TRAINING MANUAL: CONSULTANCY SERVICES FOR HOSTING, UPGRADE AND MAINTENANCE OF THE PUBLIC PROCUREMENT AND DISPOSAL OF PUBLIC ASSETS AUTHORITY'S (PPDA) CONTRACT MONITORING SYSTEM (CMS)

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20 years of
unique technology solutions

New Wave Technologies Limited
128 Old Kira Road
P. O. Box 500538 Wandegeya, Uganda
info@nwt.ug
www.nwt.ug
+256 414 389220

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ACCESS THE PPDA CMS

- Open the PPDA CMS web link in a browser of your choice: https://ppdacms.net/ - see illustration below.

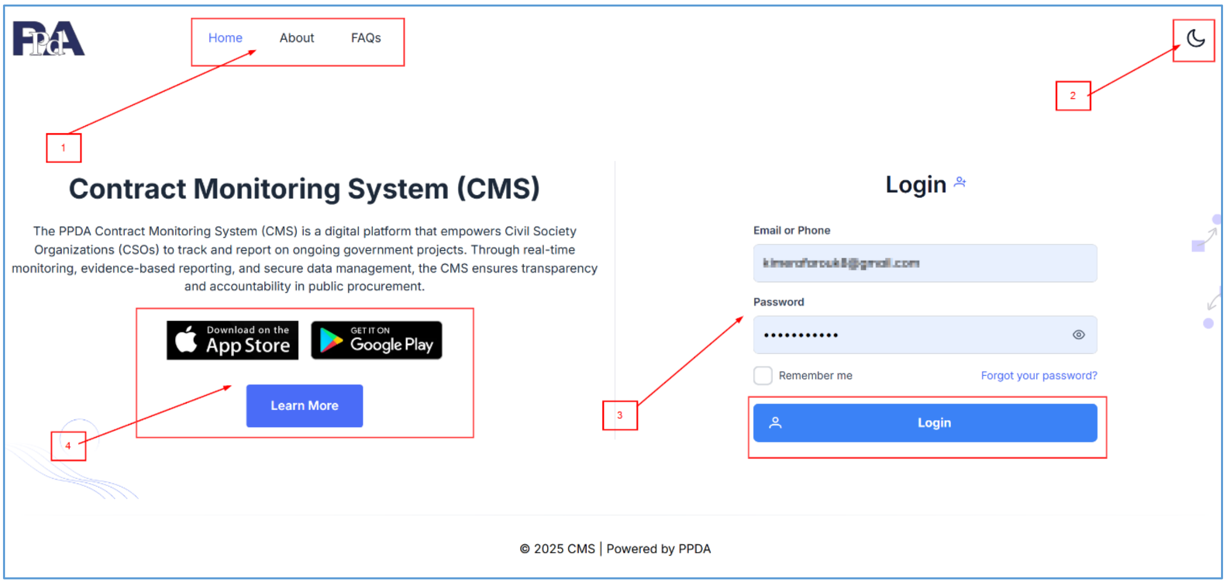

Figure 1: PPDA CMS Landing page

Section marked – 1

- To view information About the CMS, click the About Link
- To view information on CMS FAQs (Frequently Asked Questions), click the FAQs Link

Section marked – 2

- To change between light and dark theme, click the “half-moon” icon

Section marked – 3

To login,

- Enter your user name
- Enter your password
- Click the Login button

Section marked – 4

To download the mobile app,

- Android – Get it on Google Play
- Apple – Download on the App Store

DASHBOARD

When a user successfully logs into the system, they can access the dashboard – see illustration below:

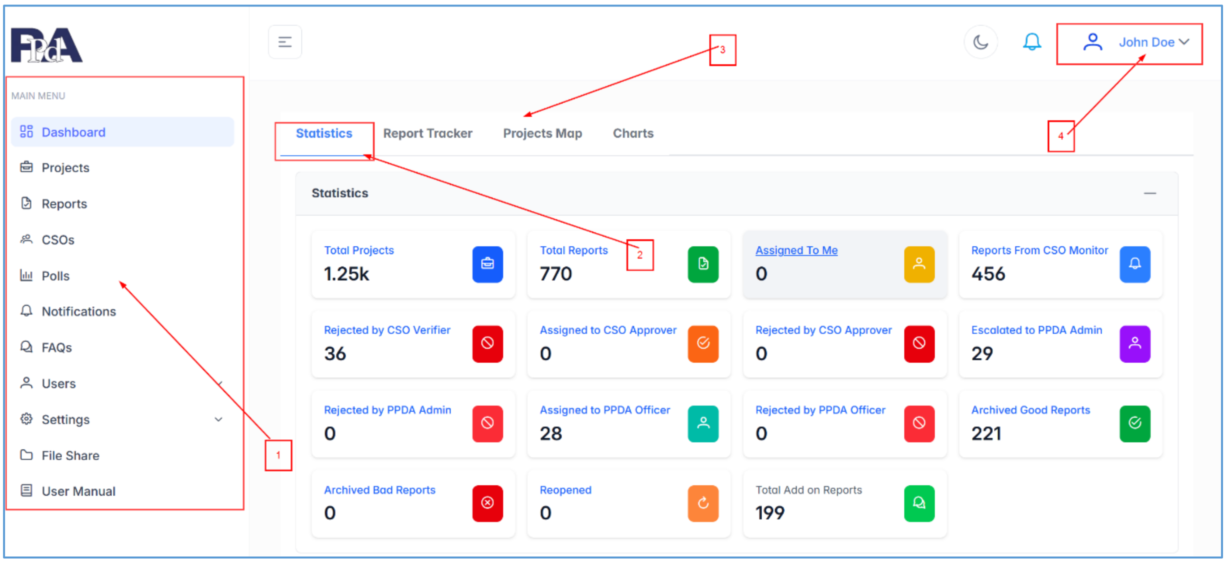

Figure 2: Dashboard – main menu

Section marked – 1 Dashboard >> Main Menu

The main menu of the Dashboard is illustrated on the left hand side, with the Dashboard highlighted.

NOTE: The main menu links change according the role of the user that is logged in.

Section marked – 2 Dashboard >> Statistics

The figures on the different areas of the PPDA CMS are shown in this section, e.g. there are 770 total reports.

Section marked – 3 Dashboard >> other sections

Here, the user can track the reports, view the location of each project in Uganda as well as the charts

Section marked – 4 Dashboard >> User Settings

The user can find out more details about their account on PPDA CMS by clicking their name.

Report Tracker

View the reports that have been submitted by the monitors in the last:

- One month
- Three months
- 6 months, see illustration below. It shows 208 reports.
- 12 months
- More than 12 months

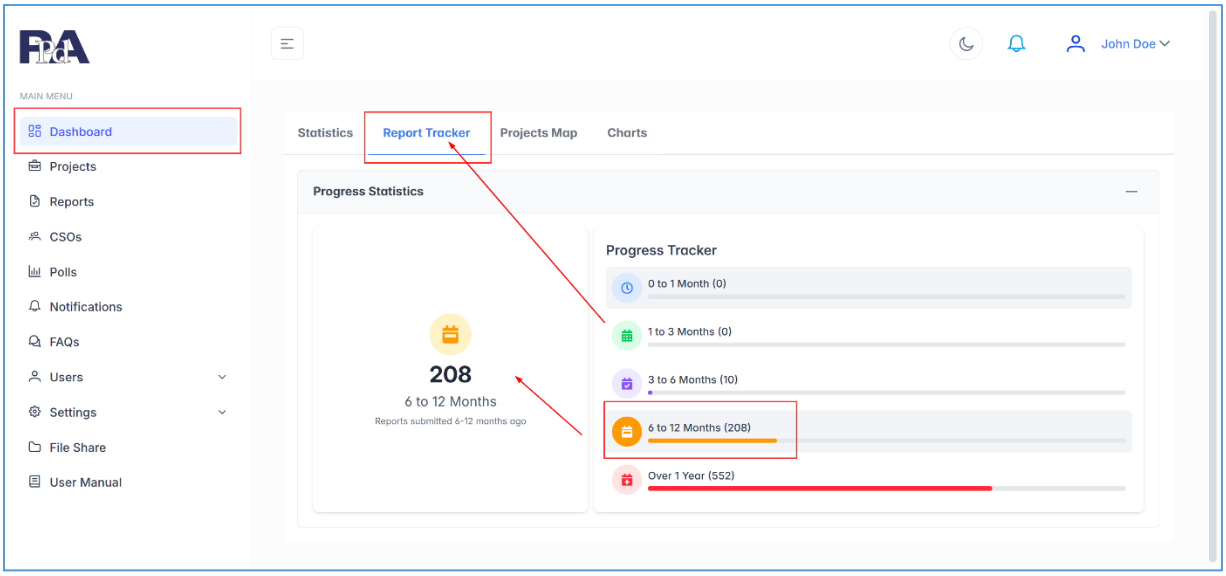

Figure 3: Dashboard >> Report Tracker

Project Map

To view the project details on a map, click the Projects Map tab – see illustration below:

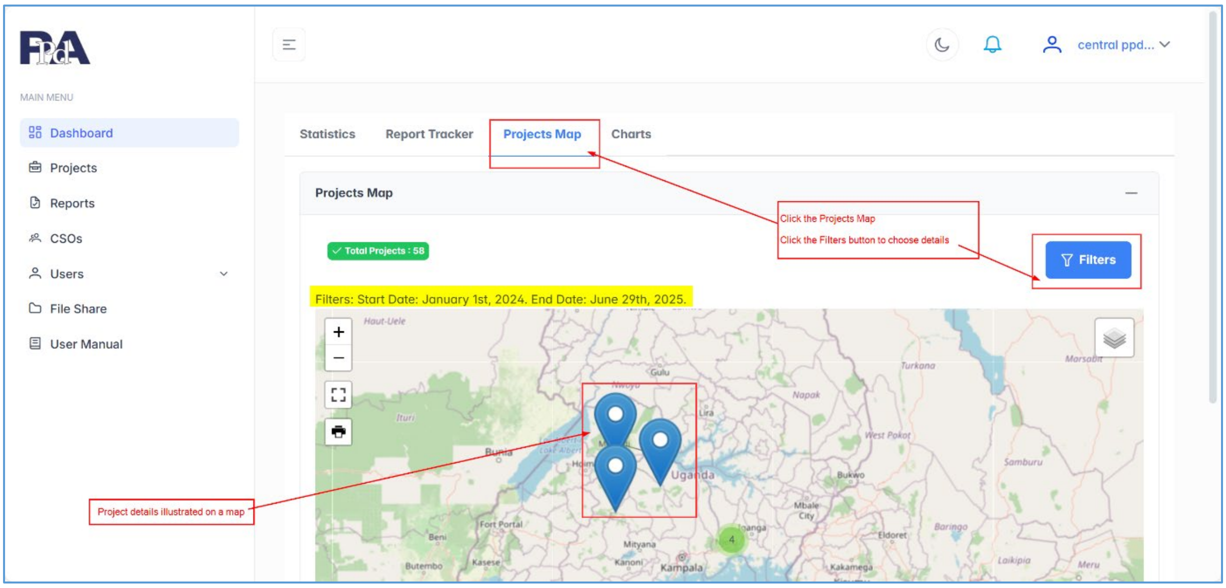

Figure 4: Dashboard >> Project Map

Charts

Click the Charts tab to view available charts.

MANAGE PROJECTS

View Projects

- Click the Projects link, under the main menu. A list of projects is shown.
- Enter the project name in the search field >> click the search icon. The project that fits your criteria is shown below. Click the blue "view" icon to view more details.

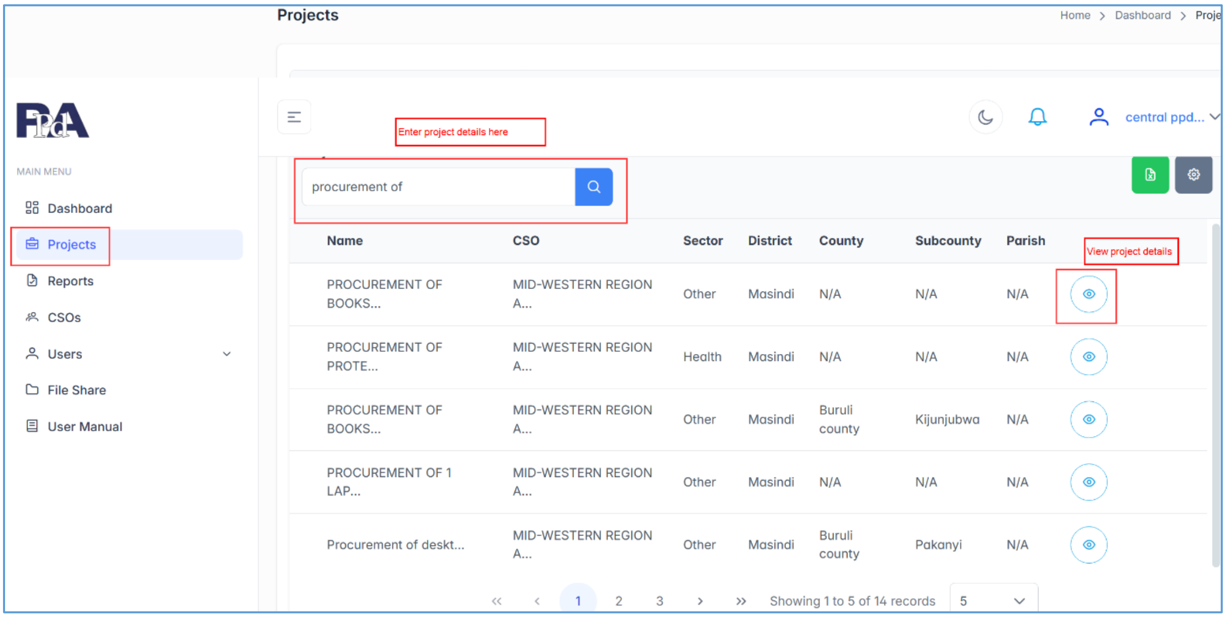

Figure 5: View Project List

Add Project

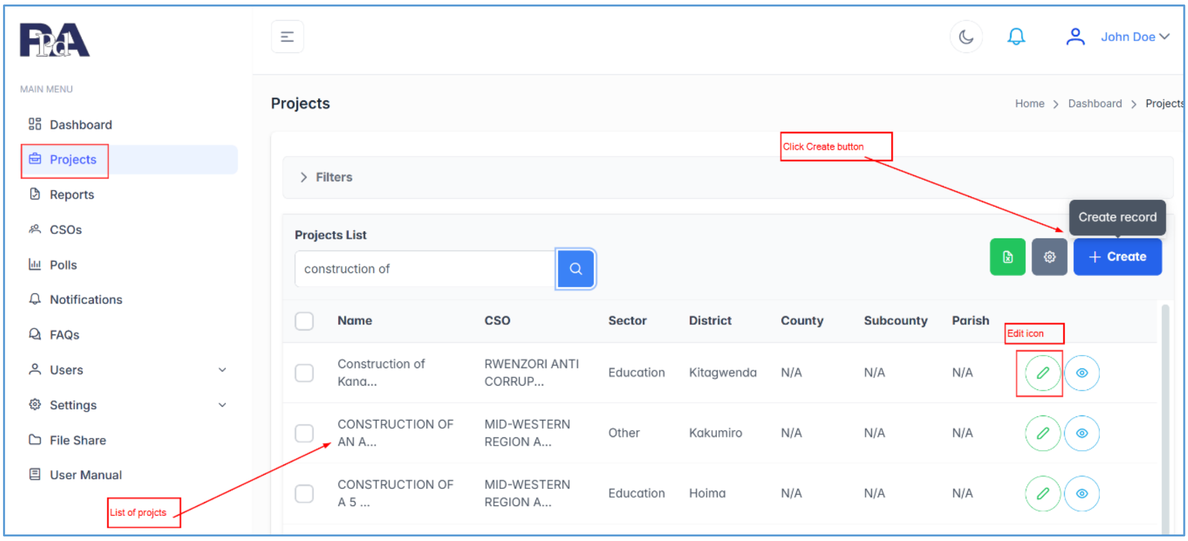

Figure 6: Add Projects

- Click the Create button. The Create project page/form is shown.

- Complete the 4 sections of the project, i.e.
    - Project info
    - Contract info
    - Attachments
    - Assign to monitor
        - Select the created project
        - Choose "Assign to Monitor" option
        - Select the CSO Monitor from the dropdown list
        - Add assignment comments if necessary
        - Click "Assign Project"
- Click the Submit button to save the project details

Edit Project

- Click the green "edit" icon. The project details are shown. See illustration below.
- Make changes to the project sections, project info >> contract info >> attachments >> assign to monitor
- Submit edited project details

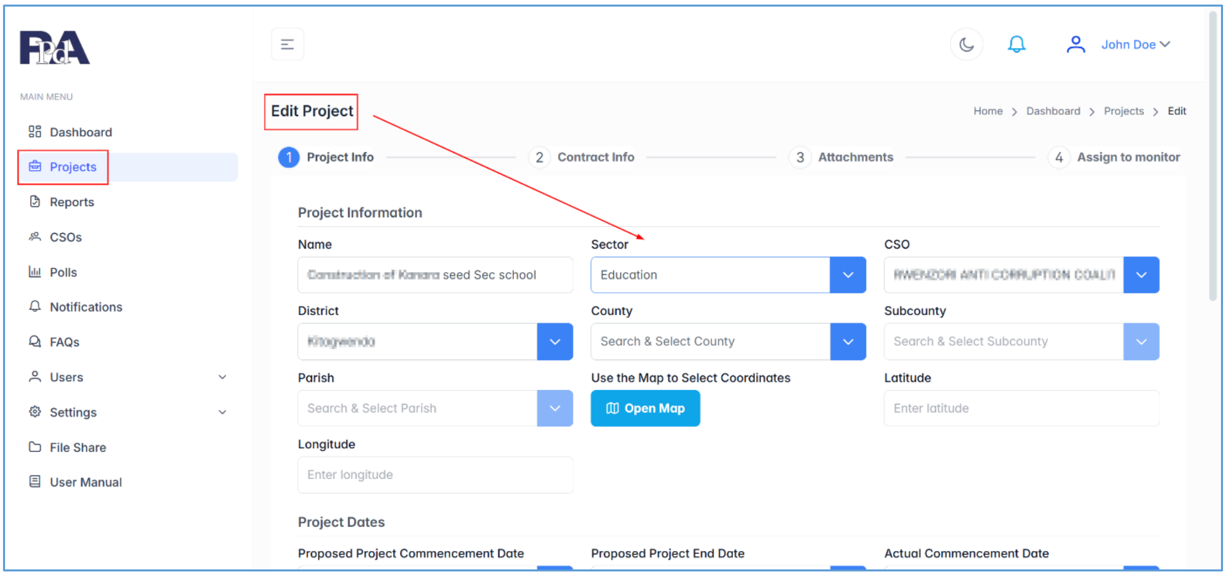

Figure 7: Edit Project

THE REPORTING PROCESS

CSO User Management

CSO User Roles

- **CSO Admin:** Full administrative control within assigned CSO and regional scope
- **CSO Approver:** Project and activity approval authority within CSO operations
- **CSO Verifier:** Verification and validation responsibilities for CSO activities
- **CSO Monitor:** Monitoring and reporting functions for CSO project oversight

Add CSO User

The CSO Admin is responsible for adding CSO users.

