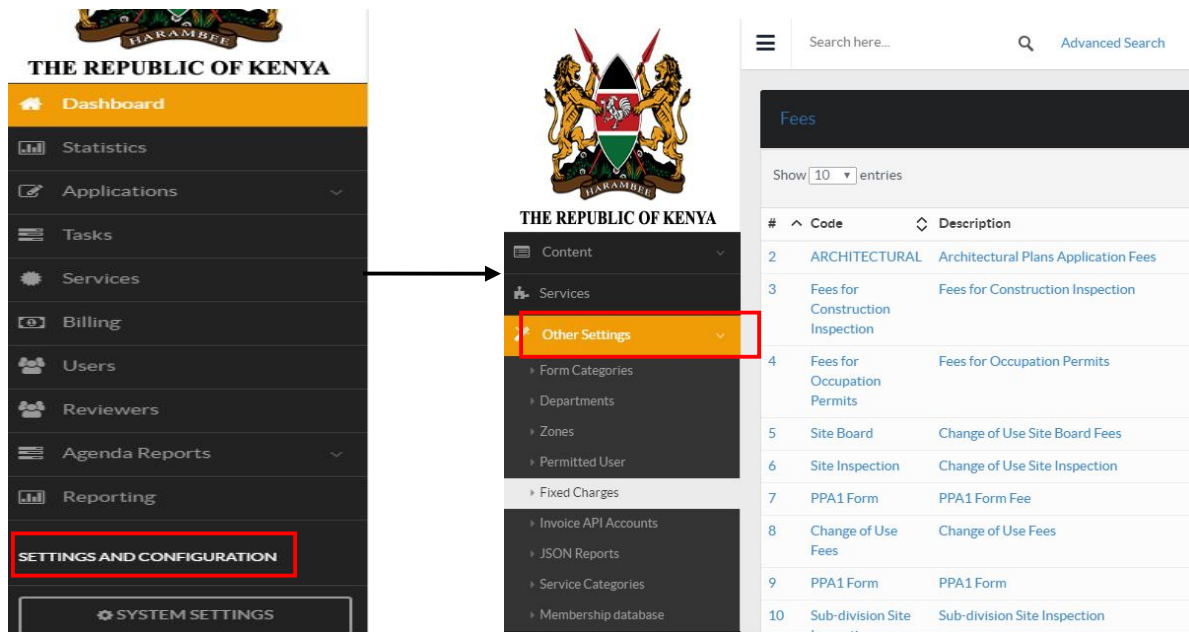
CHAPTER 4: PAYMENT HANDLING

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”.

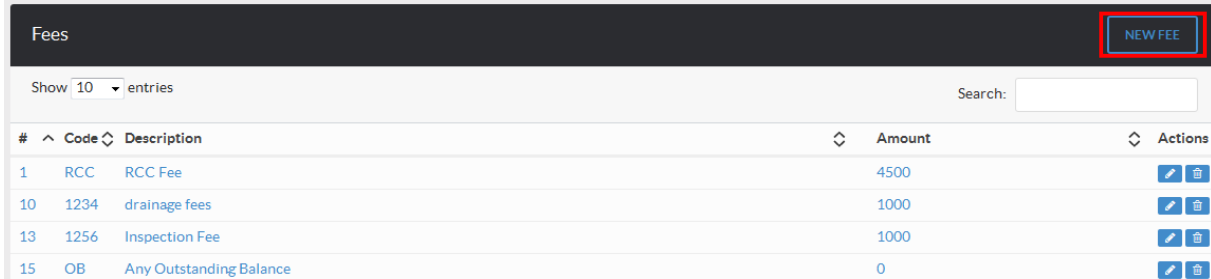


You will be presented with a list of all fixed charges available in the system

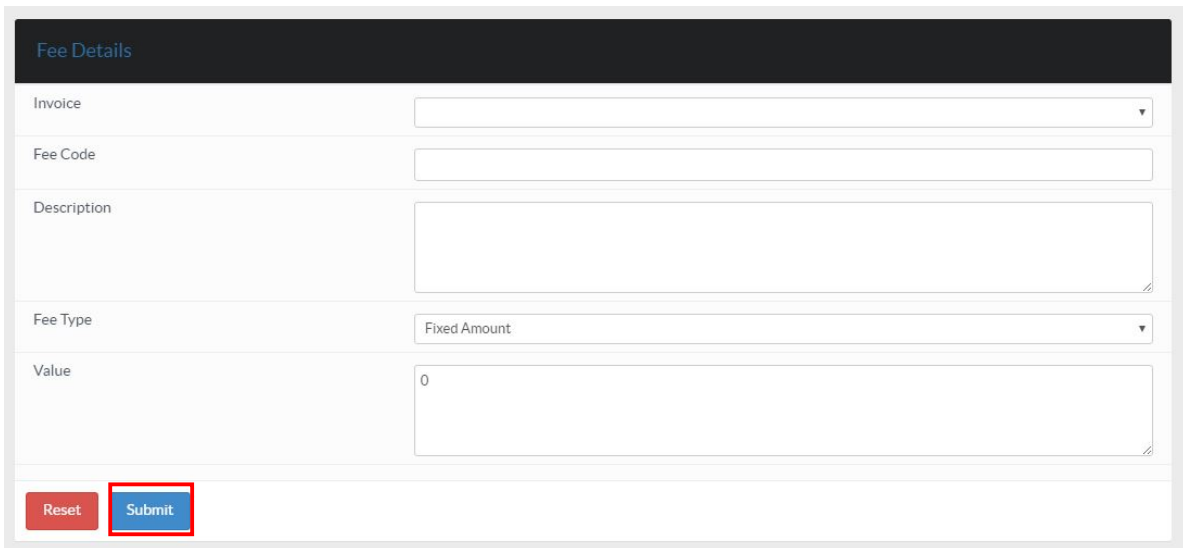
#	Code	Description	Amount	Actions
2	ARCHITECTURAL	Architectural Plans Application Fees	0	
3	Fees for Construction Inspection	Fees for Construction Inspection	3000	
4	Fees for Occupation Permits	Fees for Occupation Permits	5000	
5	Site Board	Change of Use Site Board Fees	10000	
6	Site Inspection	Change of Use Site Inspection	3000	
7	PPA1 Form	PPA1 Form Fee	1000	
8	Change of Use Fees	Change of Use Fees	0	
9	PPA1 Form	PPA1 Form	1000	
10	Sub-division Site	Sub-division Site Inspection	3000	

4.1.1.1 Adding a new Fee

1. Click on the “New Fee” button.



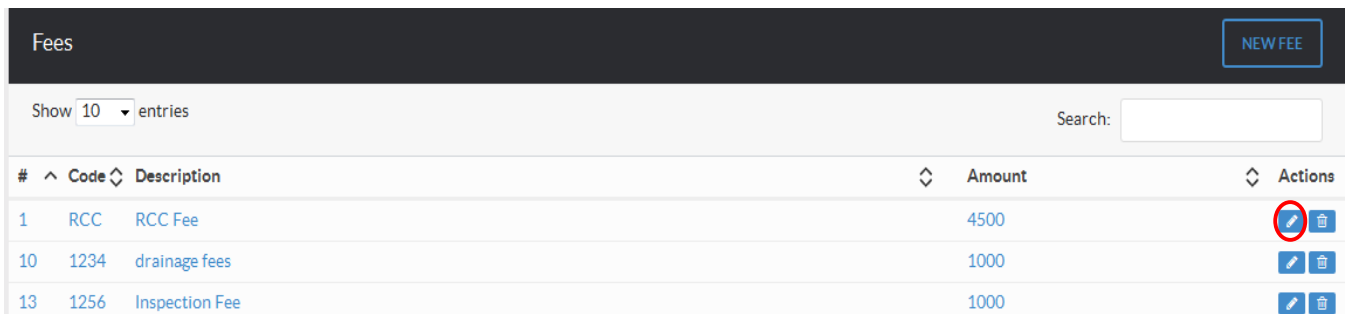
2. Enter the fee details;



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.

#	Code	Description	Amount	Actions
1	RCC	RCC Fee	4500	[Edit] [Delete]
10	1234	drainage fees	1000	[Edit] [Delete]

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

THE REPUBLIC OF KENYA

- Content
- Services
- Other Settings**
 - Form Categories
 - Departments
 - Zones
 - Permitted User
 - Project Cost Multiplier
 - Fixed Charges**
 - Invoice API Accounts
 - JSON Reports
 - Service Categories

#	Code	Description	Amount	Actions
2	ARCHITECTURAL	Architectural Plans Application Fees	0	[Edit] [Delete]
3	Fees for Construction Inspection	Fees for Construction Inspection	3000	[Edit] [Delete]
4	Fees for Occupation Permits	Fees for Occupation Permits	5000	[Edit] [Delete]
5	Site Board	Change of Use Site Board Fees	10000	[Edit] [Delete]
6	Site Inspection	Change of Use Site Inspection	3000	[Edit] [Delete]
7	PPA1 Form	PPA1 Form Fee	1000	[Edit] [Delete]
8	Change of Use Fees	Change of Use Fees	0	[Edit] [Delete]
9	PPA1 Form	PPA1 Form	1000	[Edit] [Delete]
10	Sub-division Site	Sub-division Site Inspection	3000	[Edit] [Delete]

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

Range 1	Range 2	Percentage	Actions
5000001	6000000	60	
4000001	5000000	50	
3000001	4000000	40	
2000001	3000000	30	
1000001	2000000	20	
0	1000000	0.25	

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.

Range Name	Min value	Max value	Result	Action
No data available in table				

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

New Detail

Name

Range Min

Range Max

Result Type Fixed Value

Result

Condition

Condition Field

Condition Operator Equals

Condition Value

4.1.2.3 Editing Fee Range

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

Fees Range NEW FEE RANGE

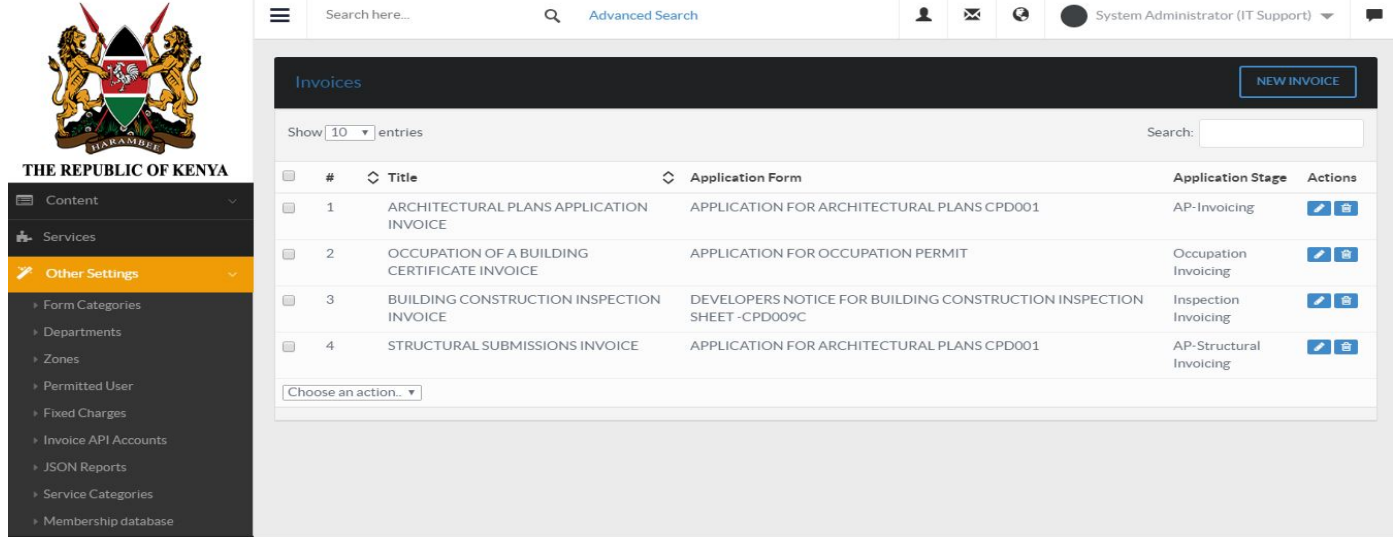
Show 10 entries Search:

<input type="checkbox"/>	Range 1	Range 2	Percentage	Actions
<input type="checkbox"/>	5000001	6000000	60	✎ 🗑️
<input type="checkbox"/>	4000001	5000000	50	✎ 🗑️

4.1.3 INVOICE TEMPLATES

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

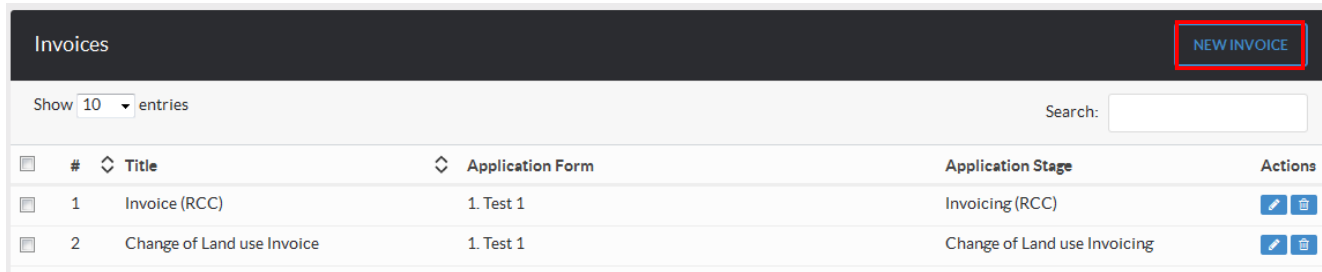
To access this page, Go to “System Settings”, click on the “Services” menu, select a service and select “Invoices” as shown below.



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.

