USER MANUAL

Kagga And Partners Requisition Module

SEPTEMBER 21, 2020

EISAH K MAYANJA
128 OLD KIRA ROAD | LEVEL 2 KAMURE PARK BUILDING

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Administrator

Add an Employee: The administrator shall click “add employee” button and fill in the form accordingly (All fields are compulsory) then click submit to create the employee account.

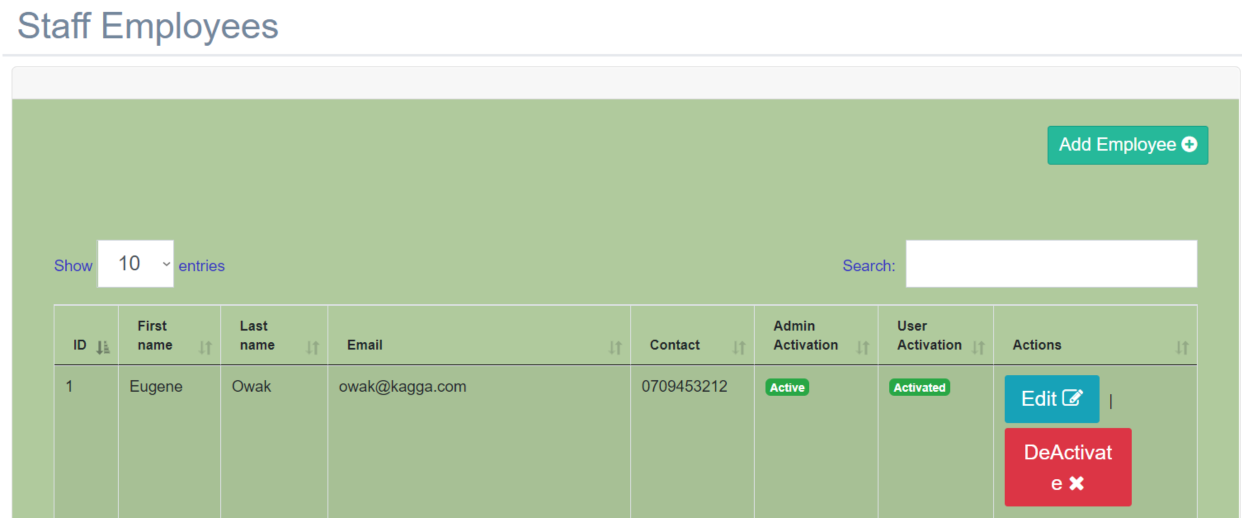

Figure 1 Employees' screenshot

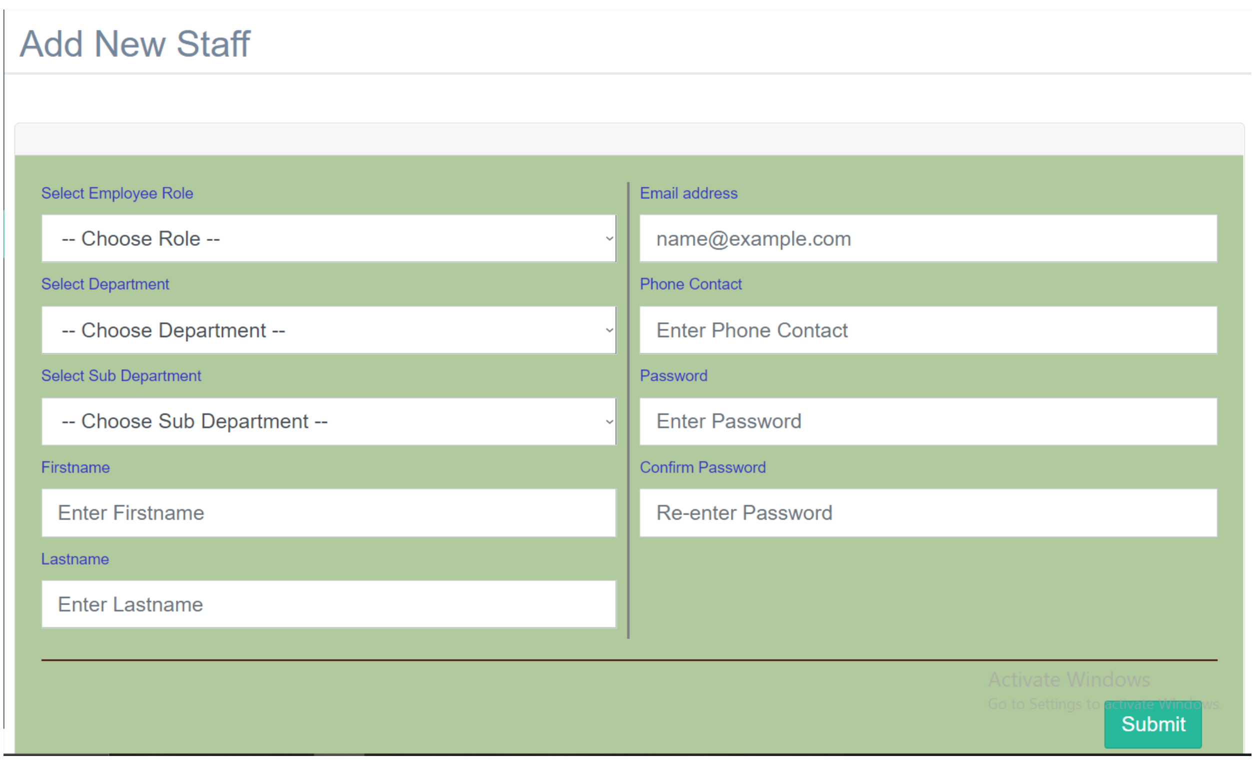

Figure 2 Screenshot showing form used to create an employee account.

Edit or De-activate an employee: The administrator may click the "edit" button in the "Actions" column (shown below) to edit the employee's record; a form shall appear that can be used to edit the record, click submit to save the changes accordingly.

To deactivate an employee account, the administrator shall click the "DeActivate" button in the "Actions" column (shown below).

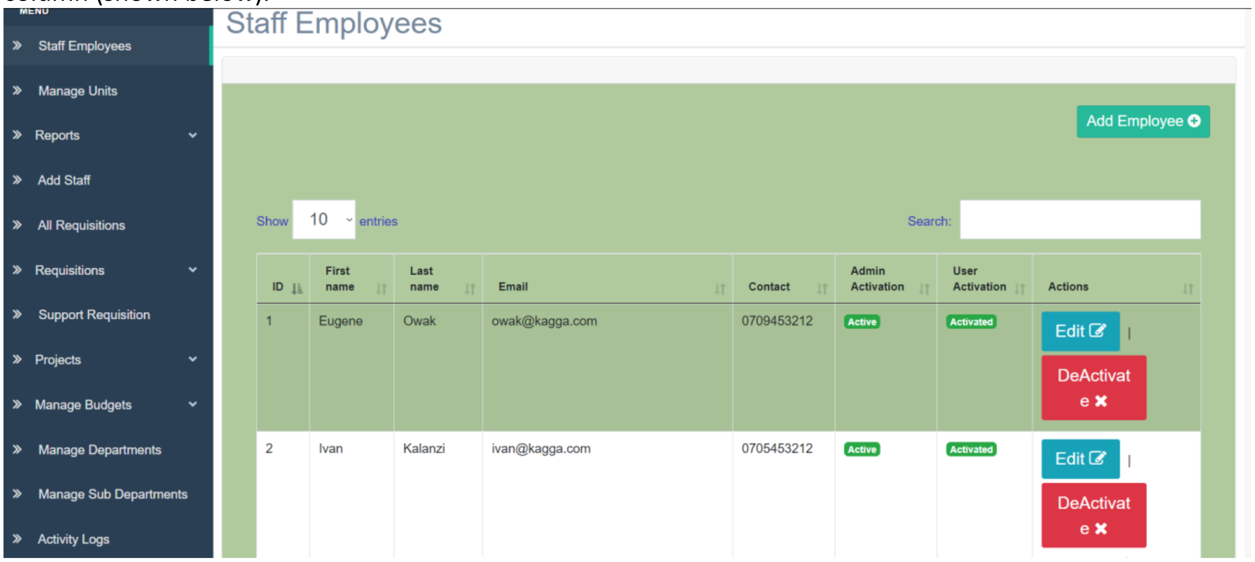

Figure 3 Screenshot showing Edit and Deactivate User account buttons.

Manage Units

To create a new unit, the administrator shall click Manage Units from the left-hand side vertical menu; click the add new unit button and add the unit.

To edit an existing unit, the administrator has to click the edit button in the Actions column.

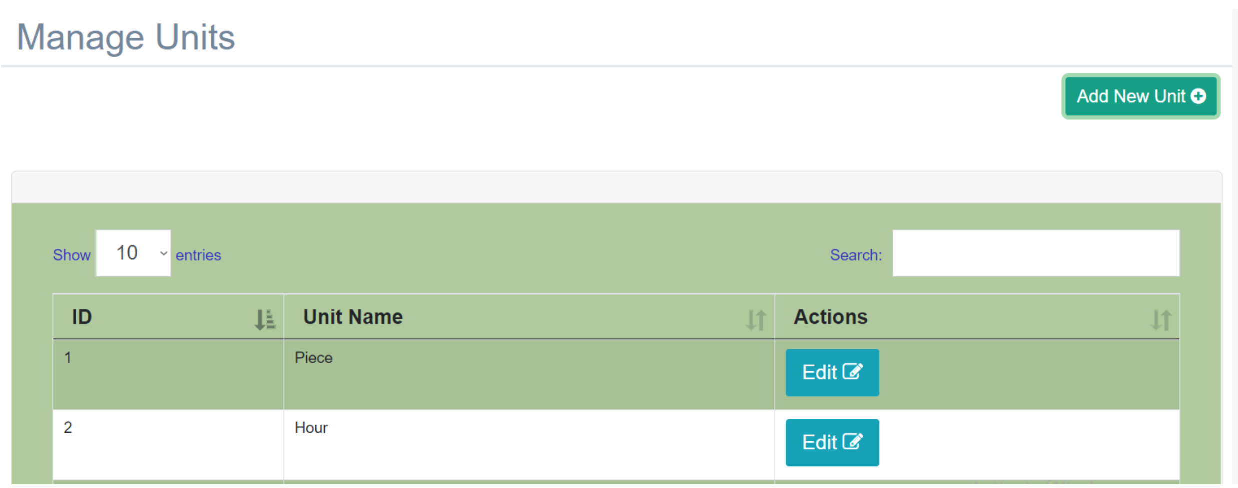

Figure 4 Manage Units screenshot

Requisitions

To view submitted requisitions:

- The administrator shall click "all requisitions" from the left-hand side vertical menu; a list of all submitted requisitions shall appear as shown below.

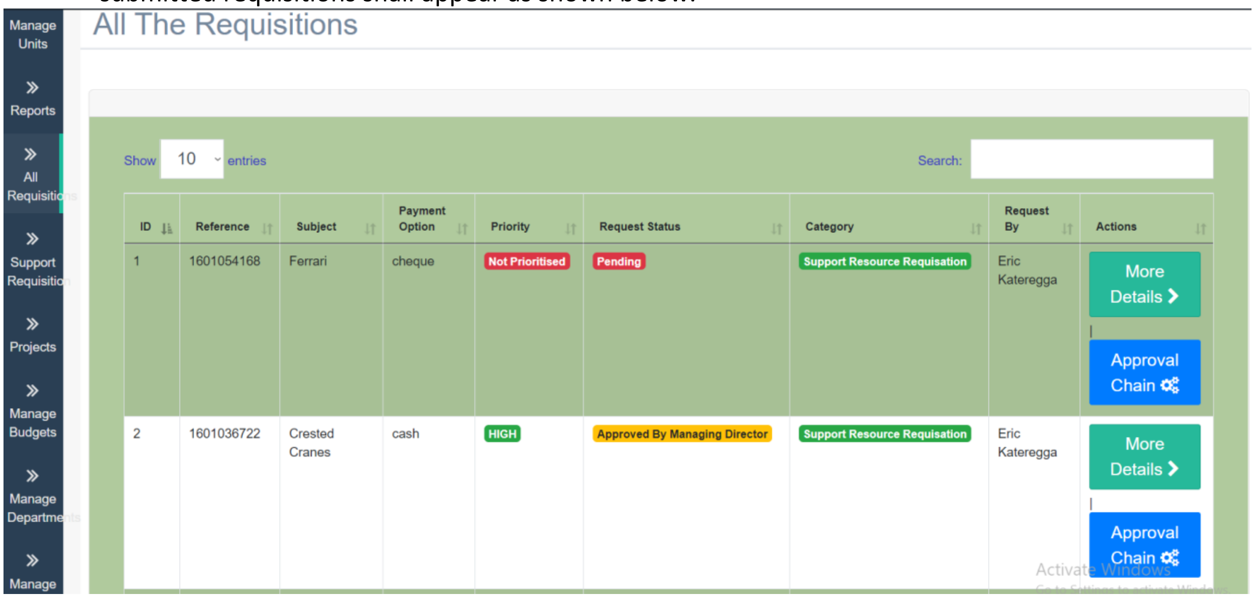

Figure 5 Screenshot showing a partial list of submitted requisitions.

- Click the one of "More Details" or "Approval Chain" buttons in the Actions column (refer to figure above) to view details about a particular requisition or its approval status.