- Log into the PPDA CMS using your credentials
- Navigate to the Users section from the side navigations bar
- Click the CSO Users link – see illustration below
- Click "Create" new user button

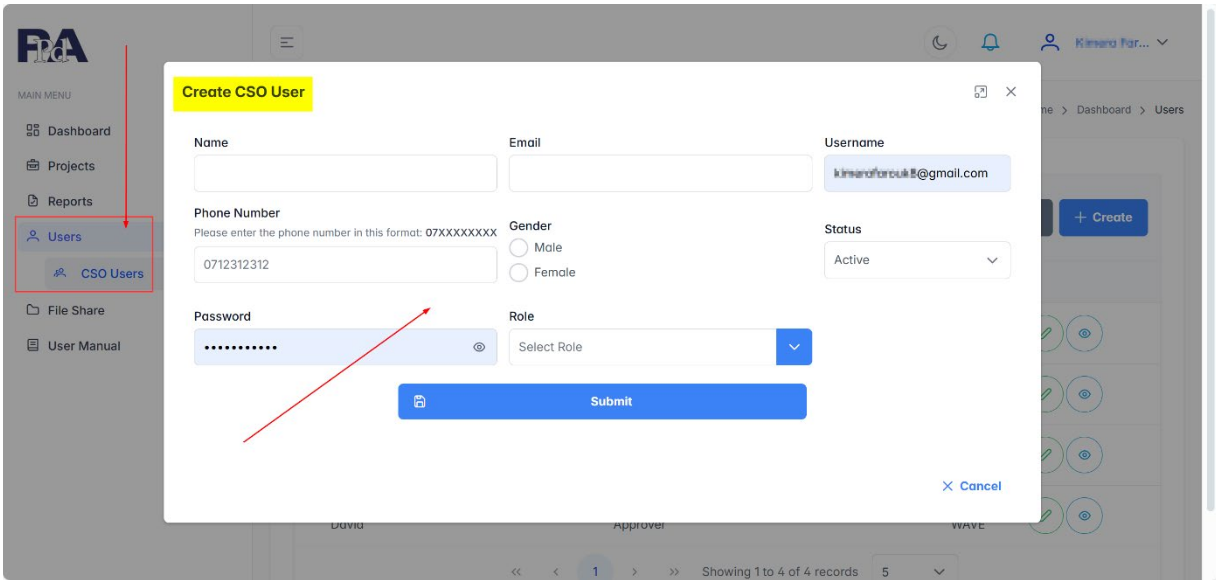

Figure 8: CSO Admin - Add CSO User

- Complete the form above >> name, email, role, etc
- Submit the details

View CSO User

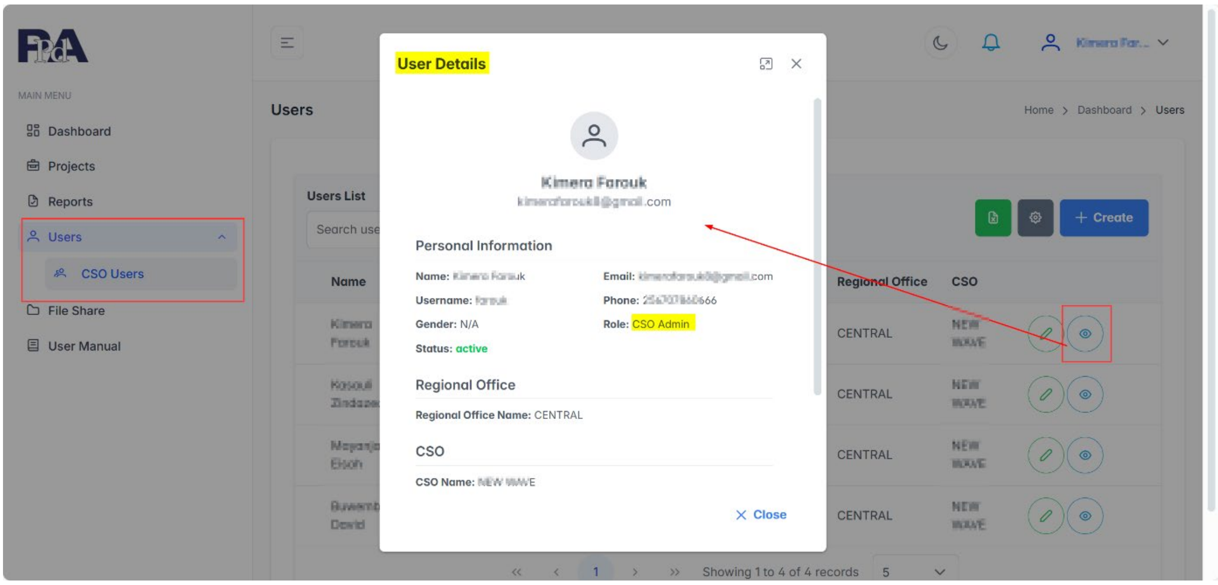

Figure 9: CSO Admin - View CSO User

- Click the Users >> CSO Users link, under the main menu. A list of CSO users is shown.
- Enter the user name in the search field >> click the search icon. The user that fits your criteria is shown below. Click the blue “view” icon to view more details.

Edit CSO User

- Click the green “edit” icon. The project details are shown. See illustration below.
- Make changes to the project sections, project info >> contract info >> attachments >> assign to monitor
- Submit edited project details

Report Status Overview

Reports in the PPDA CMS system move through different statuses based on actions taken by various roles:

- **Submitted** - Report gets this status after the **CSO Monitor** submits it through the PPDA CMS mobile app and is now waiting for verification by **CSO Verifier**
- **Rejected by CSO Verifier** - Report sent back to **CSO Monitor** for corrections
- **Assigned to CSO Approver** - Report verified and forwarded for approval
- **Rejected by CSO Approver** - Report sent back to **CSO Verifier** for revisions
- **Archived as a Good Report** - Report marked as successfully completed by **CSO Approver**
- **Archived as a Bad Report** - Report marked as incomplete or problematic by **CSO Approver**

- **Assigned to PPDA Admin** - Report escalated to PPDA for further investigation by **CSO Approver**
- **Rejected by PPDA Admin** - Report sent back for revision by **PPDA Admin**
- **Assigned to PPDA Officer** - Report assigned by PPDA Admin to specific officer
- **Rejected by PPDA Officer** - Report sent back to PPDA Admin by **PPDA Officer**
- **Reopened** - Archived report sent back for follow-up

CSO Monitor Submits Report

Successful creation or addition of a project by the CSO Admin triggers a notification to the CSO Monitor, to whom the reporting has been assigned. The CSO monitor is notified via a) **SMS**, b) **Email**, and c) PPDA CMS **in-app notification**.

For detailed instructions on using the mobile app – as a CSO Monitor, please refer to the PPDA CMS Mobile App User Manual.

Key Process Overview:

- CSO monitor receives project assignments through mobile app notifications
- CSO monitor accesses ONLY assigned projects from mobile dashboard
- CSO monitor creates detailed monitoring reports using mobile forms
- CSO monitor submits completed reports for verification

NOTE: Reports can only be created for assigned projects and are submitted for verification upon completion.

CSO Verifier Reporting Process

Accessing Assigned Reports

Step 1: Login and Navigate to Reports

- Log into the PPDA CMS using your credentials
- From the dashboard, click on the "Assigned to Me" card
- You will be redirected to the reports page where all reports assigned to you will be displayed

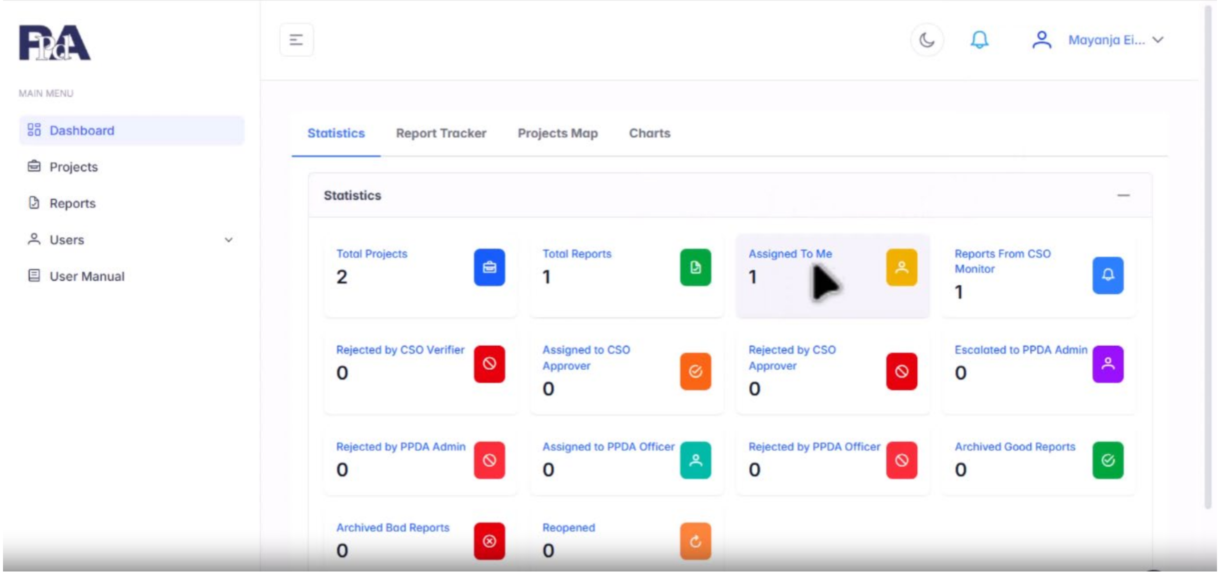

Figure 10: CSO Verifier Dashboard - Assigned to Me Card

Step 2: View Report Details

- Locate the report you want to review
- Click the "eye" icon to view the full report
- You will be taken to the detailed report view

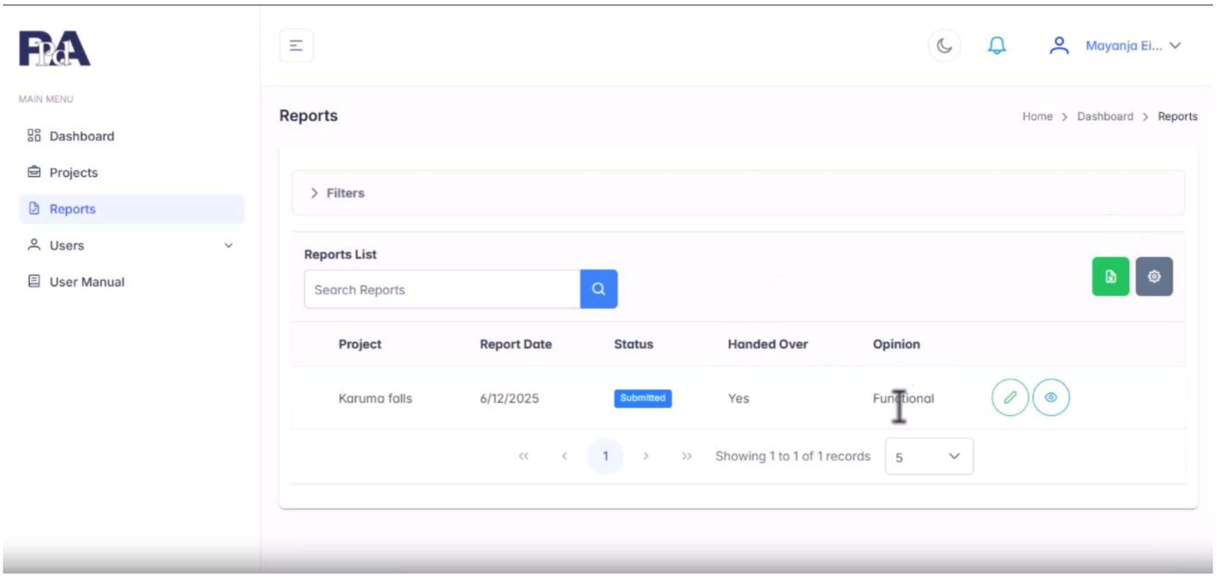

Figure 11: CSO Verifier Reports List Page

Step 3: Review Report Content

- Read through each section of the report carefully
- Review all submitted information, attachments, and evidence

- Assess the quality and completeness of the monitoring data

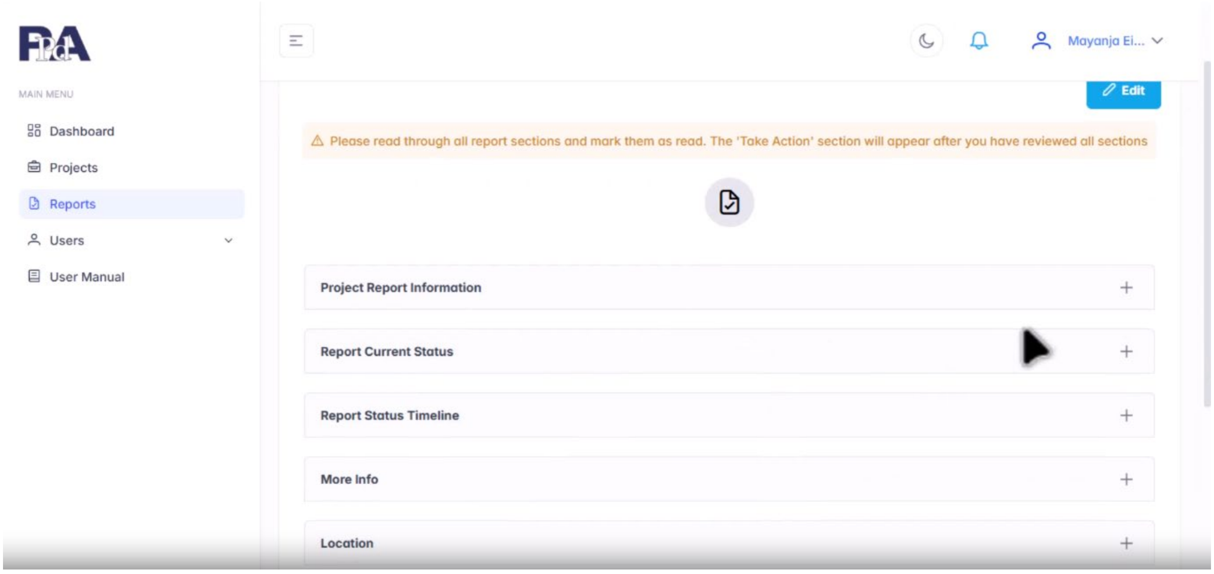

Figure 12: Detailed Report View Interface

Step 4: Take Action on Report

- After reading through the report, the "Take Action" form will appear below the report content.

Available Actions for CSO Verifier:

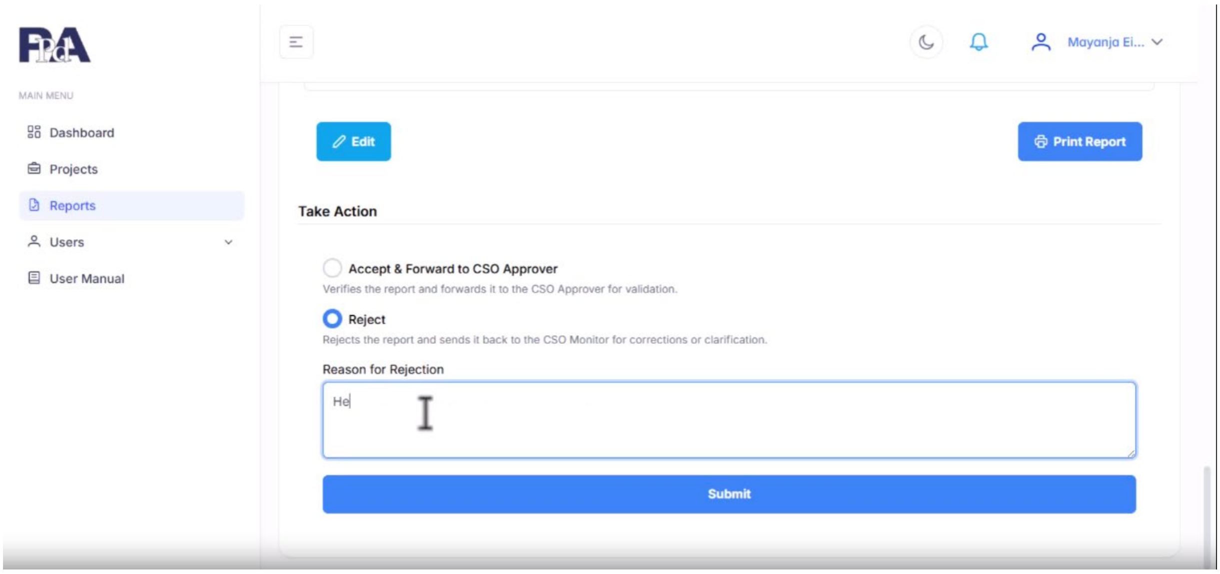

Figure 13: CSO Verifier Take Action Form

Option 1: Accept & Forward to CSO Approver

- Select "Accept & Forward to CSO Approver" option
- **Action Required:** Add comment for the CSO Approver

- Enter your verification comments in the text field
- Click "Submit" to forward the report

Option 2: Reject Report

- Select "Reject" option
- **Action Required:** Provide reason for rejection
- Enter detailed rejection comments explaining required corrections
- Click "Submit" to send report back to CSO Monitor

NOTE: Once you submit your action, the report status will change and move to the appropriate next step in the workflow.

CSO Approver Reporting Process

Accessing Assigned Reports

Step 1: Login and Navigate to Reports

- Log into the PPDA CMS using your credentials
- From the dashboard, click on the "Assigned to Me" card
- You will be redirected to the reports page where all reports assigned to you will be displayed

Step 2: View Report Details

- Locate the report you want to review
- Click the "eye" icon to view the full report
- Review the CSO Verifier's comments and recommendations

Step 3: Review Report Content

- Read through each section of the report thoroughly
- Review the CSO Verifier's verification comments
- Assess the overall quality and compliance of the monitoring report

Step 4: Take Action on Report

- After reviewing the report, the "Take Action" form will appear below the report content.

Available Actions for CSO Approver:

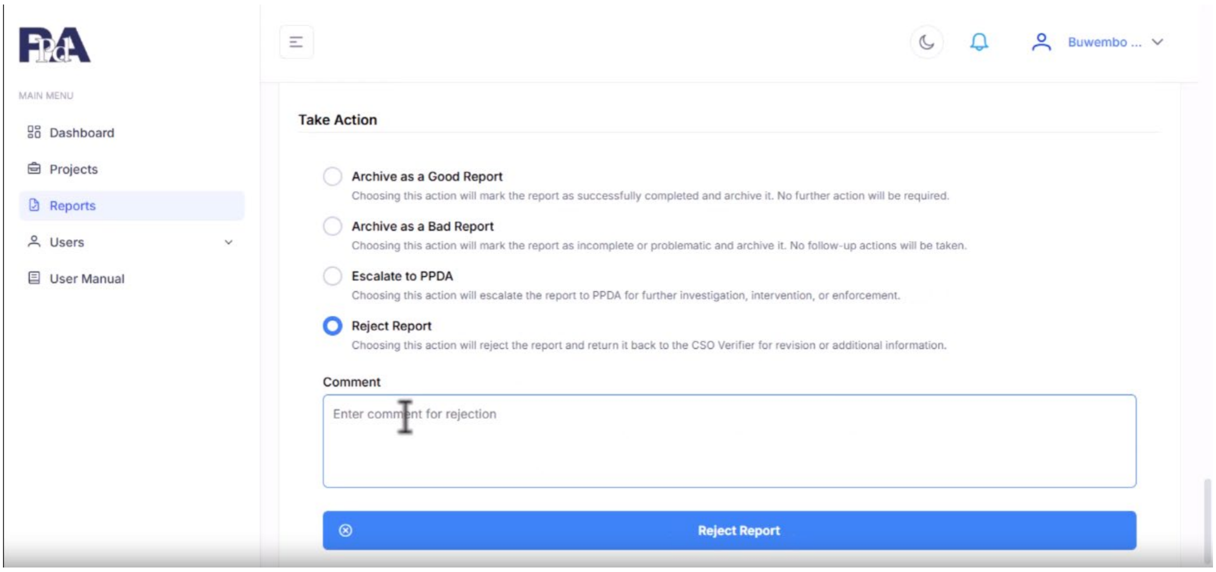

Figure 14: CSO Approver Take Action Form

Option 1: Archive as a Good Report

- Select "Archive as a Good Report" option
- Marks the report as successfully completed and archives it
- No further action will be required
- Add final approval comments
- Click "Submit"

Option 2: Archive as a Bad Report

- Select "Archive as a Bad Report" option
- Marks the report as incomplete or problematic and archives it
- Add comments explaining why report is marked as bad
- Click "Submit"

Option 3: Escalate to PPDA

- Select "Escalate to PPDA" option
- Escalates the report to PPDA for further investigation or enforcement
- **Action Required:** Add comments explaining reason for escalation
- Click "Submit"

Option 4: Reject Report

- Select "Reject Report" option

- Rejects the report and returns it to the CSO Verifier for revisions
- **Action Required:** Provide detailed comment for revision
- Click "Submit"

PPDA Admin Reporting Process

Accessing Escalated Reports

Step 1: Login and Navigate to Reports

- Log into the PPDA CMS using your credentials
- From the dashboard, click on the "Assigned to Me" card
- You will be redirected to the reports page showing reports escalated to PPDA

Step 2: View Report Details

- Locate the escalated report you want to review
- Click the "eye" icon to view the full report
- Review all previous comments and escalation reasons

Step 3: Review Report Content

- Read through the complete report and all stakeholder comments
- Review the CSO Approver's escalation comments
- Assess the situation requiring PPDA intervention

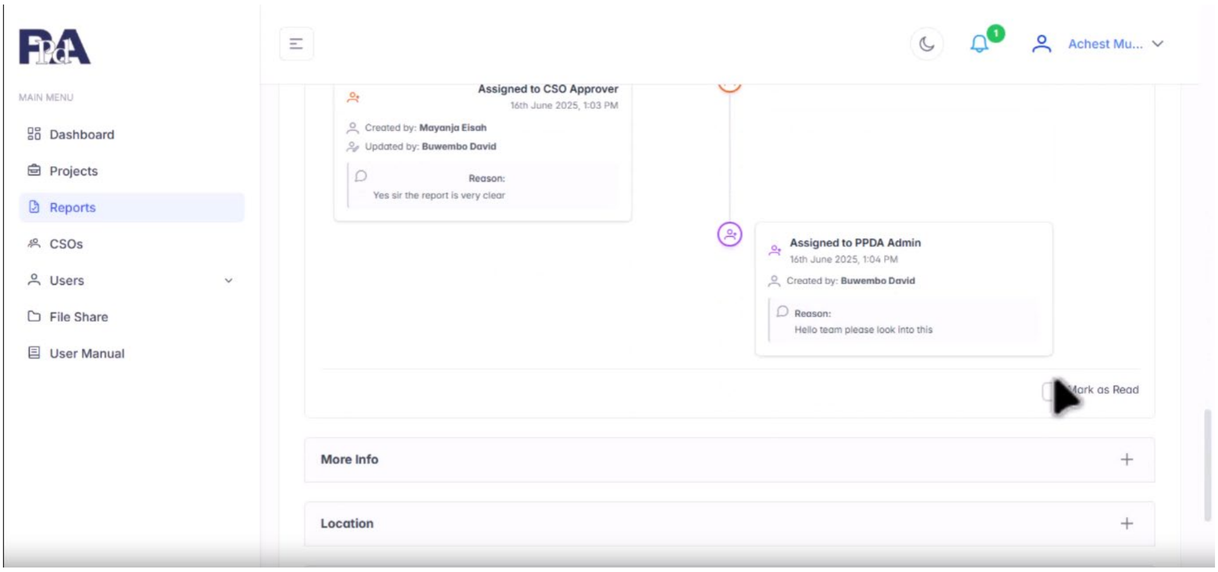

Figure 15:PPDA Admin Report Review Interface

Step 4: Take Action on Report

- After reviewing the escalated report, the "Take Action" form will appear below the report content.