New Template

Invoice Title

Application Form

Application Stage

Choose a stage

Invoice number of the first invoice

0

Maximum number of days before expiration

0

Maximum number of days till due date

0

Content

body

View available user/form fields

Reset Submit

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.







#	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	

4.1.3.3 Delete an Invoice Template

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

Invoices NEW INVOICE

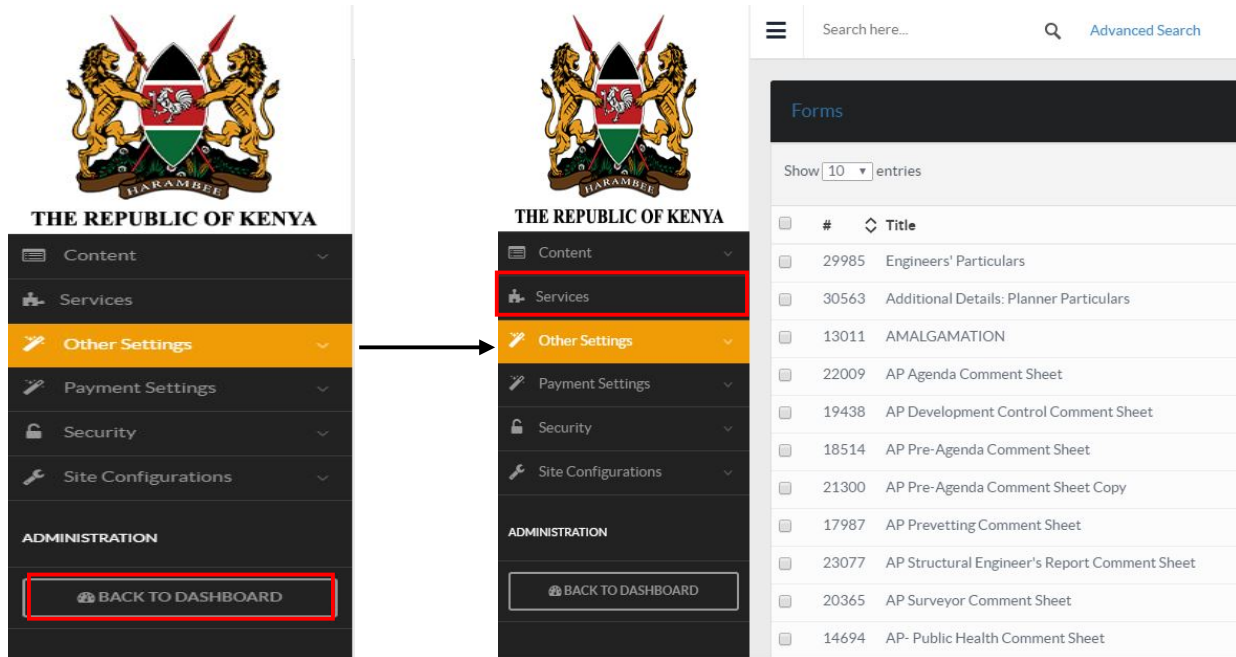
Show 10 entries Search:

#	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	 

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”.

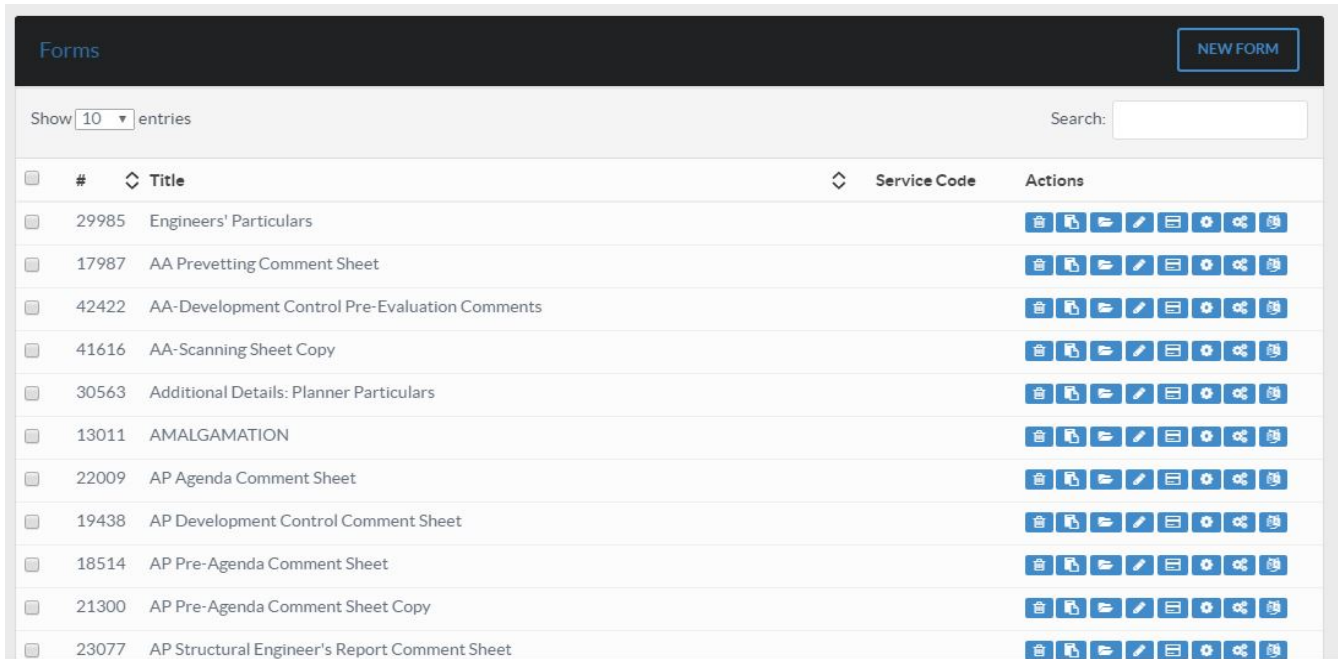
Menu and then selecting on “Forms” as shown below



The screenshot illustrates the navigation process. On the left, the main menu for 'THE REPUBLIC OF KENYA' is shown. The 'Services' menu item is highlighted with a red box. An arrow points to the right, where the 'Services' menu is expanded, and the 'Forms' option is highlighted with a red box. To the right of this is a preview of the 'Forms' page, which displays a search bar and a table of forms.

#	Title
29985	Engineers' Particulars
30563	Additional Details: Planner Particulars
13011	AMALGAMATION
22009	AP Agenda Comment Sheet
19438	AP Development Control Comment Sheet
18514	AP Pre-Agenda Comment Sheet
21300	AP Pre-Agenda Comment Sheet Copy
17987	AP Prevetting Comment Sheet
23077	AP Structural Engineer's Report Comment Sheet
20365	AP Surveyor Comment Sheet
14694	AP- Public Health Comment Sheet

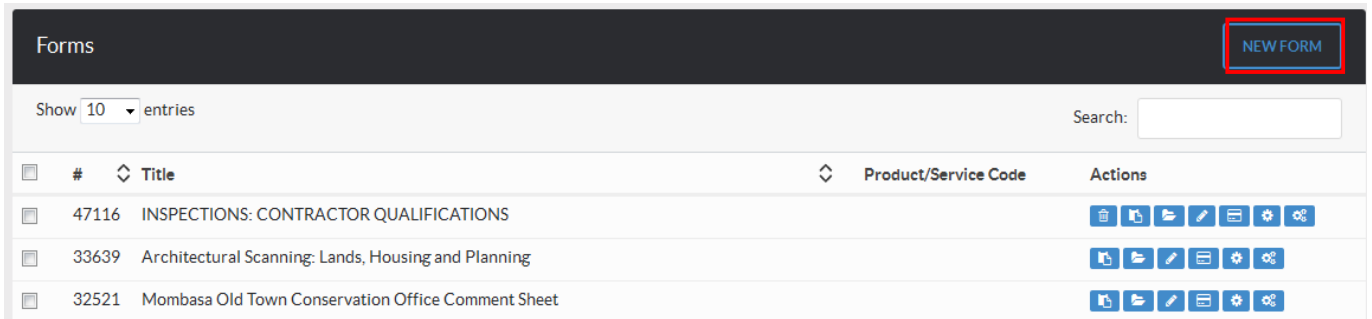
You will be presented with a list of forms available in the system. This list mostly includes fixed forms that can only be edited but cannot be deleted.



#	Title	Service Code	Actions
29985	Engineers' Particulars		[Icons]
17987	AA Prevetting Comment Sheet		[Icons]
42422	AA-Development Control Pre-Evaluation Comments		[Icons]
41616	AA-Scanning Sheet Copy		[Icons]
30563	Additional Details: Planner Particulars		[Icons]
13011	AMALGAMATION		[Icons]
22009	AP Agenda Comment Sheet		[Icons]
19438	AP Development Control Comment Sheet		[Icons]
18514	AP Pre-Agenda Comment Sheet		[Icons]
21300	AP Pre-Agenda Comment Sheet Copy		[Icons]
23077	AP Structural Engineer's Report Comment Sheet		[Icons]

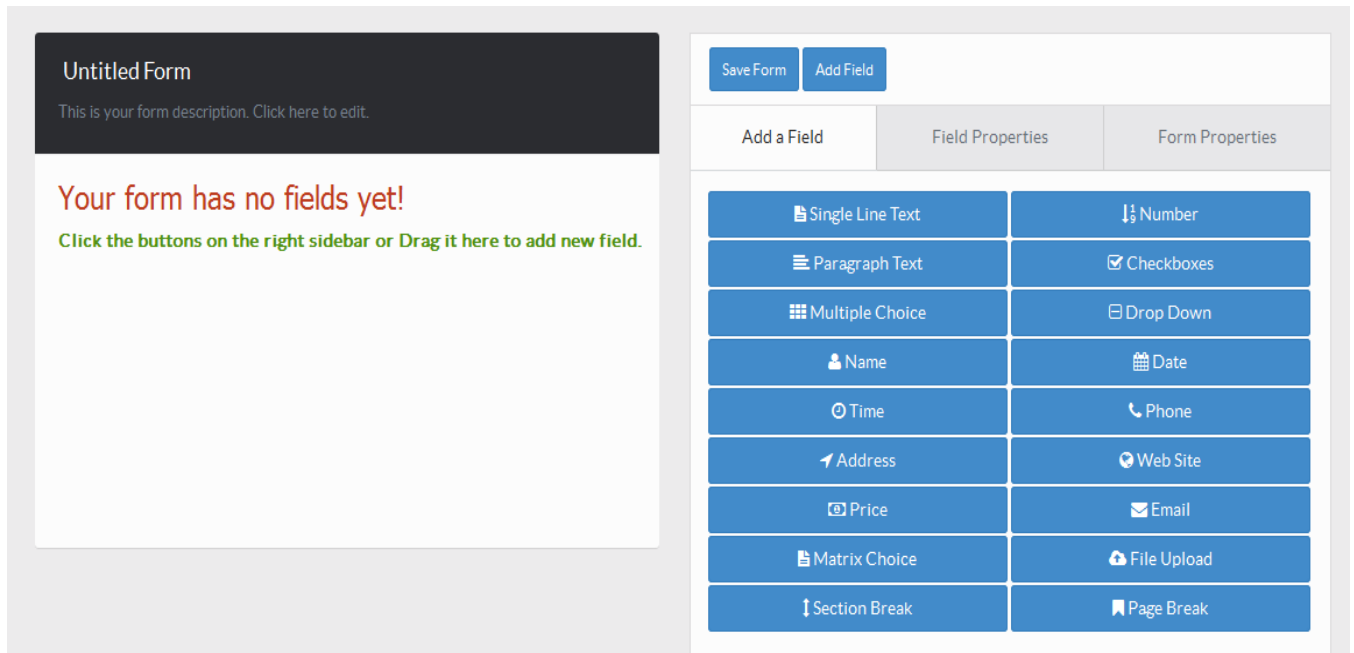
5.1 Creating a new Form

Click on the “New Form” button.

