

TRANS NZOIA COUNTY GOVERNMENT

County PMTS Staff System Manual

Complete training guide — features, workflows, roles, screenshots,
and day-to-day operations

VERSION

v3.0

CHAPTERS

18

GENERATED

**June
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Staff Training & Executive Reference

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Complete training guide for county staff using the Projects Monitoring and Tracking System.

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CHAPTER 1

System Overview

What PMTS is, who it serves, and the modules available to county staff.

The Projects Monitoring and Tracking System (PMTS) is the county's authoritative platform for registering, tracking, reporting, and publishing development projects. Staff use it to maintain accurate project records; citizens use the public portal to view approved projects and provide feedback.

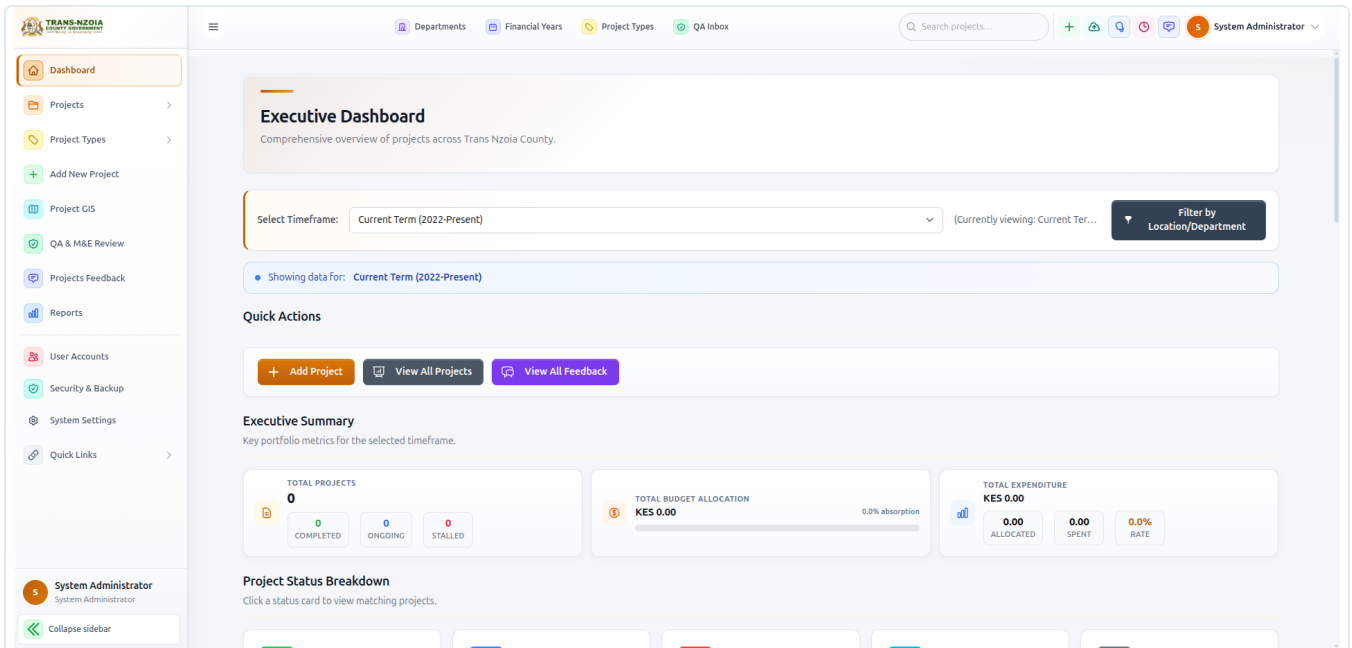


Figure 1 — Executive dashboard: your county-wide command centre for project delivery.

Core modules

Module	Purpose	Primary users
Projects	CRUD, photos, progress, GIS map	Department staff
QA & M&E	Publication review gate before public visibility	Economic Planning
Reports	Financial, geographic, and performance analytics	County leadership & admin
Feedback	Citizen ratings and comments on projects	All staff
Resources	Downloadable policies, reports, templates	County leadership & admin
Updates	County news and project announcements	County leadership & admin
User accounts	Staff onboarding, roles, security & backup	System administrators

Built-in county defaults

Departments, locations, project types, funding partners, download categories, portal settings, and staff accounts (all role tiers) are seeded automatically on deploy via `seed_system_defaults`. The project registry starts empty — add projects via CRUD or bulk import. Re-deploying will not remove your CRUD edits.

CHAPTER 2

Getting Started & Login

How staff access the portal, choose the correct role, and land on the right dashboard.

Every county staff member receives a work email and temporary password from the system administrator. Use the Staff Login page — not the citizen registration flow.

1 Open the staff login page

From the public website header, click Staff Login (or go to /accounts/login/).

2 Enter your county email and password

Use the email assigned by ICT — e.g. name@county.go.ke or your department address.

3 Confirm your role (if prompted)

System administrators may sign in under any staff role for support. All other staff use only their assigned role.

4 Change your password on first login

Go to Profile → change password. Never share credentials.

5 Bookmark your dashboard

County leadership and admins land on the Executive Dashboard; department staff on My Department; Economic Planning on QA Dashboard.

Citizen vs staff accounts

Public/citizen accounts cannot open staff URLs. If you are redirected to the public homepage after login, contact the system administrator to verify your role assignment.

CHAPTER 3

Roles & Permissions

Who can do what — county leadership, department staff, planning, and admin.

Your role is assigned to your account and applied automatically at login. Capabilities below reflect the current PMTS permission model.

Role group	Examples	Landing dashboard
County leadership	Governor, Deputy Governor, County Secretary, Executive	Executive Dashboard
Economic Planning	Planning (QA / M&E)	QA & M&E Review
Department leadership	CEC, Chief Officer	My Department
Department staff	Director, Staff, Departmental	My Department
System admin	Administrator	Executive Dashboard + admin tools

Capability matrix

Action	Department staff	County leadership	Planning QA	Admin
Create / edit projects	✓ (own dept)	View county-wide	Review queue	✓
Bulk import (Excel)	✓	—	—	✓
Bulk edit grid	✓	—	—	✓
Submit for QA publication	✓	—	—	✓
Approve / reject publication	—	—	✓	✓
Reports & analytics hub	Dept scope	✓ County-wide	✓	✓
Executive feedback on projects	—	✓	—	—
Manage user accounts	—	—	—	✓
Security, backup & system settings	—	—	—	✓
Manage downloads & news posts	View	✓	View	✓

User Accounts
Create and manage county staff, leadership, and executive portal accounts.

