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| AFR Staff Recognition Awards Nomination System Guide |
| 1. System Access |
| * 1. Access the system through <https://www.compassionkenya.com/recognition> (Note: This address will change when the system goes live)      * 1. Provide your Work Email and Password in the screen above. In case you have forgotten your password, click on the *Forgot Your Password?* link, you will be prompted to provide your Work Email through which the system will send you via the same email a reset password to use for your logging. Note: You can change this password once you log in. |
| 2.0 Dashboard |
| 2.1. This is the first page that opens once a user logs into the system. The page has access privileges that can be set by the system’s super admin to allow users depending on their level access view different components of this dashboard. Below is a dashboard for a user will full access privileges: |
| 3.0 User Account Management |
| 3.1. The 2 administrative steps related to user account management:   1. Setting Up Account Control Parameters 2. Managing User Accounts   3.1.1. Setting Up Account Control Parameters  We have 5 Accounts Control Parameters. These features are used for creating, retrieving, updating and deleting user accounts controls:   1. Countries – Used for set up user countries. 2. Departments – Used for setting up user department 3. Teams – Used for setting up country special teams e.g. Devotion committee 4. Roles – Used for setting up user roles 5. Profiles – Used for setting up user profiles.   Note: User profiles determine the users’ system access privileges while the other 4 determine users’ voting privileges.    3.1.1.1. Setting Up Countries  Depending on the privilege provided by the system admin, a user can create, retrieve, update and delete a country.    Country Administration System Control:   * A privileged user cannot delete a country if contains users i.e. the Staff column is not Zero * Access privileges can be assigned to the following actions; *Add Countries**, Edit a Country*  *and Delete a Country*  .   3.1.1.2. Setting Up Departments  Depending on the privilege provided by the system admin, a user can create, retrieve, update and delete departments.    Departments Administration System Control:   * A privileged user cannot delete a department if contains users i.e. the Staff column is not Zero * Access privileges can be assigned to the following actions; *Add departments**, Edit a Department*  *and Delete a Department*  .   3.1.1.3. Setting Up Teams  Depending on the privilege provided by the system admin, a user can create, retrieve, update and delete Teams.    Teams Administration System Control:   * A privileged user cannot delete a team if contains users i.e. the Staff column is not Zero   Access privileges can be assigned to the following actions; *Add teams* *, Edit a Team*  *and Delete a Team*   * A privileged user can only add teams in the countries he/she has an “admin scope” for. Note: We see what a scope is in the Scope section of this guide.   3.1.1.4. Setting Up Roles  Depending on the privilege provided by the system admin, a user can create, retrieve, update and delete user roles.    Roles Administration System Control:   * A privileged user cannot delete a role if contains users i.e. the Staff column is not Zero   Access privileges can be assigned to the following actions; *Add Role* *, Edit a Role*  *and Delete a Role*  Note: The contribution columns denote whether the user is a staff (Staff) or a people’s manager (Manager).  3.1.1.5. Setting Up Profiles  Depending on the privilege provided by the system admin, a user can create, retrieve, update and delete user profiles. Profiles determine the user feature access privileges.    Profiles Administration System Control:   * A privileged user cannot delete a role if contains users i.e. the Staff column is not Zero   Access privileges can be assigned to the following actions; *Add profile* *, Edit a Profile*  *and Delete a Profile*  Creating and Editing a Profile  When a privileged user creates a profile, the system creates a container of access privileges that can be applied to a group of users.     * You have to give the profile a meaningful name. For Ex. Country Administrators * Provide a Description to the Profile * Drag or double click from the list of Privileges in the “Add All” list to the “Remove All” list. The opposite will apply when removing a privilege. * Click on “Save” or “Save and go back to list” button to save the changes.   3.1.2. Managing User Accounts  Managing user accounts entails editing you own profile email (Manage Profile Tab), Changing your own password (Change Password Tab) and Managing User accounts (Manage Users Tab).    Managing Users Tab allows a privileged user to:   * Add new Users * Edit a user account * Assign user scope * Suspend a user * Delete a user account   All of the above features can be accessed by user depending on the access privileges provide by their user profile (Recall: Creating and Editing a Profile Section).  3.1.2.1. Add new Users   * Go to the Manage Users Tab and click on the *Add User* button * Fill in the form that will pop up as appropriate. * Click on the “Save” button.   3.1.2.2. Edit a user account   * To edit a user, click on the “Action” button for the particular user account record.      * Fill in the pop up form that will appear as appropriate.   Note: You cannot create or edit user account in a country you have no scope for (See the User Scope Section).  