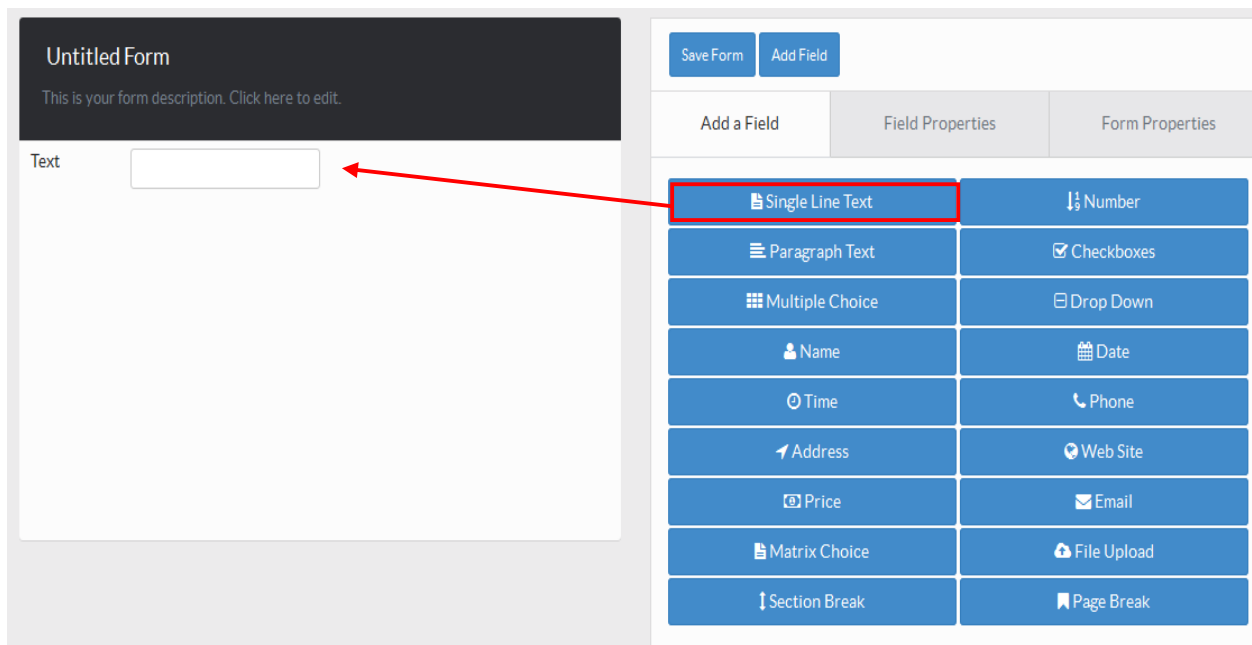


#	Title	Product/Service Code	Actions
47116	INSPECTIONS: CONTRACTOR QUALIFICATIONS		[Icons]
33639	Architectural Scanning: Lands, Housing and Planning		[Icons]
32521	Mombasa Old Town Conservation Office Comment Sheet		[Icons]

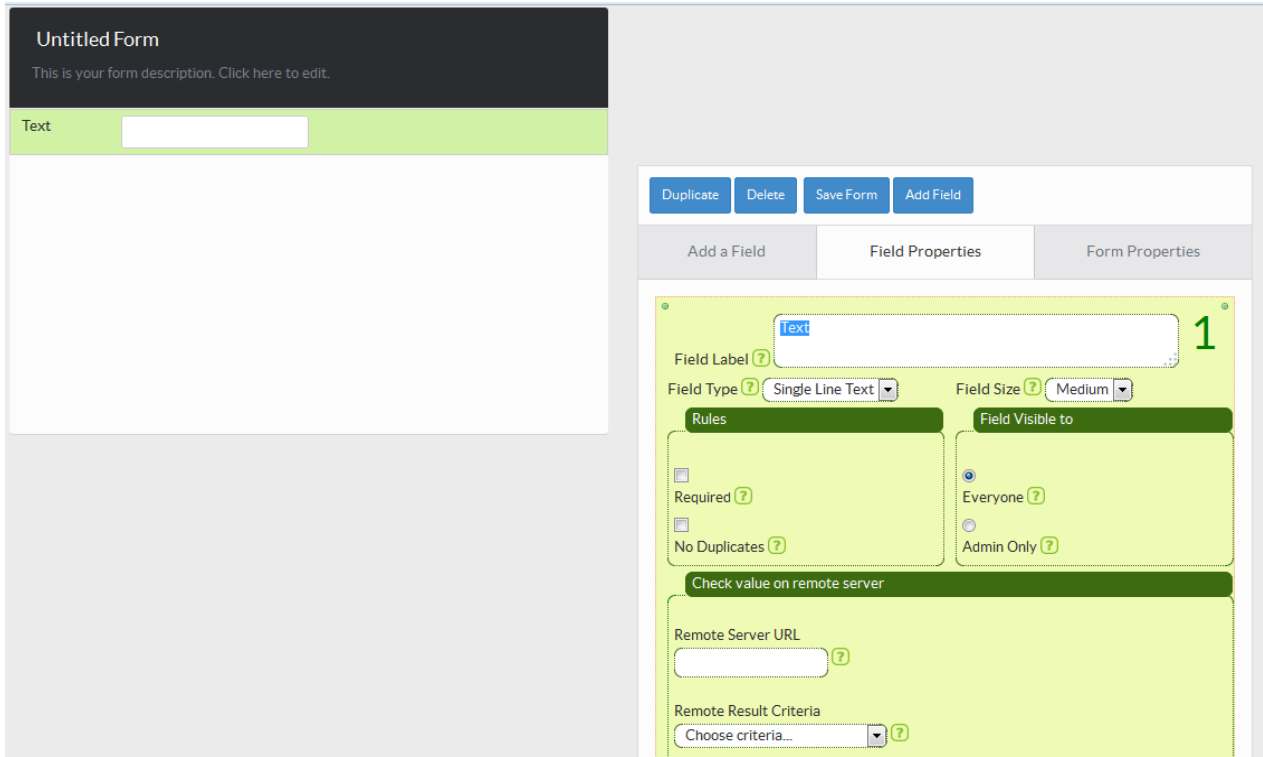
On the page that appears, you are provided with various tools on the right that allow you to create different form elements including: text-fields, text-areas, drop-downs, address fields, multiple choices e.t.c. On the left you are provided with the form area where you can organize/arrange the form elements 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.

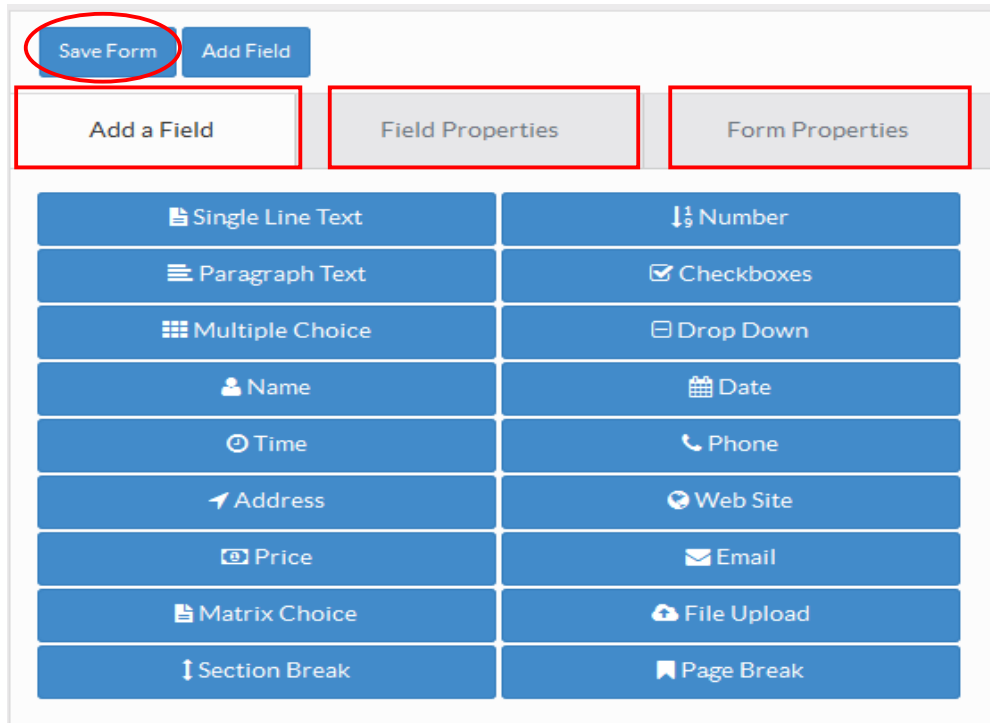


Click on the newly created text-field. This will display the text-field properties on the right which will allow you to edit the text-field’s title, its length e.t.c



Do the same for any other form element.

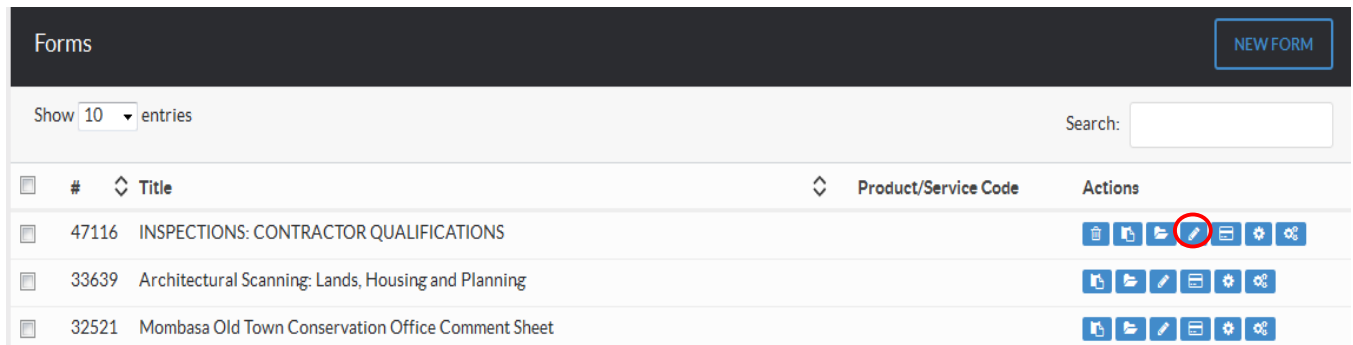
Tip: Use the three Tabs will help you navigate in order to Add a field, its properties and also the form properties.



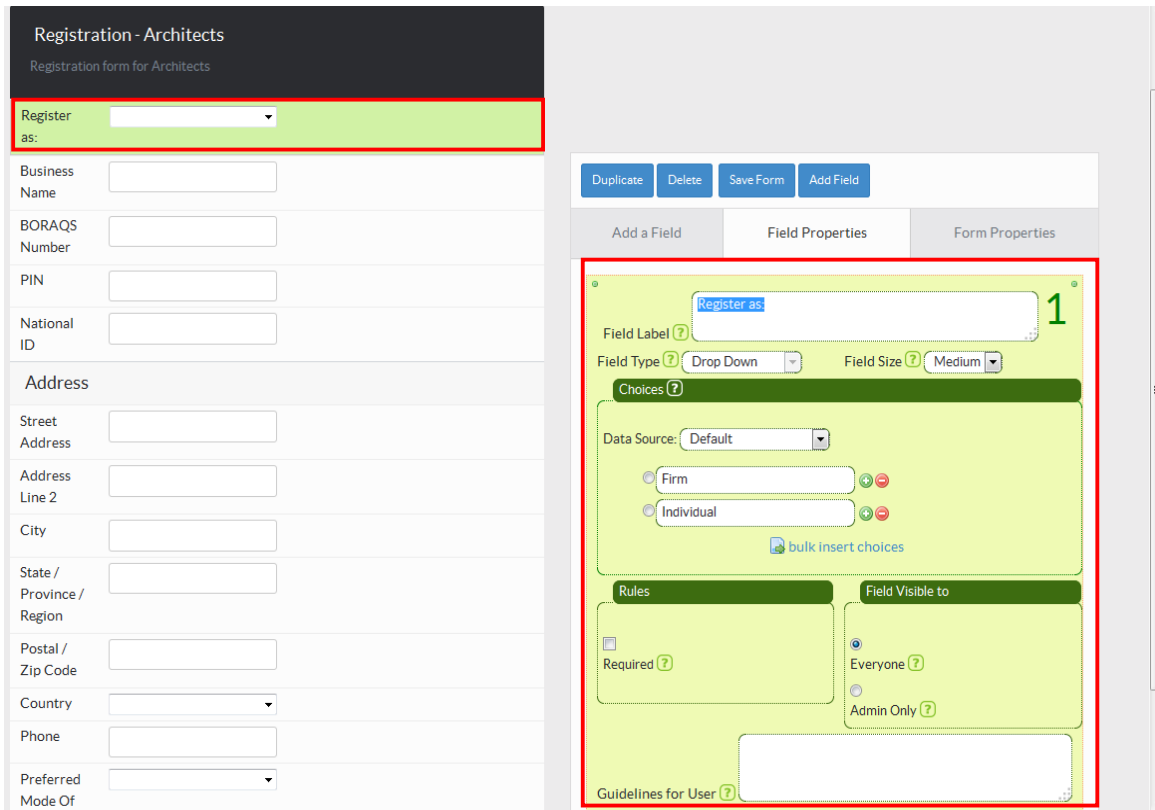
When you're done creating your form, click on the "Save Form" button.

5.2 Editing a Form

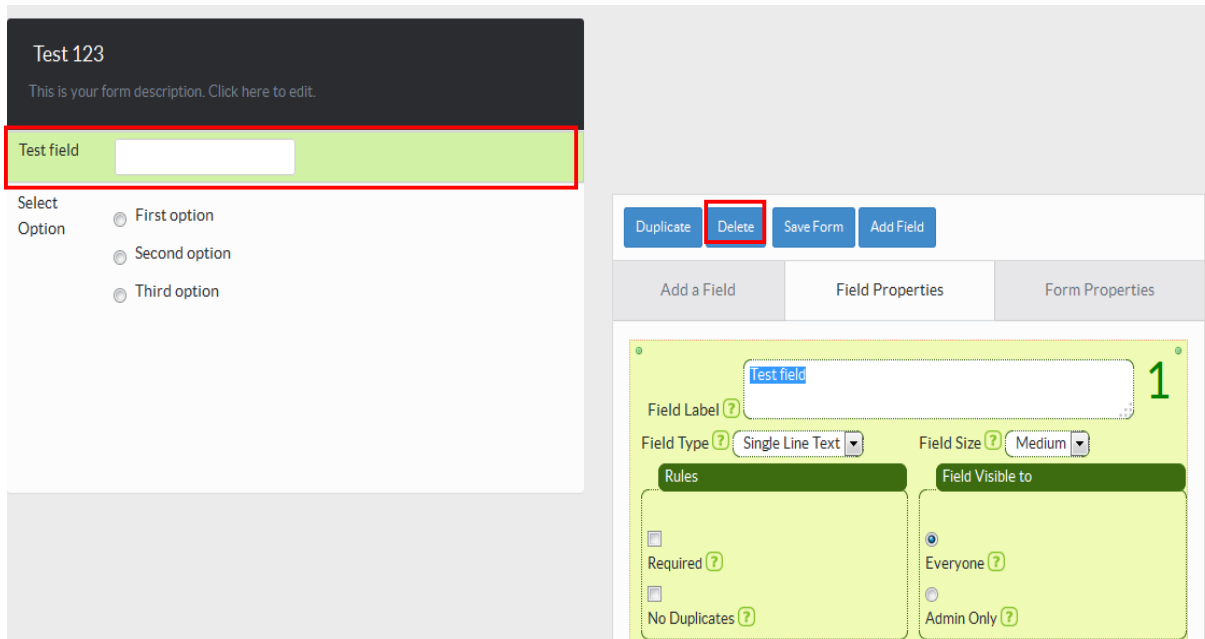
Go to the forms page and click on the "edit" button of the form you wish to edit as shown below.