[+ Add staff account](#)

Summary Statistics:

- TOTAL STAFF: 56
- ACTIVE: 56
- LEADERSHIP: 4
- DEPARTMENTAL: 50
- PLANNING / QA: 1
- SYSTEM ADMINS: 1

Staff directory
56 accounts

SEARCH: ROLE: STATUS: [Apply filters](#) [Reset](#)

STAFF MEMBER	ROLE	DEPARTMENT	STATUS	ACTIONS
SA System Administrator <small>sysadmin@county.gov</small>	System Administrator	—	Active	Edit
AC Agriculture, Irrigation, Livestock, Fisheries & Cooperative Development CEC <small>cec.agriculture.irrigation.livestock.fisheries.cooperative.development@county.gov</small>	County Executive Committee Member (CECM)	Agriculture, Irrigation, Livestock, Fisheries & Cooperative Development	Active	Edit Deactivate
EC Education & Technical Training CEC <small>cec.education.technical.training@county.gov</small>	County Executive Committee Member (CECM)	Education & Technical Training	Active	Edit Deactivate
PC Finance & Economic Planning CEC <small>cec.finance.economic.planning@county.gov</small>	County Executive Committee Member (CECM)	Finance & Economic Planning	Active	Edit

Figure 2 — System administrators create staff accounts and assign roles here.

CHAPTER 4**Staff Training Paths**

Recommended learning sequence by role — use this section to onboard new staff.

Use the paths below in induction workshops. Each path lists pages to open, tasks to practise, and the manual sections to read. Allow 2–4 hours per role tier.

Department staff (project managers)

1. Login → confirm My Department dashboard loads.
2. Sidebar → All Projects → apply department filter → open one project.
3. Practise: Add New Project → select type → complete mandatory fields → save as draft.
4. Practise: Update progress and expenditure on an existing project.
5. Practise: Upload at least one geotagged photo.
6. Practise: Bulk Import — download template, import 3 sample rows, preview, save.
7. Submit one project for QA review; track status under My QA Submissions.
8. Open Projects Feedback → read and practise a staff reply.

Economic Planning (QA / M&E)

1. Login → QA & M&E Review dashboard.
2. Filter pending submissions → open one project review screen.
3. Practise: Approve one complete record; reject one with clear correction notes.
4. Review QA metrics on the Reports hub.
5. Monitor publication_status on the project list filter.

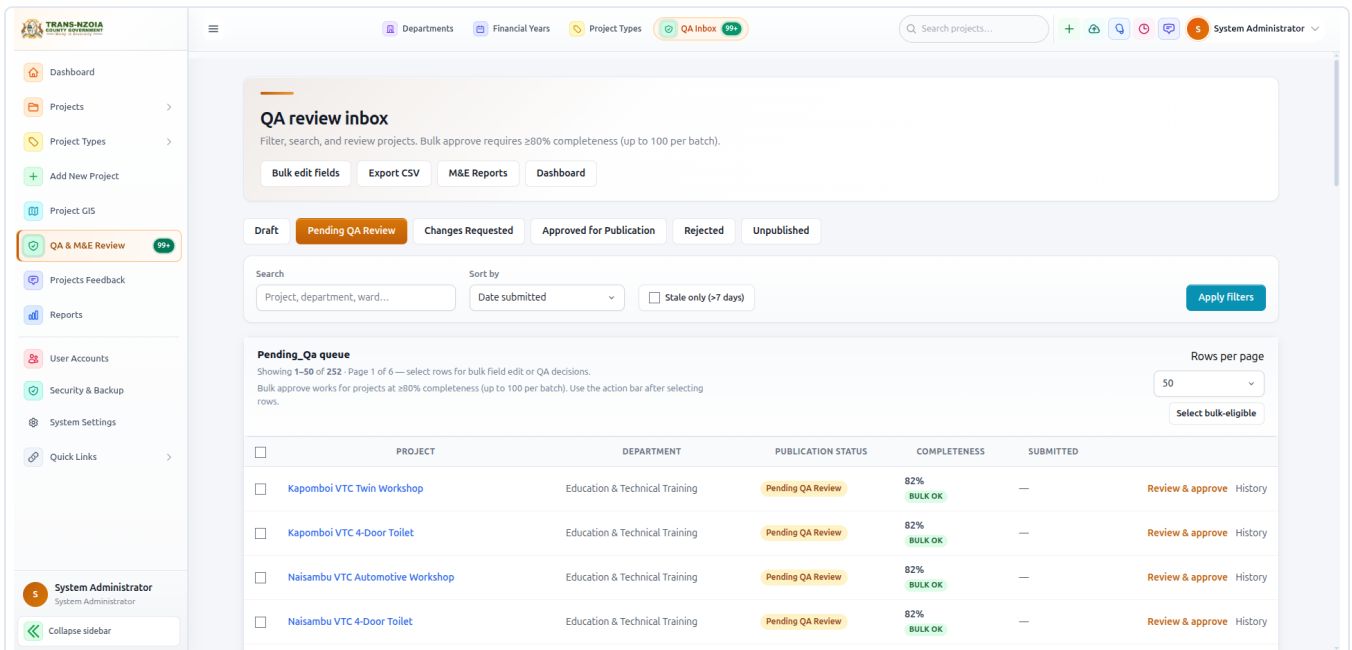


Figure 3 — Planning reviewers work from this queue daily.

County leadership

1. Login → Executive Dashboard → explore KPI strip and timeframe filters.
2. Open Departments, Sub-Counties, and Financial Years analytics pages.
3. Open Reports → review Key Insights and export a PDF sample.
4. Open Projects Feedback → review sentiment by location.
5. Leave executive feedback on one flagship project.

System administrator

1. Create a test staff account with department staff role.
2. Verify login redirect and sidebar links for that account.
3. Review Security & Backup → run a security scan → create a database backup.
4. Review System Settings → confirm portal contact details and SEO.
5. Open Activity Log → confirm audit entries for your test actions.

Training tip

Export this manual as PDF (button at top) and distribute printed copies during workshops. Trainers can walk through screenshots section-by-section.

CHAPTER 5

Dashboard Navigation

Sidebar groups, landing pages, and filters shared across the staff portal.

Sidebar structure

- Dashboard — role-specific home (executive, departmental, or QA landing)
- Projects — All Projects, Departments, Sub-Counties, Financial Years, Flagship filter
- Project Types — quick filters for Departmental, FLLOCA, KDSP II
- Add New Project — type selection then programme-specific form
- Project GIS — interactive map of geotagged projects
- QA & M&E Review / My QA Submissions — based on your role
- Projects Feedback — citizen comments dashboard with unread badges
- Reports — analytics hub with charts, KPIs, and drill-down tables
- Quick Links — Resources, Posts, Notifications, Activity Log, System Documentation
- User Accounts, Security & Backup, System Settings — administrators only

The screenshot shows the 'Project registry' dashboard. At the top, there are buttons for 'Export Excel', 'Import', 'Bulk edit', and 'Add project'. Below this is a 'Project status breakdown' section with a progress bar showing 252 projects in the 'ACTIVE' status. A table of projects is displayed below, with columns for Project, Type, Department, Status, Publication, Progress, Budget Used, FY, Location, and Action. The table lists several projects, including 'Kisumu VTC Tech Workshop' and 'Kisumu VTC e-Learning Hub'.

All Projects — filter by department, location, status, and financial year.

The screenshot shows the 'Available Project Type Categories' dashboard. It features three main sections, each with a progress bar and a 'View Projects' button. The first section is 'Departmental Project' with 0 projects and 0% completion. The second is 'FLLOCA Project' with 0 projects and 0% completion. The third is 'KDSP II Project' with 252 projects and 100% completion. Each section also includes a 'View Projects' button.

