User Manual for Application

Login & Landing Page

Login -Pass

1. Navigate to the login screen.
2. Enter your username and password.
3. Click Login to access the app.

Landing Page -Pass

- Upon successful login, you will land on the Dashboard.
- The dashboard gives an overview of your role-based actions and recent updates.

Application Management

Maintain Application-Pass

- Access this from the side navigation.
- This is used for system-wide configurations and monitoring.

User Management

View Users -Pass

- Navigate to the User Management section.
- Displays a list of all registered users.

Add a User-Pass

1. Click Add User.
2. Fill in personal details, email, role, and department.
3. Click Save to create the user.

Edit a User -Pass

1. Locate the user in the list.
2. Click Edit.
3. Modify the necessary information.

4. Click Update to save changes.

Department Management

Creating a New Department-Pass

1. Go to Department Management.
2. Click Create Department.
3. Enter the department name and description.
4. Save the entry.

Edit Department-Pass

1. Find the department.
2. Click Edit.
3. Update the name or description as needed.

Link User to Departments

Link User -Pass

1. Access Link User to Department.
2. Select a user and assign them to a department.
3. Save the link.

User Status Management

Change User Status -Pass

1. Click on a user profile.
2. Select Change Status (Active, Inactive, Suspended).
3. Confirm the change.

Department Compliance

View and Edit Compliance -Pass

1. Navigate to the compliance section under a department.
2. Click Edit to update compliance requirements or status.

Role Management

Create a New Role -Pass

1. Go to User Role Management.
2. Click Create Role.
3. Input role name and permissions.
4. Save.

Edit Existing Role -Pass

1. Select the role from the list.
2. Click Edit.
3. Update role permissions or details.

Users Status Management

Creating a New User Status-Pass

1. Go to User Status Management.
2. Click Create New Status.
3. Name the status (e.g., Active, Pending Approval).
4. Save.

Edit User Status -Pass

1. Click Edit on the status.
2. Update name or related conditions.

Intervention Management

Add New Intervention - Pass

1. Access Intervention Management.
2. Click Add Intervention.
3. Fill in name, description, related objectives.
4. Save.

Edit Intervention -Pass

1. Find the intervention in the list.
2. Click Edit.
3. Update details and save.

Key Result Area (KRA) Management

Create New KRA - Pass

1. Navigate to KRA Management.
2. Click Add KRA.
3. Define the name, goals, and metrics.
4. Save.

Edit KRA - Pass

1. Click Edit on a KRA.
2. Modify goals or metrics.

Indicator Management

Create New Indicator -Pass

1. In the Indicators section, click New Indicator.
2. Enter name, unit of measure, and target value.
3. Save.

Edit Indicator -Pass

1. Click Edit next to an indicator.
2. Update the values or name.

KRA Reports - Pass

View/Edit KRA Report

1. Navigate to KRA Report.
2. Filter by department or period.

3. Click Edit to update results or findings.

Intervention Priority Link

Create New Link

1. Go to Intervention Priority section.
2. Click Add Link.
3. Select Intervention and assign a priority level.
4. Save.

Edit Link

1. Click Edit.
2. Update the intervention or priority level.

Announcements Management

Create New Announcement -Pass

1. Go to Announcements.
2. Click New Announcement.
3. Enter title, message, and display timeframe.
4. Save.

Edit Announcement -Pass

1. Click Edit.
2. Change message or dates.

Announcement Display

- Announcements will be shown on the dashboard or landing page.

Report Period (Quarters) Management

Create New Report Period -Pass

1. Navigate to Report Period.
2. Click Add Period.

3. Specify the start and end dates for the quarter.
4. Save.

Edit Report Period -Pass

1. Click Edit on an existing period.
2. Update date range or name.

New Features

Document Management

Documents Overview -Pass

1. Navigate to the Documents section from the main navigation.
2. View a list of all uploaded documents with details including ID, department, name, description, display settings, dates, and status.
3. Search for documents using the search bar at the top of the page.
4. Use the pagination at the bottom to navigate between pages of documents.

Upload New Document -Pass

1. Click the "New Document" button in the Documents section.
2. Enter a name and description for the document.
3. Select the appropriate department from the dropdown.
4. Set "Display To All" option to determine visibility.
5. Set start and end dates for document availability.
6. Click "Choose File" to select a document for upload.
7. Set the status to Active.
8. Click "Submit" to upload the document.

Edit Document -Pass

1. Locate the document in the documents list.
2. Click the "Edit" button in the Actions column.

3. Update the document name, description, department, display settings, dates, or status as needed.
4. Click "Submit" to save your changes or "Cancel" to discard them.

Language Management

Language Link Overview -Pass

1. Access the Language Link section from the Reports dropdown.
2. View a list of all language links with ID, intervention, language, department, status, and available actions.
3. Links show which languages are associated with which interventions and departments.

New Language Link -Fail

1. Click the "New Language Link" button.
2. Select an intervention from the dropdown.
3. Select a language from the available options.
4. Choose the appropriate department.
5. Set the status to Active.
6. Click "Submit" to create the link.

Edit Language Link -Pass

1. Find the language link in the list.
2. Click the "Edit" button in the Actions column.
3. Update the intervention, language, department, or status as needed.
4. Click "Submit" to save changes.

Segmentation Management

Segmentation Link Overview

1. Navigate to the Segmentation Link section from the Reports dropdown.
2. View all segmentation links with ID, intervention, segmentation type, department, status, and actions.

3. These links show how interventions are segmented across departments.

New Segmentation Link -Pass

1. Click the "New Segmentation Link" button.
2. Select the appropriate intervention from the dropdown.
3. Choose a segmentation type.
4. Select the relevant department.
5. Set the status to Active.
6. Click "Submit" to create the link.

Edit Segmentation Link -Pass

1. Locate the segmentation link in the list.
2. Click the "Edit" button in the Actions column.
3. Update the intervention, segmentation type, department, or status.
4. Click "Submit" to save your changes.

User Report Periods

User Report Periods Overview

1. Access User Report Periods from the Reports dropdown.
2. View all report periods with their status and available actions.
3. Report periods determine the timeframes for user reporting.

Create User Report Period -Pass

1. Click the "Create New" button.
2. Select the appropriate report period from the dropdown.
3. Click "Save" to create the period or "Back to List" to cancel.

Edit User Report Period -Pass

1. Navigate to the Edit User Report Period page by clicking "Edit" on a period.
2. View the current report period.

3. Click "Save" to confirm or "Back to List" to return without saving.

Enhanced Reporting Features

Department Intervention Report -Pass

1. Access the Department Intervention Report from the Reports dropdown.
2. View intervention counts by department in a tabular format.
3. See a graphical representation of interventions by department.
4. Export the data to CSV format by clicking the "Export to CSV" button.

Quantity of Interventions by Department and Reporting Period

1. Navigate to this report from the Reports dropdown.
2. View interventions by department and quarter in a tabular format.
3. See graphical representation of intervention quantities.
4. Export the data to CSV format as needed.

Department Interventions by Quarter Report -Pass

1. Access this report from the Reports dropdown.
2. View which departments have interventions in each quarter with Yes/No indicators.
3. See graphical representation of department interventions by quarter.
4. Export the data to CSV format.

Department Interventions Total Report -Pass

1. Navigate to this report from the Reports dropdown.
2. Select a fiscal year from the dropdown to filter the report.
3. View department intervention totals across all quarters.
4. See graphical representation of department interventions by quarter.
5. Export the data to CSV format.