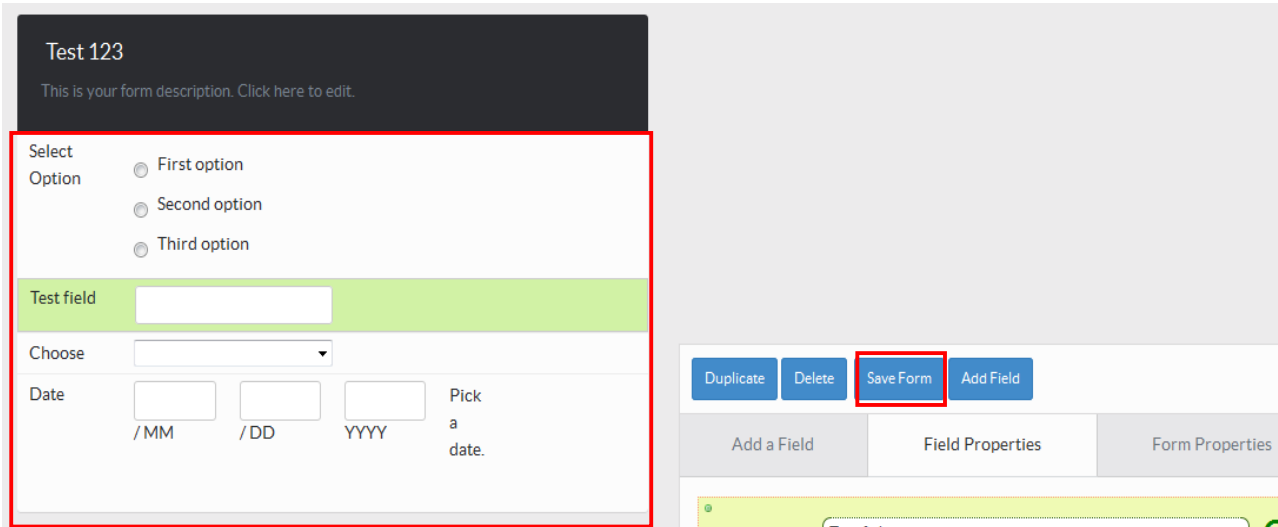
Edit any form elements you want by clicking on the form element and editing the details from the property area on the right as we did when creating a new form above.



To delete a form element, select the element and click on the “delete” button at the top section as shown



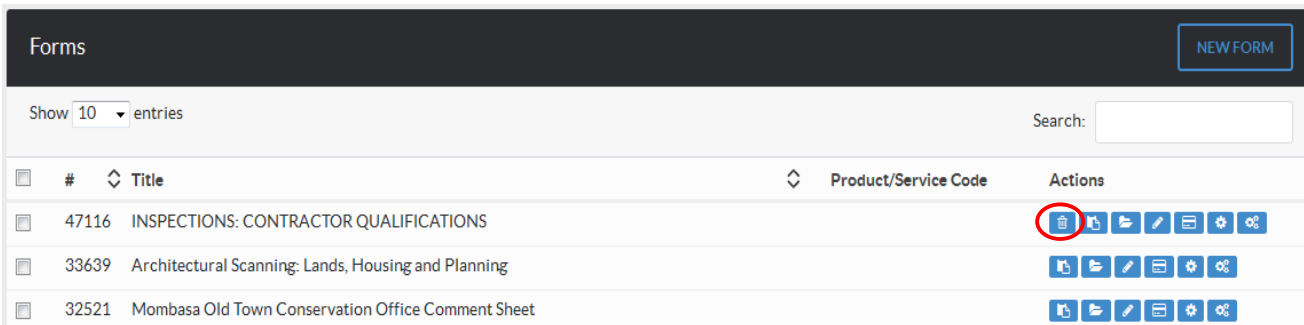
NB: You can change the position of a form-element in a form by dragging it up and down the form area.



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.



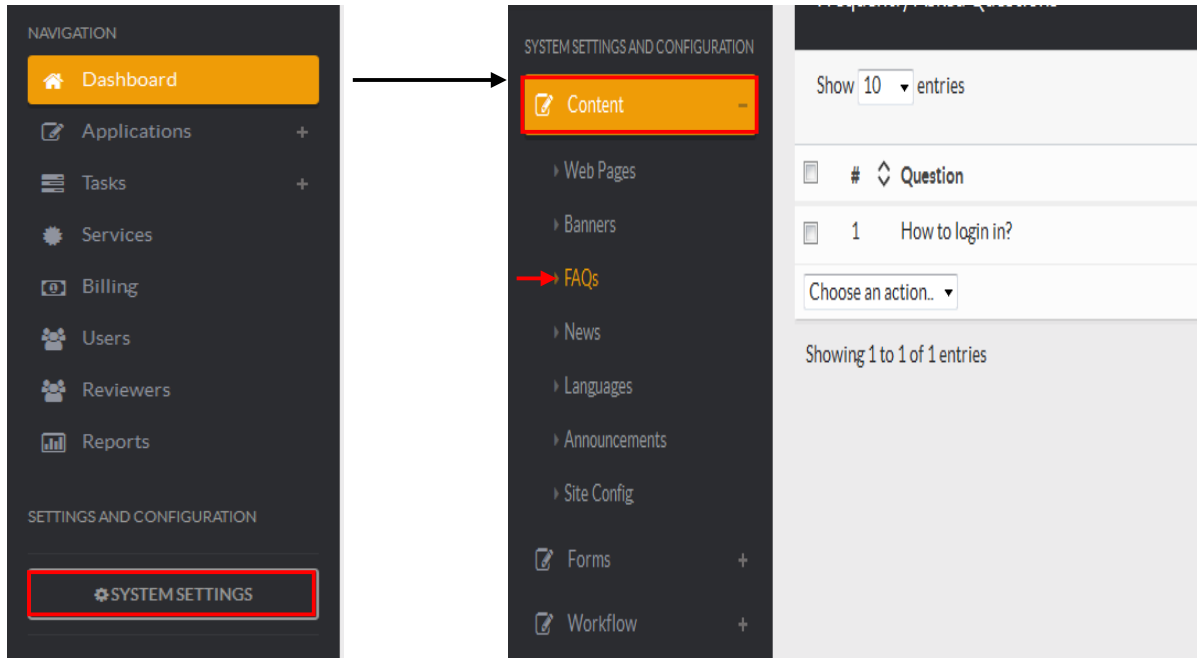
5.4 ASSIGNING A FORM TO A WORKFLOW

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.

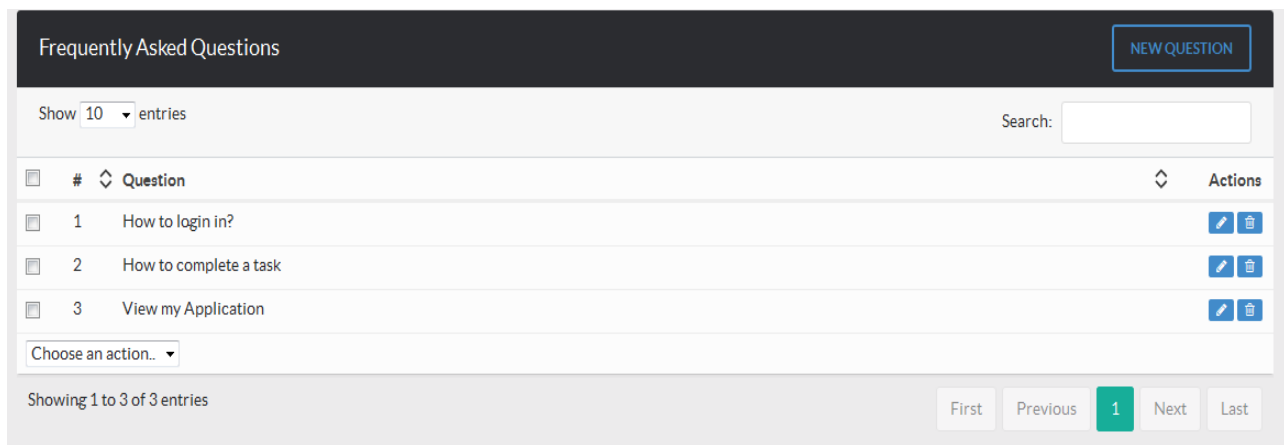
CHAPTER 6: OTHER ADMINISTRATIVE TASKS

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

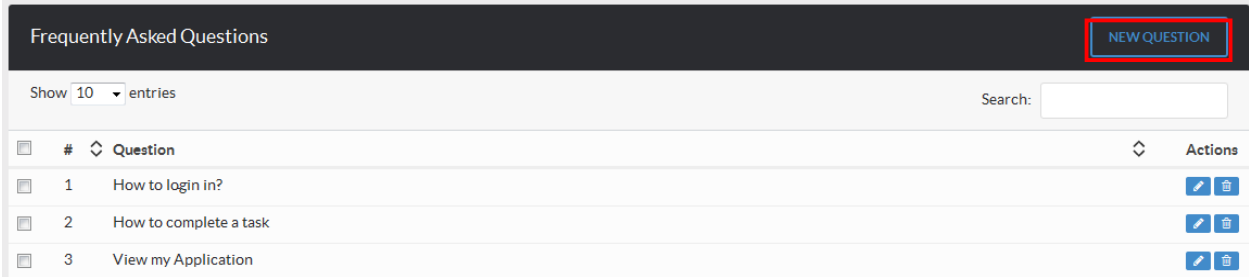


You will be presented with a list of all the FAQs currently available in the system.

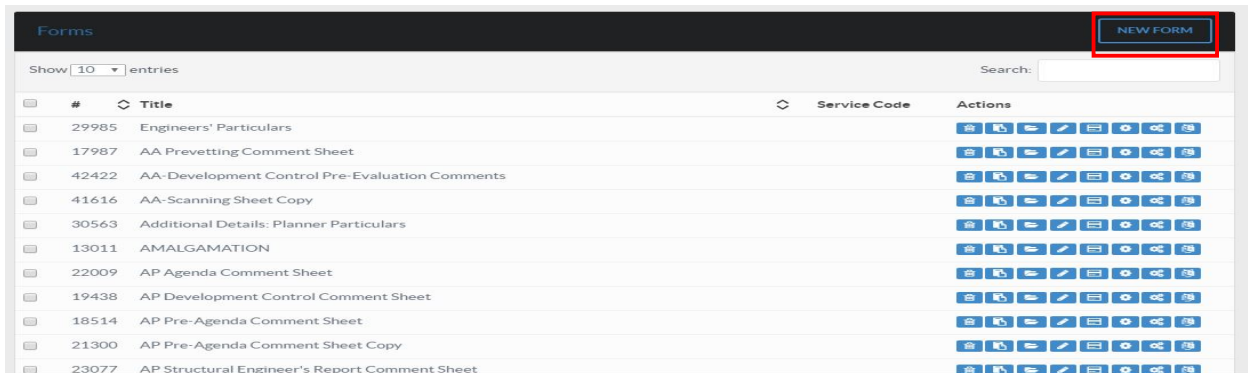


6.1.1 Adding a new FAQ

Click on the “New Question” button

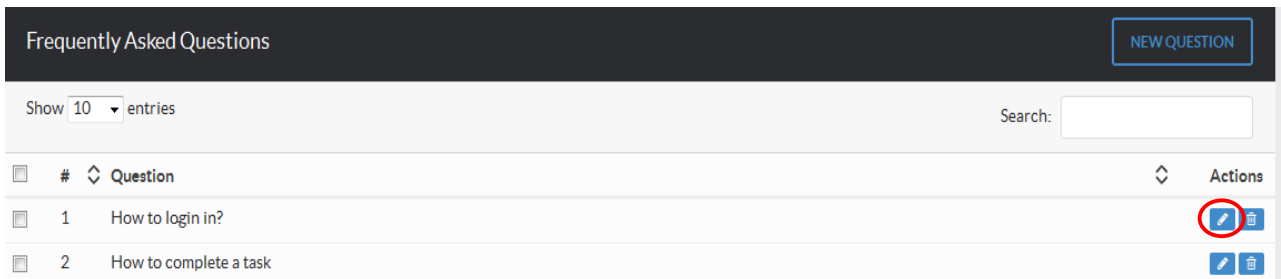


Enter a Question and its Answer in the text boxes provided then click “Submit”

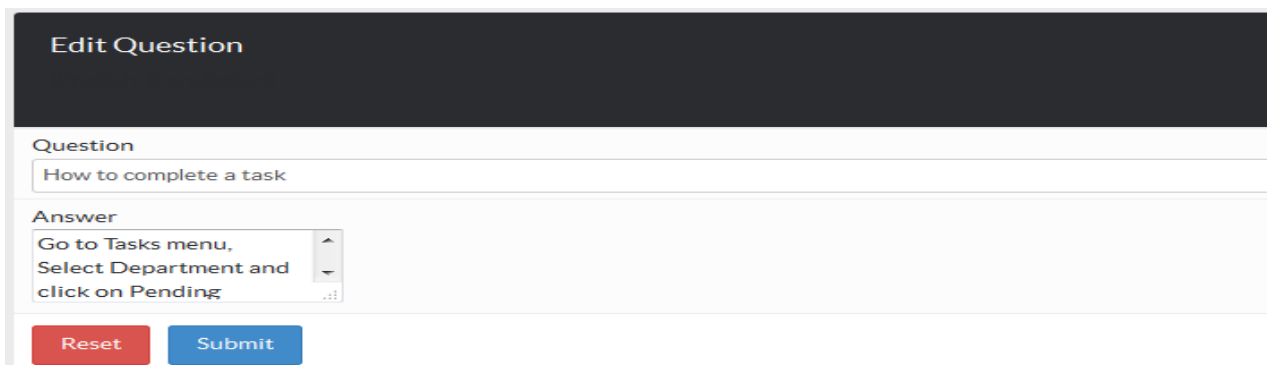


6.1.2 Editing a FAQ

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.