Available Actions for PPDA Admin:

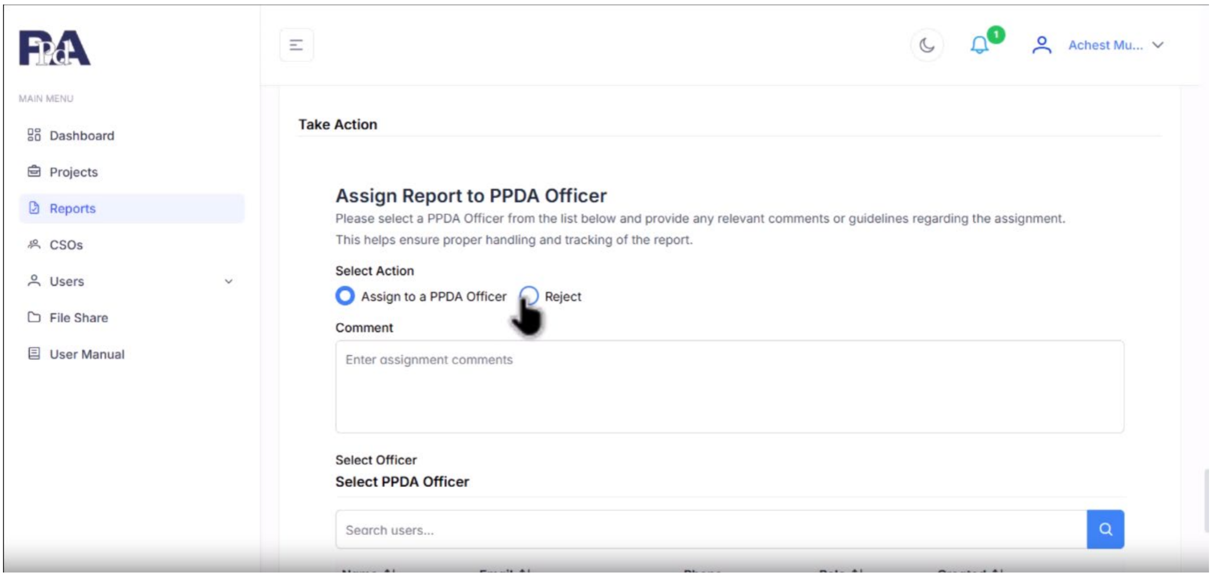

Figure 16: PPDA Admin Take Action Form

Option 1: Assign Report to PPDA Officer

- Select "Assign to PPDA Officer" option
- **Select Action:** Assign to a PPDA Officer
- **Select Officer:** Choose specific PPDA Officer from dropdown
- **Action Required:** Provide relevant comments for handling and tracking
- Click "Submit"

Option 2: Reject Report

- Select "Reject" option
- Rejects the report and sends it back for revision
- **Action Required:** Add detailed rejection comments
- Click "Submit"

PPDA Officer Reporting Process

Accessing Assigned Reports

Step 1: Login and Navigate to Reports

- Log into the PPDA CMS using your credentials
- From the dashboard, click on the "Assigned to Me" card
- You will be redirected to the reports page showing reports assigned by PPDA Admin

Step 2: View Report Details

- Locate the assigned report you want to review
- Click the "eye" icon to view the full report
- Review PPDA Admin assignment comments and instructions

Step 3: Review Report Content

- Read through the complete report and all previous stakeholder comments
- Review the PPDA Admin's assignment instructions
- Conduct necessary investigation or enforcement actions

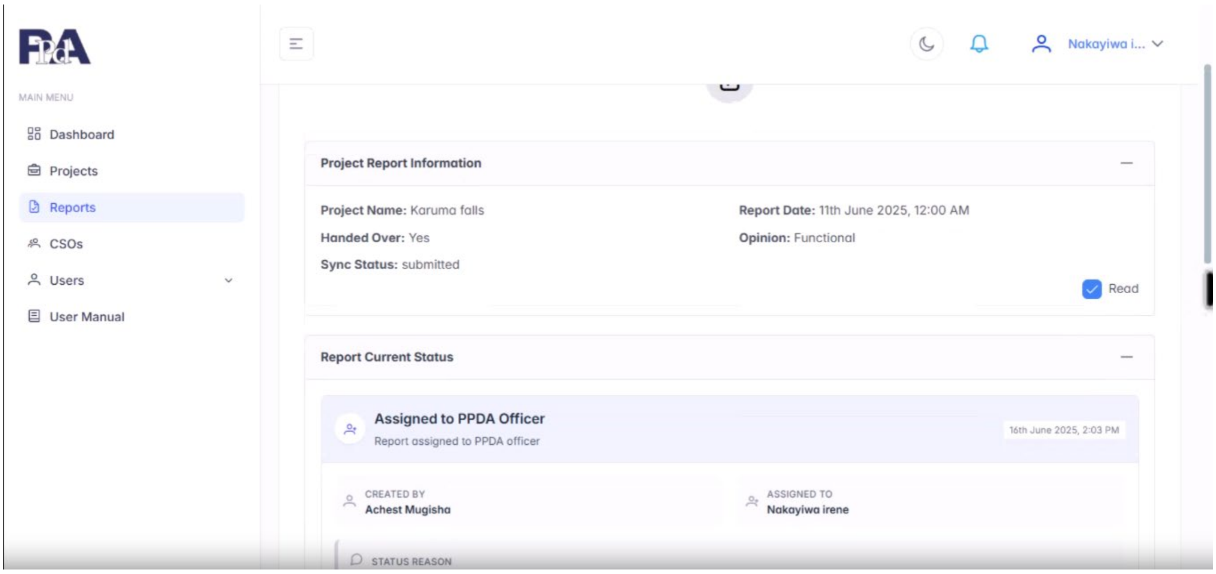

Figure 17: PPDA Officer Report Review Interface

Step 4: Add Comments

- Switch to the **Comments** tab
- Add remarks to communicate directly with CSO Approvers

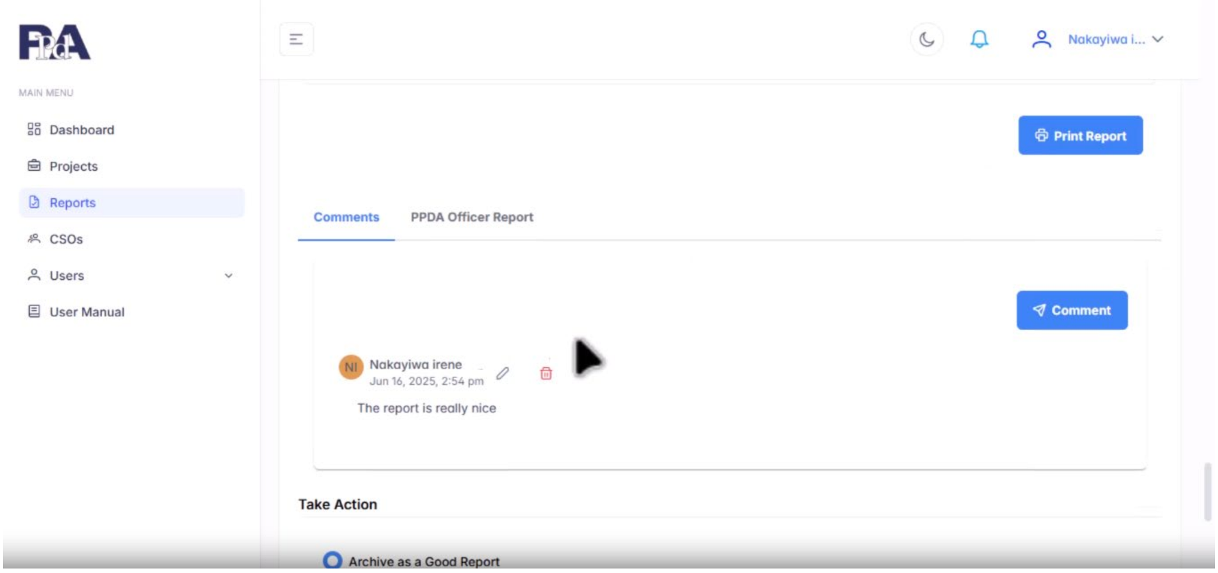

Figure 18: Adding Comments

Step 5: Add PPDA Officer Report

- Navigate to the **PPDA Officer Report** tab next to **Comments**
- Add your official PPDA Officer report or internal findings
- Use this section to upload investigative details or summaries

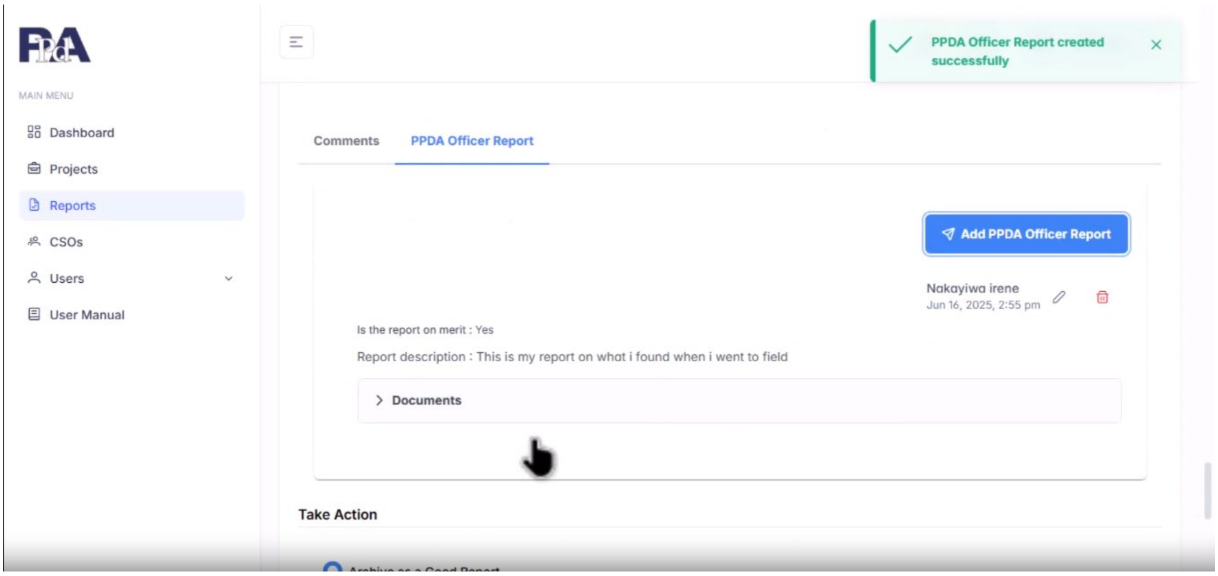

Figure 19: Adding a PPDA Officer Report

Step 6: Take Action on Report

- After reviewing and investigating the report, the "Take Action" form will appear below the report content.

Available Actions for PPDA Officer:

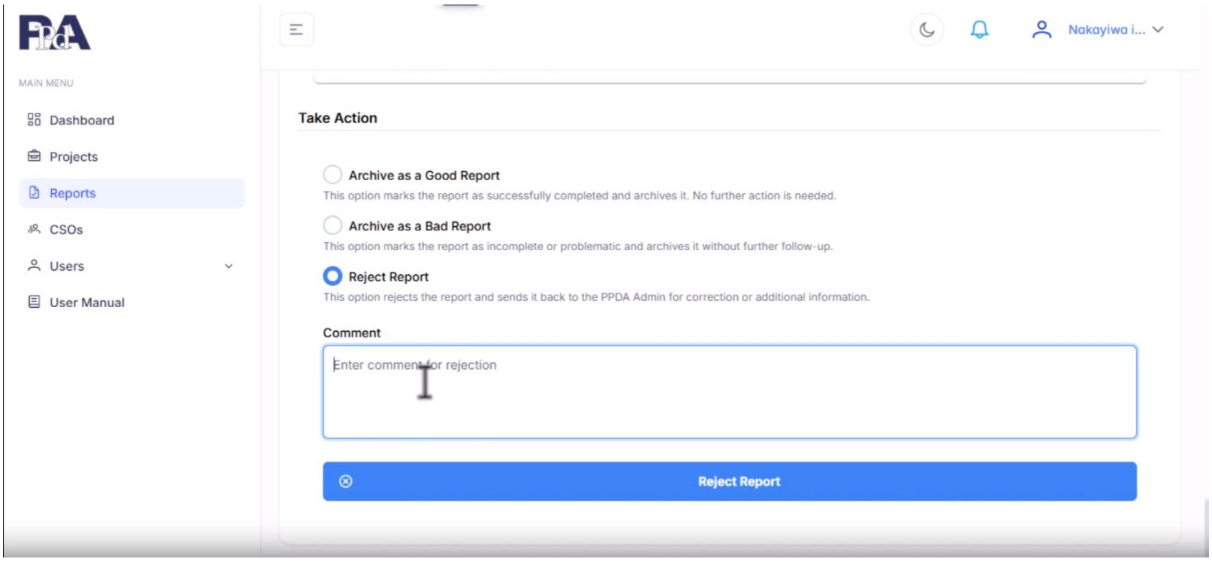

Figure 20: PPDA Officer Take Action Form

Option 1: Archive as a Good Report

- Select "Archive as a Good Report" option
- Marks the report as completed and archives it
- Add final resolution comments
- Click "Submit"

Option 2: Archive as a Bad Report

- Select "Archive as a Bad Report" option
- Archives incomplete/problematic report with no follow-up
- Add comments explaining final determination
- Click "Submit"

Option 3: Reject Report

- Select "Reject Report" option
- Rejects the report and sends it back to the PPDA Admin
- **Action Required:** Add detailed comment explaining rejection
- Click "Submit"

Additional Actions Available:

- **Attach a PPDA Officer Report:** Upload official PPDA investigation report
- **Add Comments:** Provide detailed investigation findings

- **Discuss with CSO Approvers:** Engage in dialogue about report findings

Archived Reports Management

Accessing Archived Reports

Archived reports can be accessed through the Archived cards.

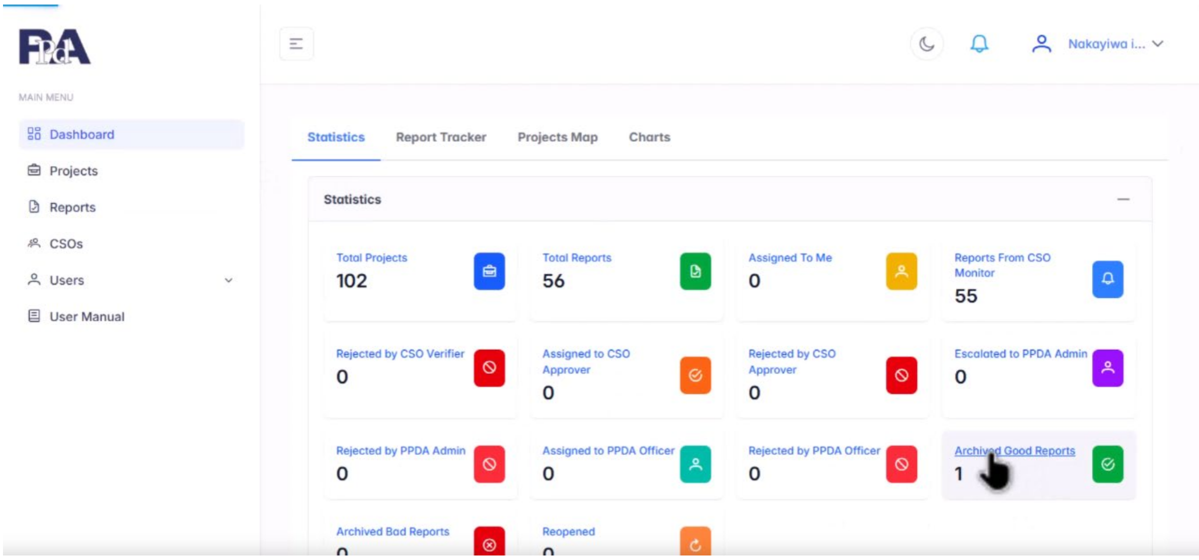

Figure 21: Archived Cards

Available Actions for Archived Reports:

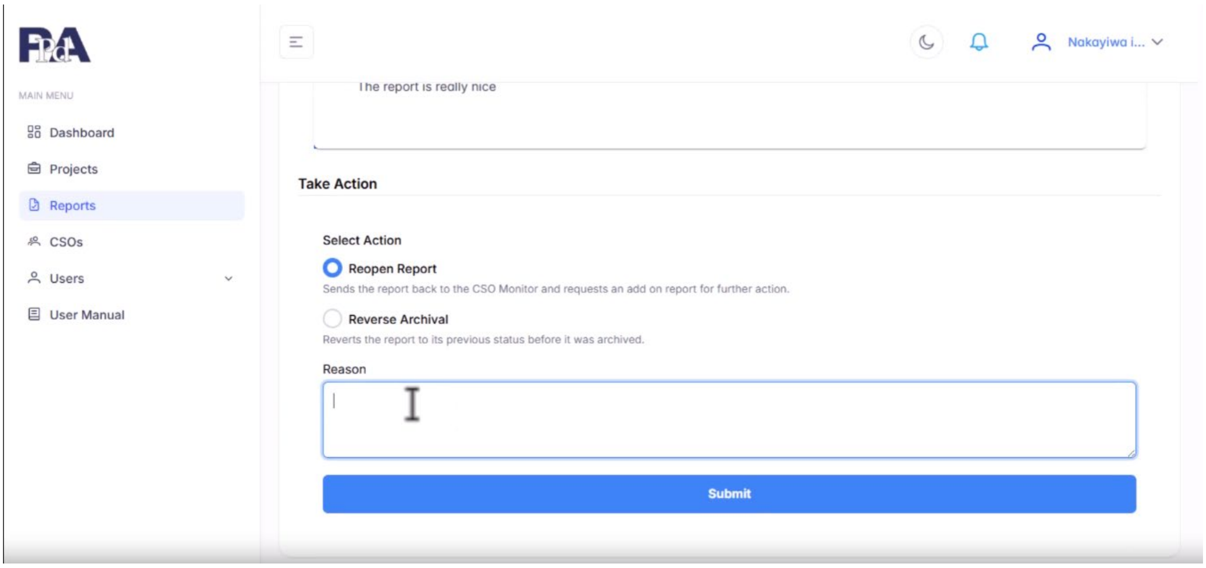

Figure 22: Archived Reports Take Action Form

Option 1: Reopen Report

- Select "Reopen Report" option
- Sends the report back to the CSO Monitor for follow-up
- Add comments explaining reason for reopening
- Click "Submit"

Option 2: Reverse Archival

- Select "Reverse Archival" option
- Reverts the report to its pre-archived state
- Add comments explaining reason for reversal
- Click "Submit"

Workflow Summary

The complete reporting workflow follows this path:

1. **CSO Admin** creates project → assigns to **CSO Monitor**
2. **CSO Monitor** creates report → submits (Status: **Submitted**)
3. **CSO Verifier** reviews → accepts/rejects
4. **CSO Approver** reviews → archives good/bad, escalates, or rejects
5. **PPDA Admin** (if escalated) → assigns to officer or rejects
6. **PPDA Officer** (if assigned) → archives or rejects
7. **Archived Reports** can be reopened or reversed

NOTE: Each role has specific actions available based on their authority level and the current report status.

POLLS MANAGEMENT

Learn how **System Admins** can create, manage, and distribute polls to CSO Monitors through the PPDA CMS dashboard, enabling real-time feedback collection.

Poll System Overview

The PPDA CMS polling feature empowers **System Admins** to create and send polls to CSO Monitors. These polls are delivered through the mobile app, where monitors can respond in real-time.

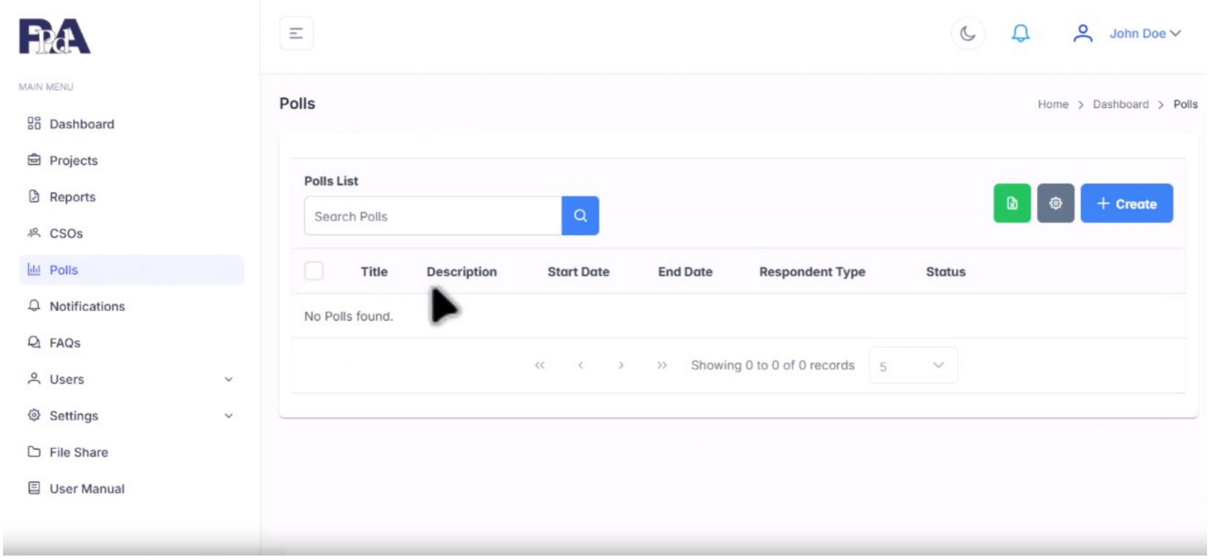

Figure 23: Poll Interface

Key Capabilities

- Create polls with open-ended, single-select, or multi-select questions using the built-in questionnaire builder
- Set response deadlines for each poll
- Target specific CSO Monitors for personalized polling
- Monitor response submissions in real-time

Notification Channels

- In-App Alerts (PPDA CMS App)
- Push Notifications
- SMS
- Email

Notifications are automatically sent once a poll is created and dispatched.