Projects

Create a Project: To create a project, the administrator shall click projects from the left-hand side vertical menu. From the drop-down menu click manage projects.

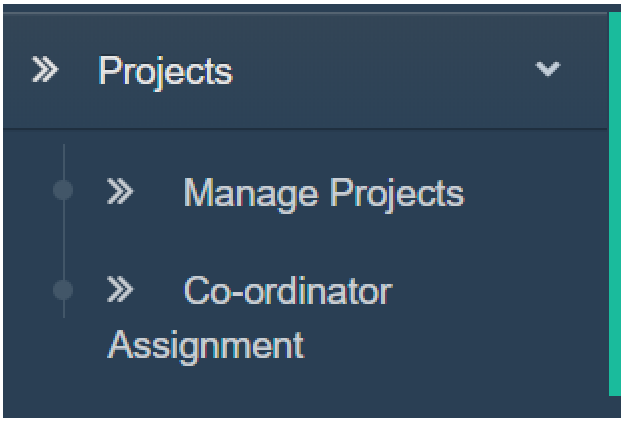

Figure 6 Projects drop-down menu

- From the resulting page (shown below), click add project and fill out the form (all fields are required) and submit it by clicking the submit button at the end of the form.
- To edit an existing project, from the Actions column (shown below) click the edit button and make the necessary changes and submit it by clicking the submit button at the end of the form.
- The administrator may mark the project as done using the "Mark As Done" button in the Actions column upon it's completion.

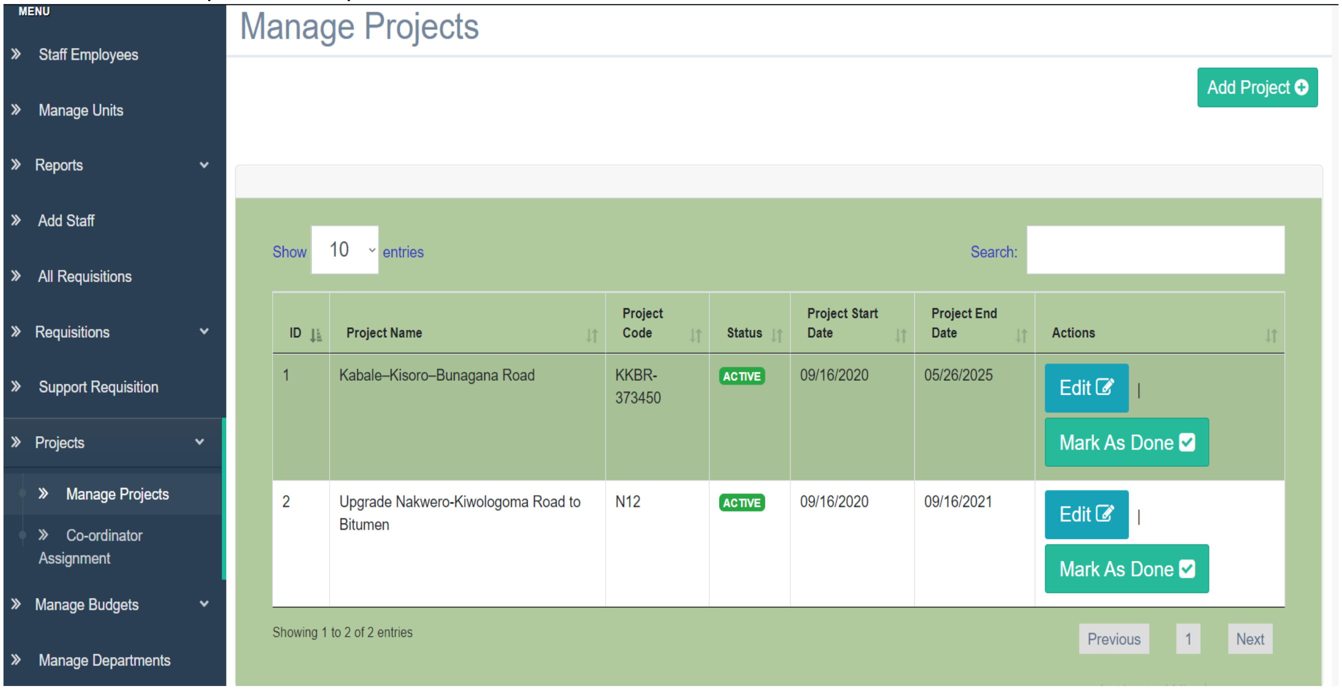

Figure 7 Manage Projects Screenshot

Assign a project coordinator: the administrator shall click projects from the left-hand side vertical menu. From the drop-down menu click “Co-ordinator Assignment”.

- From the resulting page, click “Assign Project Coordinator”, select the project and coordinator from the dropdown and click submit to save the changes made to the project.

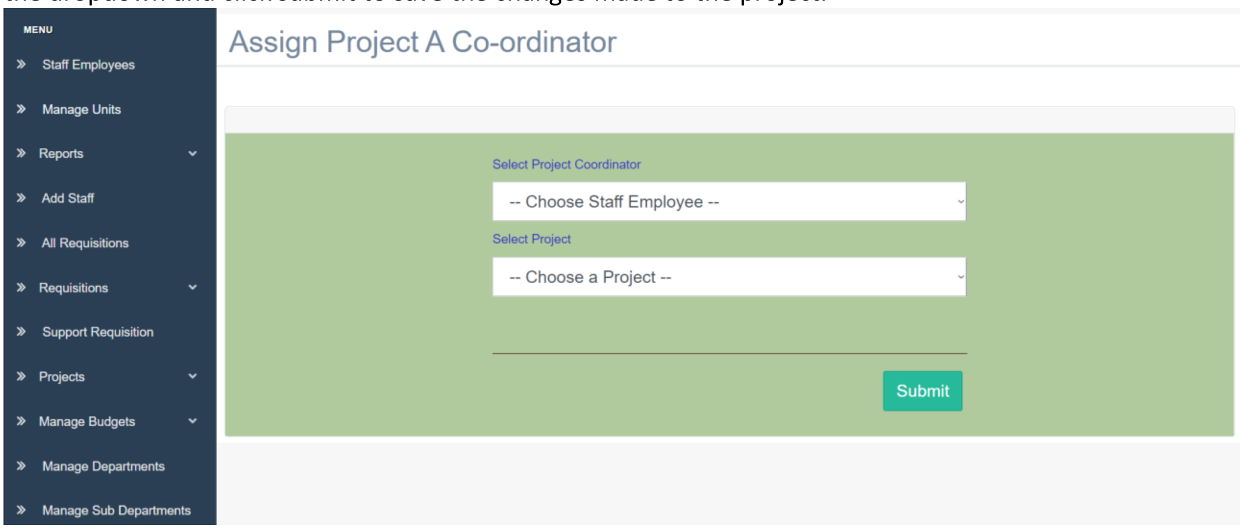

Figure 8 Screenshot showing Project Coordinator Assignment form.

- To re-assign the project coordinator, click “Re-assign Coordinator” from the Actions column. Select a coordinator from the dropdown list and click submit to save the changes.

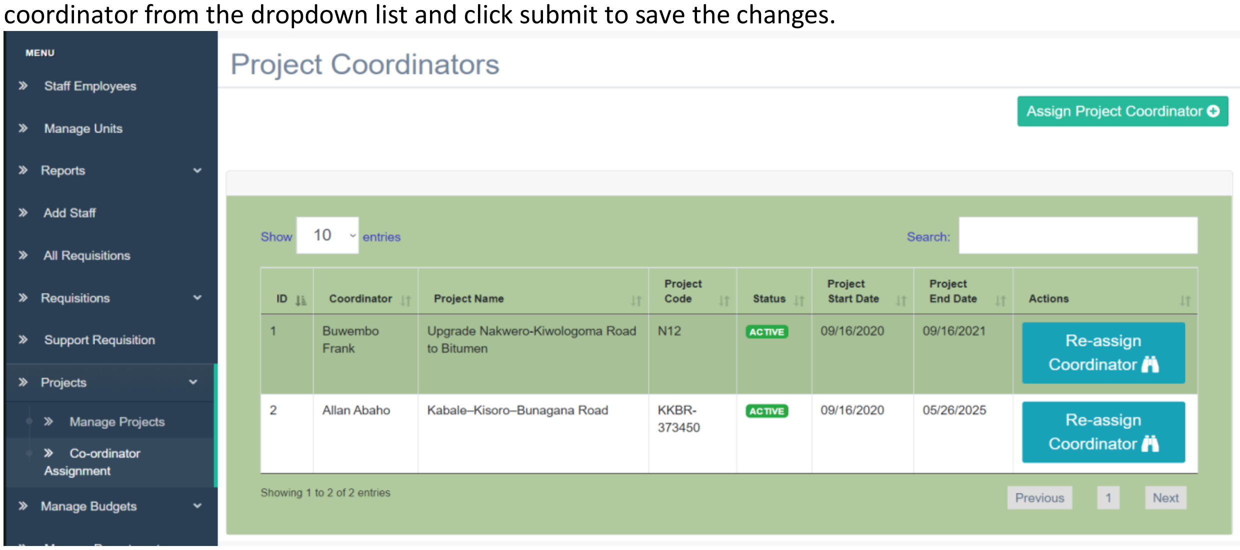

Figure 9 Project Coordinators Management screenshot.

Departments

To manage departments i.e. to create or edit: the administrator shall click Manage Departments from the left-hand side vertical menu.

From resulting page:

- Click add department to create a new department, add a department name and click submit to save the changes.
- To edit an existing department, click the edit button in the Actions column, change the department name and click submit to save the changes.

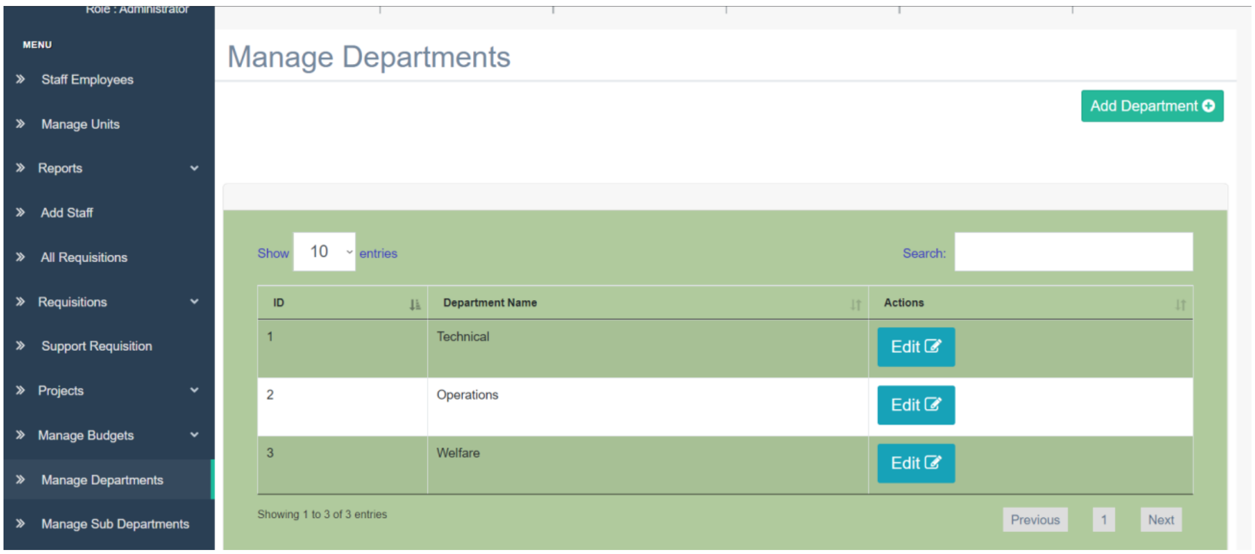

Figure 10 Manage Departments Screenshot

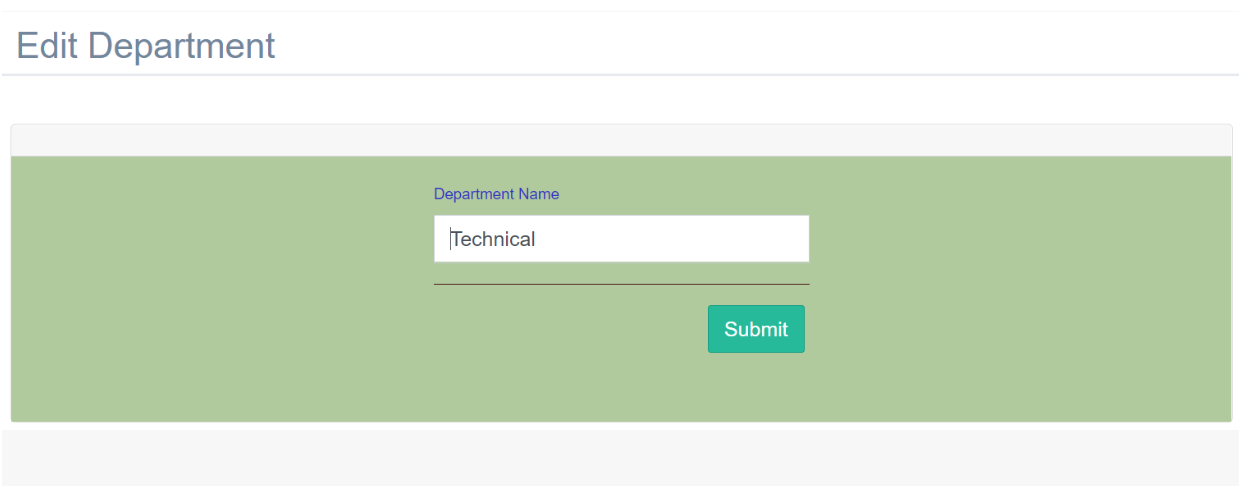

Figure 11 Screenshot showing form to edit departments.