Project Types — quick access to Departmental, FLLOCA, and KDSP II registers.

Analytics directory pages

Departments, Sub-Counties, and Financial Years pages aggregate budget, expenditure, absorption rate, and project counts. Filters match the executive dashboard so you can drill from high-level KPIs into departmental performance.

Departments Overview
Departmental performance across Trans Nzoia County.

Select Timeframe: Current Term (2022-Present) (Currently viewing: Current Ter... Filter by Location/Department)

Showing data for: Current Term (2022-Present)

DEPARTMENT	PROJECT COUNT	AVG. COMPLETION	BUDGET ALLOCATED (KES)	BUDGET SPENT (KES)	ABSORPTION RATE (%)	ACTIONS
Education & Technical Training	252	100.0%	410,020,515.00	390,806,715.00	95.3%	Project Feedback

Financial Trends (Budget vs Expenditure)
Appropriate budget and expenditure across departments for the selected timeframe.

Departments — compare delivery and budget absorption across CEC portfolios.

Sub-Counties Overview
Project performance across Trans Nzoia County sub-counties.

Select Timeframe: Current Term (2022-Present) (Currently viewing: Current Ter... Filter by Location/Department)

Showing data for: Current Term (2022-Present)

SUB-COUNTY	PROJECT COUNT	AVG. COMPLETION	BUDGET ALLOCATED (KES)	BUDGET SPENT (KES)	ABSORPTION RATE (%)
Chirokinyi	79	100.0%	130,776,324.00	127,894,733.00	98%
Embobes	31	100.0%	46,695,020.00	46,760,586.00	100%
Kindefu	39	100.0%	102,469,026.00	97,253,117.00	95%
Kwana	39	100.0%	97,219,221.00	93,120,330.00	96%
Saboti	42	100.0%	70,094,944.00	65,028,411.00	93%

Financial Trends (Budget vs Expenditure by Sub-County)
Filtered by selected timeframe.

Sub-Counties — geographic performance and ward-level drill-down.

Financial Years Overview
Budget and project performance trends across financial years in Trans Nzoia County.

Select Timeframe: Current Term (2022-Present) (Currently viewing: Current Ter... Filter by Location/Department)

Showing data for: Current Term (2022-Present)

Key Insights
Highlights from financial year performance data.

- Highest Absorption Rate**
Financial Year: 2023-2024
Rate: 95.3%
- Lowest Absorption Rate**
Financial Year: 2023-2024
Rate: 95.3%
- Most Projects**
Financial Year: 2023-2024
Projects: 252

FINANCIAL YEAR	PROJECT COUNT	AVG. COMPLETION	BUDGET ALLOCATED (KES)	BUDGET SPENT (KES)	ABSORPTION RATE (%)
2023-2024	252	100.0%	410,020,515.00	390,806,715.00	95.3%

Financial Trends (Budget vs Expenditure)

Financial Years — track allocation vs expenditure by FY (July–June cycle).

Shared filters

Most staff pages share the same filter vocabulary: department, sub-county, ward, financial year / election term (timeframe), project type, status, funding source, and publication status. Filters persist in the URL so you can bookmark or share a filtered view with colleagues.

CHAPTER 6

Creating Projects

Select a programme type, complete the form, and submit for QA when ready.

- 1 Open Add New Project**
 Sidebar → Add New Project (requires project manager or admin role).
- 2 Choose project type**
 Pick Departmental, FLLOCA, or KDSP II. Tick Flagship to mark a county leadership priority.
- 3 Complete core fields**
 Name, description, department, ward, budget allocation, expenditure, financial year (YYYY-YYYY), status, percentage complete, funding source, contractor (where required), and photos.
- 4 Fill programme fields**
 Custom fields appear below the standard sections for your selected type.
- 5 Save**
 New projects start as draft / pending publication. Update progress and submit to QA when ready for public visibility.

The screenshot shows the 'Create New Project' interface. The top navigation bar includes 'Departments', 'Financial Years', 'Project Types', and 'QA Inbox'. The main content area is titled 'Create New Project' and offers three options: Departmental Project, FLLOCA Project, and KDSP II Project. Each option provides a brief description and a list of key custom fields. For example, the Departmental Project requires 5 custom fields, including Strategic Objective, Expected Outcome, and Number of Beneficiaries. The FLLOCA Project requires 9 custom fields, including Problem Solved, Climate Impact, and Climate Action Category. The KDSP II Project requires 14 custom fields, including Activity Number, Sub-Activity, and Output Indicator. Below the project type selection, there is a section for 'Information you will need before starting' with three numbered steps: 1. Project identity, 2. Location & department, and 3. Timeline & progress.

Step 1 — Choose the programme type before the form loads type-specific fields.

Step 2 — Complete all mandatory fields. Red asterisks indicate required data.

Financial year format

Use Kenya's July–June cycle: e.g. 2024-2025. The system validates that years span exactly one financial year.

Donor-funded projects

FLLOCA and KDSP II types require a funding partner. Select from the built-in partners list (County, National Government, World Bank) or add partners via admin.

CHAPTER 7

Managing Projects

Project detail page, edits, photos, progress updates, and executive feedback.

Project detail page

- Overview — status, budget absorption, timeline, location, type-specific fields
- Photos — upload, caption, set cover image; visible on public portal when published
- Updates — milestone notes tied to the project
- Feedback — citizen ratings and comments; staff can review and respond
- Documents — attachments linked to the project record
- GIS — set or view coordinates on the map
- QA status — publication workflow state and review history

The screenshot displays the 'Kapomboi VTC Twin Workshop' project detail page. At the top, it shows the project name, status 'Completed', and financial year '2023-2024'. Action buttons for 'Manage Photos', 'Update Progress', 'Edit Project', and 'Delete Project' are visible. A 'Publication & QA status' section indicates the project is 'Approved for Publication' with 82% completeness. The 'Project Details' section includes basic information such as Department (Education & Technical Training), Programme (KDSP II Project), and Description (Construction of twin workshop to enhance learning infrastructure). The 'Financial Information' section provides a summary of budget allocation (KES 3,000,000.00), expenditure (KES 2,916,731.00), and a disbursement rate of 97.22%. A 'Location Map' section is also present at the bottom.

Project detail — central hub for all project management tasks.

Editing & progress

Use Edit Project from the detail page. Department staff can only edit projects in their department unless they hold county-wide or admin privileges. Update percentage complete and expenditure regularly — these drive dashboard KPIs and report accuracy.

Edit Project — update scope, budget, contractor, and location data.

Update Progress — record milestone completion and expenditure.

Project GIS map

Sidebar → Project GIS opens an interactive map. Filter by department, ward, status, and financial year. Colour-coded markers show project status. Ensure projects have coordinates for map visibility.

Project GIS — verify geographic coverage and identify data gaps.

Executive feedback

County leadership can leave structured executive feedback on a project. Your account role is recorded automatically. Comments appear in the project timeline for accountability.