Creating a Poll

Step 1: Access Poll Creation

- Log into the PPDA CMS as System Admin
- Navigate to the "Polls" section from the main menu
- Click "Create Poll" or navigate to the polls creation page

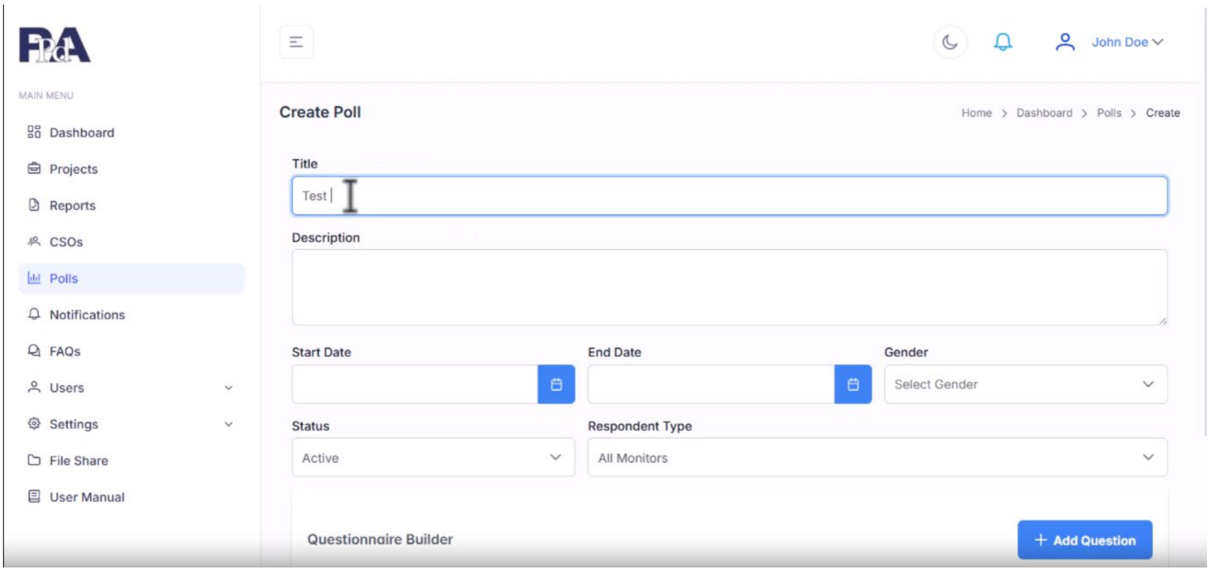

Figure 24: Poll Creation Interface

Step 2: Enter Poll Details

- **Title:** Enter a descriptive title for your poll
- **Description:** Provide detailed description of the poll purpose and context
- **Start Date:** Select when the poll should become active (click calendar icon)
- **End Date:** Select the poll deadline (click calendar icon)
- **Gender:** Select target gender if needed, or leave as "Select Gender"
- **Status:** Set poll status (typically "Active")

Step 3: Configure Respondent Type

Available Respondent Types:

- **All Monitors:** Poll sent to all registered CSO Monitors
- **Regional Offices:** Target monitors in specific regional offices
- **CSOs:** Target monitors from specific Civil Society Organizations
- **Users:** Select specific individual monitors within a CSO

NOTE: When selecting "Users" as respondent type, you will need to choose specific monitors within a Civil Society Organization from a detailed selection interface.

Step 4: Build Poll Questions

- Use the **Questionnaire Builder** section to create poll questions
- Click "**+ Add Question**" to start adding questions
- Configure question types (open-ended, single-select, or multi-select)
- Add multiple questions as needed

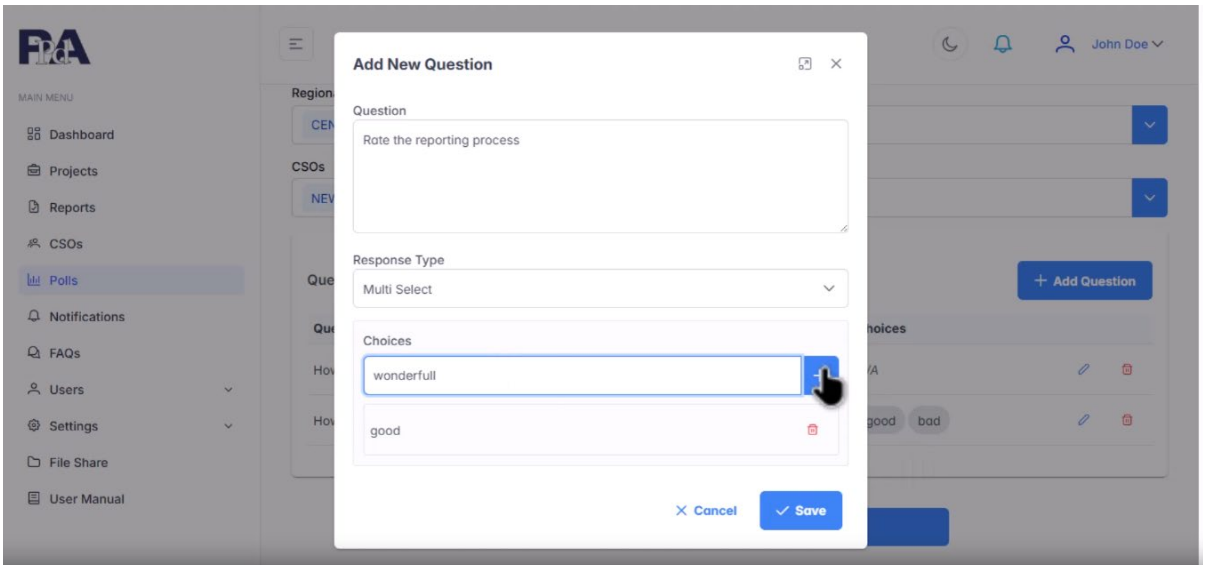

Figure 25: Questionnaire Builder Interface

Step 5: Submit Poll

- Review all poll details and questions
- Click the "**Submit**" button to create and distribute the poll
- Poll will be automatically sent to selected respondents through the PPDA CMS mobile app

NOTIFICATIONS MANAGEMENT

Learn how **System Admins** can create and manage notifications that are distributed to different user roles throughout the PPDA CMS system.

Notification System Overview

The PPDA CMS notification system supports both manual and automatic alerts. Admins can create notifications and send them to different users. The system also auto-triggers alerts for specific events, such as acknowledgements after CSO Monitors submit reports.

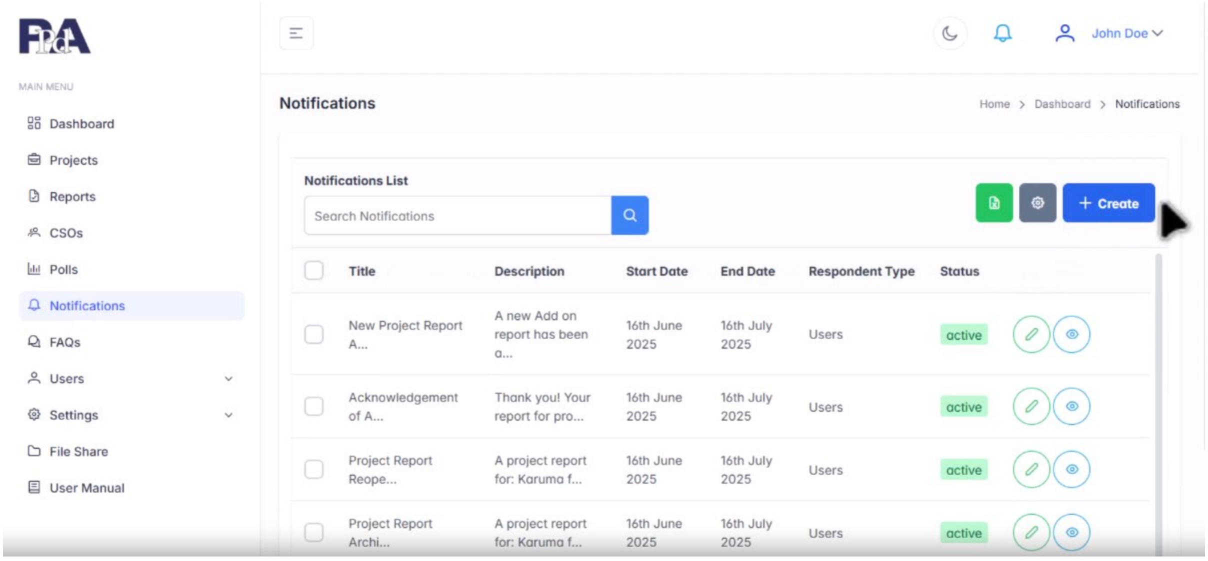

Figure 26: Notifications Interface

Notification Delivery Channels

- SMS
- Email
- In-System Dashboard Alerts
- Push Notifications (Mobile App)

Notification Recipients

Mobile App Users:

- CSO Monitors (via push notifications and in-app alerts)

Web Dashboard Users:

- System Admin
- CSO Admin
- CSO Verifiers

- CSO Approvers
- PPDA Admin
- PPDA Officers

Creating a Notification

Step 1: Access Notification Creation

- Log into the PPDA CMS as System Admin
- Navigate to the "Notifications" section from the main menu
- Click "Create Notification" or navigate to the notification's creation page

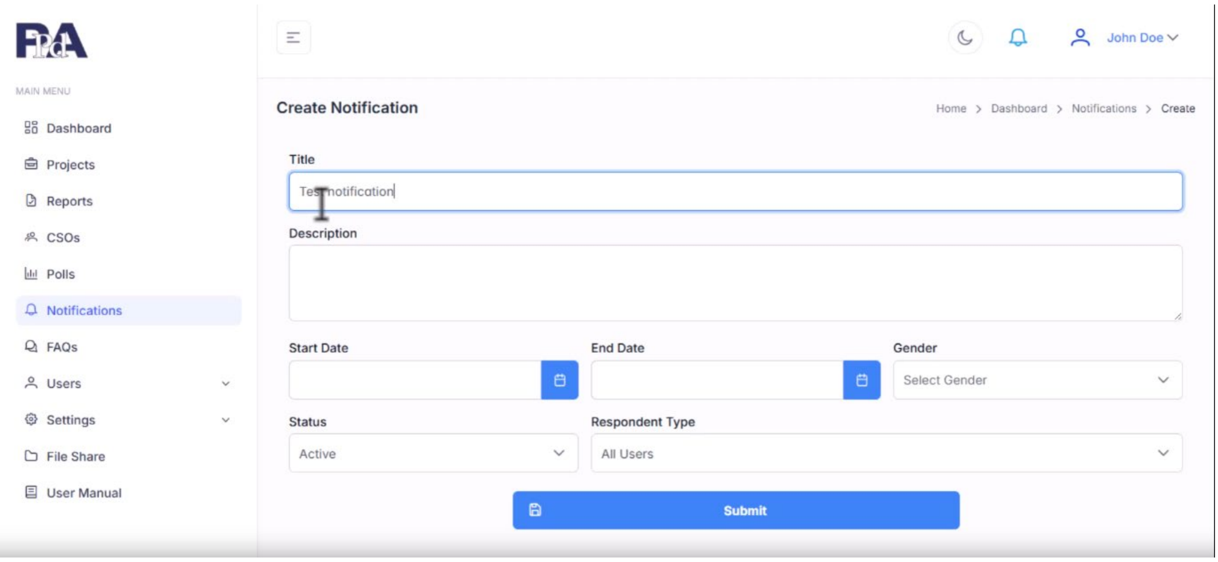

Figure 27: Notification Creation Interface

Step 2: Enter Notification Details

- **Title:** Enter a clear, descriptive title for your notification
- **Description:** Provide the full notification message content
- **Start Date:** Select when the notification should be sent (click calendar icon)
- **End Date:** Select notification expiry date (click calendar icon)
- **Gender:** Select target gender if needed, or leave as "Select Gender"
- **Status:** Set notification status (typically "Active")

Step 3: Configure Respondent Type

Available Respondent Types:

- **All Users:** Notification sent to all system users
- **Regional Offices:** Target users in specific regional offices
- **CSOs:** Target users from specific Civil Society Organizations

- **Users:** Select specific individual users to receive the notification

Note: When selecting "Users" as respondent type, you will need to choose specific users from the system to receive the notification.

Step 4: Delivery Method

- **CSO Monitors:** Receive notifications through the PPDA CMS mobile app
- **Other Roles:** Receive notifications in the PPDA CMS web dashboard
- **All Users:** Automatically receive notifications via email and SMS regardless of their role

Step 5: Submit Notification

- Review all notification details and recipient settings
- Click the "**Submit**" button to create and send the notification
- Notification will be distributed through appropriate channels based on user roles

Automatic Notifications: The system also automatically generates notifications for specific events, such as:

- Report submission acknowledgements
- Assignment notifications

FILE SHARE MANAGEMENT

Learn how **System Admins** can share files with **CSO Admins** through the PPDA CMS dashboard, enabling efficient document distribution and collaboration.

File Share System Overview

The PPDA CMS file sharing feature allows System Admins to upload and distribute files directly to CSO Admins. Files are shared through the web dashboard with recipient selection and attachment capabilities.

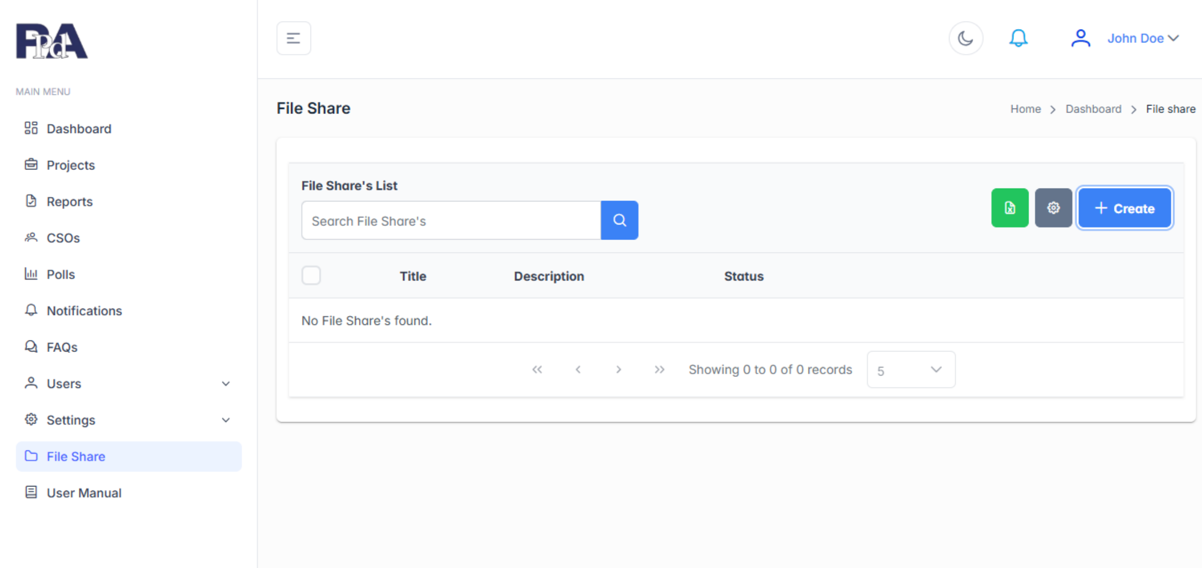

Figure 28: File Share Main Interface

Key Capabilities

- Upload and share files with multiple CSO Admins simultaneously
- Search and select specific recipients from the user database
- Add file attachments with preview and management options
- Set file sharing status (Active/Inactive)
- Track file distribution and access

Sharing a File

Step 1: Access File Share Creation

- Log into the PPDA CMS as System Admin
- Navigate to the "File Share" section from the main menu
- Click "Create" button to open the file sharing interface

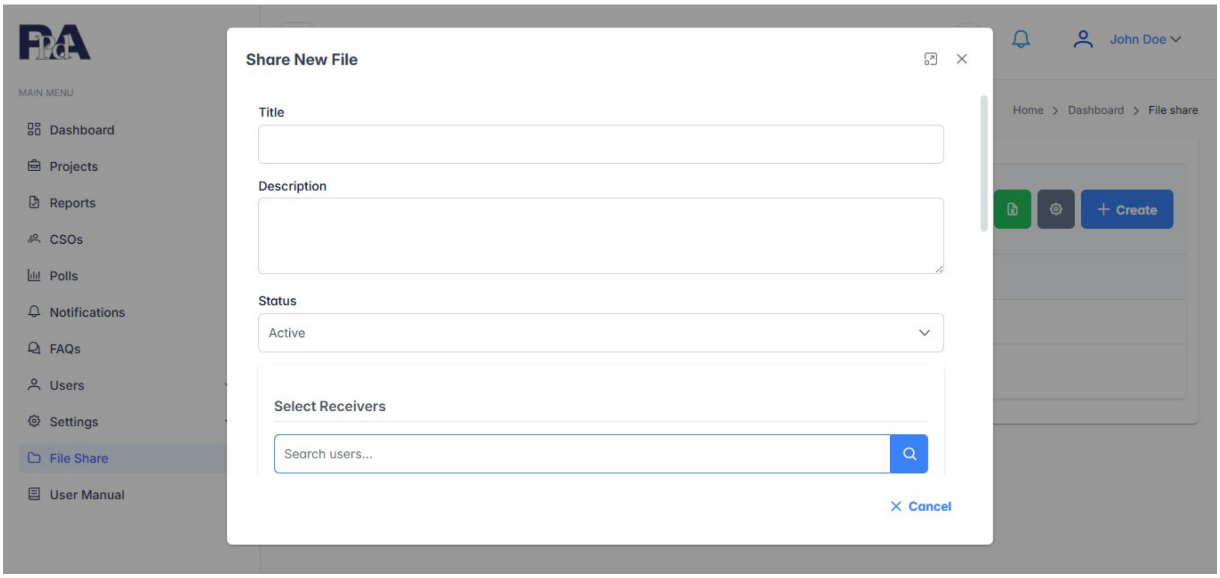

Figure 29: File Share Form

Step 2: Enter File Details

- **Title:** Enter a descriptive title for the file being shared
- **Description:** Provide detailed description of the file content and purpose
- **Status:** Set sharing status (typically "Active")

Step 3: Select Recipients

- Use the "Select Receivers" section to choose file recipients
- **Search Functionality:** Use "Search users..." field to find specific CSO Admins
- **User Selection:** Browse through the user list showing:
    - Name
    - Email address
    - Phone number
    - Role (CSO Admin)
    - Account creation date
- **Multiple Selection:** Use checkboxes to select multiple CSO Admins as recipients

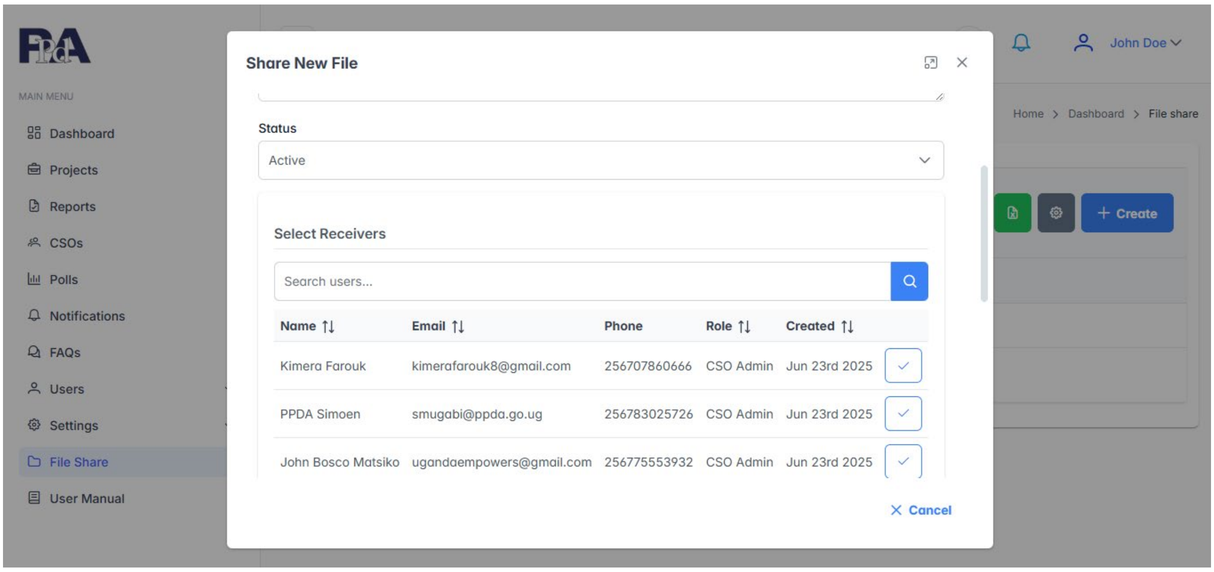

Figure 30: Recipient Selection Interface

Step 4: Add File Attachments

- Click "**Add Attachment**" button to upload files
- **File Management Table:** View uploaded files with columns for:
    - Type (file format)
    - Preview (thumbnail/icon)
    - File Name
    - Caption
    - Actions (edit/delete options)
- **Note:** "No available options" appears when no files are attached