Sub departments

To manage sub departments i.e. to create or edit: the administrator shall click Manage Sub Departments from the left-hand side vertical menu.

From resulting page:

- Click add sub department to create a new sub department, select a department from the drop-down list, add a sub department name and click submit to save the changes.
- To edit an existing sub department, click the edit button in the Actions column, select a department from the drop-down list, edit the sub department name and click submit to save the changes.

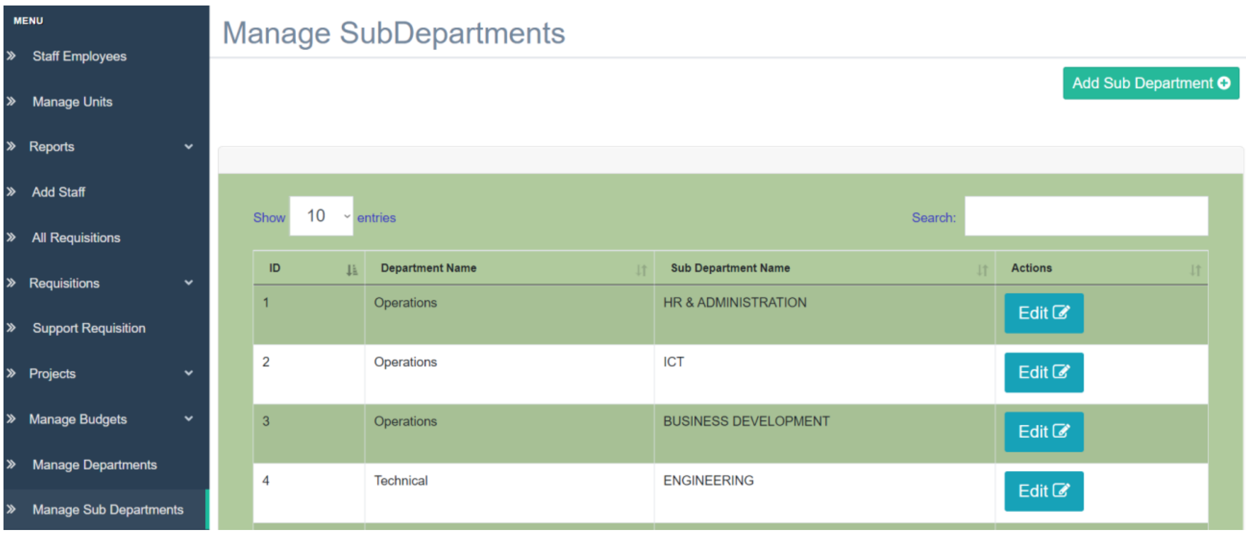

Figure 12 Manage sub departments screenshot.

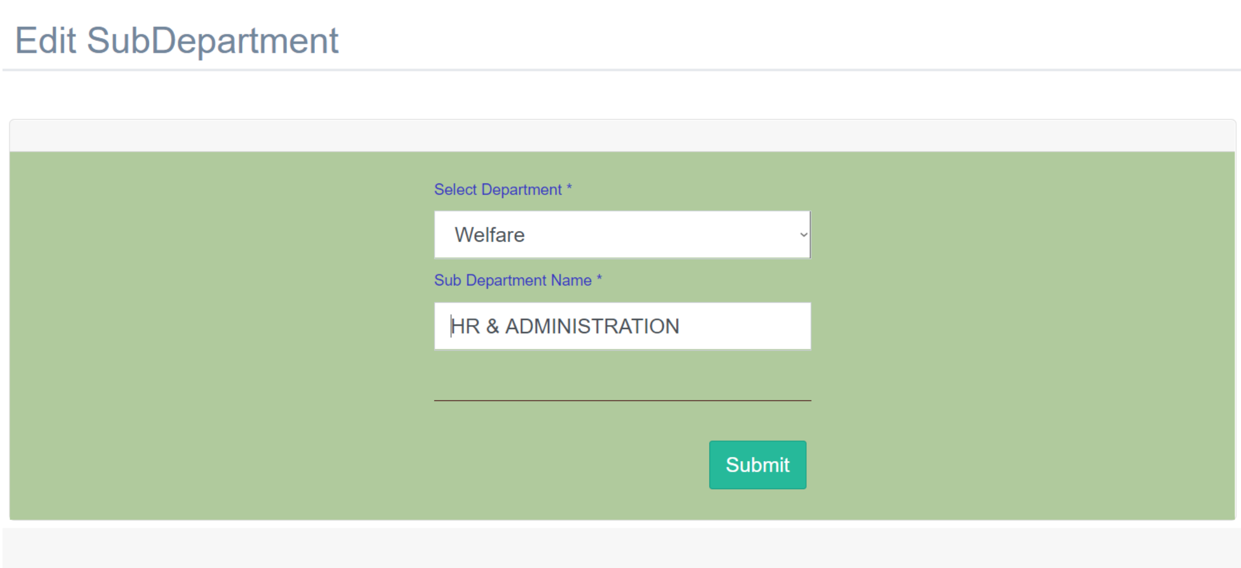

Figure 13 Screenshot form used to edit sub departments.

Budgets

To create a budget or view budgets; the administrator shall click Manage Budgets from the left-hand side vertical menu. A drop-down list: add budget, add Project Budget, All Budgets, All Projects Budgets shall appear as shown below.

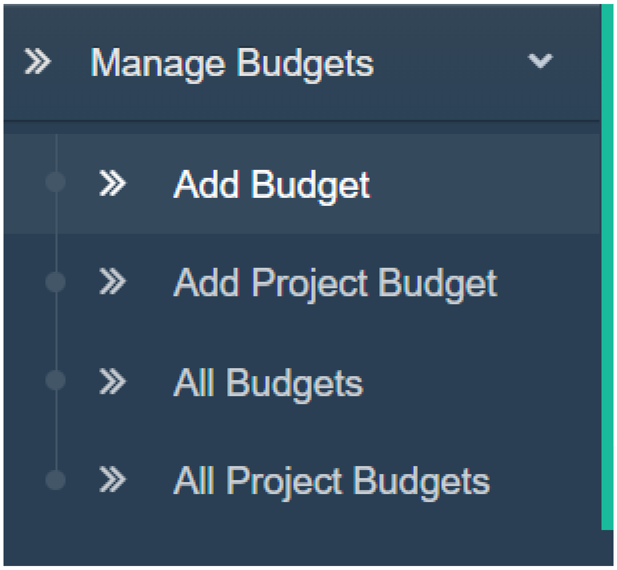

Figure 14 Manage Budgets drop-down menu.

From the drop-down list click:

- Add Budget to create a sub-department budget: select the sub-department of choice and upload an excel sheet of the budget. Click submit to save the created budget.

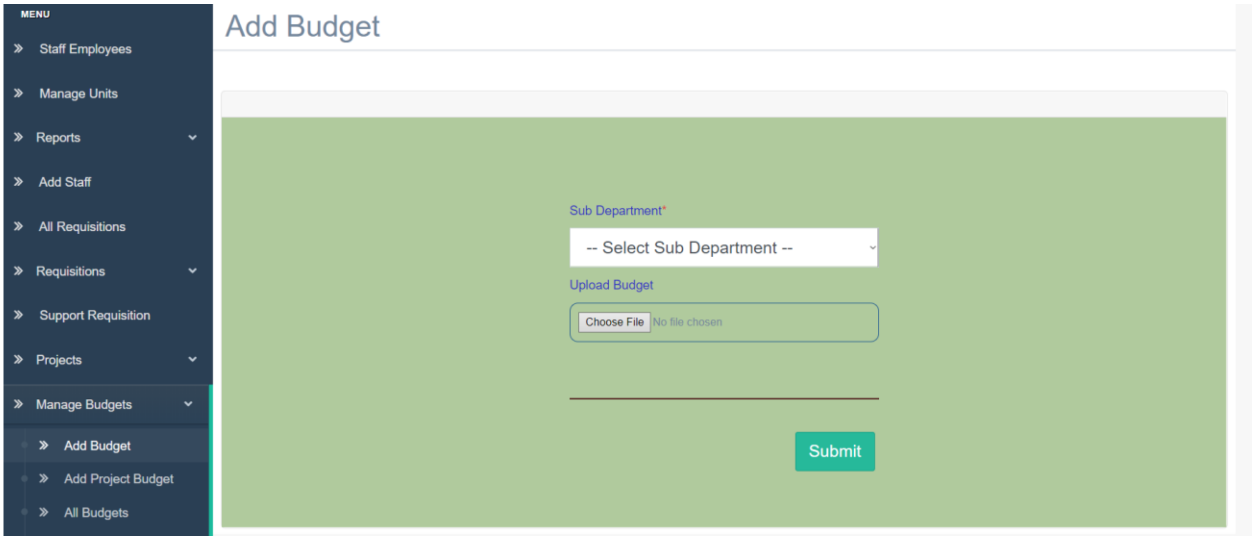

Figure 15 Screenshot showing the sub-department budget creation form.

- Add Project Budget to create a project budget: select the project of choice and upload an excel sheet of the budget. Click submit to save the created budget.

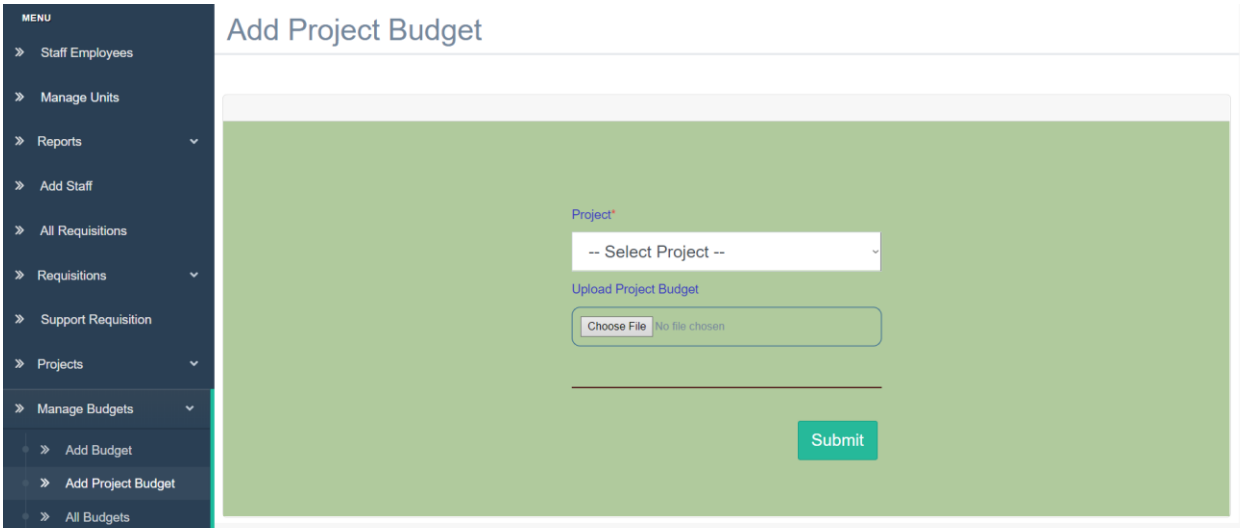

Figure 16 Screenshot showing the Project budget creation form.

- All Budgets to view budget utilization, delete, download all sub-department budgets as shown below.

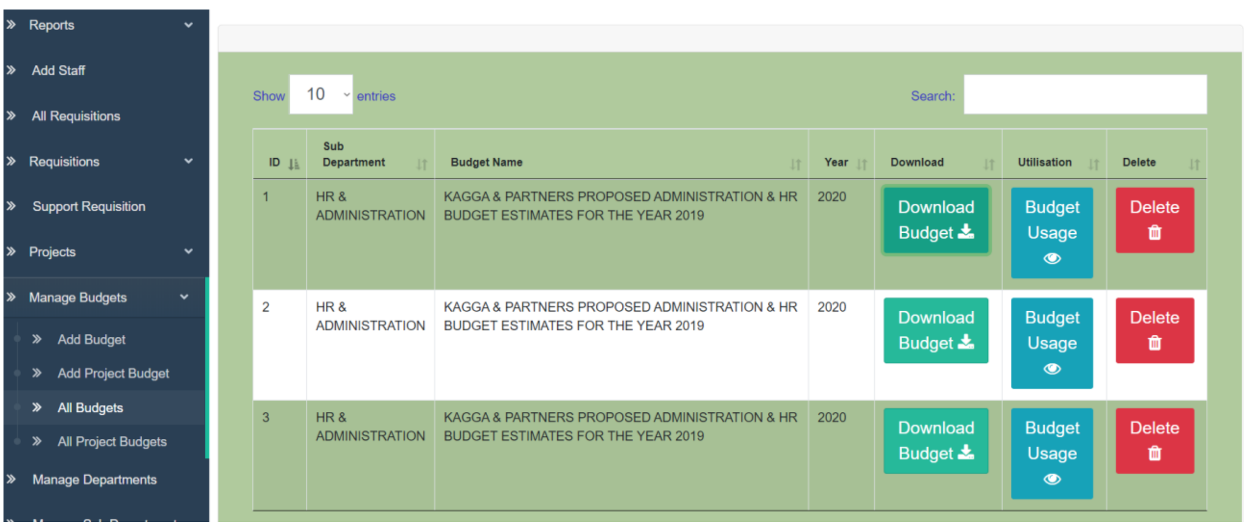

Figure 17 Screenshot showing sub-department budgets.