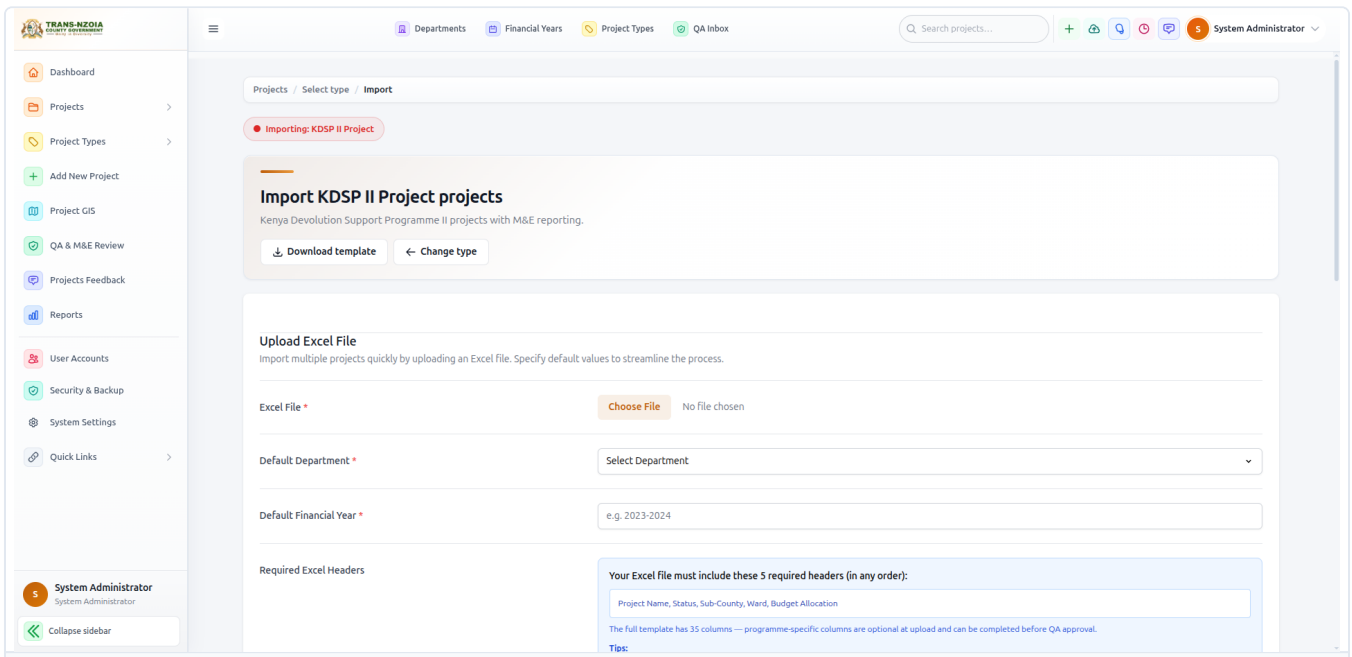
CHAPTER 8

Bulk Import & Bulk Edit

Excel import for many projects at once; spreadsheet-style bulk editing.

Bulk import (Excel)

- 1 Projects → Import → select project type
- ↓
- 2 Set defaults: department, financial year, optional sub-county
- ↓
- 3 Upload Excel workbook matching the template headers for that type
- ↓
- 4 Review validation & fuzzy-matched location names
- ↓
- 5 Preview parsed rows, fix errors, confirm save



Bulk Import — upload departmental Excel registers with default department and FY.

Preview imported projects
Review rows before confirming the import.

[← Back to projects](#)

Projects to Import
Review the projects below before saving.

PROJECT NAME	DESCRIPTION	STATUS	START DATE	END DATE
Construction of new dip Kapsirowa	Cattle dip construction to improve livestock production	Completed	2023-07-01 00:00:00	2024-
Supply of incubators in Makutano	Supply of incubators to improve poultry production	Completed	2023-07-01 00:00:00	2024-
Renovation of cattle dips in Motosiet, Sitatunga & Makutano	Renovation of cattle dips to improve livestock production	Completed	2023-07-01 00:00:00	2024-
Cattle dip renovation in Motosiet, Tunen, Mateket, Murugwa, Machungwa, Chematich & Kongasis	Cattle dip renovation to improve livestock production	Completed	2023-07-01 00:00:00	2024-
Renovation of Saboti grain store	Renovation works of grain store to reduce post-harvest loss	Completed	2023-07-01 00:00:00	2024-
Supply of incubators	Supply of incubators to improve poultry production	Completed	2023-07-01 00:00:00	2024-
Cattle dip renovation in Kiminini, Makutano, Motosiet & Sirende	Cattle dip renovation to improve livestock production	Completed	2023-07-01 00:00:00	2024-
Renovation of Sibanga Livestock Sale Yard	Renovation of Sibanga Livestock Sale Yard to improve livestock production	Completed	2023-07-01 00:00:00	2024-

[Cancel](#) [Save Projects](#)

Import preview — resolve validation errors before committing records to the database.

Templates

Download the import template from the import page for your project type. Headers must match exactly — the validator flags missing or unexpected columns.

Bulk edit

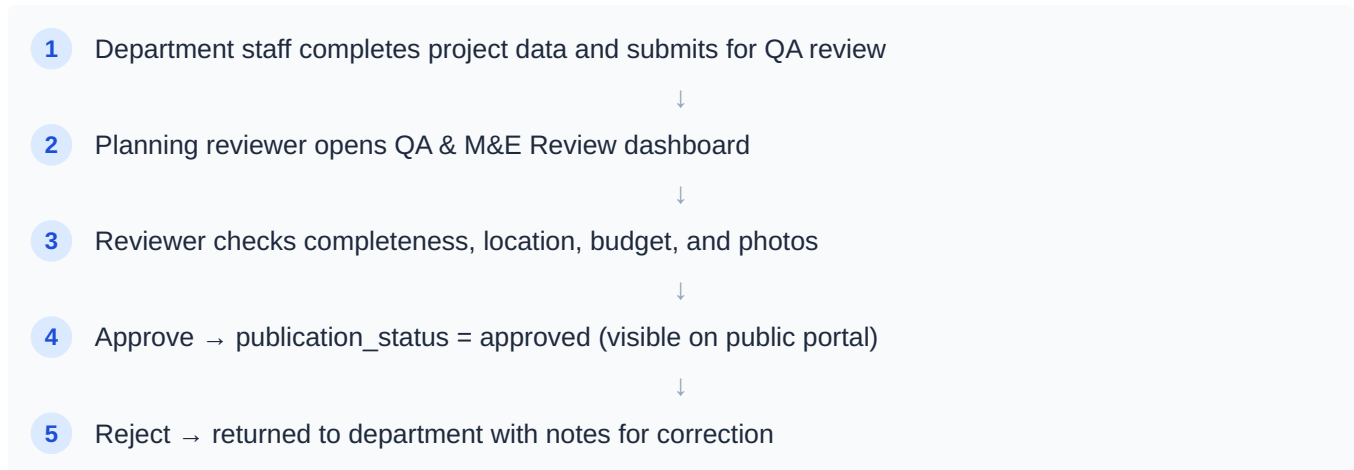
Open Bulk Edit from the projects list (/projects/bulk-edit/). Filter to the records you need, edit status, progress, and financial fields inline, then save the batch. Changed rows are highlighted; all saves are written to the Activity Log.