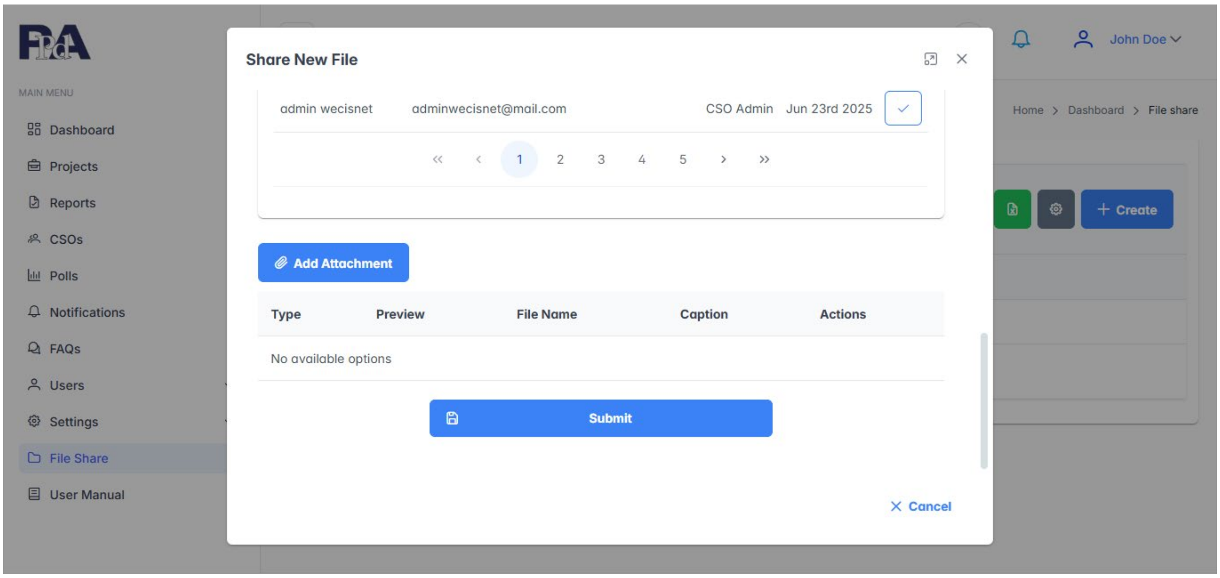

Figure 31: File Attachment Interface

Step 5: Submit File Share

- Review all file details, recipients, and attachments
- Click the "**Submit**" button to share the file
- Files will be distributed to selected CSO Admins through the PPDA CMS dashboard

File Distribution:

- **CSO Admins:** Receive shared files through their PPDA CMS web dashboard
- **Access Control:** Only selected recipients can access the shared files

File Management:

- **Edit Shared Files:** Modify file details and recipient lists
- **Archive Files:** Deactivate file sharing when no longer needed

FAQs MANAGEMENT

Learn how System Admins can create, manage, and maintain Frequently Asked Questions (FAQs) in the PPDA CMS dashboard to provide users with quick access to common information and support.

FAQ System Overview

The PPDA CMS FAQ module allows **System Admins** to create and manage a comprehensive knowledge base of frequently asked questions. This self-service resource helps users find answers to common queries about the system functionality, processes, and support.

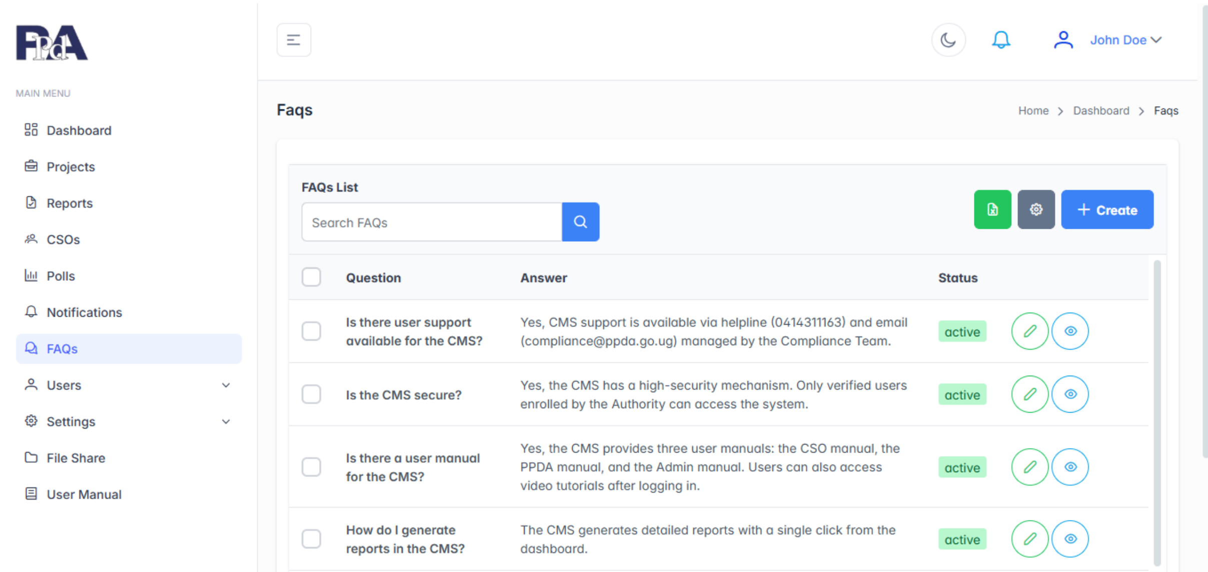

Figure 32: FAQ List Interface

Key Capabilities

- Create question and answer pairs for common user inquiries
- Search through existing FAQs for quick reference
- Set FAQ status (Active/Inactive) to control visibility
- Edit and update FAQ content as needed
- View FAQ details for comprehensive information display

Current FAQ Topics Include

- User support availability and contact information
- System security and access controls
- User manual availability and access
- Report generation processes

Creating an FAQ

Step 1: Access FAQ Creation

- Log into the PPDA CMS as System Admin
- Navigate to the "FAQs" section from the main menu
- Click "Create" button to open the FAQ creation form

Step 2: Enter FAQ Details

- **Question:** Enter the frequently asked question in clear, concise language
- **Answer:** Provide a comprehensive answer that addresses the question thoroughly
- **Status:** Set FAQ status (typically "Active" to make it visible to users)

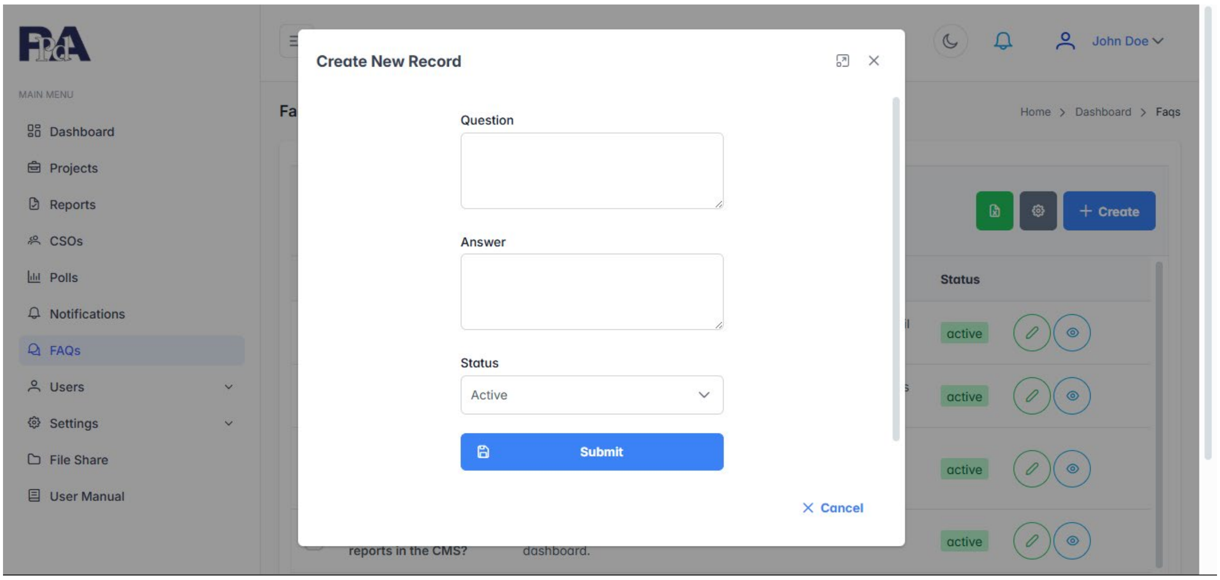

Figure 33: Create New FAQ Record Form

Step 3: Submit FAQ

- Review the question and answer content for accuracy
- Ensure the status is set appropriately
- Click "**Submit**" button to save the FAQ
- Click "**Cancel**" to discard changes if needed

Managing Existing FAQs

FAQ List Features:

- **Search Functionality:** Use "Search FAQs" field to find specific questions or topics
- **FAQ Display:** View all FAQs in a table format showing:
    - Question text
    - Answer content
    - Status (active/inactive)

- Action Options:
    - Edit: Modify FAQ content using the edit icon
    - View: Display full FAQ details using the view icon
    - Status Toggle: Activate or deactivate FAQs as needed

FAQ Content Examples:

- User Support: Contact information for helpline and email support
- System Security: Information about CMS security mechanisms and user verification
- User Manuals: Availability of CSO, PPDA, and Admin manuals with video tutorials
- Report Generation: Instructions for creating detailed reports from the dashboard

Best Practices:

- Keep questions clear and specific to user needs
- Provide detailed, actionable answers
- Regularly review and update FAQ content
- Organize FAQs by topic or user role for easier navigation
- Set inactive status for outdated information rather than deleting

CSO MANAGEMENT

Learn how **System Admins** can manage **Civil Society Organizations (CSOs)** in the PPDA CMS dashboard to organize users and facilitate project mapping with precise geographical coordinates.

CSO Management Overview

The CSO module allows **System Admins** to manage a comprehensive database of Civil Society Organizations.

Key Capabilities

- Create CSO records with complete organizational details
- Set geographical coordinates for CSO office locations
- Manage CSO status (Active/Inactive) to control visibility
- Upload organization logos for visual identification
- Associate CSOs with regional offices and districts
- Edit and update CSO information as needed
- View comprehensive CSO details and operational areas

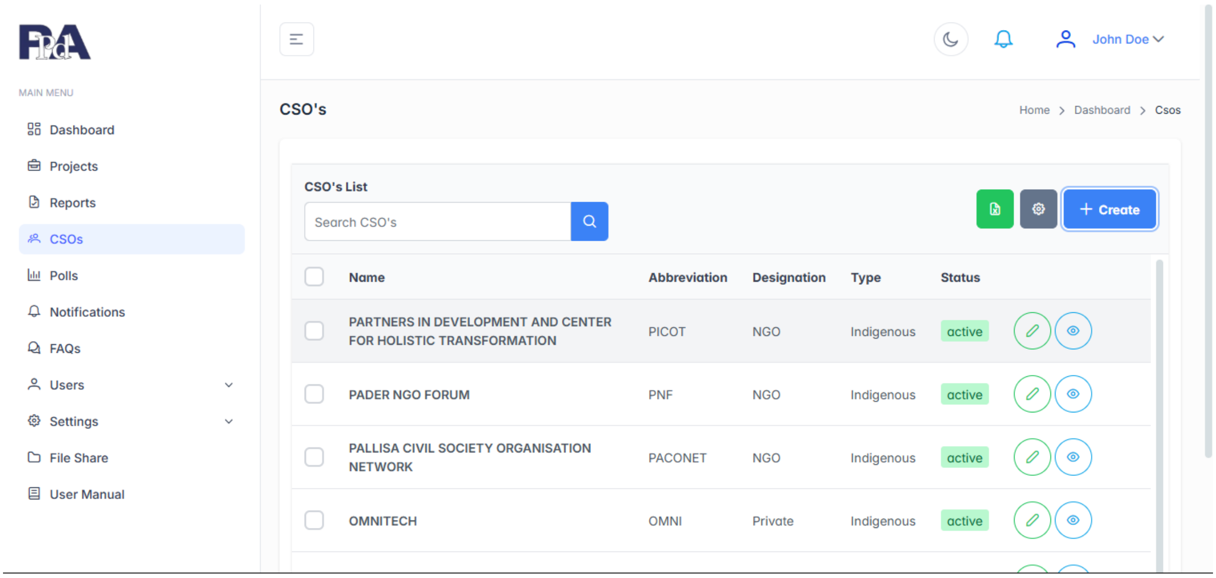

Figure 34: CSO List Interface

CSO Organizational Structure:

- **User Clustering:** CSO users are attached to specific CSOs for organizational management
- **Geographical Mapping:** CSO coordinates enable automatic map zooming during project creation

- **Regional Association:** CSOs are linked to regional offices and districts for administrative purposes
- **Project Facilitation:** CSO locations help administrators place project markers accurately on maps

Creating a CSO

Step 1: Access CSO Creation

- Log into the PPDA CMS as System Admin
- Navigate to the "CSOs" section from the main menu
- Click "Create" button to open the CSO creation form

Step 2: Enter Basic CSO Information

- **Name:** Enter the complete Civil Society Organization name
- **Abbreviation:** Provide the commonly used acronym or short form
- **Designation:** Select organization type from dropdown (NGO, Private, etc.)
- **Type:** Choose organization category (Indigenous, International, etc.)
- **Description:** Add detailed information about the CSO's mission and activities
- **Status:** Set CSO status (typically "Active" to make it operational)

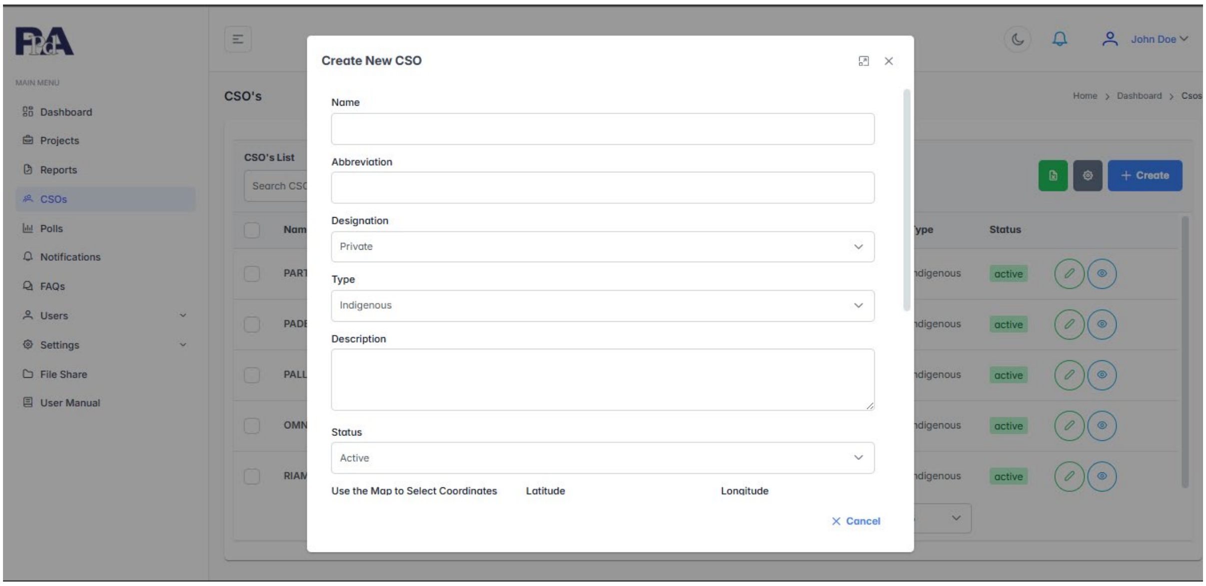

Figure 35:Create New CSO Form - Basic Information

Step 3: Set Geographical Coordinates

- **Location Mapping:** Use coordinates to define CSO office location
- **Map Integration:** Click "Open Map" button to select precise coordinates
- **Latitude:** Enter or select the latitude coordinate

- **Longitude:** Enter or select the longitude coordinate
- **Purpose:** These coordinates enable automatic map zooming during project creation, making it easier for CSO admins to place project markers in their operational area

Step 4: Assign Regional Information

- **Regional Offices:** Search and select associated regional offices from dropdown
- **Districts:** Search and select operational districts from dropdown
- **Administrative Linking:** This creates hierarchical organization structure for management

Step 5: Upload CSO Logo

- **Logo Upload:** Click "Upload CSO Logo" to add organization branding
- **File Requirements:** Maximum file size 5MB, supported formats: JPG, PNG, GIF
- **Visual Identity:** Logo appears in CSO listings and project associations

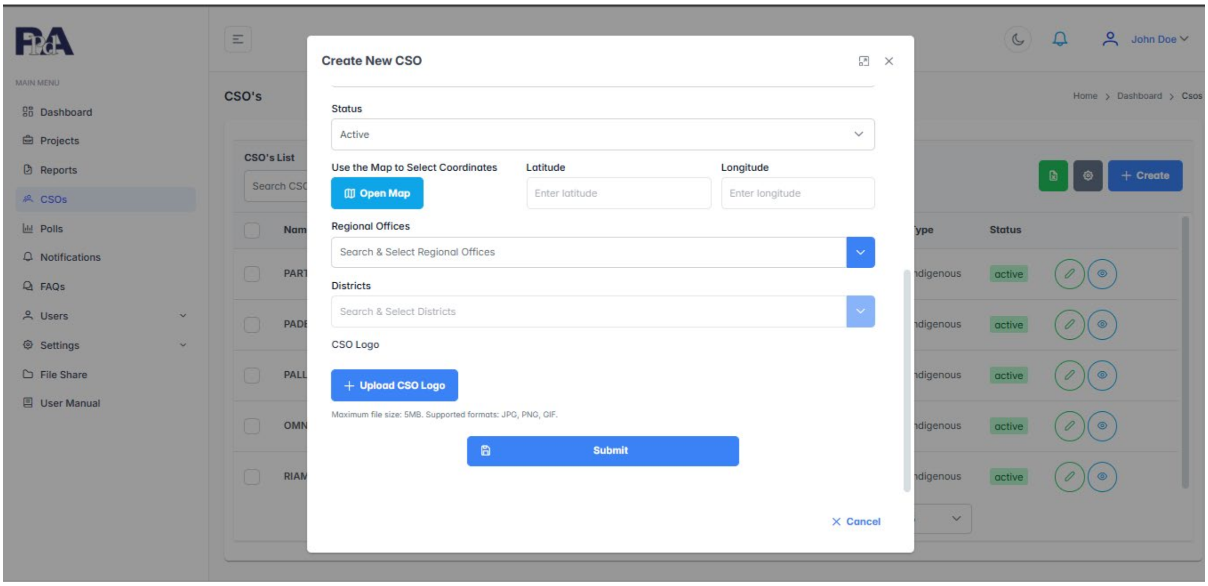

Figure 36: Create New CSO Form - Location and Branding

Step 6: Submit CSO Record

- Review all entered information for accuracy
- Ensure coordinates are correctly set for operational area
- Verify regional office and district associations
- Click "Submit" button to save the CSO record
- Click "Cancel" to discard changes if needed

Managing Existing CSOs

CSO List Features include:

- **Search Functionality:** Use "Search CSO's" field to find specific organizations

- **Comprehensive Display:** View all CSOs in table format showing:
    - Organization name and abbreviation
    - Designation (NGO, Private, etc.)
    - Type (Indigenous, International, etc.)
    - Current status (Active/Inactive)
- **Action Options:**
    - **Edit:** Modify CSO details using the edit icon
    - **View:** Display complete CSO information using the view icon
    - **Status Management:** Activate or deactivate CSOs as needed

Operational CSO Benefits

User Organization

- CSO users are clustered and attached to their respective organizations
- Enables role-based access and organizational hierarchy management
- Facilitates targeted communication and resource allocation

Geographical Project Mapping

- CSO coordinates automatically zoom map to operational areas during project creation
- Simplifies project marker placement for CSO administrators
- Ensures accurate geographical representation of CSO activities
- Reduces mapping errors and improves project location precision

Administrative Efficiency

- Regional office and district associations enable structured management
- Status controls allow temporary deactivation without data loss
- Logo integration provides visual organization identification

NOTE:

- Ensure accurate coordinate entry for effective map zooming functionality
- Regularly update CSO information and operational areas
- Maintain active status for operational organizations
- Use clear, descriptive names and abbreviations
- Upload high-quality logos for professional presentation
- Verify regional office and district associations for proper administrative structure

USER MANAGEMENT

Learn how **System Admins** can manage, and maintain user accounts in the PPDA CMS dashboard with role-based access control and organizational clustering for both CSO and PPDA users.