- All projects budgets to view budget utilization, delete, download all project budgets as shown below

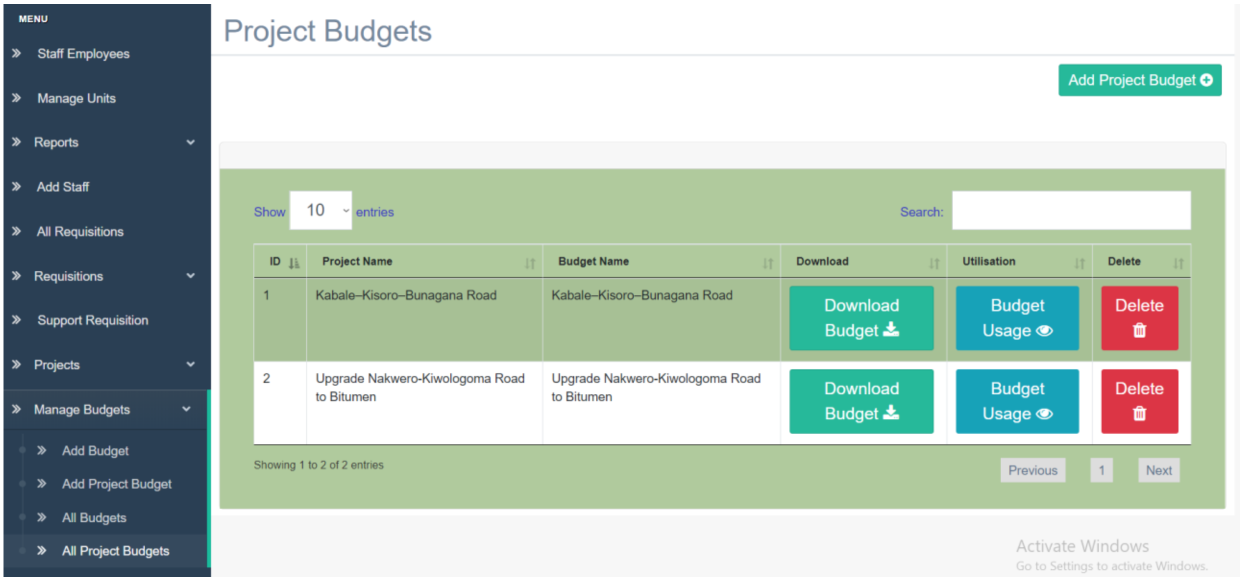

Figure 18 Screenshot showing Project budgets.

Reports

To generate a report, the administrator shall click Manage Budgets from the left-hand side vertical menu. A drop-down list: General Reports, Sub Department Budget Deviations Report and Project Budget Deviations Report shall appear as shown below.

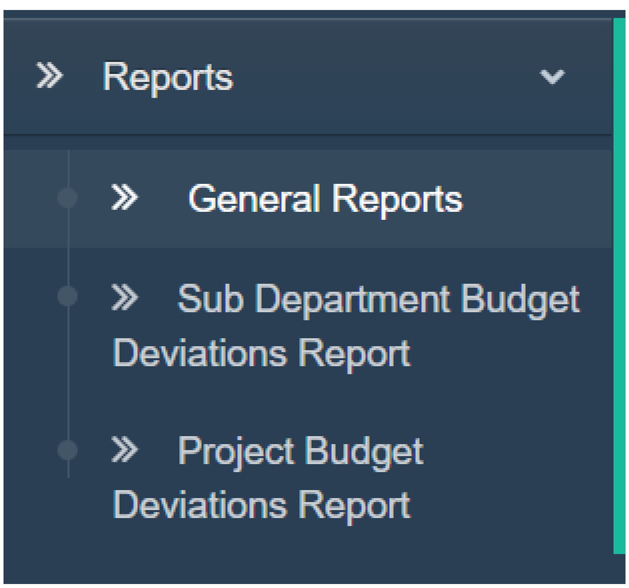

Figure 19 Screenshot showing the Reports drop-down list.

From the drop-down list click:

General Reports: This option shall be used to generate: With Holding Tax, Value Added Tax, Pay As You Earn, NSSF, Pending Requisitions, Deferred Requisitions, Cancelled Requisitions, Partially paid Requisitions and Fully Paid Requisitions reports from the drop-down options. Select the start and end dates then click "Generate Report". Screenshot shown below.

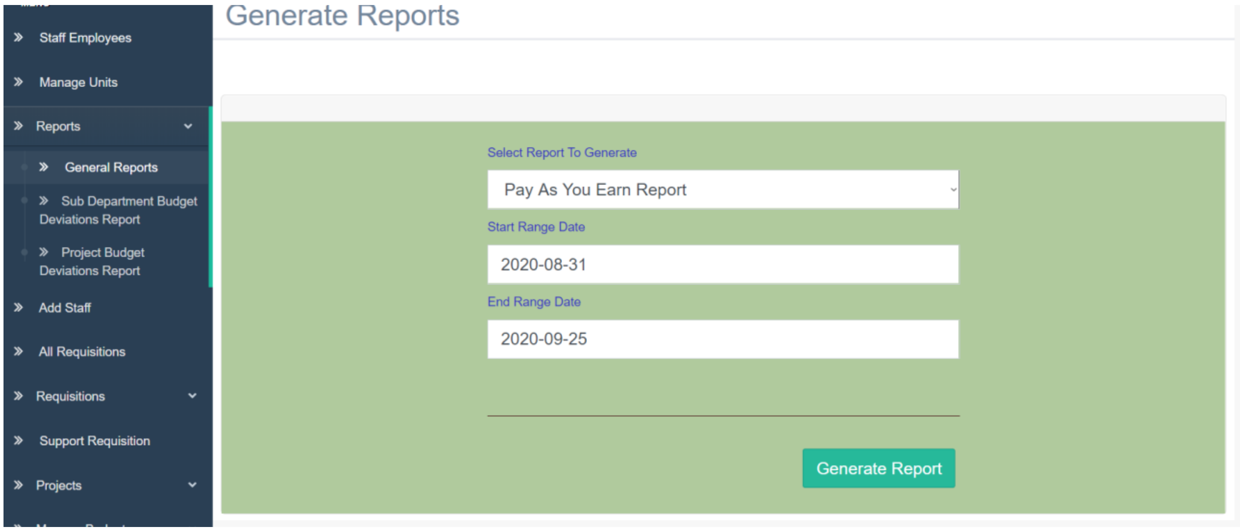

Figure 20 Screenshot showing a PAYE report to be generated.

Sub Department Budget Deviations Reports: This option shall be used to generate sub department reports i.e. HR & ADMINISTRATION, ICT, BUSINESS DEVELOPMENT and ENGINEERING using the "Select Sub Department" drop-down.

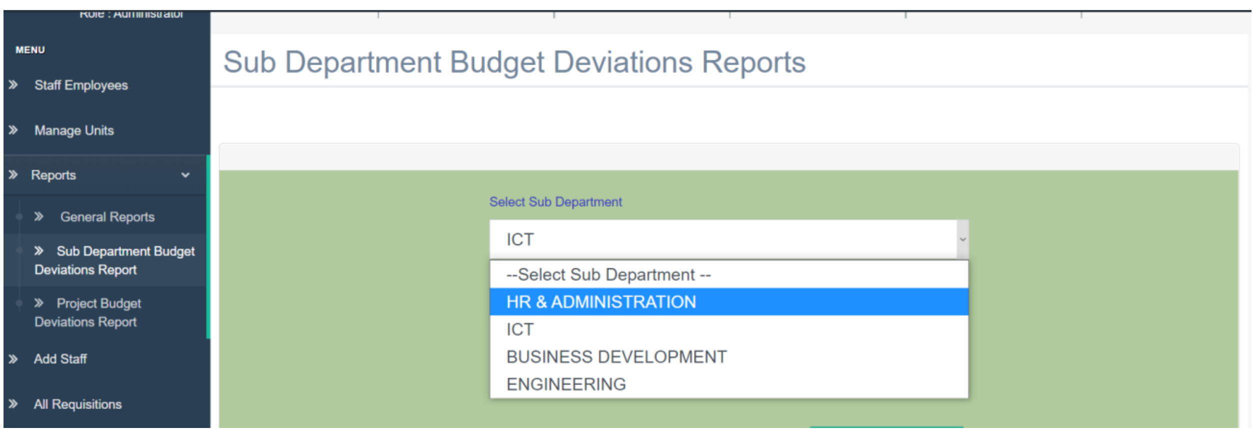

Figure 21 Screenshot showing sub-department options.

1. *Entire Budget*: This option shall be used to generate sub department's budget report. After selecting the sub-department, using the "Choose Option" select "Entire budget" and click "Generate Report" as shown below.

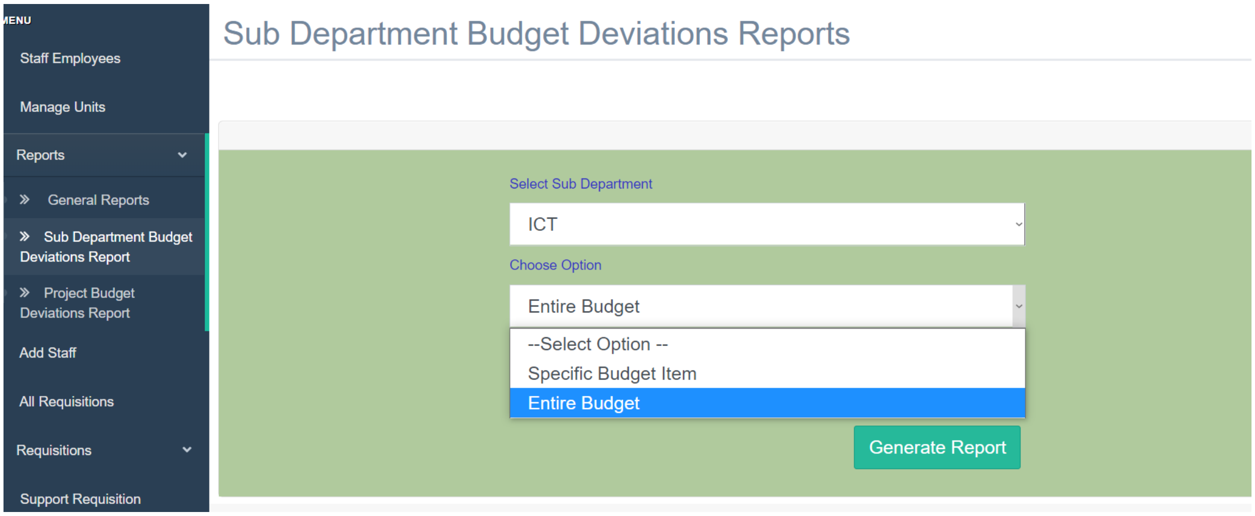

Figure 22 Screenshot showing Entire Budget report to be generated.

2. *Specific Budget Item*: This option shall be used to generate a report for a specific budget item. After selecting the sub-department, using the "Choose Option" select "Specific Budget Item", Select a budget item of choice and click "Generate Report" as shown below.

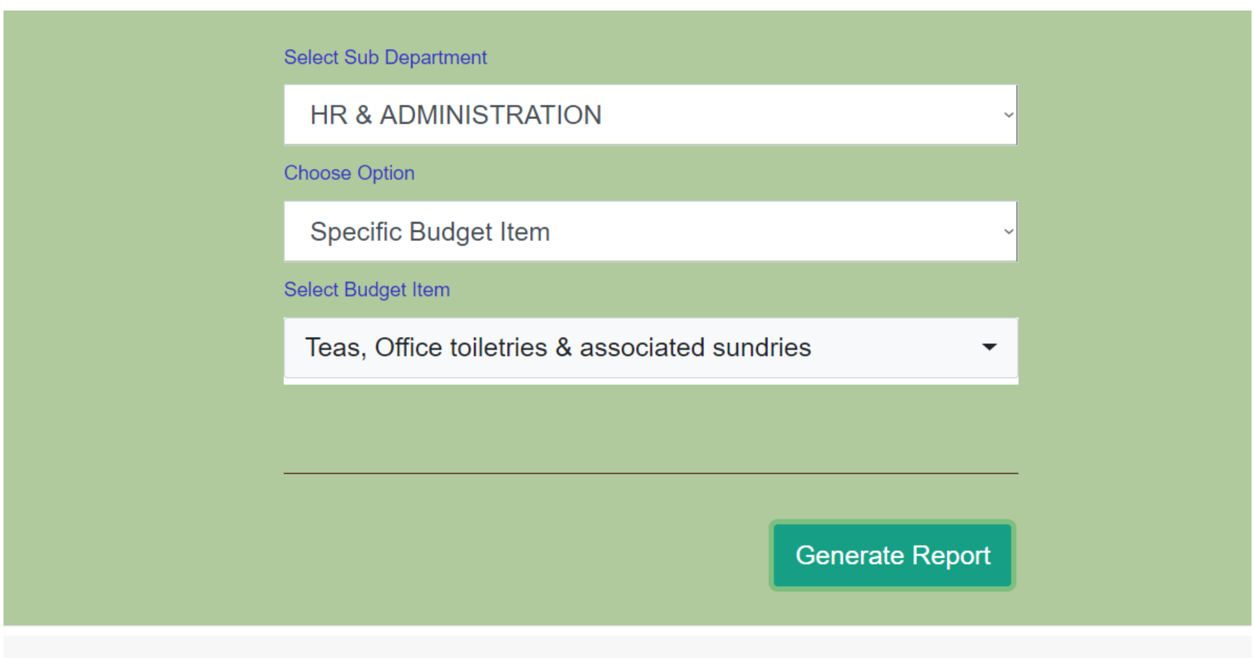

Figure 23 Screenshot showing a Specific Budget Item report to be generated.