#	Question	Actions
1	How to login in?	
2	How to complete a task	

6.2 Site Configuration

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

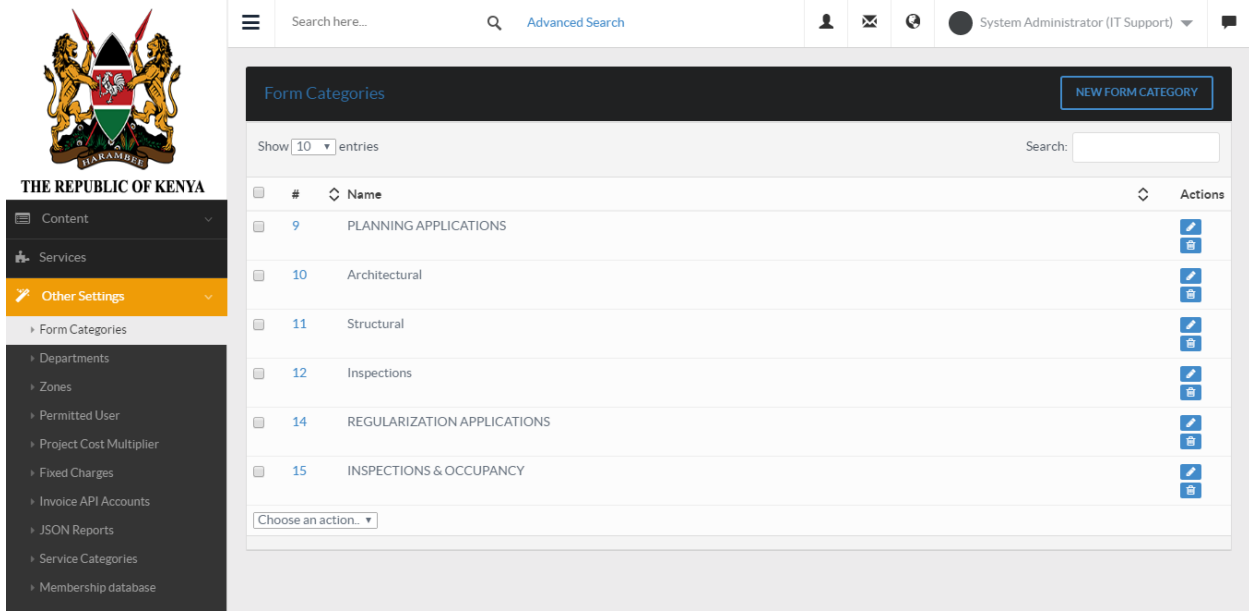
Organisation Description	Kiambu County
Organisation Email	no-reply@permitflow.com
Organisation Contact Number	0712122743
Organisation Logo	<input type="button" value="Choose File"/> No file chosen
Upload Directory	asset_data
Data Directory	asset_data
SMTP Enable	Disabled
SMTP Host	localhost
SMTP Port	25
SMTP Username	

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

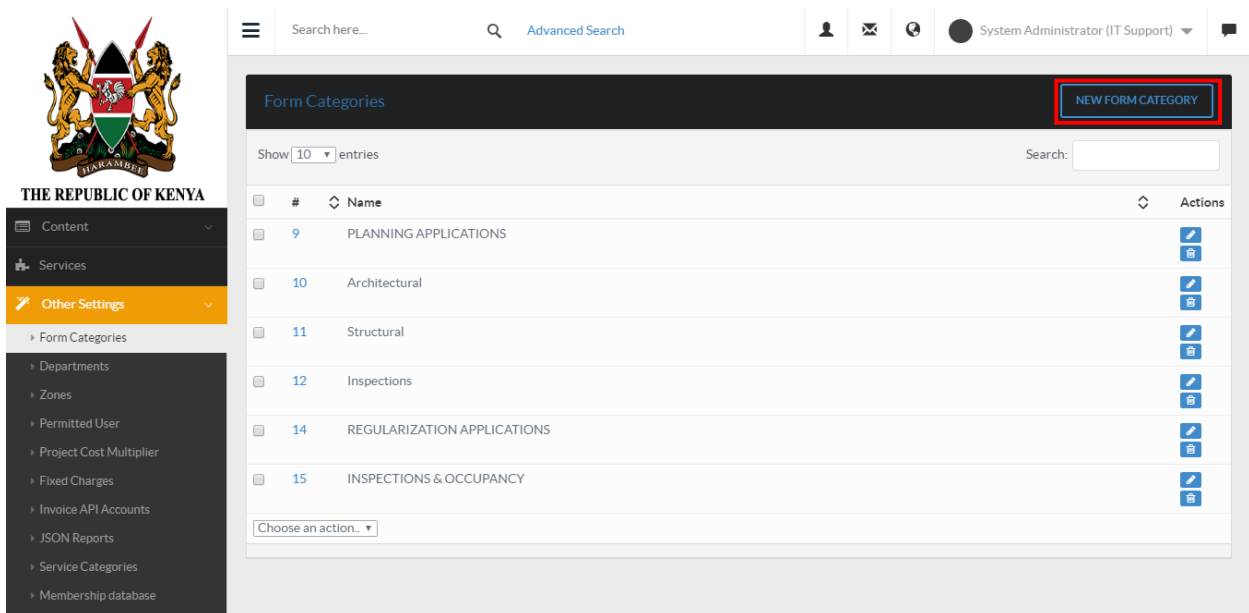
6.3 Other Settings

6.3.1 Form Categories

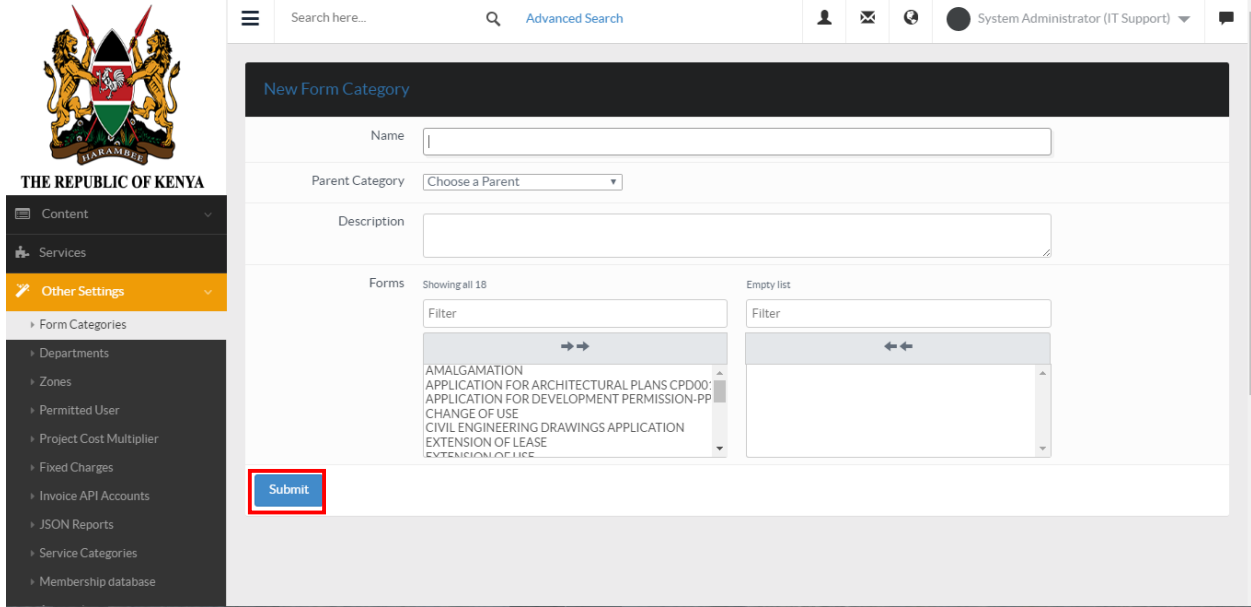
Click on “System Settings” then “Other Settings”. Then click on “Form Categories”. List of form categories will be displayed as shown below.



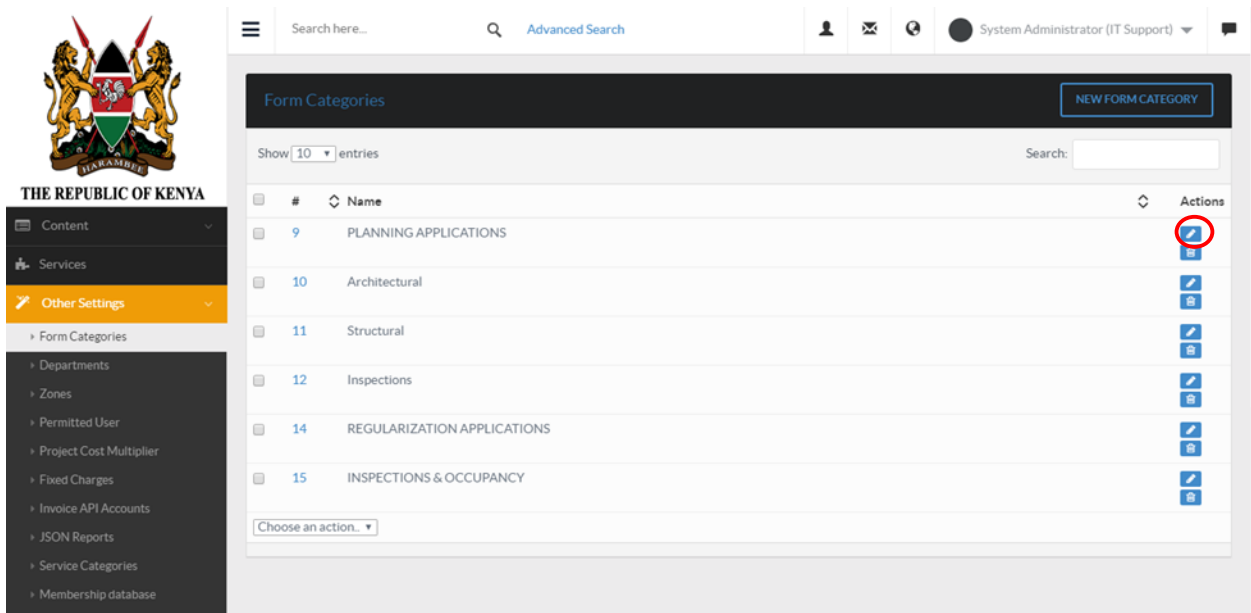
To add a new category click on “NEW FORM CATEGORY” button as shown.



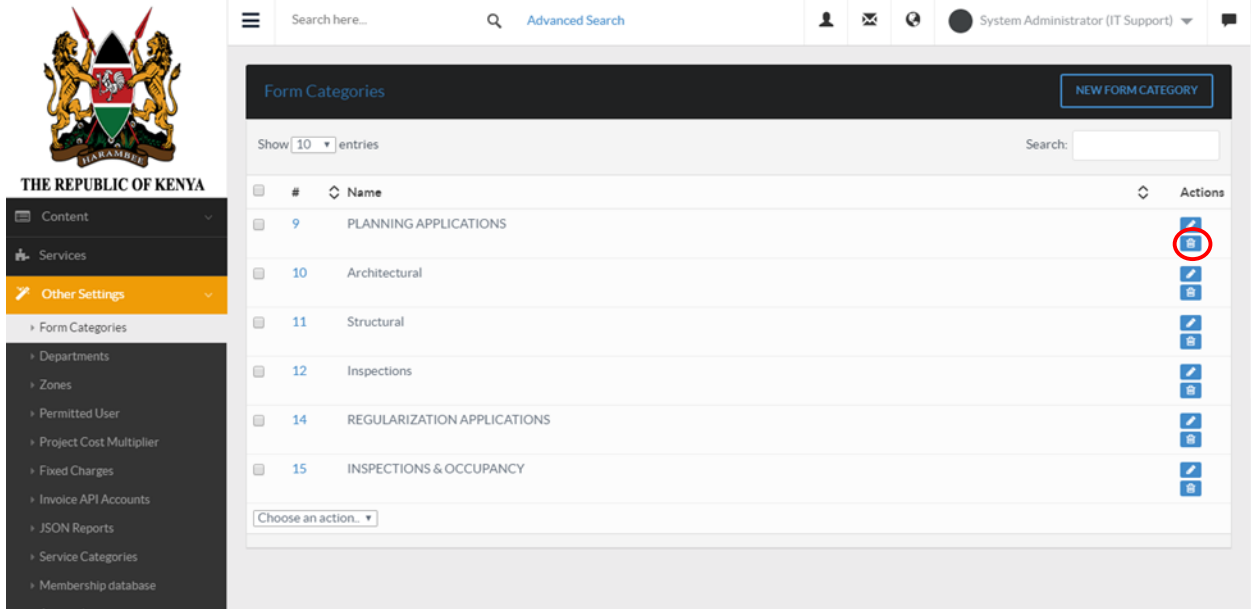
A form will appear, fill and click submit button:



To edit a form, click on the edit button as shown. Make changes and click submit to save.