3.1.2.3. Assign User scope  A scope is a container that holds a list of countries a user is privileged to:   1. Cast vote against it staff 2. Manage User Accounts on their behalf   There 3 type of types of scope privileges:   1. Voting – Allows an assigned user right to vote for staff in the allocated countries 2. Administration – Allows an assigned user a right to manager the allocated countries user accounts. 3. Both – Allows an assigned user to undertake both Voting and Administration rights in the allocated countries.   Note: All users have an automatic voting scope for their geography country (National Office). This does not require to be assigned.  Two Way Scope – When a user is assigned a “Yes” to the Two way scope variable, this mean that the user can vote for staff in the allocated countries as well as the staff in those countries are able to vote for him/her. If a “No” is assigned, then only the allocated user can vote for staff in the allocated countries but he/she can’t be voted for by staff in those countries.  Note: Two-way scope assigned is defendant of the scope type. That’s is even if a user is allocated a “Yes” to the Two Way scope variable, he/she can only have the right to vote if the type is set to “Voting” or “Both”. An Administration scope type does not have the rights to vote even when the two-way variable is set to “Yes”.  Strict Scope – The Strict scope variable when set to “No” mean the assigned user can vote for all departments in the countries he/she has been allocated to, otherwise, a “Yes” would mean the assigned user voting rights will be limited to her/his department in the countries he/she has been allocated to.     * To allocate a scope country, double click/ drag/ click on the shift arrow  to populate the list on the right. In the above example the user is being an assigned 2 countries i.e. Uganda and Tanzania. * Once done with setting up the Scope for a user click on the “Save” button.   Note: To view a user scope, click on the “View” Action alongside the User account under manage users tab. You can also view all other privileges for user here e.g. Teams, Department and Profile.  3.1.2.4. Suspending a User Account  On click the “Suspend” action of a user’s account, the user will be deactivated from logging into the system after they are logged out. This action is a toggle action. For deactivated users, the action label changes to “Activate” from “Suspend”, this allows a privileged user activate a suspended user account.  3.1.2.5. Delete a user account  A privileged user can delete a user account completely from the system by using the “Delete” action of the related user account. However this will only occur if the user account being delete has never participated in voting. |
| 4.0. Surveys |
| This section will expound on the following areas:   1. Voting/ Nomination Survey Management/ Settings 2. Casting Voting/ Nomination     4.1. Voting/ Nomination Survey Management/ Settings (*Manage Surveys* Menu)  There are 4 administration features related to Survey management.   1. Category Groups Management (*Category Groups* Menu) 2. Category Management (*Categories* Menu) 3. Survey Settings (*Survey Setting* Menu) 4. Votes Management (*Votes* Menu )   4.1.1. Category Groups Management  Category groups are containers that hold the parameters that are going to be used for voting. These voting parameters are referred to as Categories.    Category Groups Administration System Control:   * A privileged user cannot delete a Category Group if contains users i.e. the Categories column is not Zero * Access privileges can be assigned to the following actions; *Add Category Grouping* *, Edit a Category Grouping*  *and Delete a Category Grouping*   4.1.2. Category Management  A category refers to the parameters against which the users will cast their votes.    Category Administration System Control:   * A privileged user cannot delete a Category if contains votes cast i.e. the “Has Votes” column is not “No” * Access privileges can be assigned to the following actions; *Add Category* *, Edit a Category*  *and Delete a Category* * A privileged user cannot create a category for a country he/she has no scope for.   Country Visibility - The variable means that the target category can only be viewed by users in the listed countries .i.e. All or Kenya etc.  Assigned User Type – There are two type of users (Sometimes referred to as User Contribution in this system); Staff and Manager. The “Assigned User Type” parameter indicates the type of the user who is targeted to use the category. A staff assigned category will be viewed by all staff while a manager type category will be viewed only by people managers.  Status – By setting category active makes it viewable to the targeted countries of visibility and user types.  4.1.3. Survey Settings  This feature allows privileged users create, delete and update a survey. It also allows privileged users retrieving voting results. Survey status can also be changed here. There are two survey states: Active or Inactive.    Survey Setting System Controls:   * No more than one survey can be active at the same time * The status of a survey can’t be changed to Inactive if there are exists votes that have been cast but not yet submitted. In such a situation a survey is to be deactivated and there are Un-submitted votes, the system will automatically decline these votes and delete them from the system. Both the user and the administrators are going to be notified of such votes. * A survey cannot be edited nor deleted once voting starts.   Note: Even if the survey deadline is overdue, the survey will never deactivate automatically until when an assigned administrator expressly deactivates the survey. However, user will not be able to vote when the deadline is overdue.  