Project Budget Deviations Reports: This option shall be used to generate reports about an entire project's budget or a specific budget item report.

1. *Entire Budget*: Select a project of interest using the "Select Report To Generate" drop-down; from the "Choose Option" drop-down select "Entire Budget" and click "Generate Report".

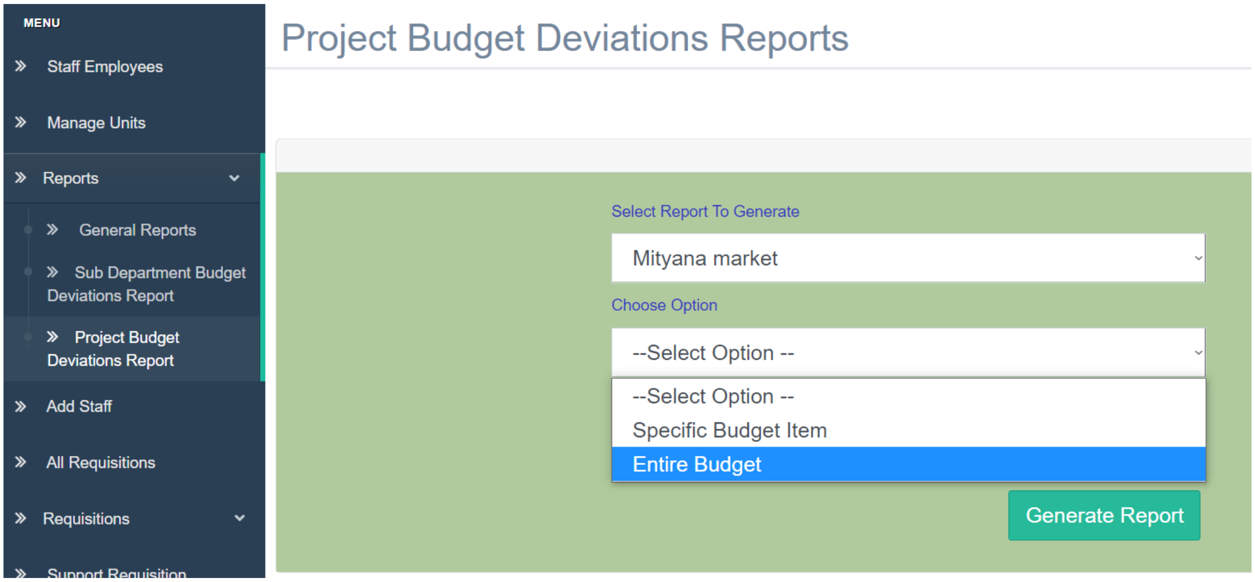

Figure 24 Screenshot showing a Project's entire budget report to be generated.

2. *Specific Budget Item*: Select a project of interest using the "Select Report To Generate" drop-down; from the "Choose Option" drop-down select "Entire Budget", Select a budget item of choice and click "Generate Report".

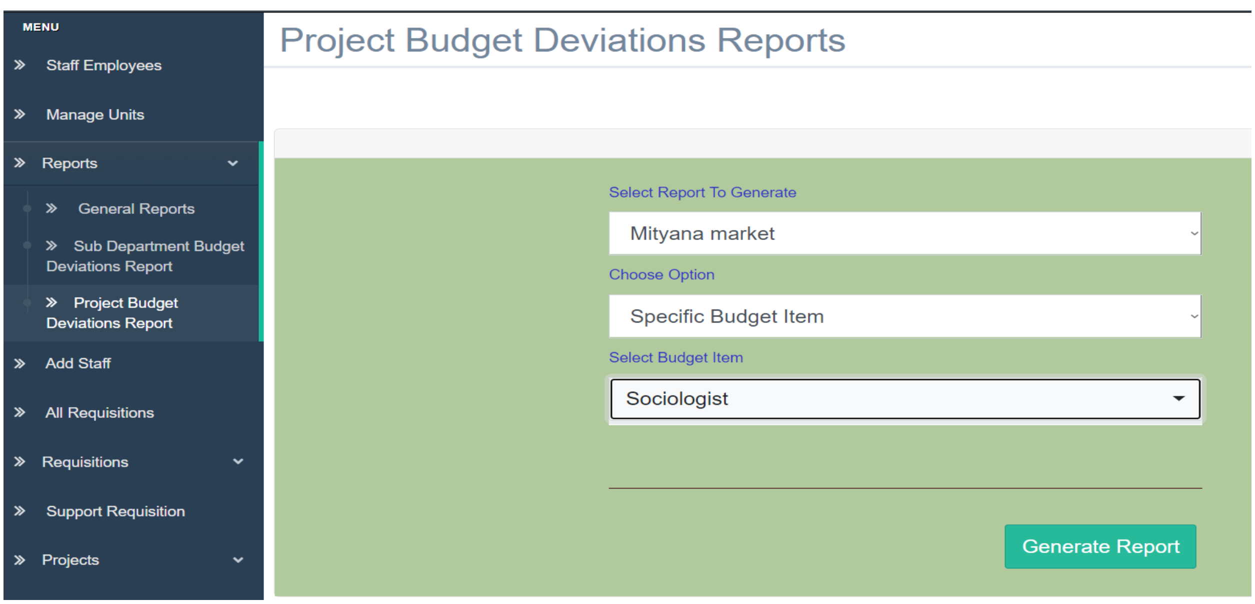

Figure 25 Screenshot showing a Specific Budget item report to be generated.

Staff Member

View Sub Department Budget:

The staff member may click “Sub Department Budget” from the left-hand side vertical menu and the budget shall be displayed as shown below.

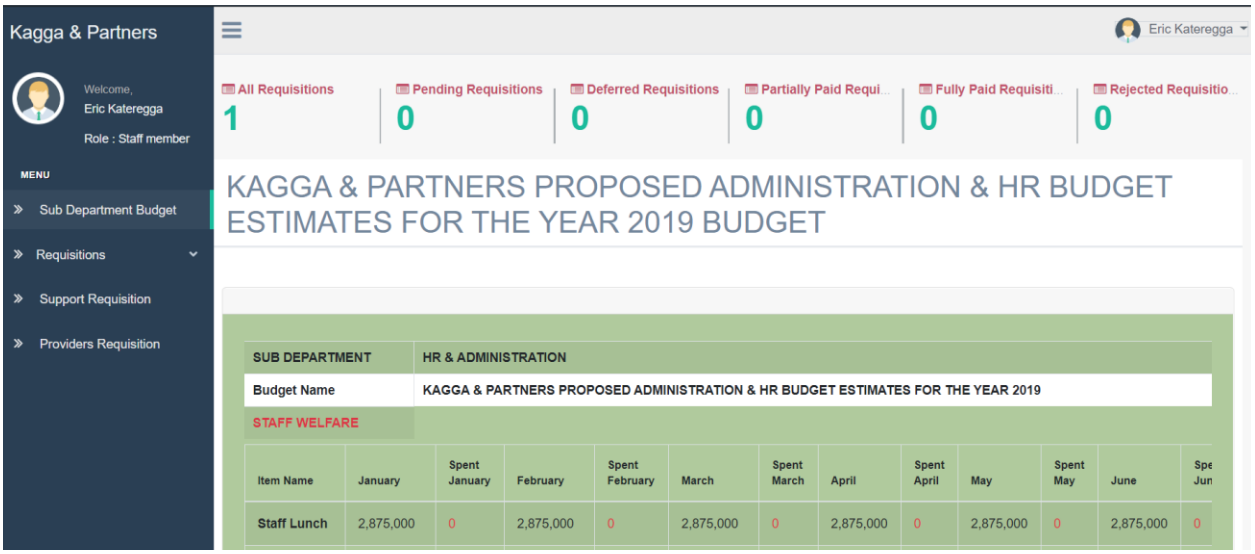

Figure 26 Screenshot showing part of a proposed Administration and HR budget.

Requisitions:

to view submitted requisitions or rejected requisitions, the staff member may click “Requisitions” from the left vertical menu; two drop-down menus shall appear as shown below. Click the one of My Requisitions or Rejected Requisitions to view submitted requisitions and rejected requisitions respectively.

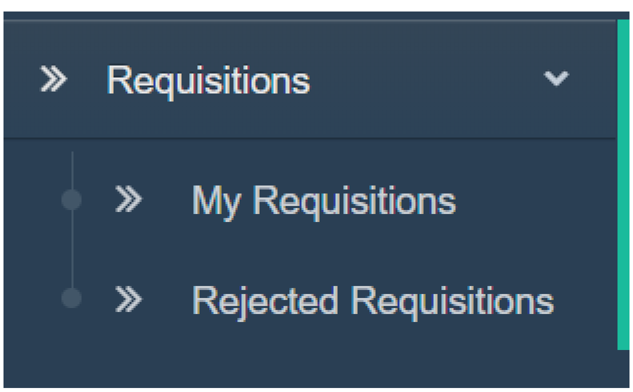

Figure 27 Screenshot showing the Requisitions drop-menu.

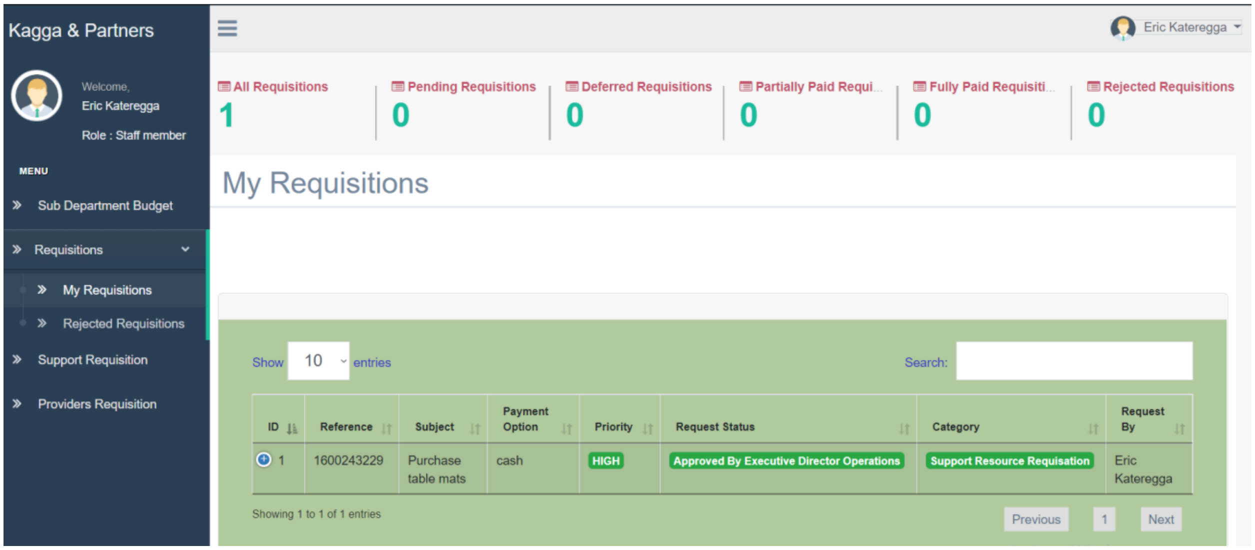

Figure 28 Screenshot showing a staff member's Requisition request.

To view the particulars of a given requisition, click “ ” in the “ID” column and then click “More Details”.

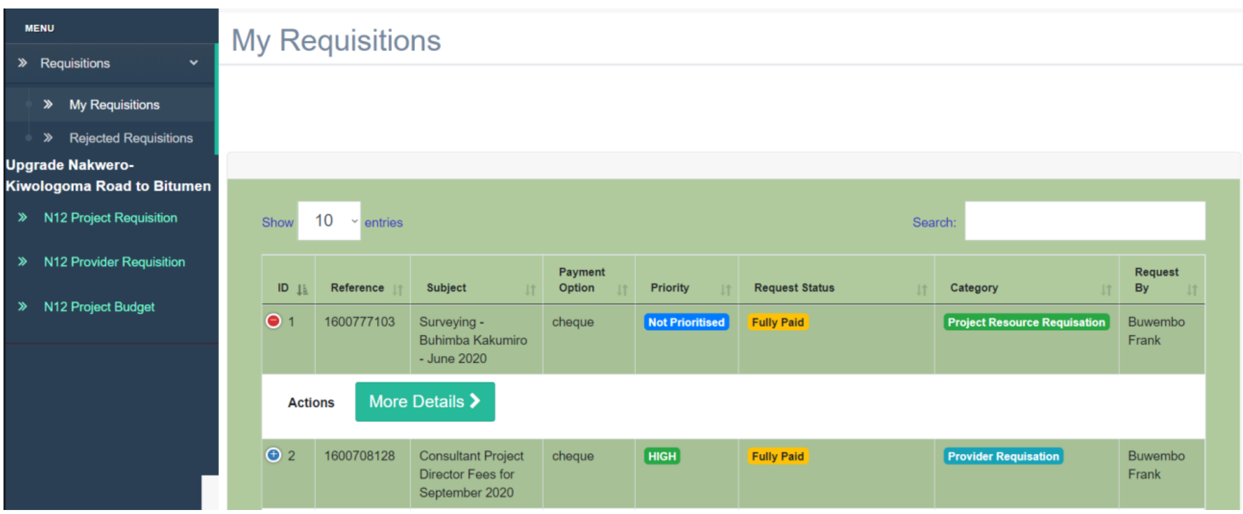

Figure 29 Screenshot showing more details button.