Users Overview

The User Management module provides comprehensive user administration with two distinct user categories: CSO Users and PPDA Users. This system enables role-based access control, organizational clustering, and regional-based user management to ensure proper system security and operational efficiency.

Key Capabilities

- Create and manage CSO Users attached to specific Civil Society Organizations
- Create and manage PPDA Users with regional office assignments
- Assign appropriate roles based on user category and responsibilities
- Control user status (Active/Inactive) for access management
- Search and filter users by various criteria
- Edit and update user information and role assignments
- View comprehensive user details and organizational associations

User Categories

- **CSO Users:** Attached to specific CSOs and regional offices for organizational project management
- **PPDA Users:** Regional-based users for administrative oversight and system management
- **System Admin:** Special administrative role with system-wide access (exception to regional requirements)

User Role Structure

PPDA User Roles

- **System Admin:** Complete system administration with unrestricted access
- **PPDA Admin:** Administrative functions for PPDA operations and oversight
- **PPDA Officer:** Operational duties and regional PPDA activities management

Creating PPDA Users

Step 1: Access PPDA User Creation

- Navigate to "Users" section from main menu
- Select "PPDA Users" from user category submenu
- Click "Create" button to open PPDA user creation form

Step 2: Enter PPDA User Details

- **Basic Information:** Complete name, email, username, phone, gender, and password fields
- **Status Setting:** Set appropriate user status for access control

Step 3: Assign PPDA User Role

- **Role Selection:** Choose from PPDA-specific roles:
    - System Admin (unrestricted system access)
    - PPDA Admin (administrative functions)
    - PPDA Officer (operational duties)

Step 4: Regional Office Assignment

- **Regional Requirement:** Select appropriate regional office (Required for all PPDA users except System Admin)
- **Regional-Based Management:** PPDA users operate within assigned regional boundaries

Step 5: Submit PPDA User Account

- Verify all information and role assignments
- Confirm regional office selection (where applicable)
- Submit user account for system activation

Managing Existing Users

User List Features

- **Category Navigation:** Switch between CSO Users and PPDA Users views
- **Search Functionality:** Use "Search users" field to locate specific accounts
- **Comprehensive Display:** View users in table format showing:
    - Name and email address
    - Assigned role and current status
    - Gender and regional office assignment
    - Associated CSO (for CSO users)
- **Pagination:** Navigate through user records with page controls

- **Records Display:** Shows total user count and current page range

User Management Actions

- **Edit:** Modify user details, roles, and assignments using edit icon
- **View:** Display complete user profile and organizational associations using view icon
- **Status Control:** Activate or deactivate user accounts as needed

Operational Users Benefits

Organizational Clustering

- CSO users are properly clustered within their assigned organizations
- Enables role-based project management and organizational hierarchy
- Facilitates targeted communication and resource allocation within CSOs

Regional-Based Administration

- PPDA users operate within defined regional boundaries for administrative efficiency
- Regional office assignments ensure proper oversight and management structure
- System Admin role provides exception for system-wide administrative functions

Role-Based Access Control

- Specific roles determine system permissions and functional access
- CSO roles focus on organizational project management and monitoring
- PPDA roles concentrate on administrative oversight and system management

NOTE:

- Ensure accurate CSO and regional office assignments for proper user clustering
- Assign roles that match user responsibilities and required system access levels
- Maintain active status for operational users and inactive for temporary suspensions
- Use clear, professional usernames and secure passwords
- Regularly review user roles and organizational assignments
- Verify contact information for effective system communications
- Monitor user activity and adjust permissions as needed for security compliance

SETTINGS MODULE

Learn how System Admins can configure and manage system-wide settings that affect all modules within the PPDA CMS dashboard, including location hierarchies, procurement configurations, PDEs management, user roles, and system monitoring.

Settings Module Overview

The Settings module provides comprehensive system configuration capabilities that form the foundation for all other system operations. These settings directly impact project creation, report generation, user management, CSO operations, and overall system functionality. The module is organized into interconnected components that establish the structural framework for the entire platform.

Key Capabilities

- Configure hierarchical location structures (Regions → Districts → Counties → Sub-Counties → Parishes → Villages)
- Manage procurement types, methods, and PDEs
- Define and control user roles with granular permission management
- Monitor system activities through comprehensive audit trails
- Establish organizational structures for regional offices and sectors

System Impact

- **Project Creation:** Location and procurement settings determine available options during project setup
- **Report Generation:** Regional and organizational structures influence reporting hierarchies
- **User Management:** Role definitions and regional offices affect user creation and access control
- **CSO Operations:** Location and sector configurations impact CSO registration and project assignments

Location Settings

Regions Configuration

The regional structure forms the top level of the location hierarchy and serves as the primary organizational boundary for user assignments and administrative oversight.

Regional Management Features

- Create and manage primary administrative regions
- Link regions to districts
- Navigate to subordinate location levels through hyperlinked connections

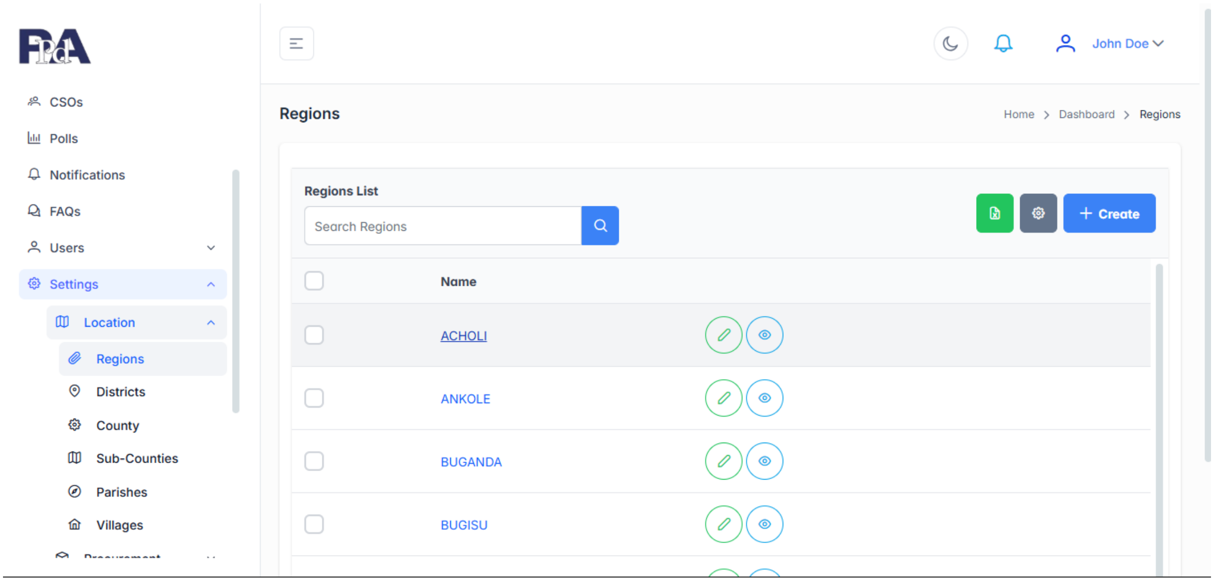

Figure 37: Regions List Interface

Region Creation Process:

- Navigate to Settings → Location → Regions
- Click "Create" button to open region creation form
- Enter region name
- Submit to save region

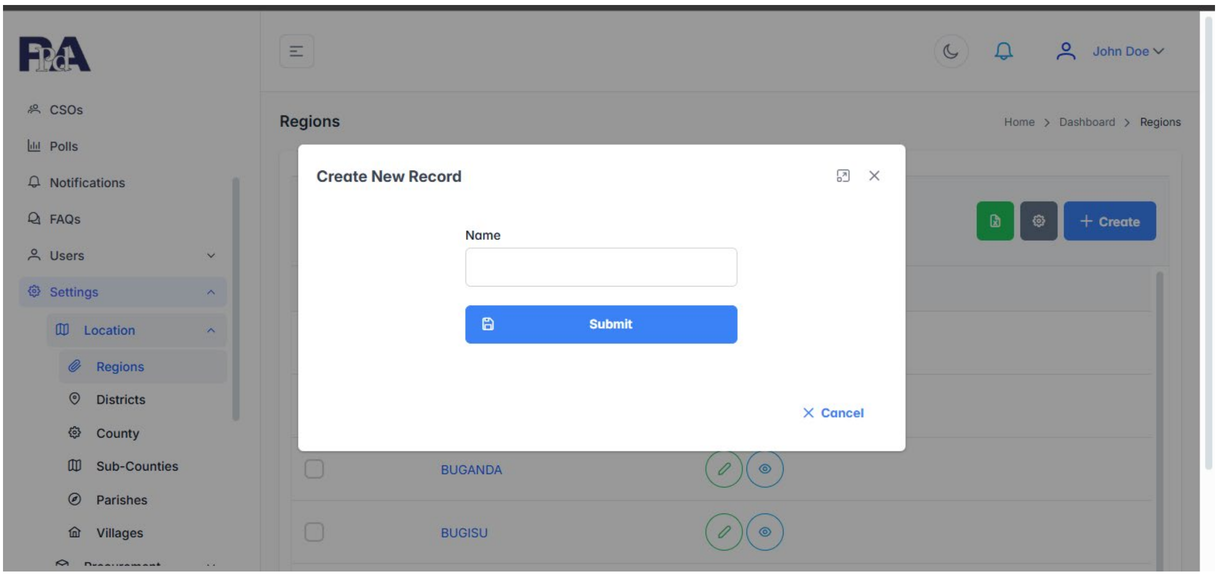

Figure 38: Create Region Form

View Region

- Click on any region name in the list to navigate to its districts
- Use the 👁 view icon to display comprehensive region details

Edit Region

- Click the ✏️ pencil icon beside the region name in the list
- Update region name.
- Change region status (Active/Inactive) as needed
- Click Submit to apply changes or Cancel to discard modifications

Delete Region

- Click the 🗑 trash icon beside the region name
- System displays confirmation dialog: "Are you sure you want to delete this region?"
- Confirm deletion to permanently remove the region
- NOTE: Regions with associated districts, users, or projects cannot be deleted until dependencies are resolved

Districts Configuration

Districts represent the second level of the location hierarchy and are directly linked to their parent regions through navigational relationships.

District Management Features

- Create districts within specific regional boundaries
- Establish district-to-region hierarchical relationships
- Navigate to county-level subdivisions
- Control district-based project and user assignments

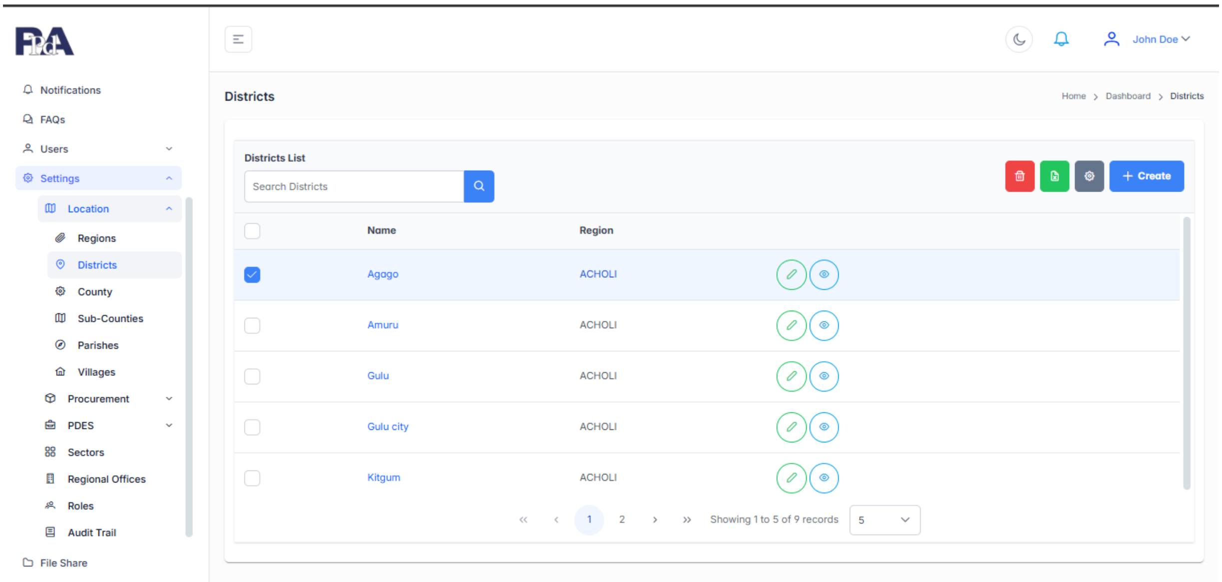

Figure 39: Districts List Interface

District Creation Process

- Navigate to specific region >> Select region for district assignment
- Enter district name
- Submit to save district

View District

- Click on district name to navigate to associated counties
- Use the 👁️ view icon to display comprehensive district profile

Edit District

- Click the ✏️ pencil icon beside the district name
- Update district details
- Change district status or parent region assignment
- Submit changes to apply modifications

Delete District

- Click the 🗑️ trash icon beside the district name
- Confirm deletion in popup dialog

Counties Configuration

Counties form the third tier of the location hierarchy, providing more granular geographic organization within district boundaries.

County Management Features

- Create counties within district administrative boundaries
- Establish county-to-district hierarchical relationships
- Navigate to sub-county level divisions
- Support detailed project location specifications

Create County

- Navigate to Settings → Location → District, to choose the district to which the county belongs
- Click + Create button
- Enter **County Name** and administrative designation
- Select **Parent District** from dropdown (pre-filtered if accessed through district)
- Set **Status** (Active/Inactive)
- Submit county configuration

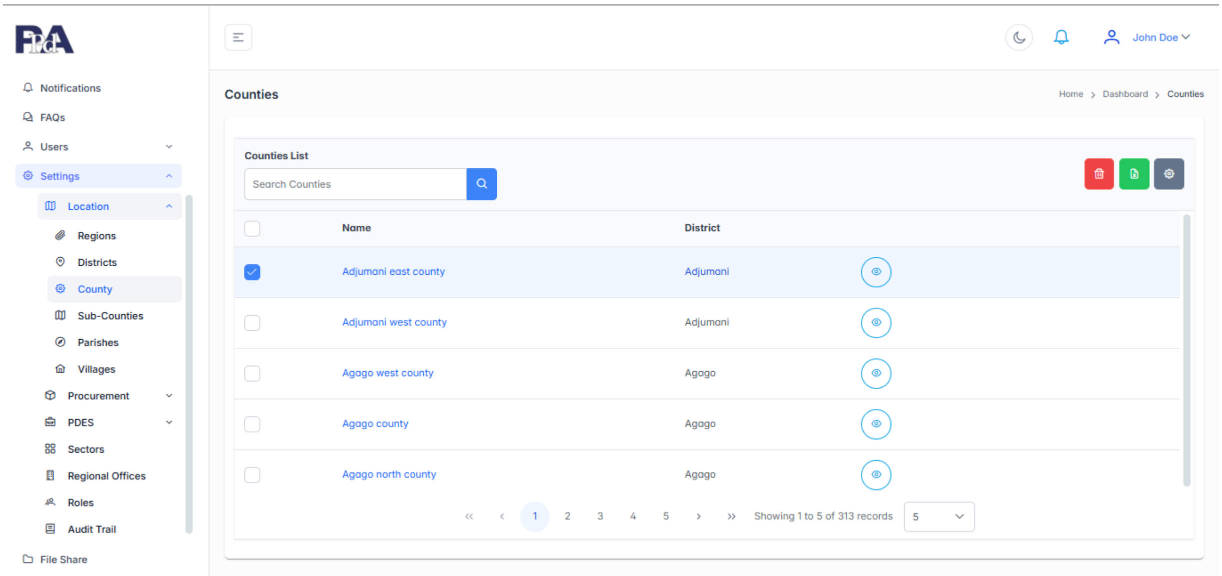

Figure 40: Counties List Interface

View County

- Click county name to navigate to sub-counties, or use view icon for detailed county profile

Edit County

- Use ✏️ pencil icon to modify county details and district assignment.

Delete County

- Click 🗑️ trash icon and confirm deletion

Sub-Counties Configuration

Sub-counties provide fourth-level location granularity for precise project and activity location identification.

Sub-County Management Features

- Create sub-counties within county boundaries
- Manage sub-county administrative structures
- Link to parish-level subdivisions
- Support detailed community-level project targeting
- Enable precise location-based reporting and monitoring

Create Sub-County

- Navigate through Settings → Location → Sub-Counties or access via county navigation
- Click + Create button to open sub-county form
- Complete **Sub-County Name** and administrative details
- Select **Parent County** from filtered dropdown
- Enter **Sub-County Code** and administrative identifiers
- Set **Status** and submit configuration

View Sub-County

- Navigate to parishes by clicking sub-county name, or use 👁️ icon for comprehensive profile

Edit Sub-County

- Click ✏️ pencil icon to update sub-county information and administrative assignments

Delete Sub-County

- Use 🗑️ trash icon with confirmation dialog

Parishes Configuration

Parishes represent the fifth level of location hierarchy, enabling community-level project identification and management.

Parish Management Features

- Create parishes within sub-county boundaries
- Manage parish codes and community identifiers
- Link to village-level subdivisions
- Support grassroots project implementation tracking
- Enable community-based monitoring and evaluation

Create Parish

- Access Settings → Location → Parishes or navigate via sub-county
- Click + Create button for parish creation form
- Enter **Parish Name**
- Select **Parent Sub-County** from dropdown menu
- Set **Status** and submit parish configuration

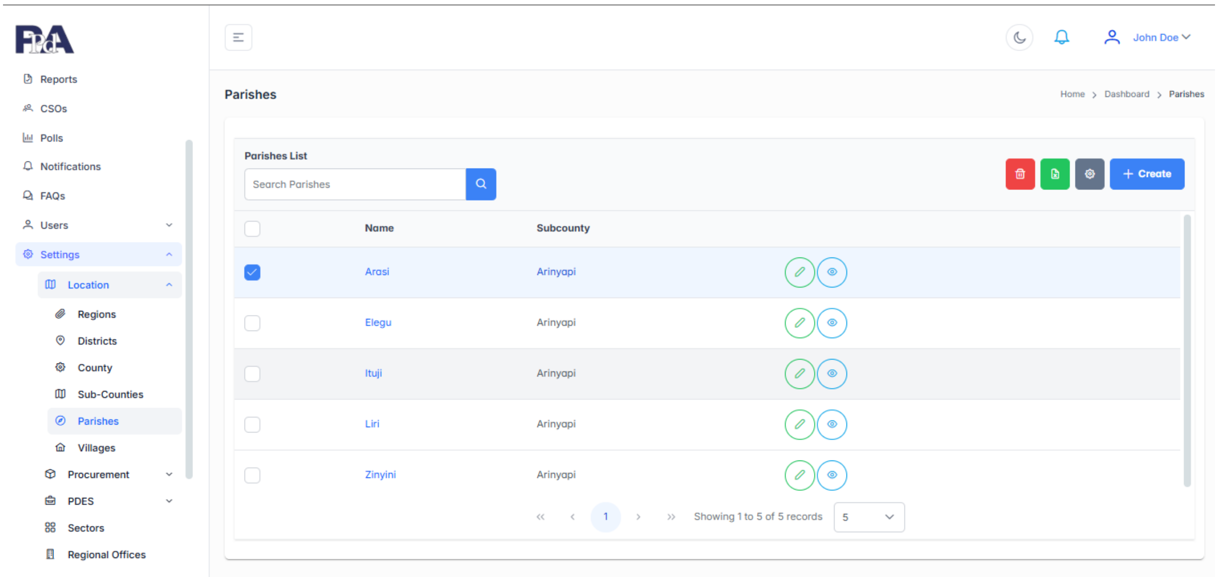

Figure 41: Parish List Interface

View Parish

- Click parish name to access villages, or use view icon for detailed parish information

Edit Parish

- Use ✏️ pencil icon to modify parish details.

Delete Parish

- Click 🗑️ trash icon after selecting a parish and confirm deletion

Villages Configuration

Villages form the most granular level of the location hierarchy, providing precise community-level project targeting and implementation tracking.

Village Management Features

- Create villages within parish boundaries
- Support precise project location specification
- Enable detailed community-level impact assessment
- Facilitate grassroots monitoring and evaluation activities

Create Village

1. Navigate to Settings → Location → Villages or access through parish navigation
2. Click + Create button to open village creation form
3. Complete **Village Name**.
4. Select **Parent Parish** from filtered dropdown menu
5. Set **Status** (Active/Inactive) and submit village configuration

View Village

- Use 👁️ view icon to display comprehensive village profile

Edit Village

- Click ✏️ pencil icon to modify village information
- Update village name and parish assignment.
- Submit changes to apply modifications

Delete Village

- Click 🗑️ trash icon after selecting a village
- System displays confirmation: "Are you sure you want to delete this village?"

- Confirm deletion to permanently remove village record

Location Hierarchy Navigation:

- **Hyperlinked Structure:** Click on any location name to navigate to its subordinate levels
- **Breadcrumb Navigation:** Clear path showing current location within hierarchy
- **Search Functionality:** Search across all location levels for quick access
- **Filtering Options:** Filter locations by parent administrative units

Procurement Settings

Procurement Types Configuration

Procurement types define the categories of procurement activities that can be managed within the system, directly impacting project creation and procurement workflows.