Allow User Edit - This variable when set to “Yes” allow users to edit their votes after they have been submitted. To disallow this, set this variable to “No”.  4.1.4. Votes Management  This feature allows privileged users to change the status of a vote and delete a vote. Note: This is a critical feature and be advised that any action done should have received a written communication from the voter since the system does not maintain history of such actions at the moment.    The votes listed above will always correspond to the current active survey.  Votes Management system control:   * Privileged users can only edit or delete votes for the current active survey. Once the survey is deactivated, not votes will be listed in the grid above. * A privileged user can only edit the status of a vote from submitted to active or the vice versa |
| 5.0. Nomination/ Voting |
| This feature allows system users nominate their preferred users, teams or departments once a survey has been created.   * To start voting go to the “Surveys” Menu then “Nominate” * Click on the “Start Voting” button  to initiate voting. This is done only once per voting cycle. * Choose your preferred nominee under the “Nominate Unit” column and always key in a comment to justify your choice.     Category – This variable defines the parameter you are intended to vote against. To see the expectation for a given Category, hover over the category title and read what appear in the tooltip.  Assignment – This refers to the assigned user type for this category. It can either be a staff or manager. If assigned to a manager only manager can see the category whereas for staff, all users can view the category as long as it is visible for their country.  Visibility – This variable can either be a specific country or All. If set to all, all registered system users can see the category. If set to a specific country, only users in those countries can see the category. Note: Users from other countries with a scope in your country can’t be voted for against categories that are country specific.  Unit – This denotes the target unit to be voted for. This variable can hold any of the following values: User (The category allows only staff to be voted for), Team (The category allows only teams to be voted for) or Department (The category allows only departments to be voted for).  Nominate Unit – This is a list of the viable units that can be voted for in the selected category. If a voter is unable to get a best choice, choose the option “No Viable Option”. The system will not allow submitting your nomination if a Nomination Unit or Comment has not been filled in.  Comment – Always provide your justification for choosing your preferred Nomination unit. All comments are mandatory.  Note: The nomination form caches your results. In case you cannot complete your nomination at once, feel free to log out the system after doing partial voting. The system will populate for you your previous choices whenever you resume. You don’t have to be in a hurry to submit.  Once done with filling in the nomination form, click on the “Submit” button. Depending on the survey setting placed during initiating the survey by the admin, you may be allowed to edit a submitted survey. However if this was not set to be so, communicate with your geography system admin or HRPB to help you activate or delete the vote for you.    Votes Management system control:   * User cannot vote users, teams or departments outside their geography unless they have been assigned a scope for that country * A user cannot cast a self-vote to their user account, team or department * User with scope to other countries cannot vote for those countries teams * Users with scope to other countries cannot vote for departments in those countries if the scope strict parameter is set to “Yes”. * A user cannot edit a submitted vote unless the survey was set as “Allow User Edit”. However the user can notify their geography admin or HRBP to do on their behalf. * No vote can be deleted by a voter unless done by a privileged admin. * No user can submit multiple votes. However a submitted vote can be edited and be re-submitted. |
| 6.0. Mail Templates |
| The system is enabled to automatically notify user on selected key actions:   1. User Registration 2. Password Reset 3. Survey Invitation 4. Survey Closure 5. Survey Closure Due 6. Vote Deletion 7. Vote Activation 8. Vote Submitted 9. Vote Initiated 10. Notify Nominee (On Submitting the Nomination form) 11. Voting Reminder (When Survey is becoming due)   To allow privileged admins customize the messages mailed to the users the system uses mail templates. Mail templates as the word suggested are predefined mail bodies that can be customized by privileged system users.     * To customize a mail template, click on the edit icon  for the template. * In the “Edit templates” form, Change the message in the Template body and Template Subject as you wish. However don’t change the strings in braces {}. These are mail tags that the system will translate to meaningful values depending on the user being notified. Ex. The {user} mail tag will be translated to the notified the user’s full name when mailed to the user. A full set of all possible mail tags that can be used in each template has been listed in in the mail tags field of the edit templates form. Note, these tags vary from template to template and are not necessarily the same.   Mail Templates have been deactivated during the test run to avoid un-expecting user getting notified. |

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