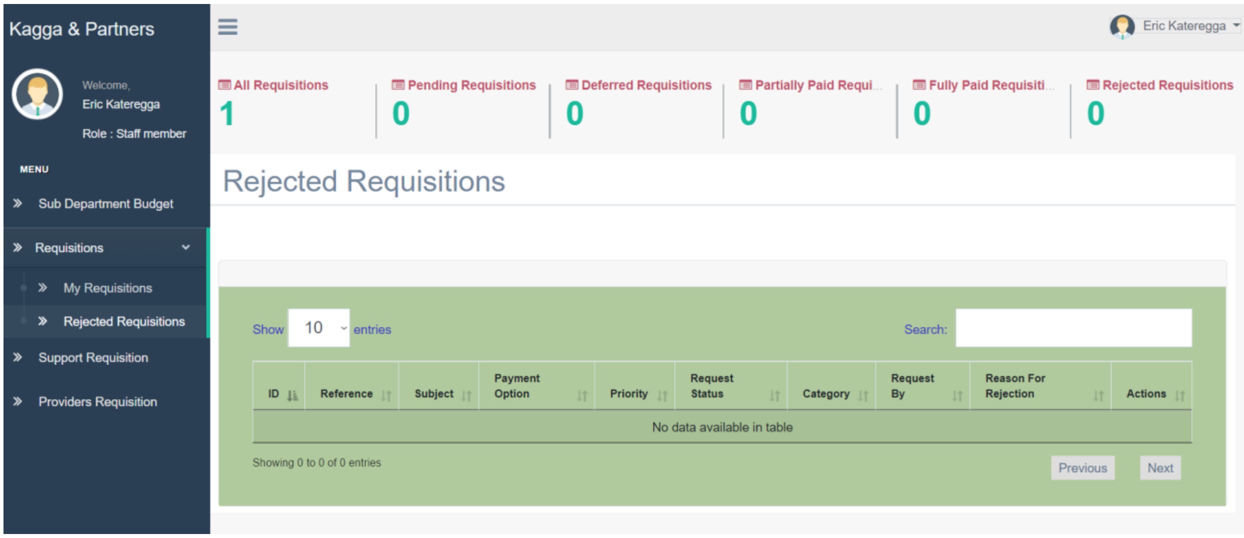

Figure 30 Screenshot showing a staff member's Rejected Requisition requests

Support Resource Requisition Request: the staff member shall click "Support Requisition" from the left-hand side vertical menu and the from shall be displayed as shown below. All fields are to be filled accordingly.

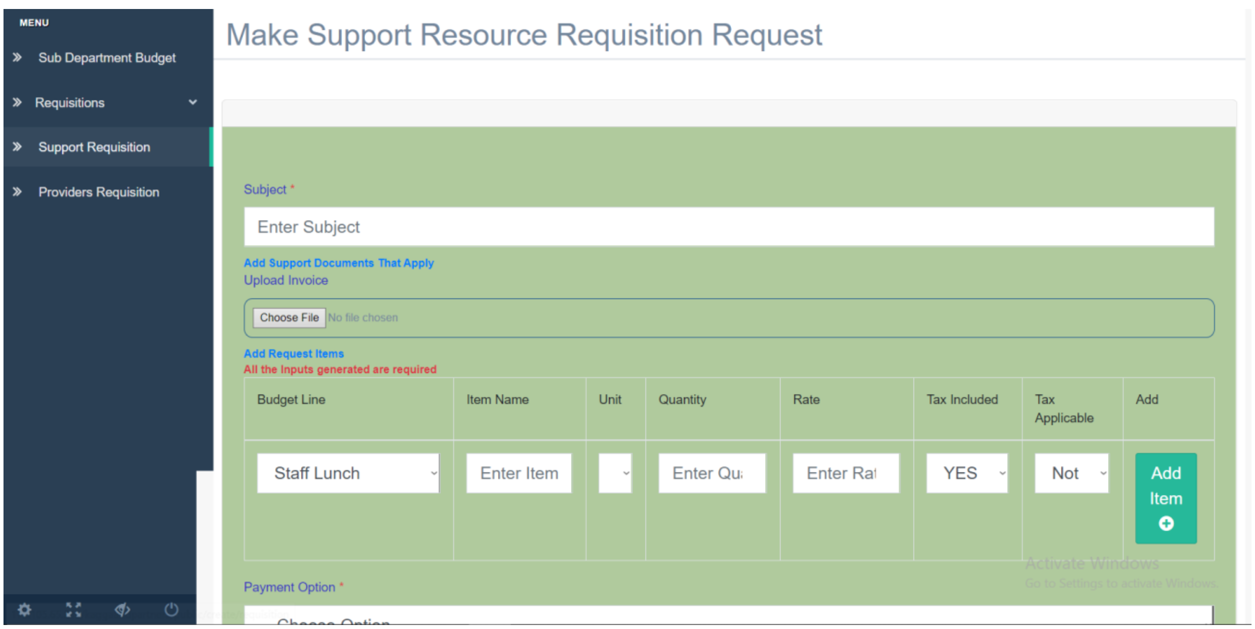

Figure 31 Screenshot showing part of the Support Resource Requisition Form.

Providers Requisition Request: the staff member shall click "Providers Requisition" from the left-hand side vertical menu and the from shall be displayed as shown below. All fields are to be filled accordingly.

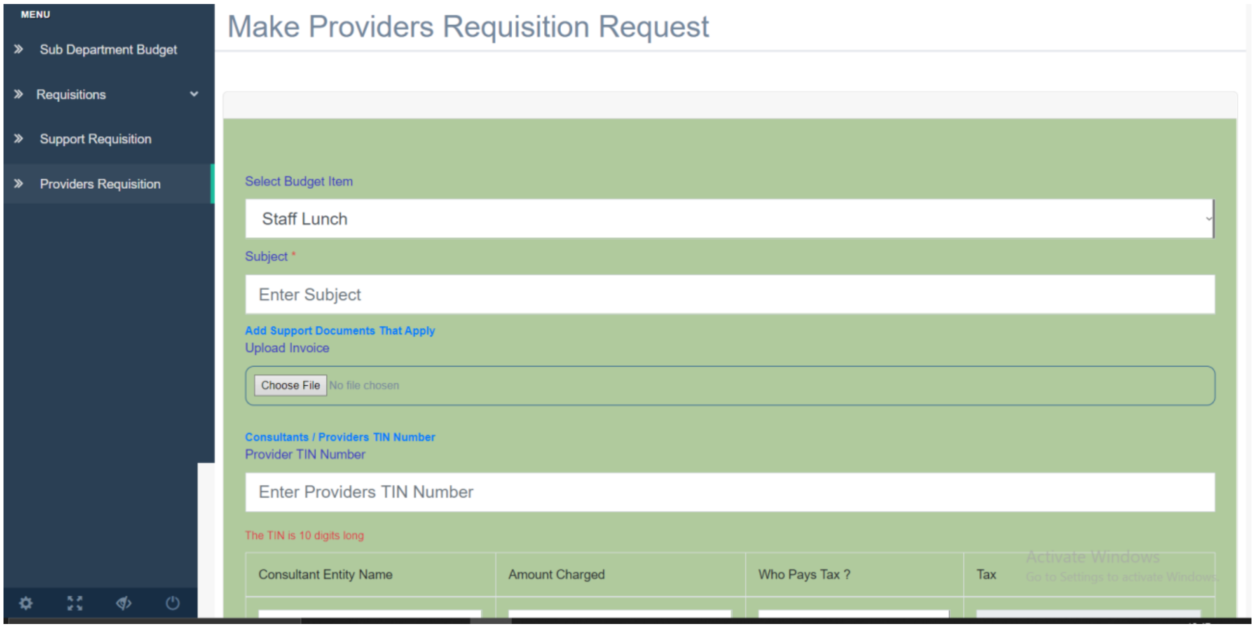

Figure 32 Screenshot showing part of the Providers' Requisition Form.

Project Coordinator: When a staff member is assigned to a project as a coordinator, the list of assigned projects shall be listed on the left-hand side vertical menu as shown below. They shall be able to make Project and Provider requisitions and also view the project budget using the "Project Requisition", "Provider Requisition" and "Project Budget" links respectively as shown in the following screen shot.

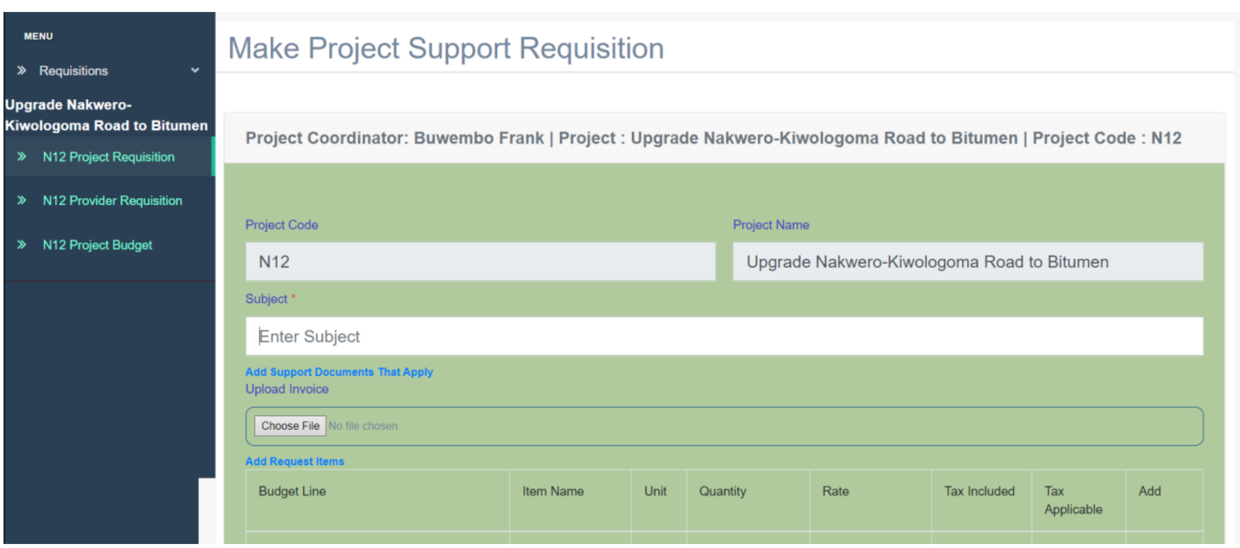

Figure 33 Screenshot showing part of the Project Support Requisition form.

Line Manager Human Resource

Approvals: To approve any requisitions made by staff members, the line manager shall sign and a list of all submitted requests will be displayed as shown below. To view a particular requisition request, click the “More Details” button the “Actions” column.

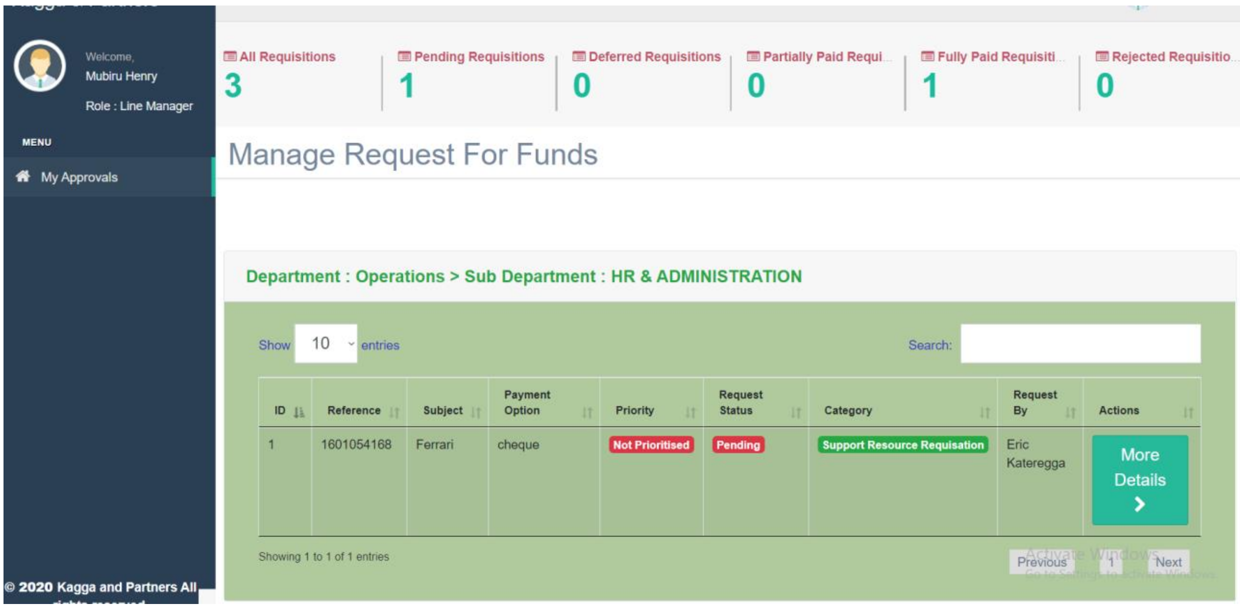

Figure 34 Screenshot showing a list of requisition requests awaiting the Line Manager Human Resource's approval.