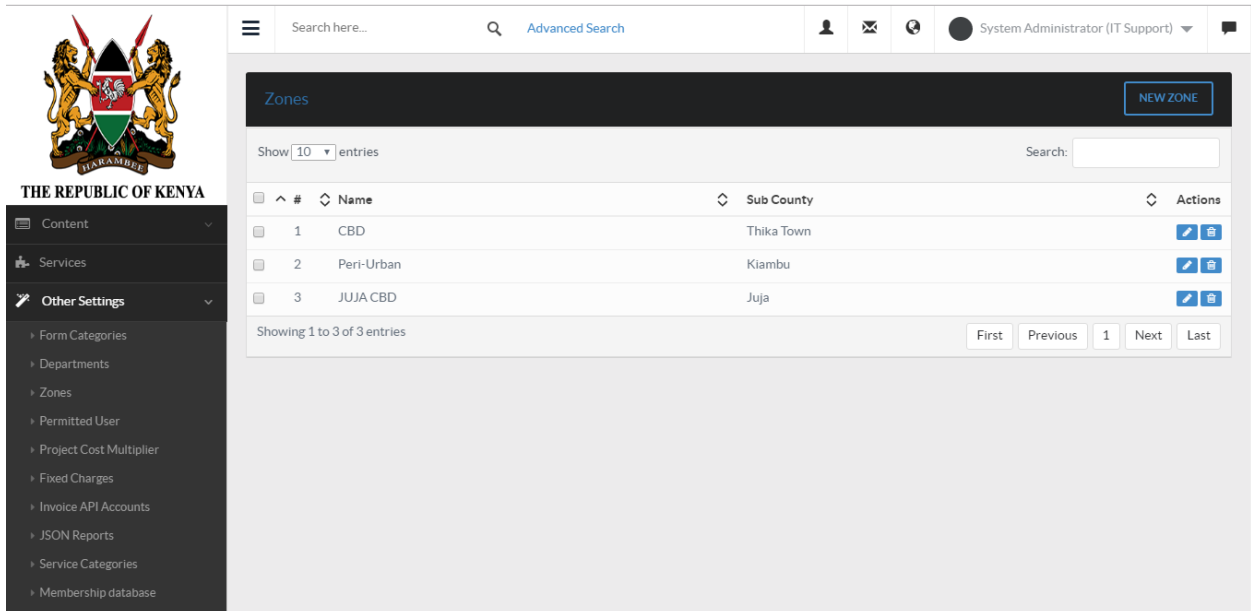


To edit a form, click on the delete button as show below



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

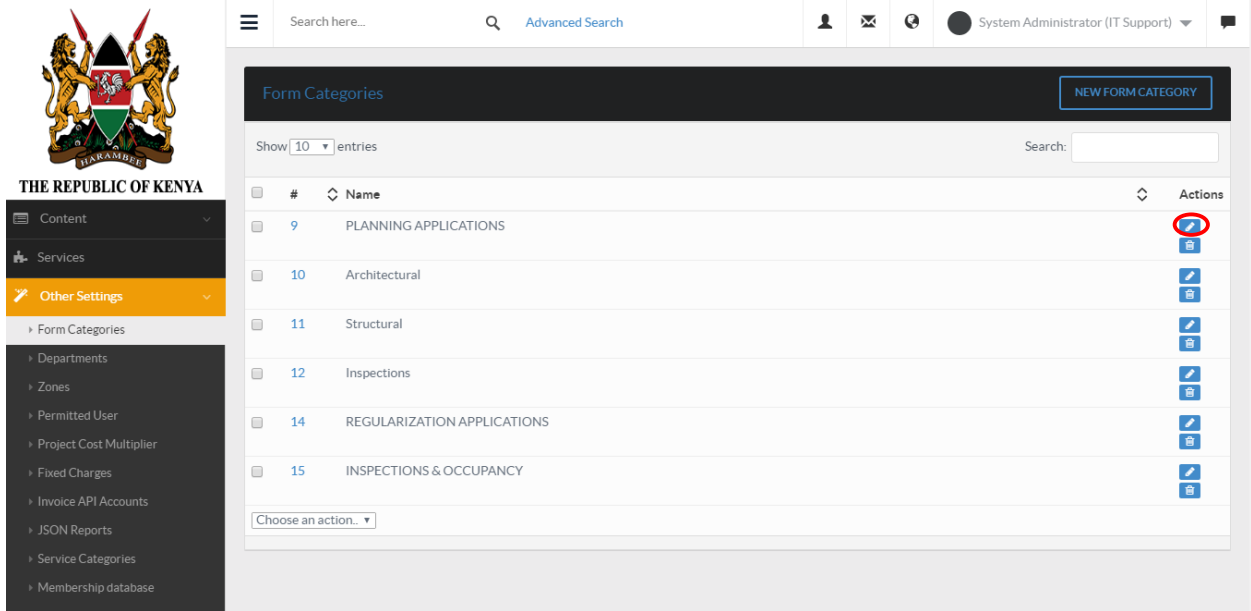
The screenshot displays the 'Zones' management interface. On the left is a sidebar with the Kenyan coat of arms and the text 'THE REPUBLIC OF KENYA'. Below this are menu items: Content, Services, Other Settings (with sub-items: Form Categories, Departments, Zones, Permitted User, Project Cost Multiplier, Fixed Charges, Invoice API Accounts, JSON Reports, Service Categories, Membership database), and ADMINISTRATION (with a 'BACK TO DASHBOARD' button). The main content area has a search bar and 'Advanced Search' link. Below is a table with columns for Name, Sub County, and Actions. The table contains three rows: 1. CBD (Thika Town), 2. Peri-Urban (Kiambu), and 3. JUJA CBD (Juja). A 'NEW ZONE' button is highlighted in a red box in the top right corner of the table area.

Name	Sub County	Actions
1 CBD	Thika Town	[Edit] [Delete]
2 Peri-Urban	Kiambu	[Edit] [Delete]
3 JUJA CBD	Juja	[Edit] [Delete]

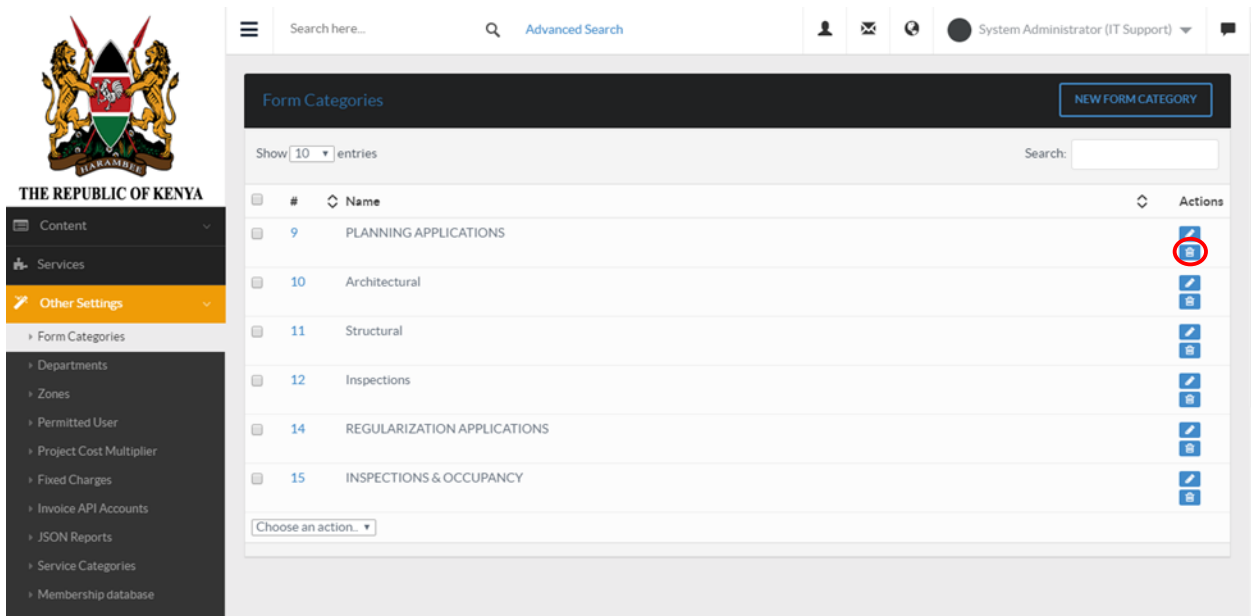
Fill the form and click submit button to save details.

The screenshot shows the 'New Zone' form. The sidebar is identical to the previous screenshot. The main content area has a 'New Zone' header. Below the header are two input fields: 'Name' (empty) and 'Sub County' (set to 'Thika Town'). At the bottom of the form are two buttons: 'Back' and 'Submit'. The 'Submit' button is highlighted in a red box.

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.

THE REPUBLIC OF KENYA

Content
Services
Other Settings
Payment Settings
Security
Site Configurations

ADMINISTRATION

BACK TO DASHBOARD

Search here... Advanced Search

System Administrator (IT Support)

Permitted User List

NEW PERMITTED USER

Show 10 entries

#	Name	Zone	Ground Coverage %	Plot Ratio %	Actions
1	Offices	CBD	120	100	[Edit] [Delete]
2	PEri-Urban	Peri-Urban	100	200	[Edit] [Delete]
3	JUJA CBD	JUJA CBD	120	120	[Edit] [Delete]

Showing 1 to 3 of 3 entries

First Previous 1 Next Last

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

THE REPUBLIC OF KENYA

Content
Services
Other Settings
Payment Settings
Security
Site Configurations

ADMINISTRATION

BACK TO DASHBOARD

Search here... Advanced Search

System Administrator (IT Support)

Permitted User List

NEW PERMITTED USER

Show 10 entries

#	Name	Zone	Ground Coverage %	Plot Ratio %	Actions
1	Offices	CBD	120	100	[Edit] [Delete]
2	PEri-Urban	Peri-Urban	100	200	[Edit] [Delete]
3	JUJA CBD	JUJA CBD	120	120	[Edit] [Delete]

Showing 1 to 3 of 3 entries

First Previous 1 Next Last

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

The screenshot shows the 'Permitted User List' page in the Kiambu eDAMS system. The page features a sidebar on the left with navigation options like 'Content', 'Services', 'Other Settings', 'Payment Settings', 'Security', and 'Site Configurations'. The main content area displays a table with the following data:

#	Name	Zone	Ground Coverage %	Plot Ratio %	Actions
1	Offices	CBD	120	100	[Edit] [Add]
2	PEri-Urban	Peri-Urban	100	200	[Edit] [Add]
3	JUJA CBD	JUJA CBD	120	120	[Edit] [Add]

The 'NEW PERMITTED USER' button is located in the top right corner of the table area and is circled in red.

To add a new user, click on “NEW PERMITTED USER” button as shown.

This screenshot is identical to the one above, but the 'NEW PERMITTED USER' button is highlighted with a red rectangle instead of a circle.

Fill the form and click submit button to save.

THE REPUBLIC OF KENYA

Content

Services

Other Settings

Payment Settings

Security

Site Configurations

ADMINISTRATION

BACK TO DASHBOARD

Search here... Advanced Search

System Administrator (IT Support)

New Permitted Use

Name

Zone

Ground Coverage

Plot Ratio

Back Submit

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:

THE REPUBLIC OF KENYA

Dashboard

Statistics

Applications

Tasks

Services

Billing

Users

Reviewers

Agenda Reports

Reporting

Sub-Counties

NEW SUB-COUNTY

Show 10 entries

Search:

#	SubCounty Name	County Code	Actions
1	Thika Town	THK	
2	Kiambu	KBU	
3	Juja	JUU	
4	Ruiru	RUR	
5	Gatundu North	GATNRTH	
6	Gatundu South	GATSTH	
7	Lari	LAR	
8	Limuru	LIM	
9	Kabete	KAB	
10	Kikuyu	KKU	

Showing 1 to 10 of 12 entries

First Previous 1 2 Next Last

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

#	SubCounty Name	County Code	Actions
1	Thika Town	THK	[Edit] [Delete]
2	Kiambu	KBU	[Edit] [Delete]
3	Juja	JUU	[Edit] [Delete]
4	Ruiru	RUR	[Edit] [Delete]
5	Gatundu North	GATNRTH	[Edit] [Delete]
6	Gatundu South	GATSTH	[Edit] [Delete]
7	Lari	LAR	[Edit] [Delete]
8	Limuru	LIM	[Edit] [Delete]
9	Kabete	KAB	[Edit] [Delete]
10	Kikuyu	KKU	[Edit] [Delete]

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:

Sub-Counties

NEW SUB-COUNTY

Show 10 entries

Search:

#	SubCounty Name	County Code	Actions
1	Thika Town	THK	
2	Kiambu	KBU	
3	Juja	JUU	
4	Ruiru	RUR	
5	Gatundu North	GATNRTH	
6	Gatundu South	GATSTH	
7	Lari	LAR	
8	Limuru	LIM	
9	Kabete	KAB	
10	Kikuyu	KKU	

Showing 1 to 10 of 12 entries

First Previous 1 2 Next Last

Edit SubCounty

Name: Thika Town

Code: THK

Number: 12

Back Submit

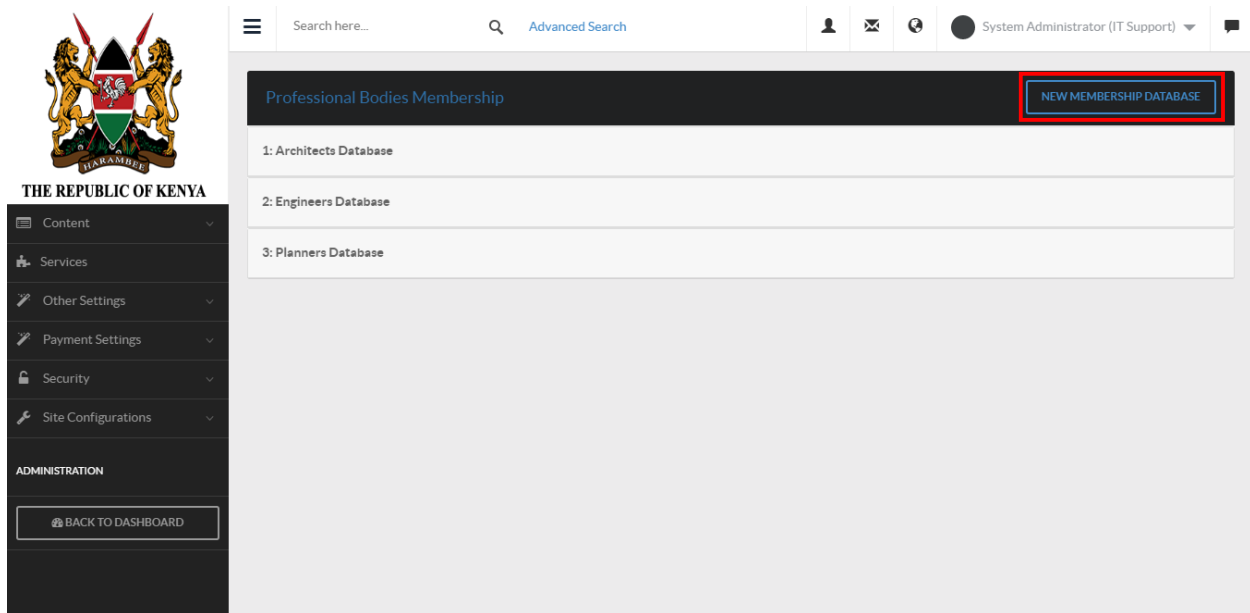
To delete a sub-county, go to actions and click on delete button as shown below.