Procurement Type Features

- Define available procurement categories for project assignments
- Control procurement workflow options during project creation
- Link procurement types to specific project categories
- Manage procurement type status and availability

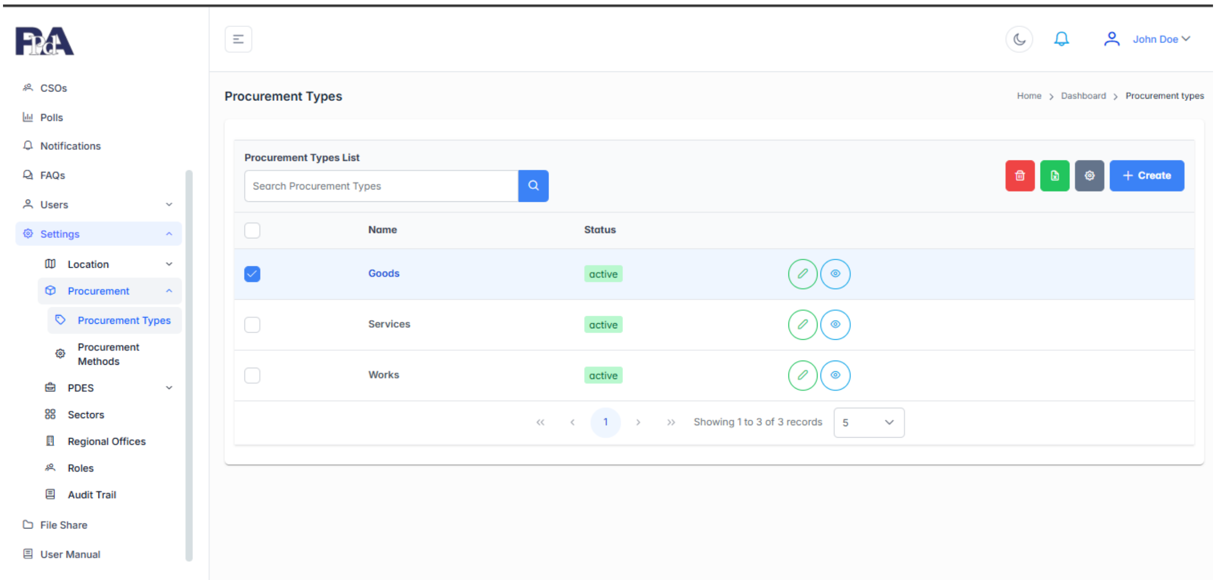

Figure 42: Procurement Types List Interface

Procurement Type Creation

- Navigate to Settings → Procurement → Procurement Types

- Click "Create" to open procurement type creation form
- Enter procurement type name and description
- Set procurement type status (Active/Inactive)
- Submit procurement type configuration

View Procurement Type

- Use view icon to display comprehensive procurement type profile

Edit Procurement Type

- Click pencil icon beside procurement type name
- Update procurement type information
- Submit modifications to apply changes

Delete Procurement Type

- First, select a procurement type, then click the trash icon that appears above the data table to delete it.
- System displays confirmation dialog.
- Confirm deletion to permanently remove procurement type

Procurement Methods Configuration

Procurement methods define the specific approaches and procedures used for different types of procurement activities within projects.

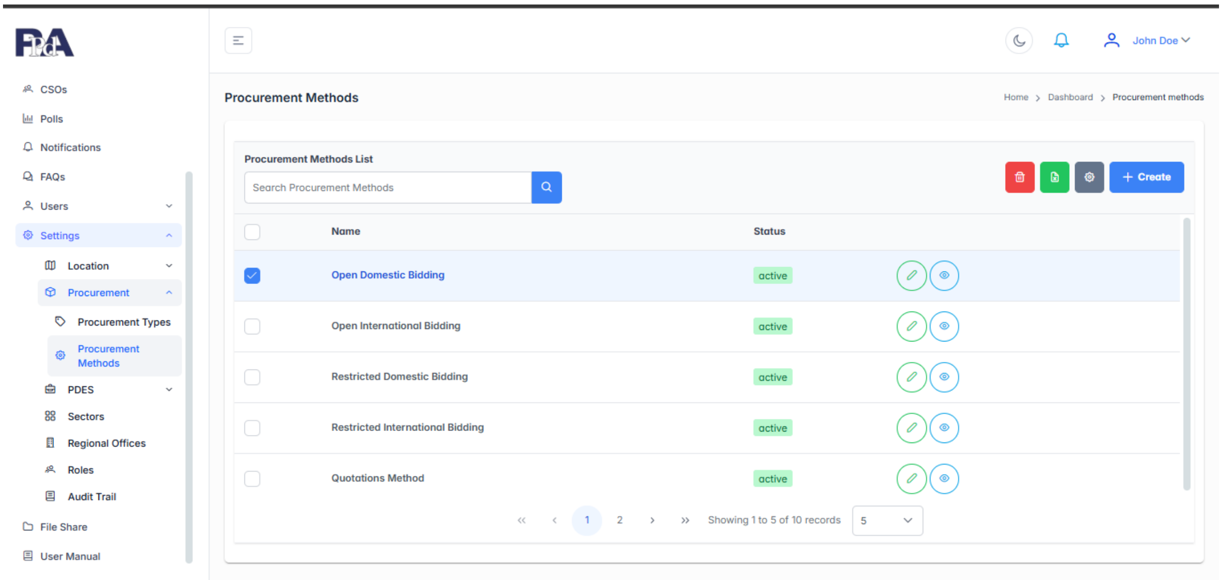

Figure 43: Procurement Methods Listing Page

Procurement Method Features

- Configure available procurement methodologies
- Define method-specific requirements and procedures
- Control method availability for different projects

Create Procurement Method

1. Navigate to Settings → Procurement → Procurement Methods
2. Click + Create button to open method creation form
3. Enter **Method Name** (e.g., "Open Bidding", "Restricted Bidding", "Direct Procurement")
4. Add **Method Description** detailing procedures and requirements
5. Set **Method Status** (Active/Inactive) and submit configuration

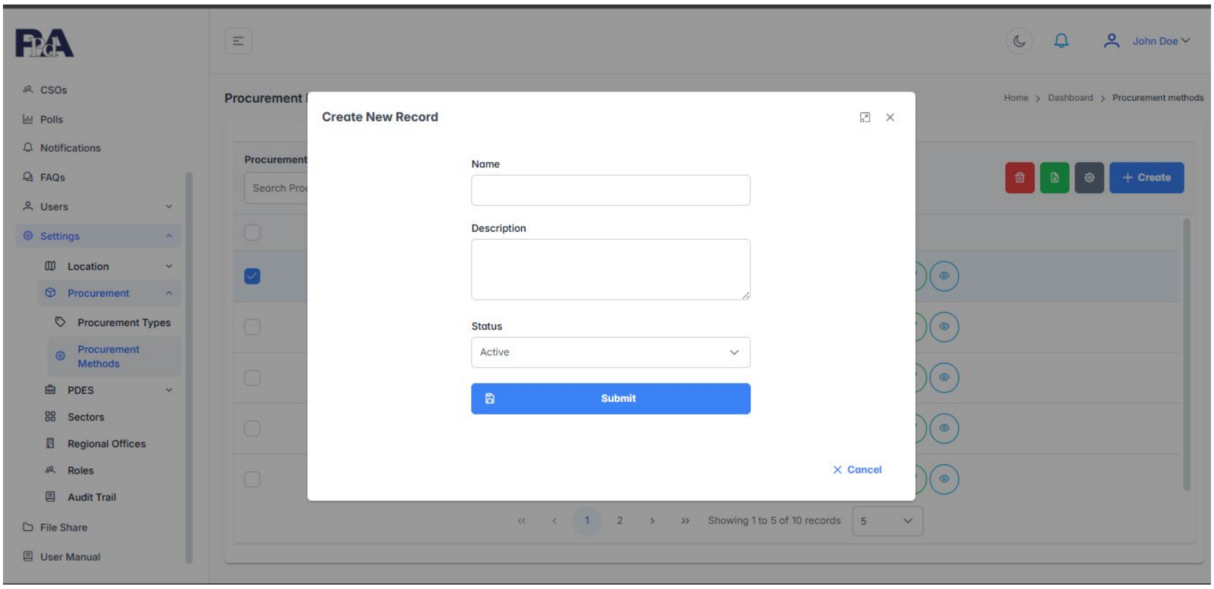

Figure 44: Create Procurement Method Form

View Procurement Method

- Use view icon to display detailed procurement method profile.

Edit Procurement Method

- Click pencil icon to modify method details
- Update method name, description and status accordingly.
- Submit changes to apply modifications

Delete Procurement Method

- First, select a procurement method, then click the 🗑 trash icon that appears above the data table to delete it.
- Confirm deletion.

Procuring and Disposing Entities (PDE) Settings

The **PDEs module** controls the configuration and management of Procuring and Disposing Entities—the organizations responsible for procurement activities within the PPDA framework.
It defines a structured hierarchy for managing these entities and their associations. The configuration follows this order: **PDE Types** → **PDE Categories** → **PDEs**
These settings are part of the PPDA CMS and are essential for ensuring consistent classification, alignment, and oversight of procurement-related data across the system.

PDE Types Configuration

PDE Types represent the highest level of entity categorization, establishing the primary classification structure for different types of procuring and disposing entities within the system.

PDE Type Navigation:

- **Hierarchical Structure:** PDE Types → PDE Categories → Individual PDEs
- **Hyperlinked Navigation:** Click on PDE type to filter and access associated categories
- **Search and Filter:** Locate specific entity types quickly using search functionality
- **Status Management:** Control active/inactive status of entity types

Create PDE Type

1. Click the + Create button in the PDE Types interface
2. Fill in the **Name** field with the entity type designation
3. Enter **Description** detailing the entity type's scope and authority
4. Set **Status** (Active/Inactive) for entity type availability
5. Click Submit to save or cancel to discard changes

Edit PDE Type

- Click the ✏️ pencil icon beside the PDE type name
- Update entity type details.
- Submit changes to apply modifications

Delete PDE Type

- First, select a PDE type, then click the trash icon that appears above the data table to delete it.
- Confirm deletion in the popup dialog

PDE Categories Configuration

PDE Categories provide the second level of entity organization, offering more specific entity classification within each PDE type for enhanced organizational structure.

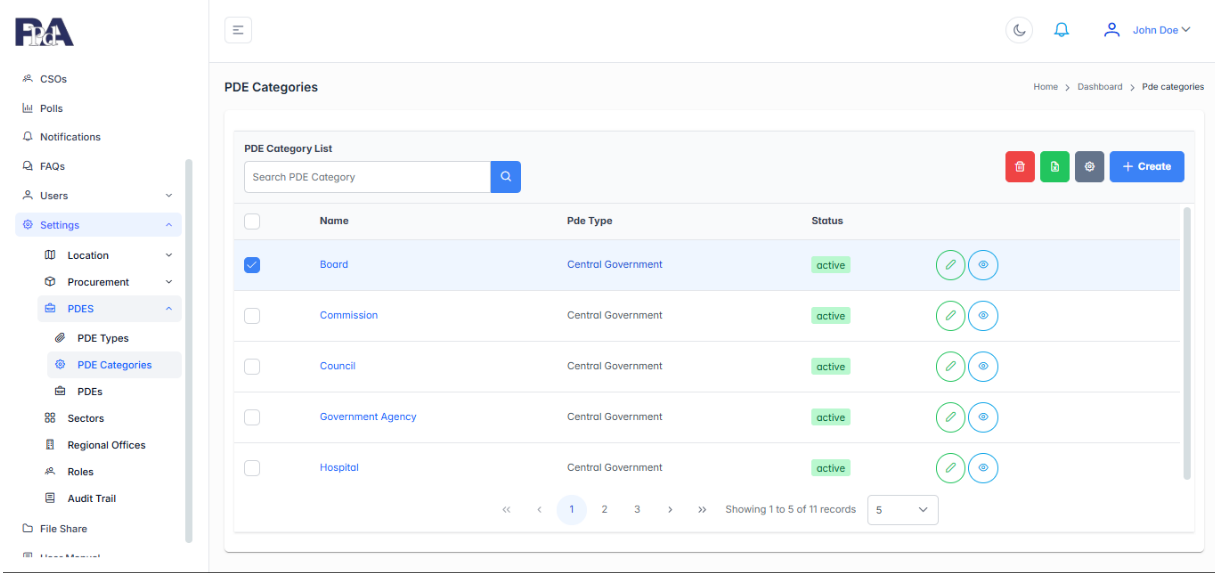

Figure 45: PDE Categories Listing Page

Create PDE Category

1. Navigate to PDES - PDE Categories or click through from PDE Types
2. Click + Create button
3. Enter **Category Name** and select parent **PDE Type**
4. Set category **Status**.
5. Submit category configuration

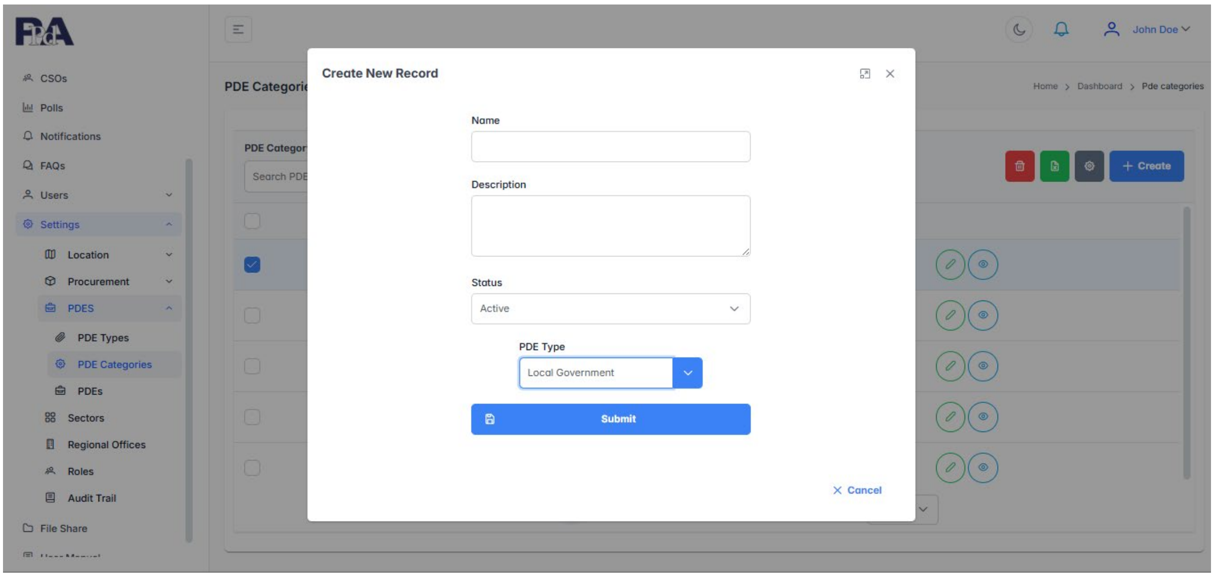

Figure 46: Create PDE Category Form

View a PDE Category

- Click the **View icon** next to a category to view detailed information
- Click on the category name to view pdes under that category

Edit a PDE Category

1. Click the **Pencil icon** beside the desired category.
2. Modify:
   - **Category Name**
   - **PDE Type assignment**
   - **Status**
3. Click **Submit** to save your changes.

Delete a PDE Category

1. Select a category by clicking on it in the list or checking the selection box.
2. Click the **Trash icon** above the list.
3. Confirm when prompted
4. Confirm deletion to permanently remove the category from the system.

PDEs (Individual PDE) Configuration

Individual PDEs represent actual organizations or institutions that perform procurement and disposal operations within the PPDA framework. Each PDE belongs to a PDE Category.

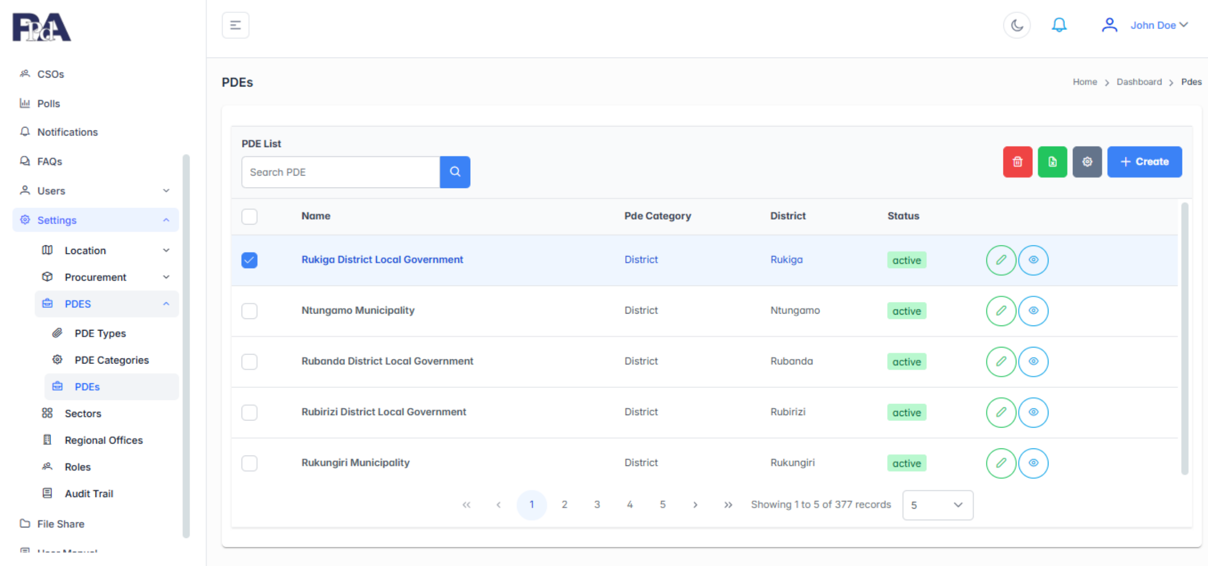

Figure 47: PDEs Listing Screenshot

Creating a PDE

1. **Navigation**

   Go to: Settings → PDES → PDEs

2. **Click + Create**

   Opens the **Create PDE** form.

3. **Fill in the Form**

   - **Name**: Enter the name of the PDE (organization/institution).
   - **Description**: Briefly describe the entity.
   - **PDE Category**: Select the appropriate category the PDE belongs to.
   - **District**: Choose the district where the entity is located (optional).
   - **Status**: Set status as **Active** or **Inactive**.

4. **Submit** to save the PDE configuration.

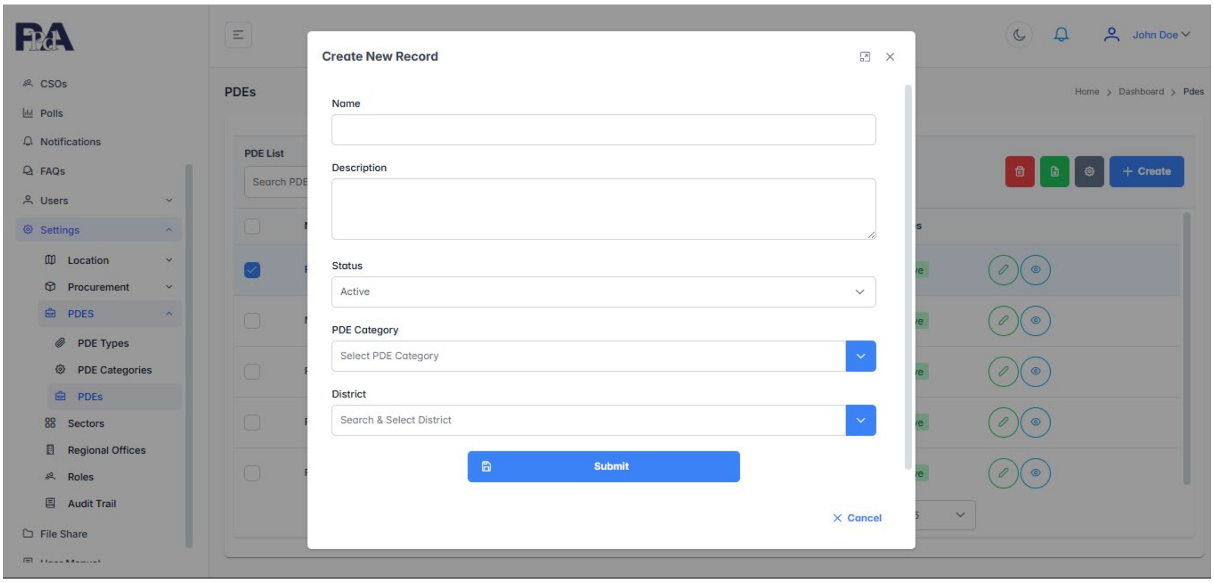

Figure 48: Create PDE Form

View PDE

- Click the 👁 **View icon** next to a PDE to see full details.

Edit PDE

1. Click the ✏️ **Pencil icon** beside the PDE you want to update.
2. Modify any of the following: **Name**, **Description**, **PDE Category**, **District**, **Status**
3. Click **Submit** to save the changes.

Delete PDE

1. Select a PDE by clicking the row or checkbox.
2. Click the 🗑️ **Trash icon** (above the data table).
3. Confirm when prompted
4. Confirm to permanently remove the PDE from the system.

Sector Settings

Sectors represent thematic areas and focus domains used to organize and categorize projects. They provide high-level grouping for project implementation within the system.