- The details pertaining to the requisition are displayed, at the end of the page are two buttons: reject and approve which shall be used to reject or approve a requisition request respectively.

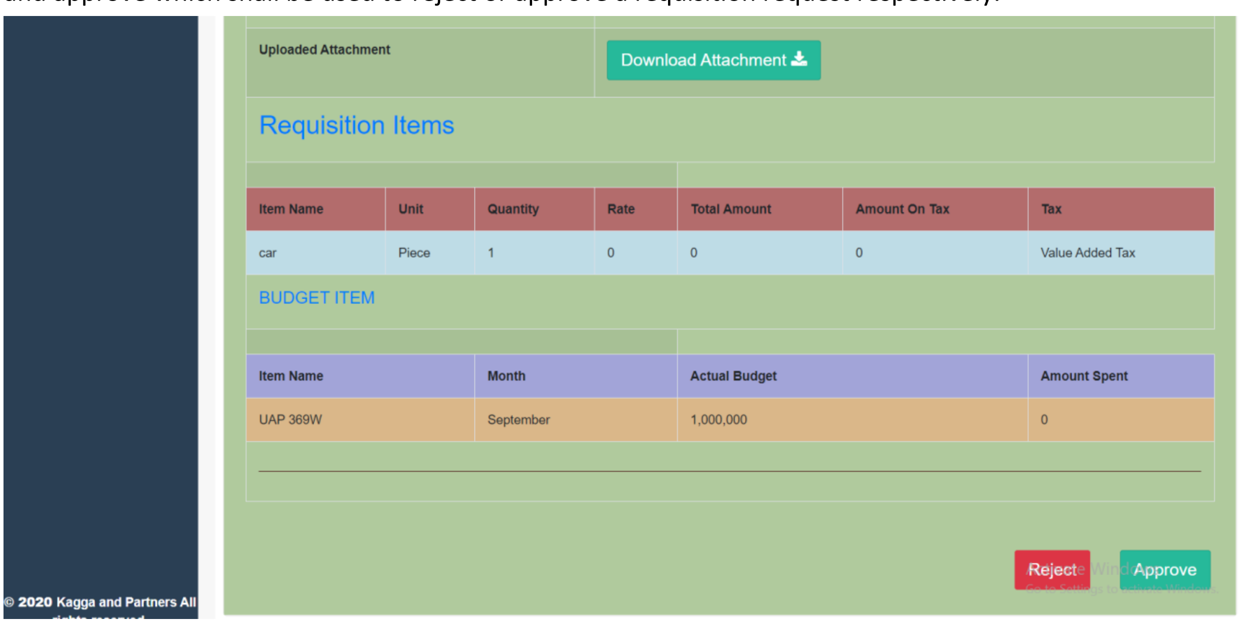

Figure 35 Screenshot showing the Approval buttons available to the Line Manager Human Resource.

- To approve the Requisition request; click the “Approve” Button and a pop-up screen shall be displayed. Add a reason for the approval and click the “Approve” Button.

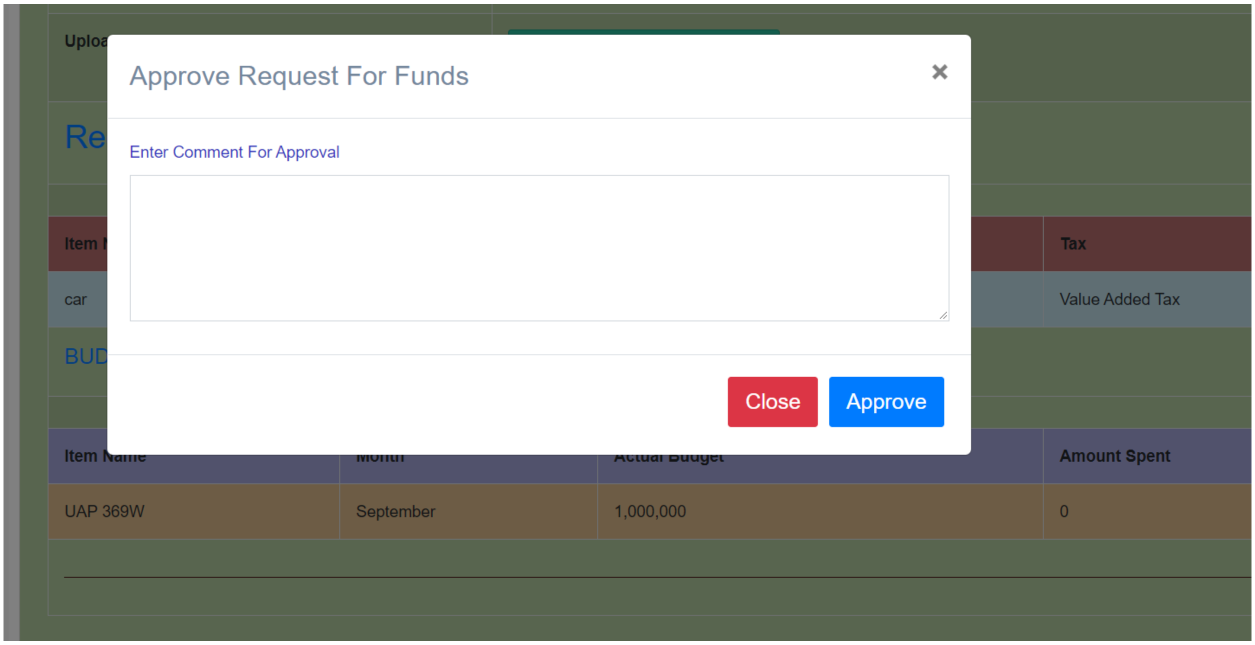

Figure 36 Screenshot showing a Request for Funds Approval form.

- To reject the fund request; click the “Reject” Button and a pop-up screen shall be displayed. Add a reason for the rejection and click the “Reject” Button.

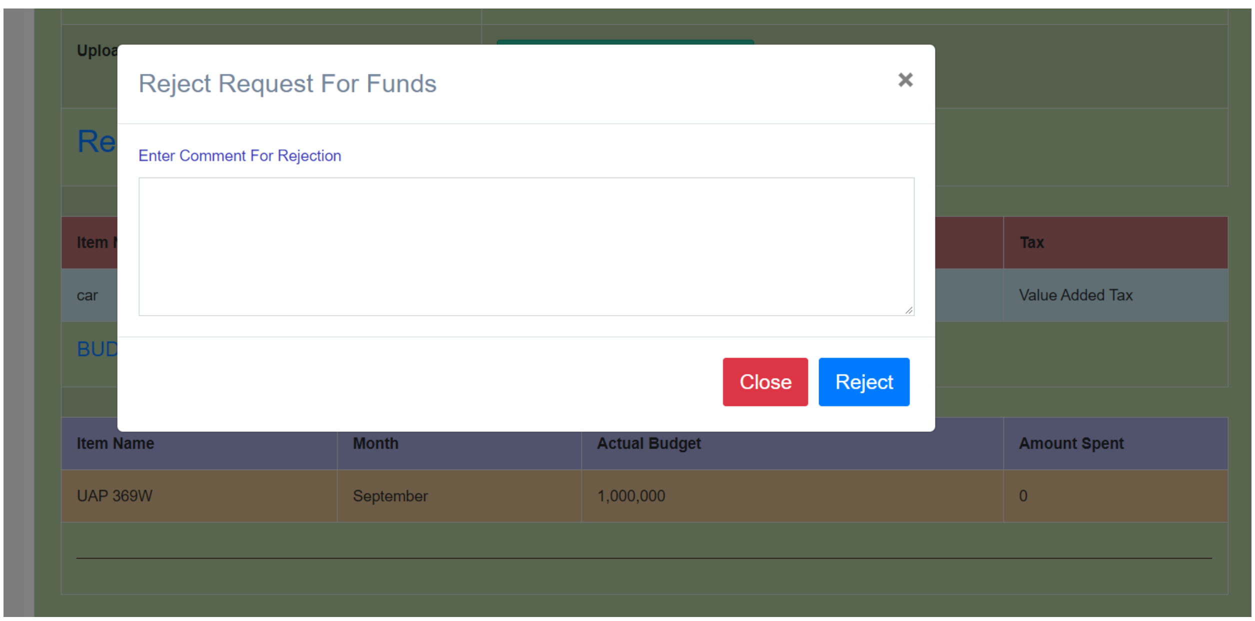

Figure 37 Screenshot showing a Request for Funds Rejection form.

Executive Director Technical

Approvals: The Executive Director Technical upon signing in shall view a list of pending requisitions to be approved or rejected. Click "More Details" to view a particular requisition request and approve it.

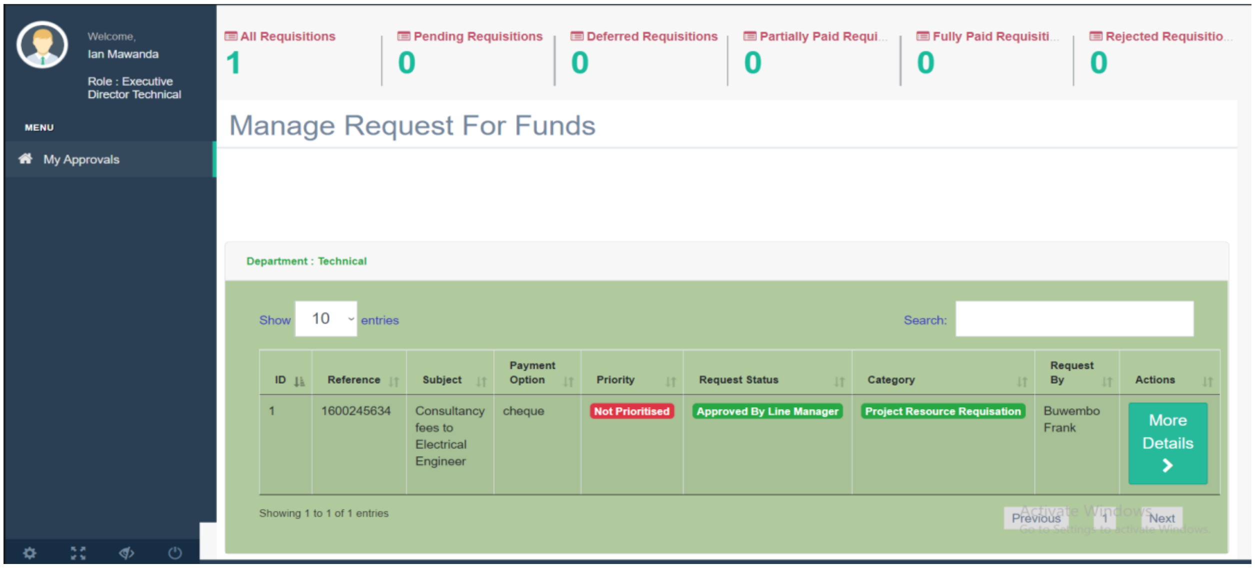

Figure 38 Screenshot showing a submitted request for funds.

Figure 39 Screenshot showing part of a fund request to be approved.

Executive Director Operations

Approvals: When signed in, a list of requests for funds will be displayed. To view particulars of a given request, click “More Details” button in the “Actions” Column.

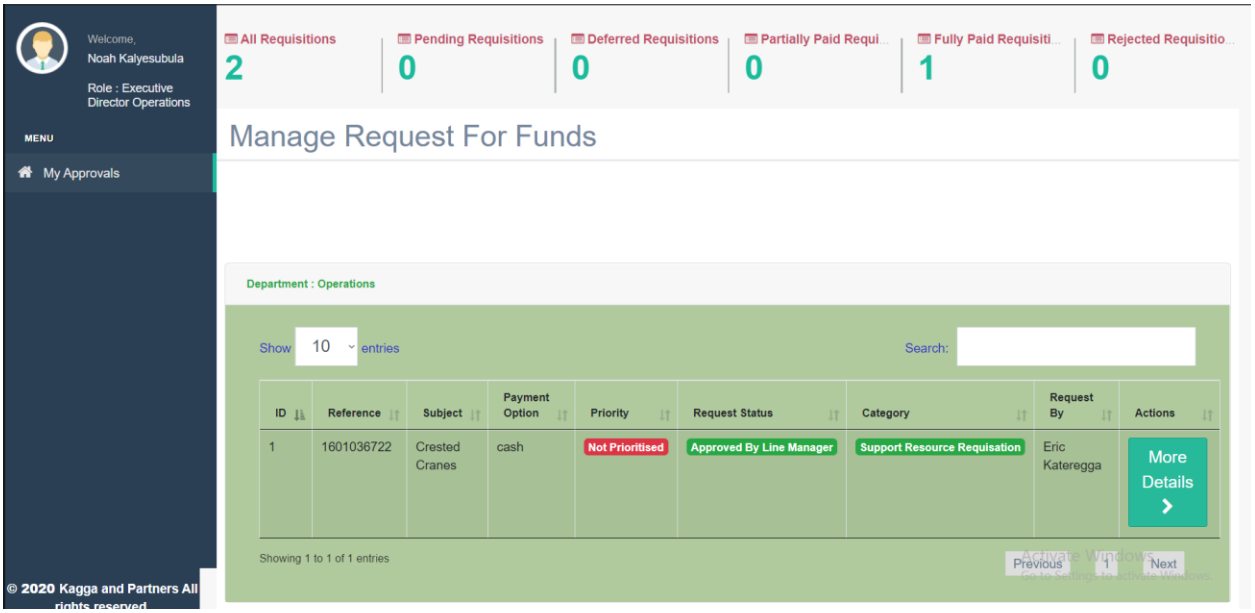

Figure 40 Screenshot showing a list of fund requests awaiting approval.