CHAPTER 9

QA & M&E Publication

Economic Planning reviews projects before they appear on the public portal.

Publication status controls whether citizens see a project. Department staff prepare records; Economic Planning approves or returns them for correction.



Project review — verify mandatory fields, photos, and location before approval.

My QA Submissions

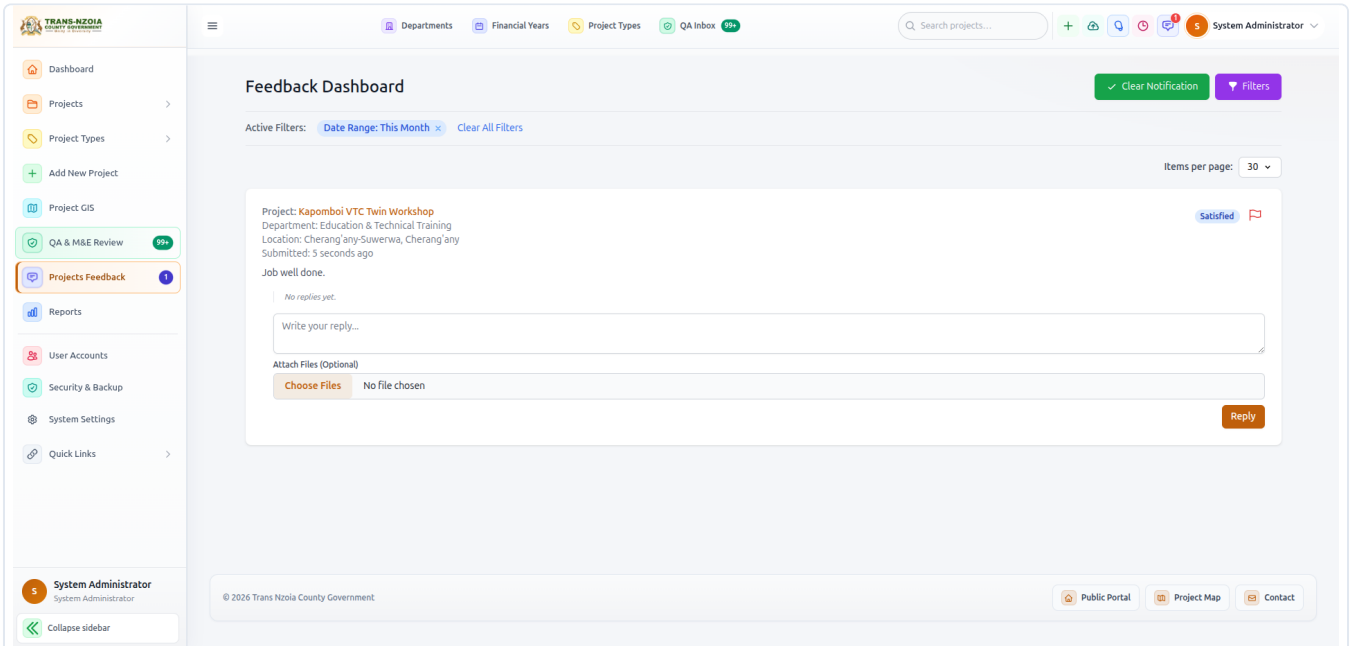
Department users track their own submission status under My QA Submissions without access to the full review queue.

CHAPTER 10

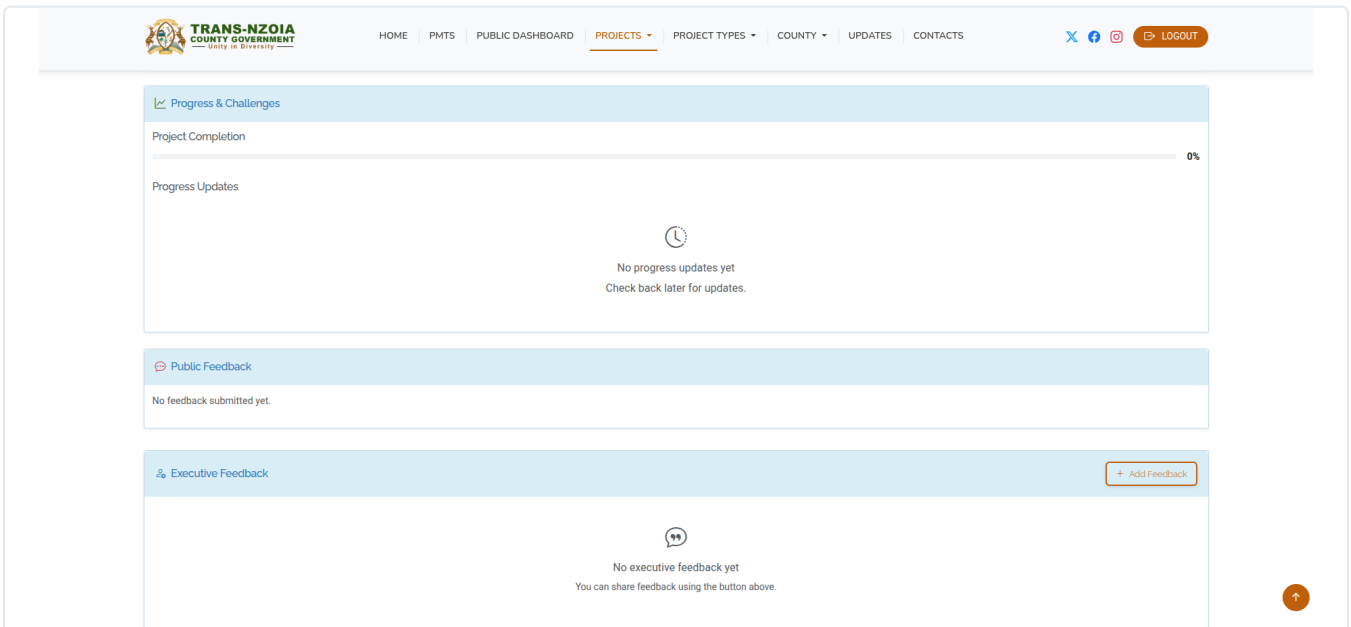
Citizen Feedback

Monitor and respond to public ratings and comments on projects.

Citizens rate projects (1–5) and leave comments on the public portal. The Feedback Dashboard aggregates sentiment by department, sub-county, and ward.



Projects Feedback — unread badge in sidebar alerts staff to new citizen comments.



Citizen view — how the public submits ratings and comments on approved projects.

- Filter feedback by timeframe, location, and department
- Reply to citizens — responses appear on the public project page

- Track average ratings and participation rates in Reports
- Executive dashboard includes sentiment charts and flagged items

CHAPTER 11

Reports & Analytics

Executive reports hub, specialized reports, and PDF export.

Reports hub

Sidebar → Reports opens the analytics hub: KPI strip, financial trend chart, status breakdown, departmental/sub-county/ward performance tables, sentiment, and links to specialized reports.