#	SubCounty Name	County Code	Actions
1	Thika Town	THK	[Edit] [Delete]
2	Kiambu	KBU	[Edit] [Delete]
3	Juja	JUU	[Edit] [Delete]
4	Ruiru	RUR	[Edit] [Delete]
5	Gatundu North	GATNRTH	[Edit] [Delete]
6	Gatundu South	GATSTH	[Edit] [Delete]
7	Lari	LAR	[Edit] [Delete]
8	Limuru	LIM	[Edit] [Delete]
9	Kabete	KAB	[Edit] [Delete]
10	Kikuyu	KKU	[Edit] [Delete]

6.3.5 Membership Database

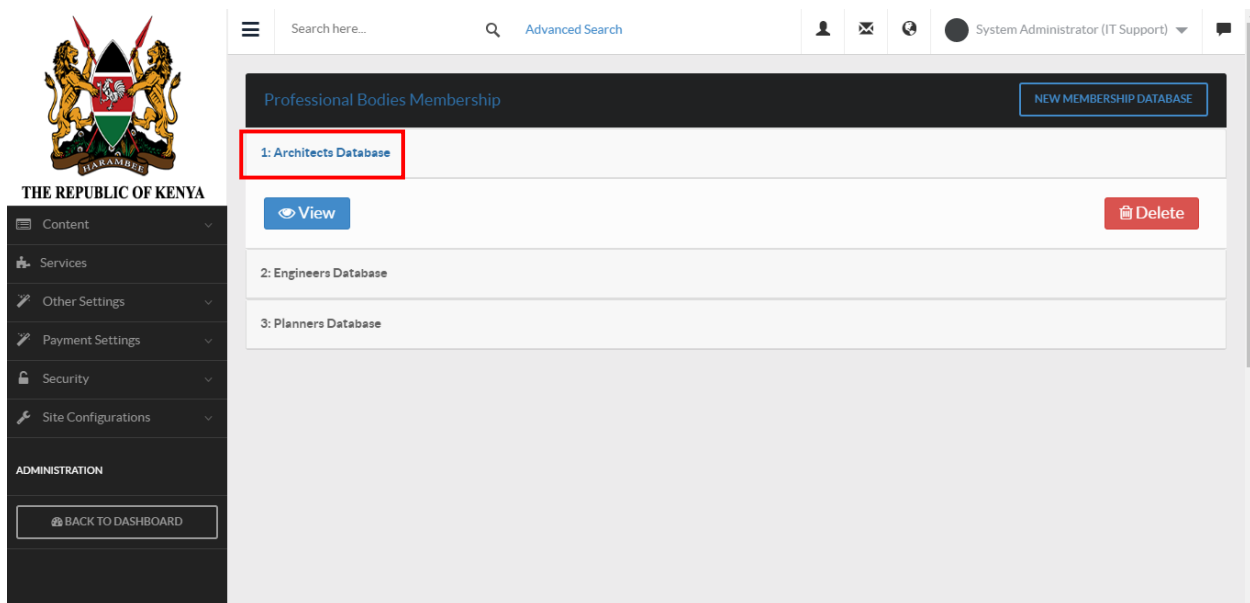
Go to “Settings” then click on “Other Settings”. Navigate to membership database. The following window will open.

To add a new membership, click on “NEW MEMBERSHIP DATABASE” as shown below:

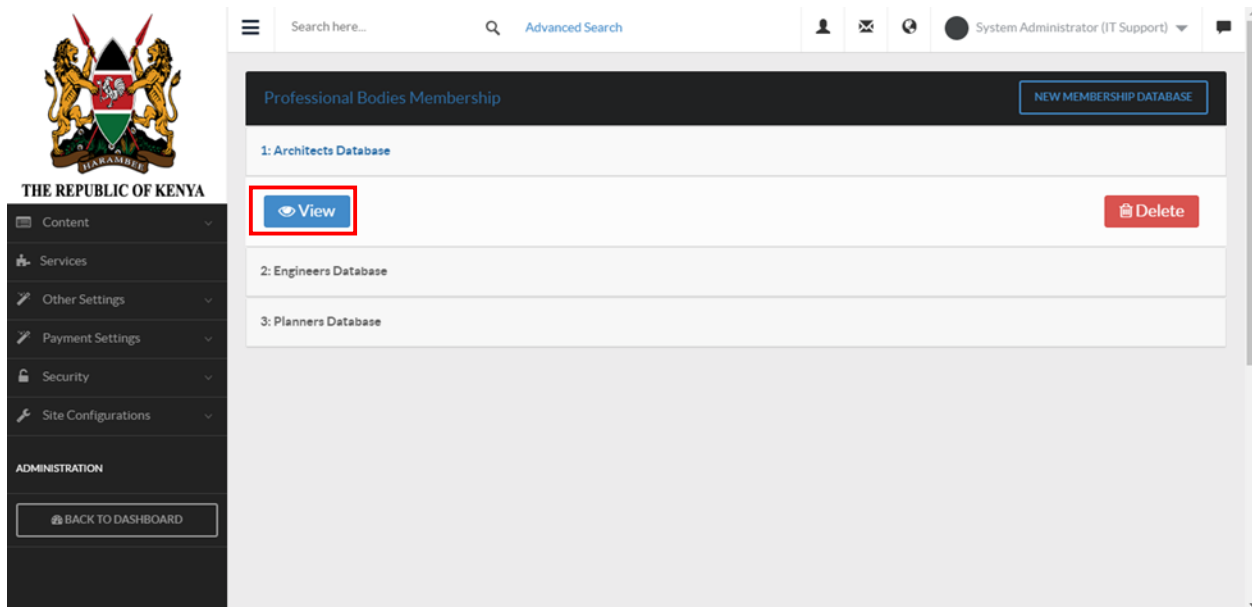


Fill the fields and click submit button to save details.

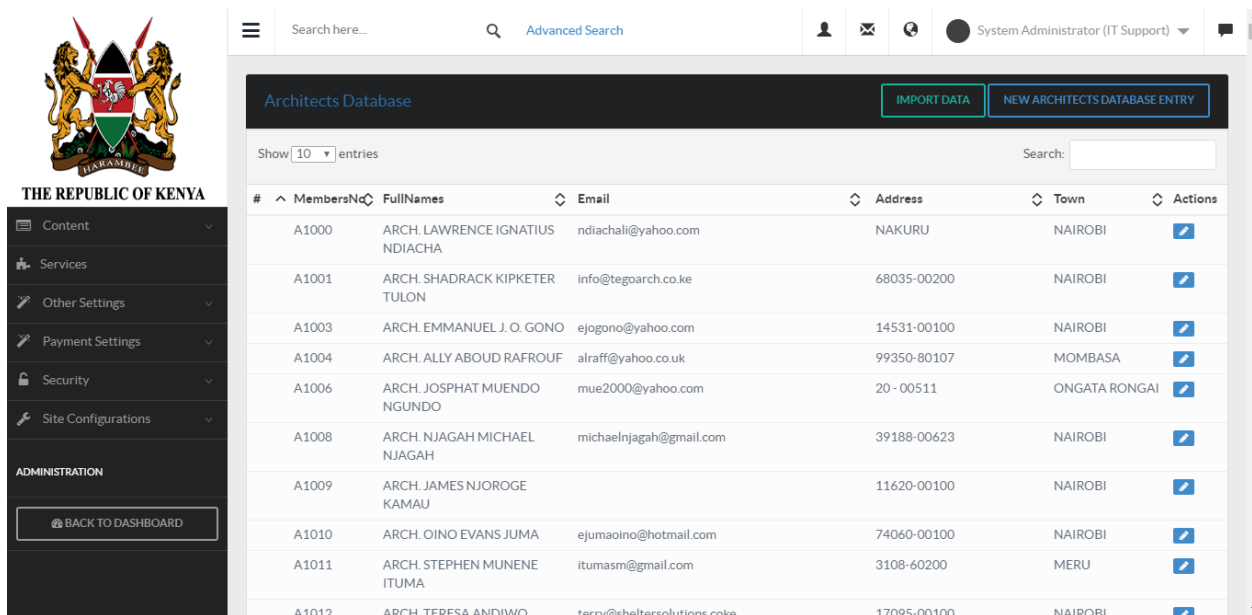
To view members, select either “Architects Database”, “Engineers Database” or “Planner Database”.



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”.

Architects Database

IMPORT DATA NEW ARCHITECTS DATABASE ENTRY

Show 10 entries Search:

#	MembersNo	FullNames	Email	Address	Town	Actions
A1000		ARCH. LAWRENCE IGNATIUS NDIACHA	ndiachali@yahoo.com	NAKURU	NAIROBI	
A1001		ARCH. SHADRACK KIPKETER TULON	info@tegoarch.co.ke	68035-00200	NAIROBI	
A1003		ARCH. EMMANUEL J. O. GONO	ejogono@yahoo.com	14531-00100	NAIROBI	
A1004		ARCH. ALLY ABOUD RAFROUF	alraff@yahoo.co.uk	99350-80107	MOMBASA	
A1006		ARCH. JOSPHAT MUENDO NGUNDO	mue2000@yahoo.com	20-00511	ONGATA RONGAI	
A1008		ARCH. NJAGAH MICHAEL NJAGAH	michaelnjagah@gmail.com	39188-00623	NAIROBI	
A1009		ARCH. JAMES NJOROGE KAMAU		11620-00100	NAIROBI	
A1010		ARCH. OINO EVANS JUMA	ejumaoino@hotmail.com	74060-00100	NAIROBI	
A1011		ARCH. STEPHEN MUNENE ITUMA	itumasm@gmail.com	3108-60200	MERU	
A1012		ARCH. TERESA ANDIWO	terry@sheltersolutions.co.ke	17095-00100	NAIROBI	

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

To delete database, select a membership database and click “DELETE”.

Professional Bodies Membership

NEW MEMBERSHIP DATABASE

1: Architects Database

View Delete

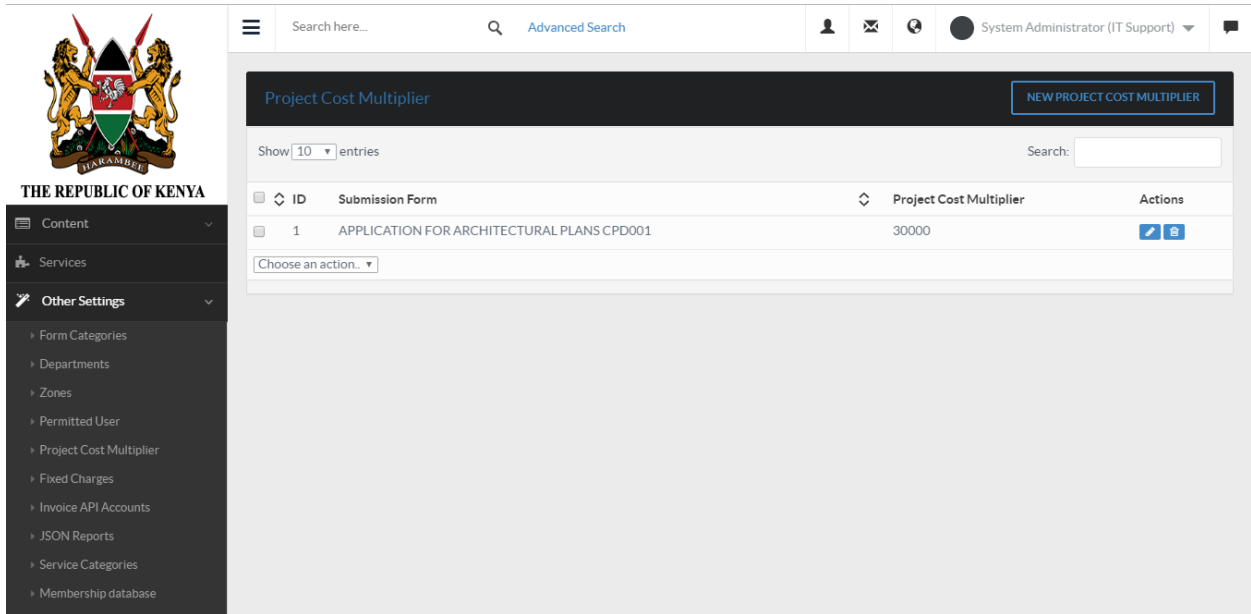
2: Engineers Database

3: Planners Database

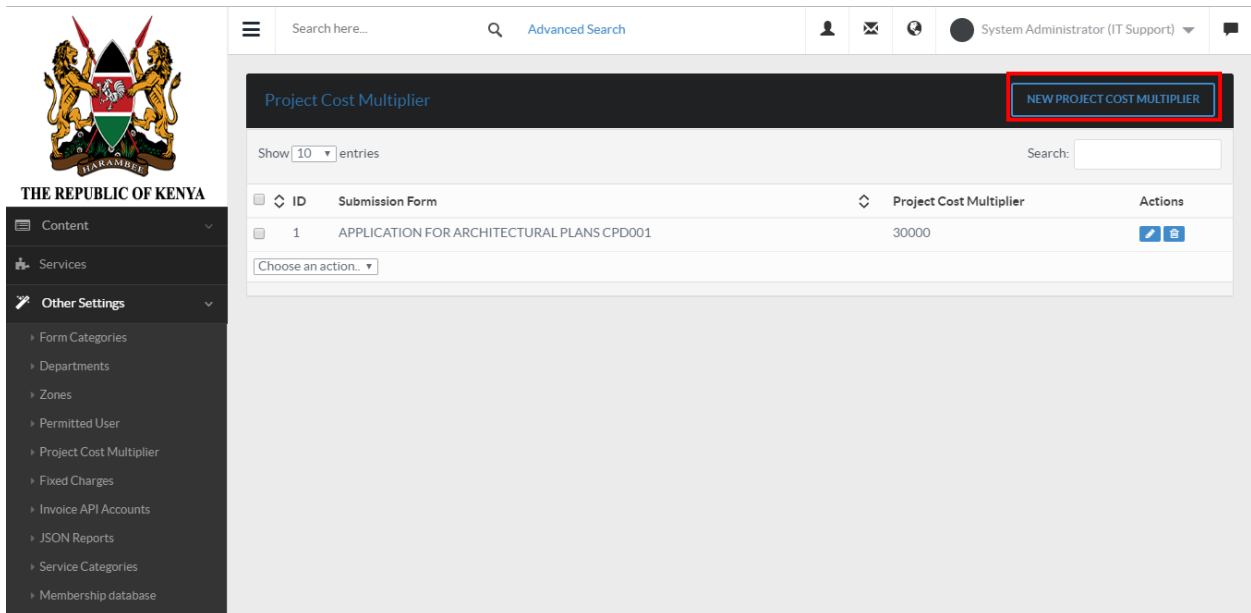
N/B: These steps will done in similar way with engineers and planners.