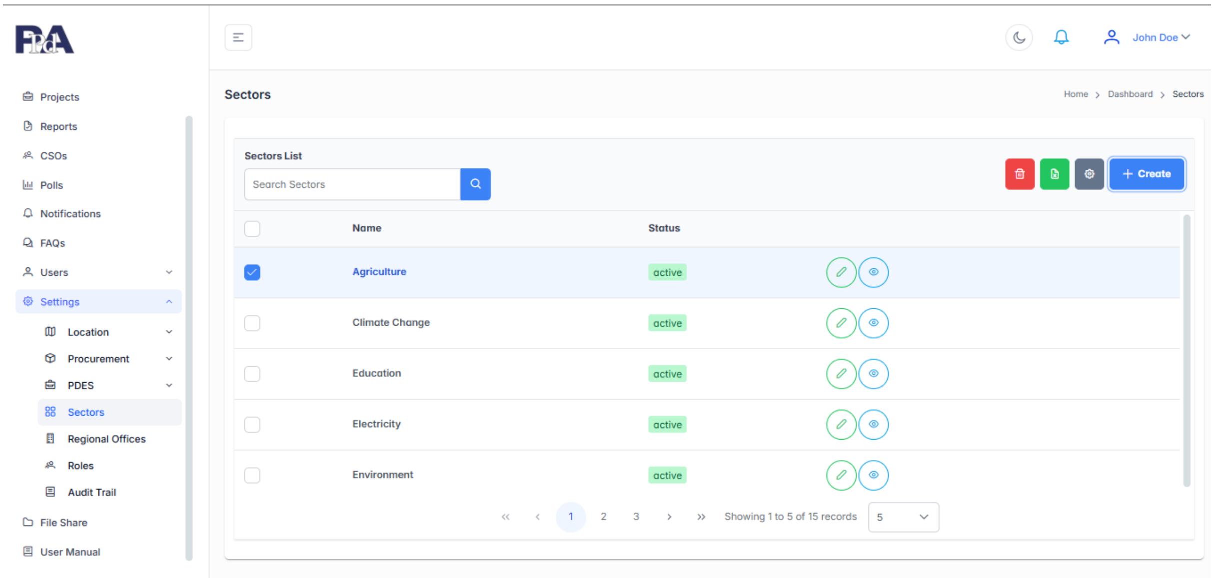

Figure 49: Sectors Listing Page

Creating a Sector

1. **Navigation**

   Go to: Settings → Sectors

2. **Click + Create**

   Opens the **Create Sector** form.

3. **Fill in the Form**
   - **Name**: Enter the name of the sector (e.g., Health, Education, Agriculture).
   - **Description**: Optionally, provide a short description of the sector.
   - **Status**: Set as **Active** or **Inactive**.

4. **Submit** to save the new sector.

View Sector

- Click the **View icon** next to a sector to display detailed information such as: Name, Description, Status

Edit Sector

1. Click the **Pencil icon** beside the sector you wish to modify.
2. Update any of the following: **Sector Name, Description**, **Status**
3. Click **Submit** to apply the changes.

Delete Sector

1. Select the sector to be deleted by clicking its row or using the checkbox.
2. Click the **Trash icon** above the table.
3. A confirmation dialog will appear
4. Confirm to permanently remove the sector.

Regional Office Settings

Regional Offices represent the physical and administrative presence of PPDA across various geographic regions. They provide the framework for managing regional operations and assigning users to specific regions.

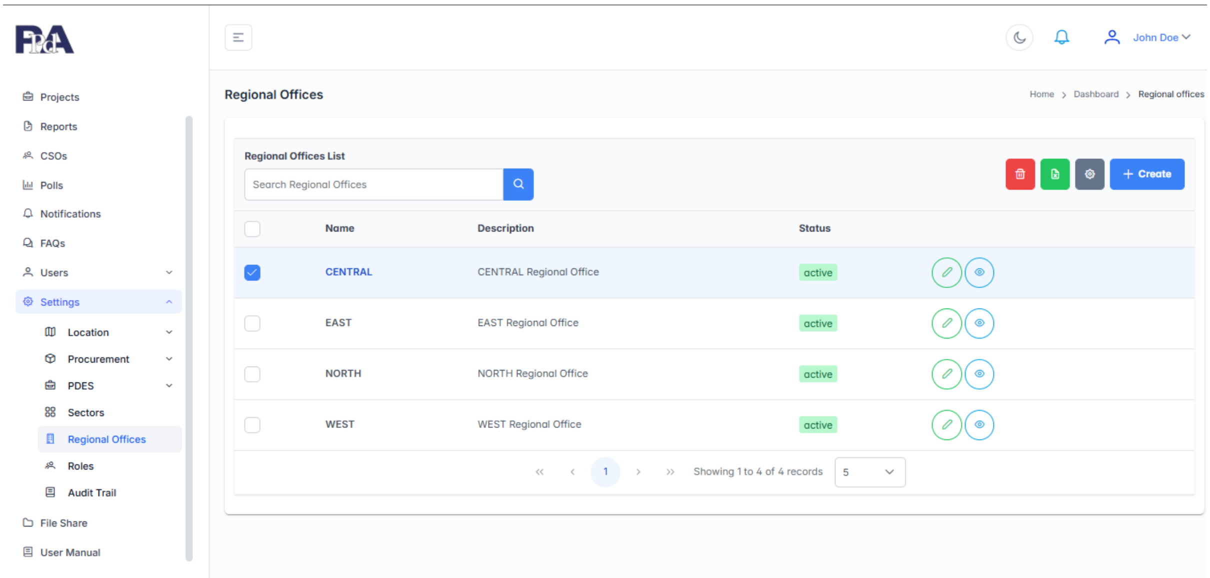

Figure 50: Regional Offices Listing Page

Create a Regional Office

1. **Navigation**

   Go to: Settings → Regional Offices

2. **Click + Create**

   Opens the **Create Regional Office** form.

3. **Fill in the Form**
   - **Name**: Enter the name of the regional office.
   - **Description**: Optionally provide details about the regional office's role or scope.
   - **Status**: Set the office as **Active** or **Inactive**.
   - **Districts**: Select one or more districts covered by the regional office.

4. **Submit** to save the regional office configuration.

View Regional Office

- Click the 👁 **View icon** to view detailed regional office information including: Name, Description, Status, Assigned Districts and Creation/Modification timestamps

Edit Regional Office

1. Click the ✏️ **Pencil icon** beside the regional office you want to update.
2. Modify any of the following: Name, Description, Status, Assigned Districts
3. Click **Submit** to apply the changes.

Delete Regional Office

1. Select the regional office to be deleted (via checkbox or row selection).
2. Click the 🗑️ **Trash icon** at the top of the table.
3. Confirm the deletion when prompted
4. Confirm to permanently remove the record.

User Roles and Permissions Settings

Location: Settings → Roles

This interface allows **System Admins**—to **view and manage permissions** assigned to each predefined role in the system. The goal is to control **who can access what** in the application, based on their assigned role.

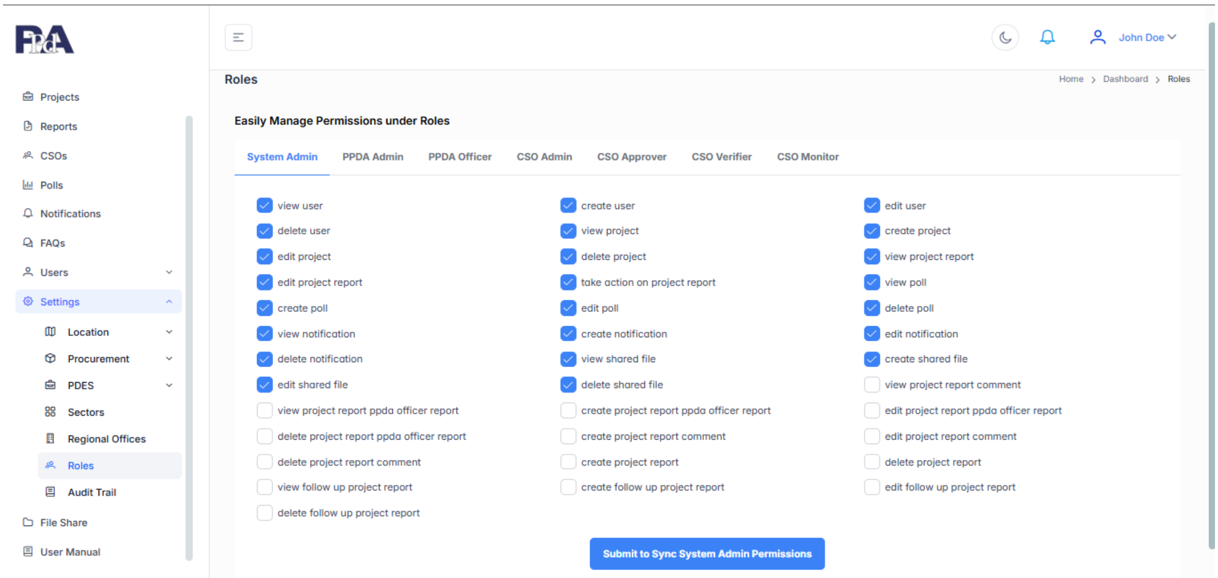

Figure 51: Roles & Permissions form

Key Concepts

Predefined Roles Only

- Roles like **System Admin**, **PPDA Admin**, **PPDA Officer**, **CSO Admin**, **CSO Approver**, **CSO Verifier**, and **CSO Monitor** are **system-defined**.
- **You cannot create or delete roles.**
- You **can only manage permissions** assigned to each role.

Permission Management

Each role tab (e.g., **System Admin**, **CSO Monitor**, etc.) displays a **list of permissions** as checkboxes.

These permissions control access to different features and actions, such as:

- Viewing or editing users/projects
- Managing reports
- Creating or deleting polls, notifications, and shared files

= Permission enabled

= Permission disabled

You can **check or uncheck** boxes to enable or disable access per role.

Submit to Sync Permissions

After adjusting permissions for a role:

- Click **"Submit to Sync [Role] Permissions"** (as shown in the blue button).

- This **does not create or delete roles** — it only **applies the updated permissions** to all users under the selected role.
- The system will immediately update access rights for all users assigned to that role.

🔍 Role Example Breakdown (from the screenshot)

🛠 System Admin

This role has nearly all permissions enabled:

- ✅ Full access to user management, projects, polls, notifications, shared files, etc.
- ⬜ Some advanced report-specific permissions are not yet checked (e.g., project report comments, PPDA officer-specific reports, follow-up reports)

👀 CSO Monitor

- ✅ Can edit users and projects
- ✅ Can view reports and polls
- ⬜ Cannot handle administrative tasks
- Intended for **basic field-level reporting and monitoring**

System Roles Descriptions

Role	Scope	Responsibilities
System Admin	System-wide	Full access to all modules and permission management. Can edit permissions and sync changes for all roles.
PPDA Admin	Regional Office	Manages CSO escalations, assigns to PPDA Officers, reviews project reports.
PPDA Officer	Regional Office	Handles regional activities and follow-up investigations on escalated reports.
CSO Admin	CSO + Regional	Manages CSO users and creates projects under a specific CSO and regional office.

CSO Approver	CSO + Regional	Final approval of CSO reports and escalation to PPDA if needed.
CSO Verifier	CSO + Regional	Verifies CSO Monitor reports before passing to CSO Approver.
CSO Monitor	CSO + Regional	Submits field reports and performs monitoring duties via the mobile interface.

📎 Summary

- ✅ You **edit permissions** via checkboxes for each role tab.
- 🔄 You **click "Submit to Sync Permissions"** to apply updates—**no creation or deletion of roles involved**.
- 📋 Each role has specific **predefined responsibilities**, and this section helps control what they can and cannot do.

Audit Trail Settings

System Activity Monitoring

The audit trail system provides comprehensive monitoring and logging of all system activities, ensuring transparency, accountability, and security compliance across all system operations.

Audit Trail Features

- **Comprehensive Logging:** Track all user activities and system interactions
- **Detailed Metadata:** Record IP addresses, geographic locations, user agents, and timestamps
- **Activity Categorization:** Organize audit records by activity types and system modules
- **Search and Filter:** Advanced search capabilities for audit record analysis
- **Export Functions:** Generate audit reports for compliance and analysis purposes

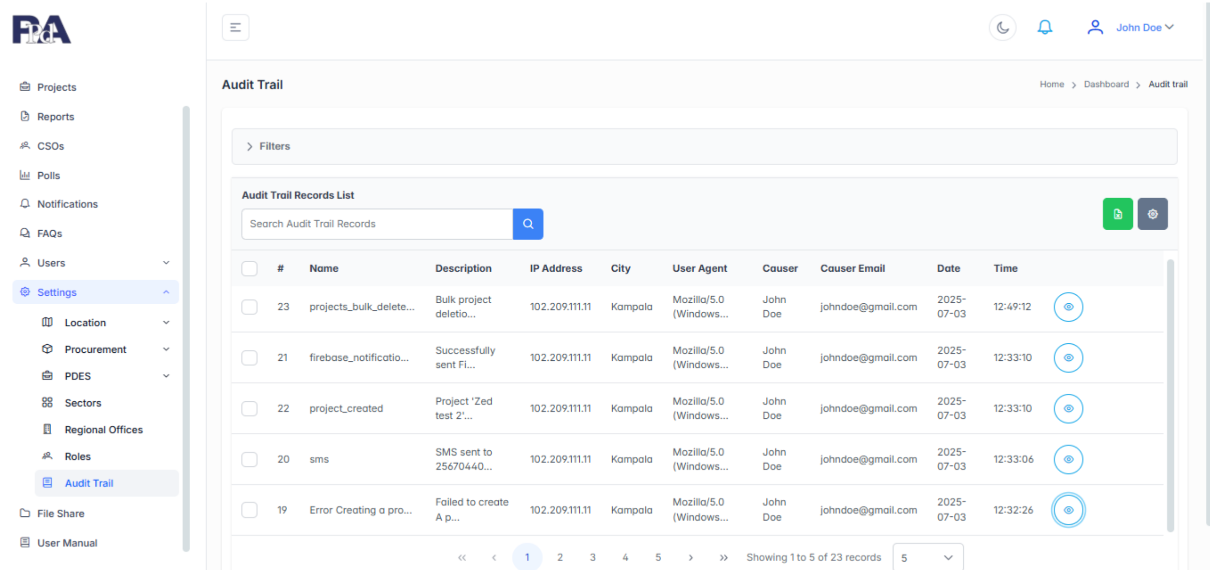

Figure 52: Audit Trail Records Interface

Audit Log Information

- **Name:** Activity or transaction identifier
- **Description:** Detailed description of the activity performed
- **Causer Email:** Email address of the user who performed the activity
- **Date and Time:** Precise timestamp of when the activity occurred

Metadata Information

- **IP Address:** Network address from which the activity was performed
- **Country:** Geographic location of the activity
- **City:** Specific city location of the user
- **User Agent:** Browser and device information
- **Causer Email:** Detailed user identification
- **Region:** Administrative region where activity occurred
- **Longitude/Latitude:** Precise geographic coordinates
- **Time zone:** Time zone information for accurate time tracking
- **Platform:** Device platform information
- **Browser:** Browser version and type
- **Device:** Device type and specifications

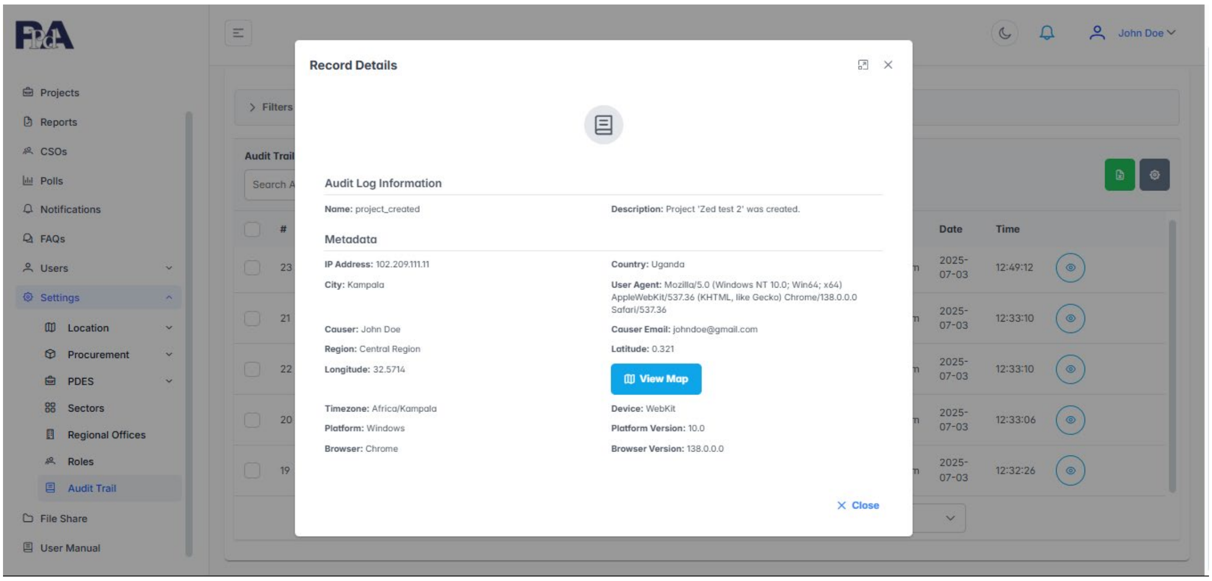

Figure 53: Audit Trail Record Details

Audit Trail Integration

- **Security Monitoring:** Track unauthorized access attempts and suspicious activities
- **Compliance Reporting:** Generate reports for regulatory compliance requirements
- **User Activity Analysis:** Monitor user behavior patterns and system usage
- **System Performance:** Track system performance and identify optimization opportunities
- **Troubleshooting:** Detailed logs assist in system troubleshooting and issue resolution

Audit Trail Categories

The system tracks various categories of activities across different modules:

- **User Management Activities:** User creation, modification, role changes, status updates
- **Project Management Activities:** Project creation, updates, approvals, status changes
- **Document Management Activities:** File uploads, downloads, sharing, deletions
- **System Configuration Activities:** Settings changes, permission updates, system modifications
- **Authentication Activities:** password changes.
- **Communication Activities:** Notification sending, poll creation, message distribution

User Manual Module

The **User Manual** section provides users with access to official documentation, guides, and help resources for using the PPDA Contract Monitoring System effectively. It serves as a built-in support center to reduce user confusion and promote system-wide consistency.

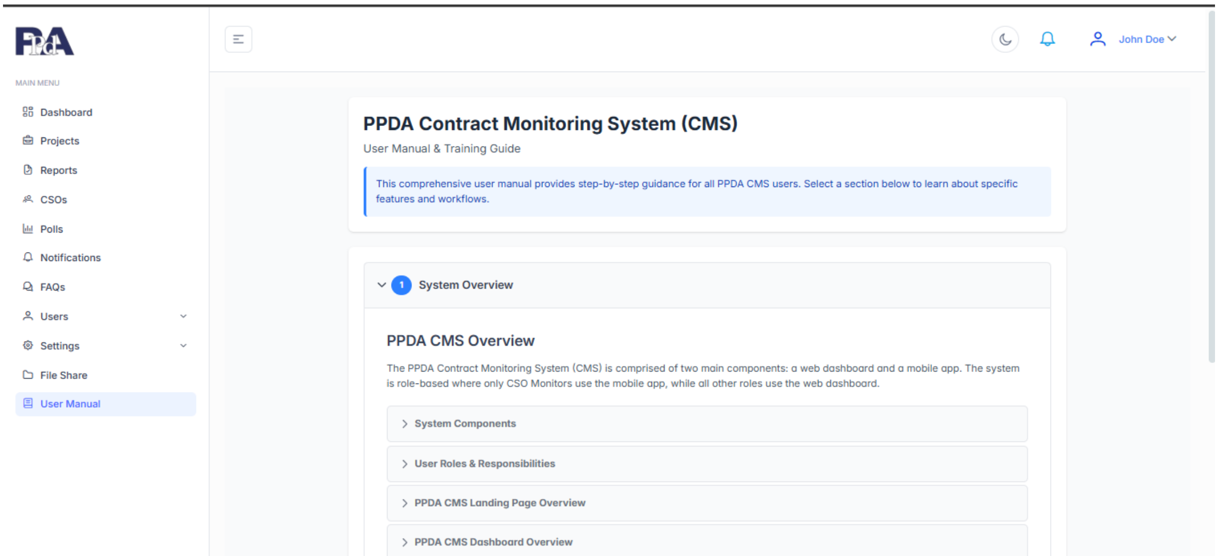

Figure 54: User manual page

🧭 Key Features:

- 📄 **Step-by-step guides**: Covers how to use various modules like Projects, Reports, Roles, File Sharing, etc.
- 🎯 **Role-based instructions**: Tailored help content depending on whether you're a System Admin, CSO Officer, PPDA Admin, etc.
- 🔄 **Always accessible**: Users can consult it any time they need clarification or instructions while using the system.
- 🆕 **Continuously updated**: Content evolves with system changes to ensure users always have the latest information.

🎯 Purpose

The User Manual module empowers users to:

- Understand system workflows
- Perform tasks correctly without external help
- Learn system features faster
- Reduce the burden on support teams

CONCLUSION

The PPDA Contract Monitoring System (CMS) is designed to promote transparency, accountability, and efficiency across all stakeholders involved in contract oversight and service delivery. This User Manual serves as a practical guide to help you navigate and utilize the system’s features with confidence. Whether you're submitting reports, managing users, reviewing project data, or monitoring field activities, the tools and guidelines provided here ensure that every action is informed and aligned with your role's responsibilities.

Thank you for your continued commitment to improving public procurement processes.