The screenshot displays the PMTS Reports Dashboard. The sidebar on the left includes navigation options: Dashboard, Projects (with sub-options for All Projects, Departments, Sub-Counties, and Financial Years), Project Type, Add New Project, Project Feedback, and Reports. The main dashboard area is titled 'Reports Dashboard' and provides comprehensive project analytics for Trans-Nzoia County. It features a KPI strip with metrics for Total Projects (13), Completed (7), Ongoing (2), and Total Budget (KES 62,191,416). Below this are sections for Project Activity Overview (Today, This Week, This Month, This Quarter), Financial & Budget Reports (Budget Utilization, Project Summary, Progress Trends), Performance & Analysis Reports (Contractor Performance, Project Type Analysis, Geographic Distribution), and Activity & Engagement Reports (Project Activity, Public Feedback, Today's Activity). The user profile at the bottom left identifies Mutai Kipkemboi as the Executive.

Reports hub — county-wide analytics with exportable PDF.

The screenshot shows the 'Key Insights' section of the PMTS system. It provides an automated summary for the selected timeframe and filters. Key insights include:

- PORTFOLIO:** 8 projects tracked across 1 financial year(s) with 100.0% marked completed and 94.9% budget absorbed. Average physical progress: 100.0%.
- BUDGET EXECUTION:** Strong budget execution — continue monitoring late-year spend. Absorption: 94.9%.
- DELIVERY RISK:** No delayed, stalled, or over-budget projects in the current filter set.
- CITIZEN VOICE:** No citizen feedback yet for this filter set — encourage public engagement on completed projects.

 Below the key insights is the 'Visual Analytics' section, which includes:

- Project Status Mix:** A donut chart showing the share of projects by delivery status.
- Budget vs Expenditure by FY:** A line chart showing allocation and spend across financial years for the current filters. The Y-axis represents Amount (KES) from 0 to 40.0M, and the X-axis represents the Financial Year (2023-2024). The chart compares Budget Allocation (blue line) and Expenditure (orange line).

 The user profile at the bottom right identifies the user as System Administrator.

Key Insights — automated highlights for stalled, delayed, and over-budget projects.

Specialized reports

- Project Summary — portfolio overview by filters
- Budget Utilization — allocation vs expenditure
- Feedback Summary — citizen engagement metrics
- Progress Trends, Contractor Performance, Geographic Distribution, and more

Export PDF

Most report pages and the main Reports hub include an Export PDF button. PDFs respect your current filters and timeframe — ideal for CEC briefings.

CHAPTER 12

Resources & News Posts

Manage downloadable documents and county news on the public portal.

Resources (Downloads)

Quick Links → Resources. Categories (Policies, Reports, Forms, etc.) are seeded on deploy. County leadership and administrators upload PDFs; all staff can browse. Citizens download from the public Resources page.

News & updates

Quick Links → Posts opens the staff posts dashboard. Create rich-text announcements with categories (News, Announcements, Project Updates, Events). Published posts appear on the public Updates section.

The screenshot displays the public portal for Trans Nzoia County Government. At the top, there is a navigation menu with links for HOME, PMTS, PUBLIC DASHBOARD, PROJECTS, PROJECT TYPES, COUNTY, UPDATES (highlighted), and CONTACTS. Social media icons for X, Facebook, and Instagram are present, along with a LOGOUT button. Below the navigation, a breadcrumb trail shows 'PMTS Updates' and 'Home / PMTS Updates'. The main content area is titled 'PMTS UPDATES' and features a featured news post. The post includes an image of four people in a meeting, a title 'TRADITIONALLY OUR INDUSTRY HAS USED LOREM IPSUM, ...', a date of 'May 9, 2025', and a category of 'Public Works, Roads, Transport Infrastructure & Energy'. The post text is a placeholder: 'Traditionally our industry has used Lorem Ipsum, which is placeholder text written in Latin. Tradit...'. A 'Read More' button is located at the bottom of the post. The footer contains four quick links: 'CGTN PMTS 2026', 'QUICK LINKS', 'PROJECT TYPES', and 'CONTACT INFO'. A caption at the bottom of the screenshot reads: 'Public Updates — published posts from the staff Posts dashboard.'

CHAPTER 13

User Account Management

Onboarding staff, assigning roles, security, and system settings (administrators).

System administrators manage staff accounts, security, backups, and portal configuration from the admin section of the sidebar.

1 Create account

User Accounts → New user: email, name, role, department (for dept-scoped roles).

2 Assign role

Pick from county leadership, planning, department, or admin tiers.

3 Communicate credentials

Set a temporary password; user changes it on first login.

4 Deactivate

Disable accounts when staff leave — do not delete historical audit data.

5 Security & Backup

Run security scans, create database/media backups, review audit events.

6 System Settings

Update portal homepage, header, footer, SEO, and contact details.

Account hygiene

Review User Accounts quarterly. Remove or deactivate departed staff promptly. Never share the sysadmin password in email or chat.

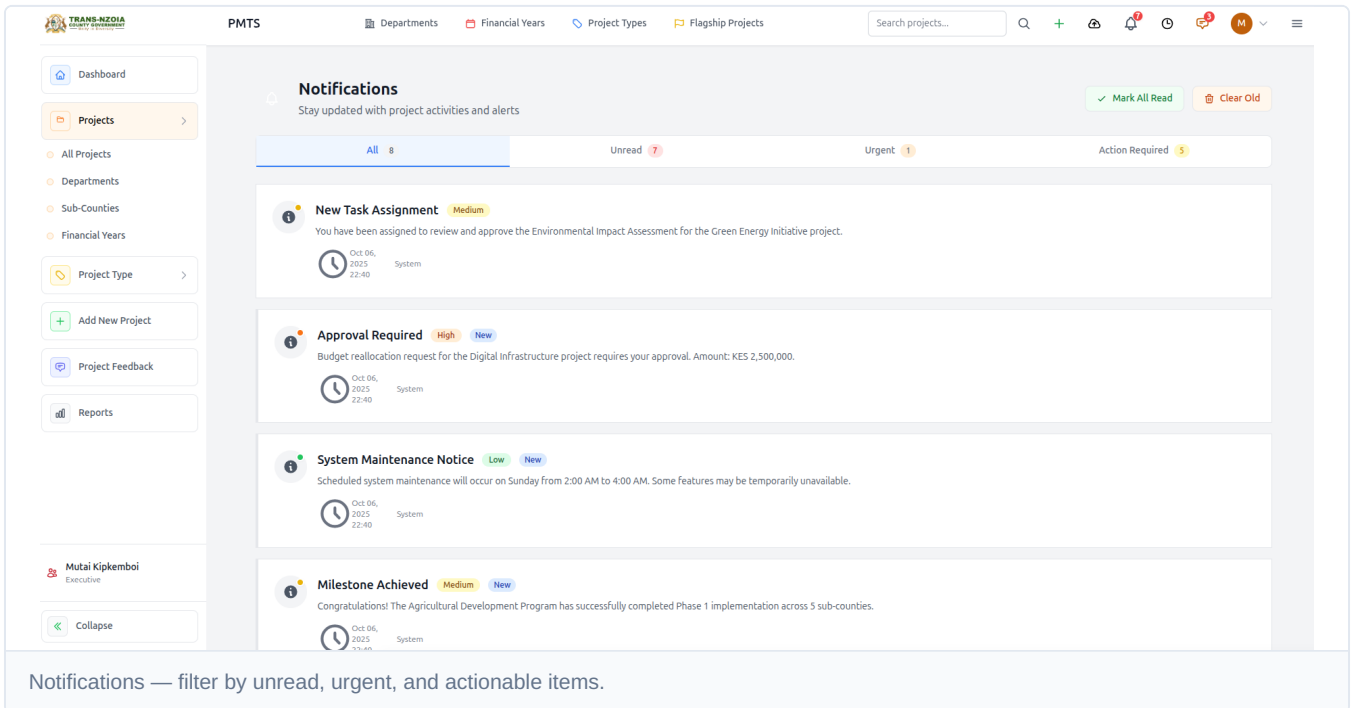
CHAPTER 14

Notifications & Activity Log

Stay informed and audit system changes.