6.3.6 Project Cost Multiplier

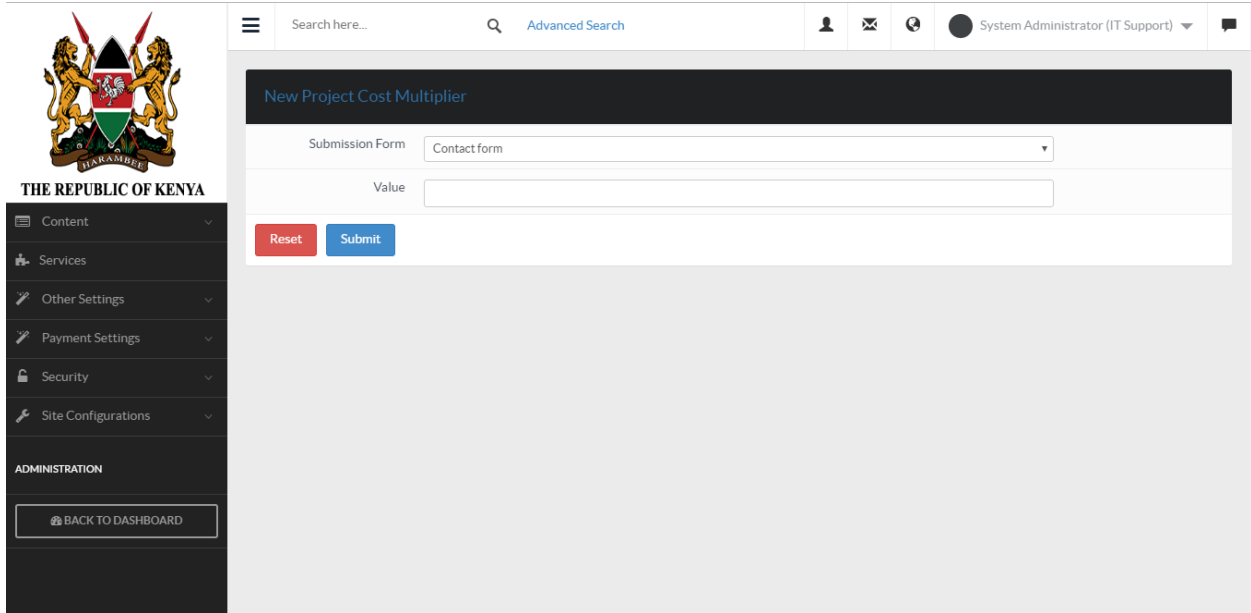
Click “System Settings” then navigate to “Other Settings”.Click on “Project Cost Multiplier ” menu item.



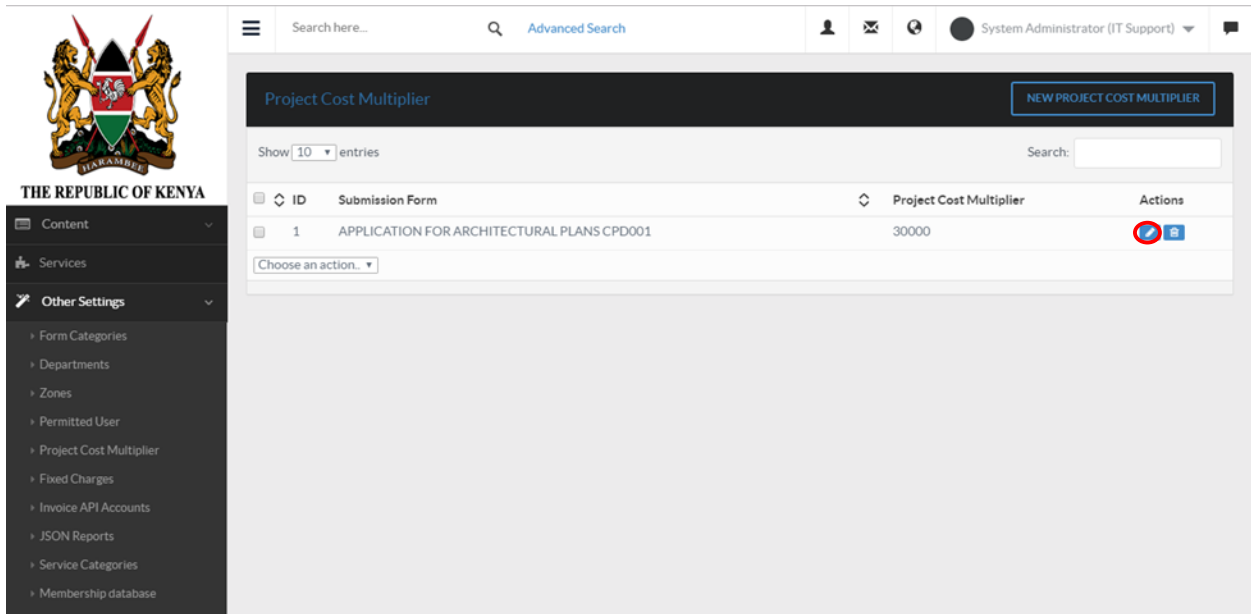
To add a new project cost multiplier, click on “NEW PROJECT COST MULTIPLIER” .

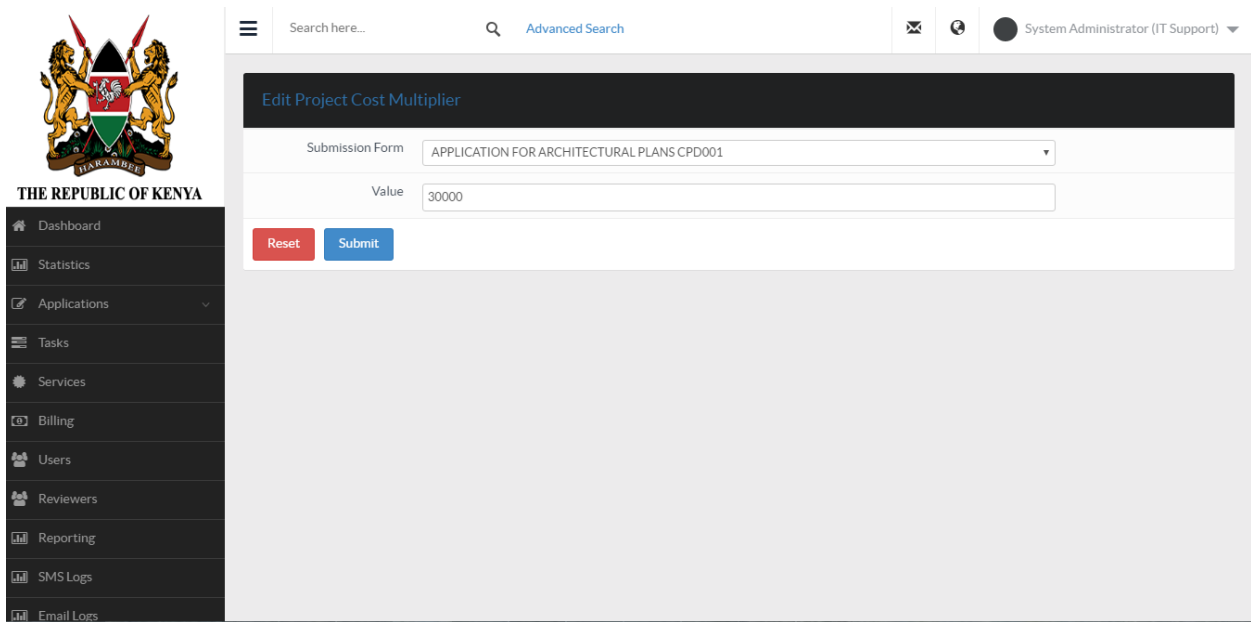


The following form will appear. Fill and click submit button.



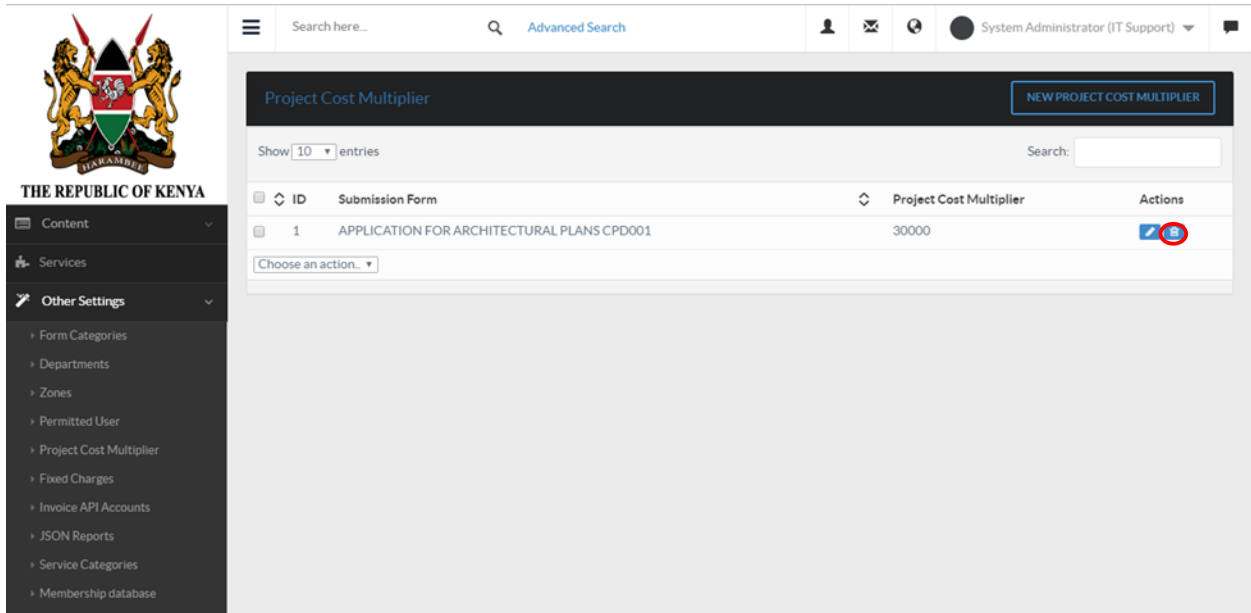
To edit a project cost, go to actions and click on the edit button as shown below. Make your changes and click submit button to save the changes.





The screenshot shows the 'Edit Project Cost Multiplier' interface. On the left is a sidebar with the Kenyan coat of arms and the text 'THE REPUBLIC OF KENYA'. Below this is a navigation menu with items: Dashboard, Statistics, Applications, Tasks, Services, Billing, Users, Reviewers, Reporting, SMS Logs, and Email Logs. The main content area has a search bar and 'Advanced Search' link. The user is identified as 'System Administrator (IT Support)'. The form contains a dropdown menu for 'Submission Form' with the selected value 'APPLICATION FOR ARCHITECTURAL PLANS CPD001'. Below it is a text input field for 'Value' containing '30000'. At the bottom of the form are two buttons: 'Reset' (red) and 'Submit' (blue).

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



The screenshot shows the 'Project Cost Multiplier' list view. On the left is a sidebar with the Kenyan coat of arms and the text 'THE REPUBLIC OF KENYA'. Below this is a navigation menu with items: Content, Services, and Other Settings (with sub-items: Form Categories, Departments, Zones, Permitted User, Project Cost Multiplier, Fixed Charges, Invoice API Accounts, JSON Reports, Service Categories, and Membership database). The main content area has a search bar and 'Advanced Search' link. The user is identified as 'System Administrator (IT Support)'. The table has columns: ID, Submission Form, Project Cost Multiplier, and Actions. There is one row with ID '1', Submission Form 'APPLICATION FOR ARCHITECTURAL PLANS CPD001', and Project Cost Multiplier '30000'. The Actions column for this row contains a delete icon (a trash can) circled in red. Above the table, there is a 'Show 10 entries' dropdown and a search input. A 'NEW PROJECT COST MULTIPLIER' button is in the top right corner.