Notifications

The bell icon in the top bar shows alerts: feedback received, QA decisions, system messages, and assignments. Mark as read or open the full notifications list under Quick Links → Notifications.



Activity log

Quick Links → Activity Log records create/update/delete events, bulk edits, imports, and logins. County leadership and administrators can archive old entries and download CSV archives.

The screenshot displays the PMTS (Project Management and Tracking System) interface. On the left is a sidebar with navigation options: Dashboard, Projects (with sub-options for All Projects, Departments, Sub-Counties, and Financial Years), Project Type, Add New Project, Project Feedback, Reports, and a user profile for Mutai Kipkemboi Executive. The top navigation bar includes links for Departments, Financial Years, Project Types, and Flagship Projects, along with a search bar and utility icons. The main content area is divided into two sections: 'Notifications' and 'System Activity Log'. The 'Notifications' section shows recent system activities and updates for Trans-Nzoia County PMTS, with a 'Select Timeframe' dropdown set to 'Last 30 Days' and a 'Filter by Location/Department' button. The 'System Activity Log' section lists various user actions, including viewing project types listing pages and updating a project named 'KachiborahCentre'.

Notifications
Recent system activities and updates for Trans-Nzoia County PMTS.

Select Timeframe: Last 30 Days (Currently viewing: Last 30 Days) Filter by Location/Department

System Activity Log

- Viewed project types listing page
By: Mutai Kipkemboi | Department: N/A | Location: N/A, N/A
34 minutes ago
- Viewed project types listing page
By: Anonymous | Department: N/A | Location: N/A, N/A
34 minutes ago
- Updated project 'KachiborahCentre' 'KachiborahCentre'
By: Mutai Kipkemboi | Department: Health Services and Sanitation | Location: Nabiswa, Kiminiini
17 hours ago
- Viewed project types listing page
By: Anonymous | Department: N/A | Location: N/A, N/A
17 hours ago
- Viewed project types listing page
By: Anonymous | Department: N/A | Location: N/A, N/A
17 hours ago
- Viewed project types listing page
By: Anonymous | Department: N/A | Location: N/A, N/A
17 hours ago
- Viewed project types listing page
By: Anonymous | Department: N/A | Location: N/A, N/A
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By: Anonymous | Department: N/A | Location: N/A, N/A
17 hours ago
- Viewed project types listing page
By: Anonymous | Department: N/A | Location: N/A, N/A
17 hours ago

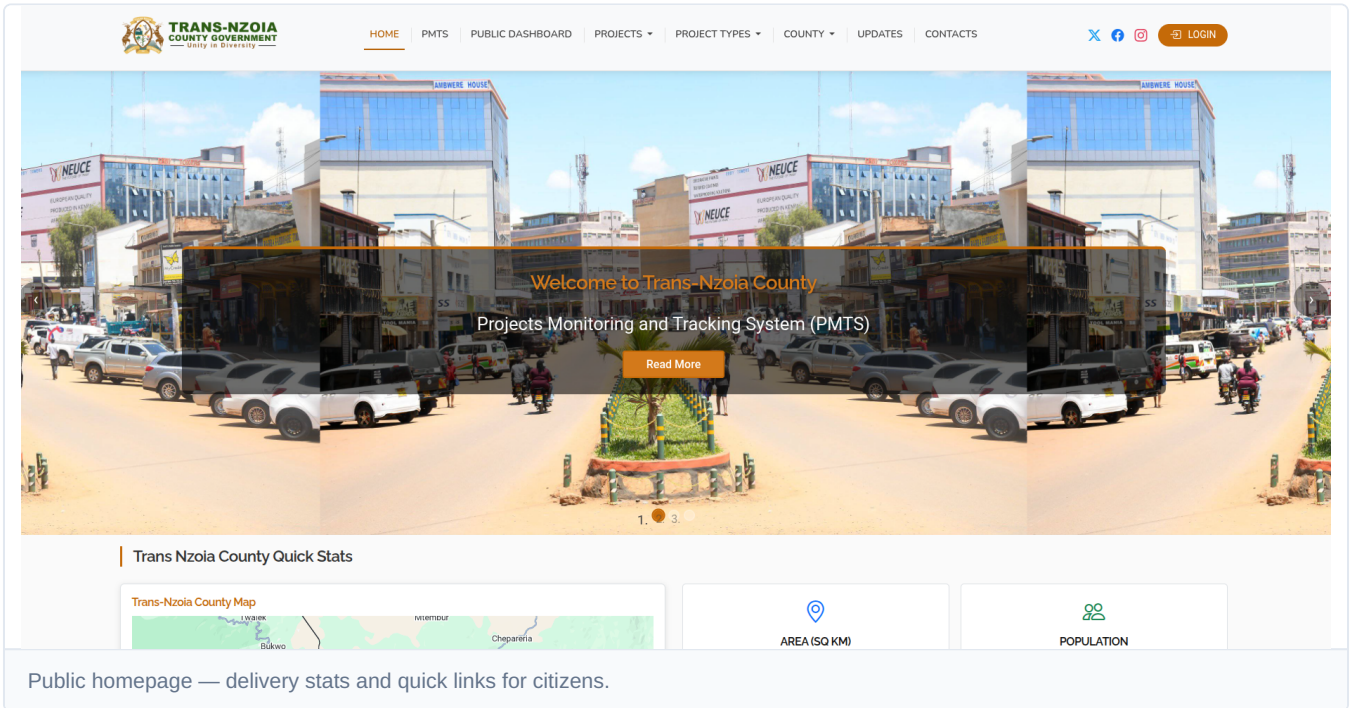
Activity Log — first place to investigate unexpected data changes.

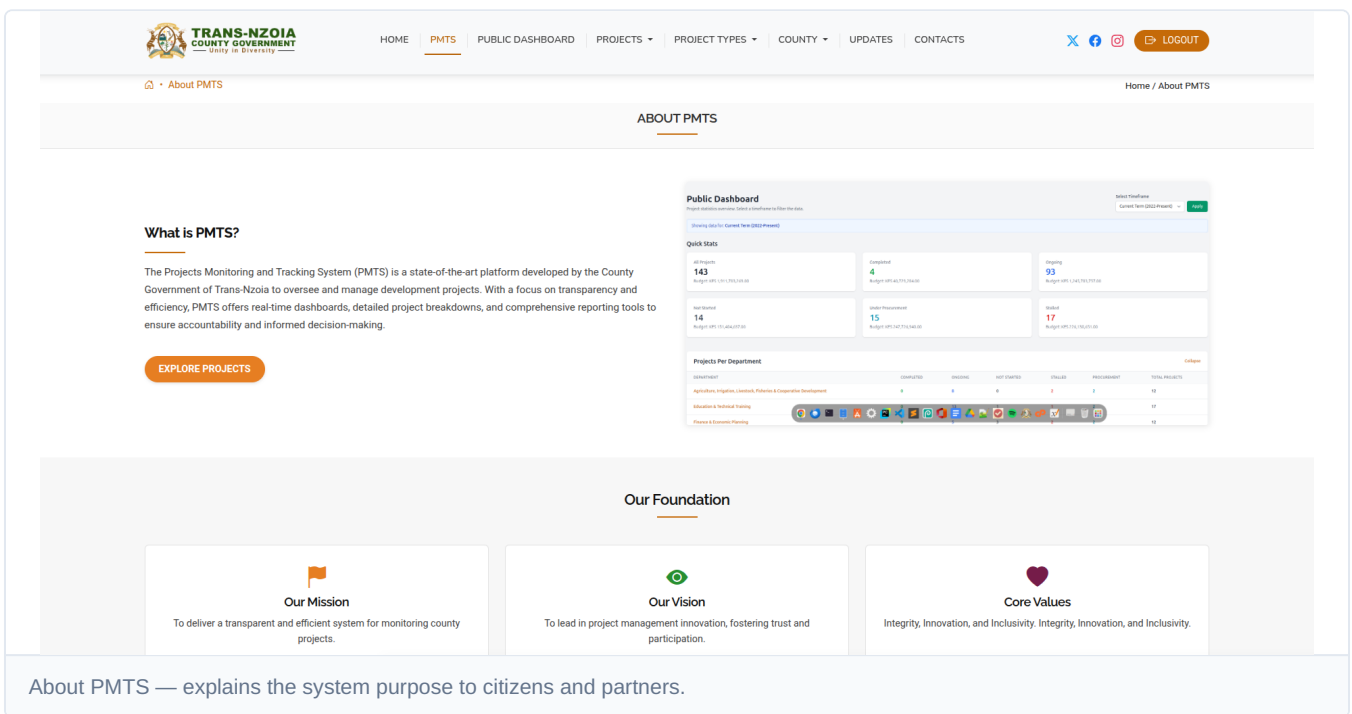
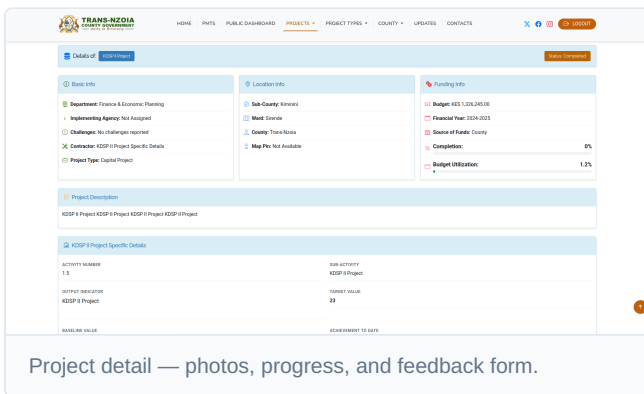
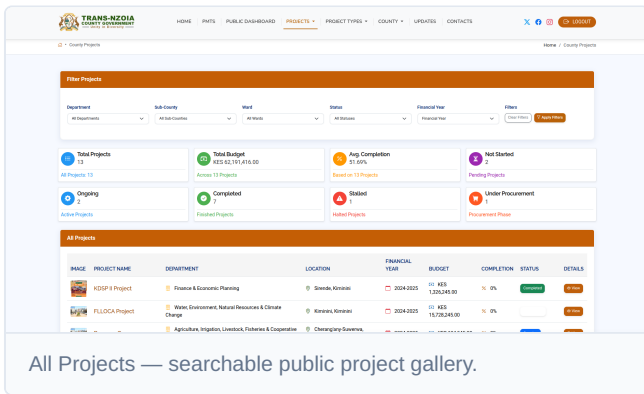
CHAPTER 15

Public Portal

What citizens see versus the staff workspace.

Staff can preview the citizen experience using View Public Portal links or by browsing with ?view=public on project URLs. Only QA-approved projects appear in public listings.





- Home — county statistics and financial year quick links
- All Projects / Flagship — searchable, filterable project gallery
- Project detail — photos, progress, feedback form
- Public dashboard — aggregate delivery stats
- Resources, Updates, FAQs, Contact

CHAPTER 16

End-to-End Workflows

Reference diagrams for common multi-step processes.

New project → public visibility

- 1 Department staff creates project (draft)
↓
- 2 Data entry: budget, location, photos, programme fields
↓
- 3 Submit for QA review
↓
- 4 Planning approves publication
↓
- 5 Project visible on public portal; citizens can submit feedback

Bulk stock-take (existing Excel registers)

- 1 Download import template for project type
↓
- 2 Fill Excel from departmental register
↓
- 3 Import with defaults (dept + FY)
↓
- 4 Validate preview → save batch
↓
- 5 QA sample-check and approve publications

Monthly reporting cycle

- 1 Department staff update progress & expenditure (by 5th of month)
↓
- 2 Chief Officer reviews departmental dashboard
↓
- 3 Planning QA spot-checks new/changed publications
↓
- 4 County leadership reviews Reports hub + Key Insights
↓

5 Export PDF briefing for CEC / executive committee

CHAPTER 17

Frequently Asked Questions

Quick answers to common staff questions.

Q Why can't I create projects?

A Only department staff and administrators hold project manager permissions. County leadership roles can view and report but not create records.

Q Why was I redirected away from the dashboard?

A Your account may have the public/citizen role, or you opened a page your role cannot access. Contact the system administrator to verify your role assignment.

Q My project doesn't appear on the public website.

A Check `publication_status`. It must be approved by Economic Planning QA before public visibility.

Q Import failed — what should I check?

A Verify Excel headers match the template, financial year format is YYYY-YYYY, ward names match the county gazette list, and department is selected in defaults.

Q Where is the full system documentation?

A Staff: sidebar → Quick Links → System Documentation. Public website footer also links to this manual. Export PDF from the top of the documentation page.

Q Can I use this manual for training workshops?

A Yes. Export the PDF, walk through the Staff Training Paths section, and practise on test projects before working on live data.

CHAPTER 18

Support & Troubleshooting

Escalation paths and best practices.

- System administrator — account access, role changes, password resets, backups
- Economic Planning — QA publication rules, reporting definitions
- ICT / vendor support — platform errors, deploy issues, integrations
- Activity Log — first place to check when data changes unexpectedly

Data quality habits

Update progress fortnightly, attach geotagged photos, keep expenditure within allocation, and submit for QA only when mandatory fields are complete. Good data quality makes county reports trustworthy for citizens and donors.