- At tail end of the page displaying the details, are two buttons: reject and approve, which shall be used to either reject or approve the fund request (See figure below).

Figure 41 Screenshot showing the reject and approve buttons.

- To approve the fund request; click the “Approve” Button and a pop-up screen shall be displayed. Add approval comment and assign priority to the request whether it be high or low and click the “Approve” Button.

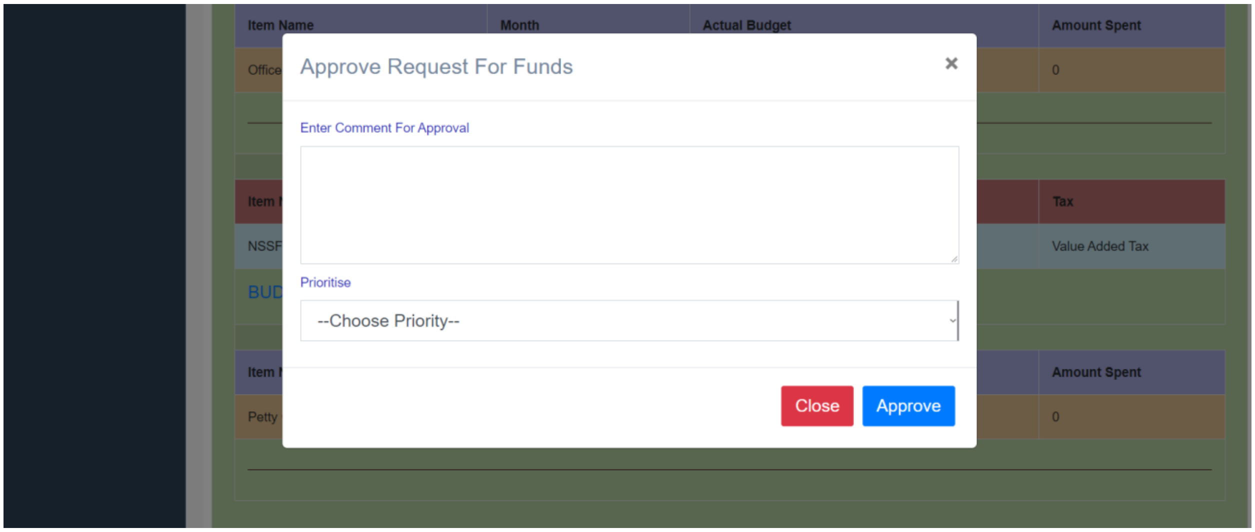

Figure 42 Screenshot showing the fund request approval form.

- To reject the fund request; click the “Reject” Button and a pop-up screen shall be displayed. Add a reason for the rejection and click the “Reject” Button.

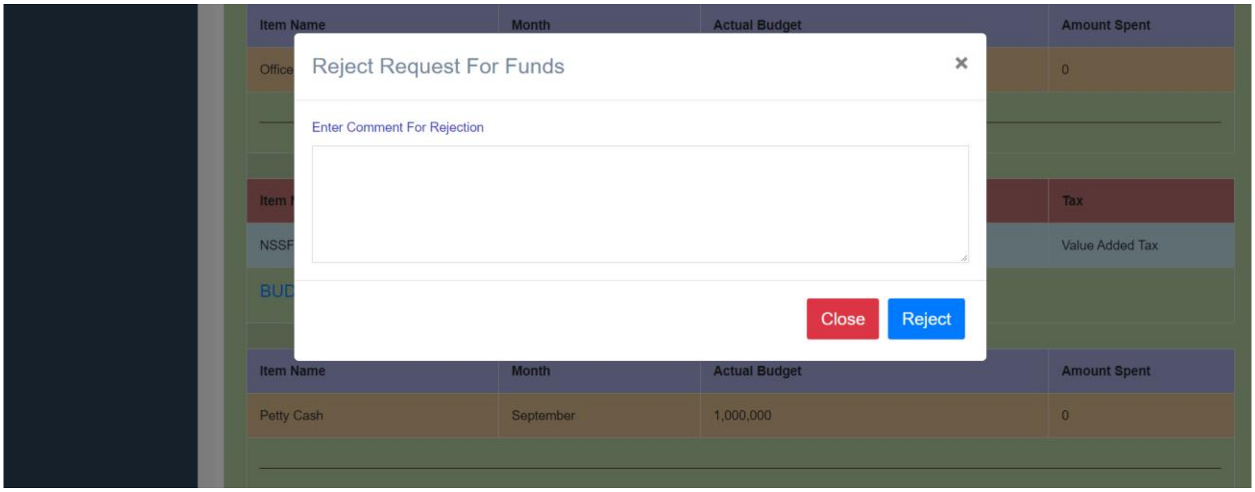

Figure 43 Screenshot showing the fund request rejection form.

Chairman

Approvals: When signed in, a list of requests for funds will be displayed. To view particulars of a given request, click “” button in the “ID” Column (as shown below) and then click the “More Details” button.

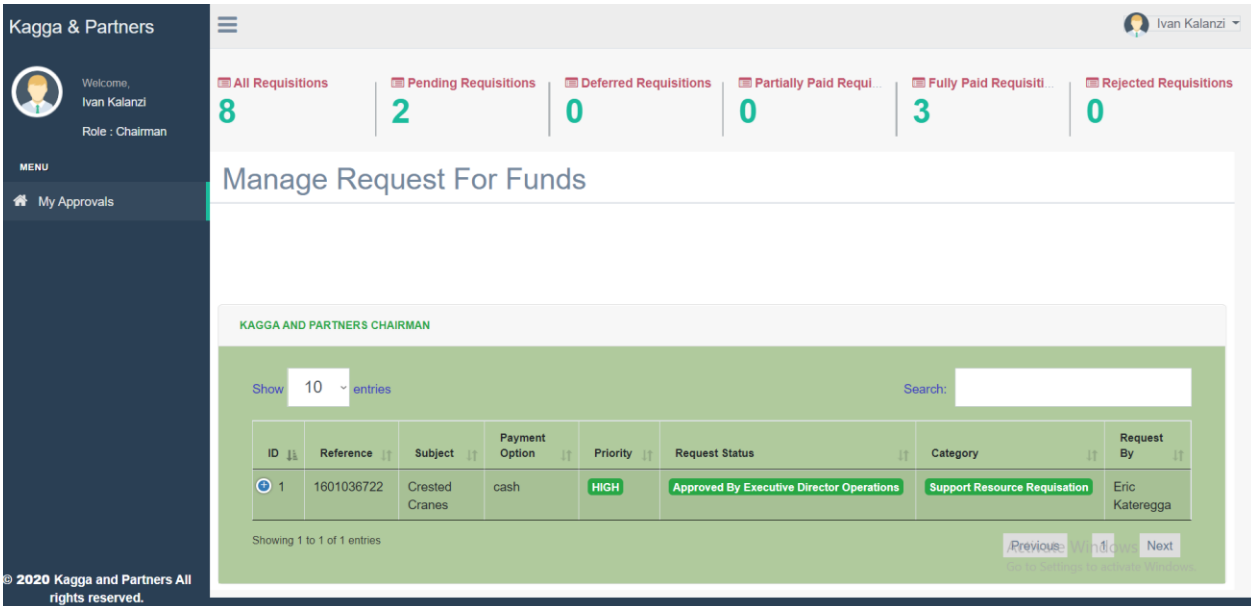

Figure 44 Screenshot showing list of fund requests awaiting the Chairman's Approval.

- At tail end of the page displaying the details, are two buttons: defer and approve, which shall be used to either defer or approve the fund request (See figure below).

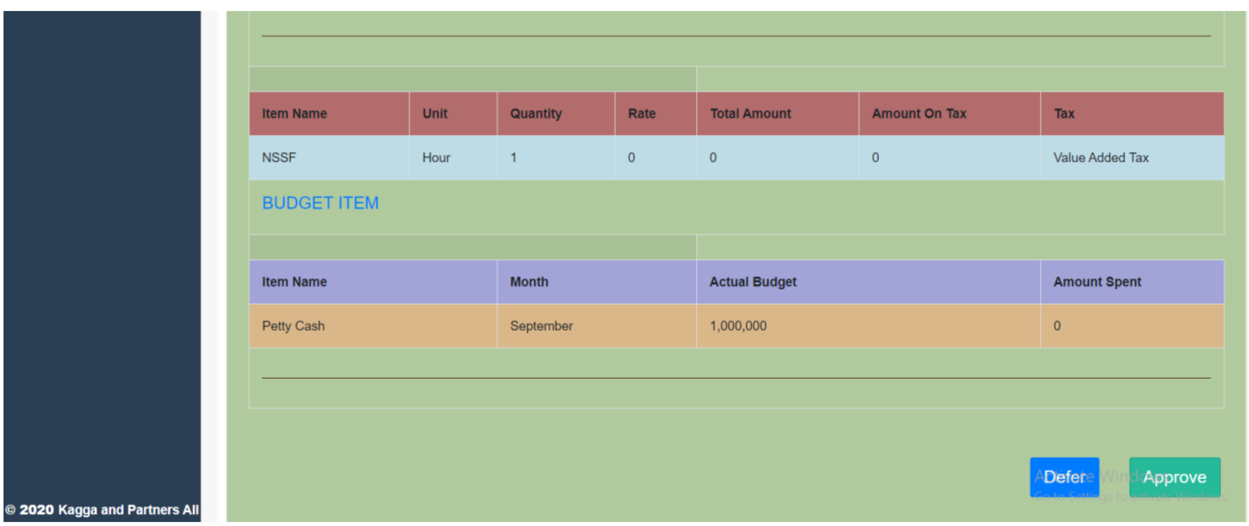

Figure 45 Screenshot showing defer and approve buttons.

- To approve the fund request; click the "Approve" Button and a pop-up screen shall be displayed. Add a reason for the approval and click the "Approve" Button.

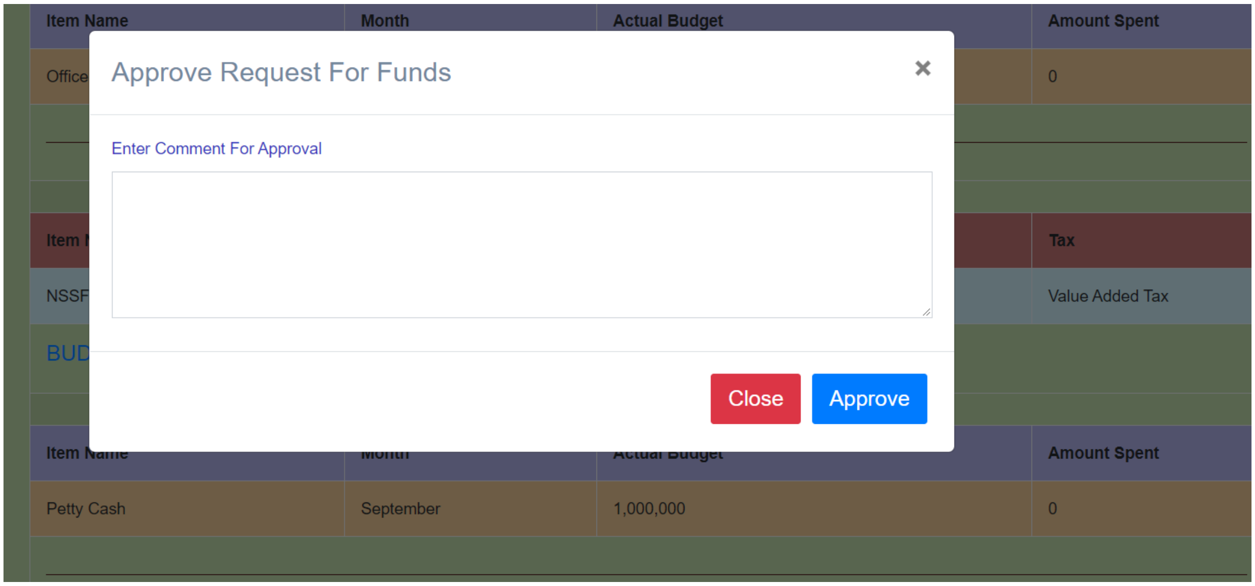

Figure 46 Screenshot showing the Fund Request Approval form awaiting the Chairman's approval.

- To defer the fund request; click the "Defer" Button and a pop-up screen shall be displayed. Add a reason for the deferral and click the "Defer" Button.

Managing Director

Payrolls:

- To view a list of all submitted payrolls, the managing director shall click “All Pay Rolls” from the left-hand side vertical menu.
- To download a pay roll, the managing director may click “Pay Roll” from the “Download” column.
- To view a payroll, click “More Details” in the “Actions” column.

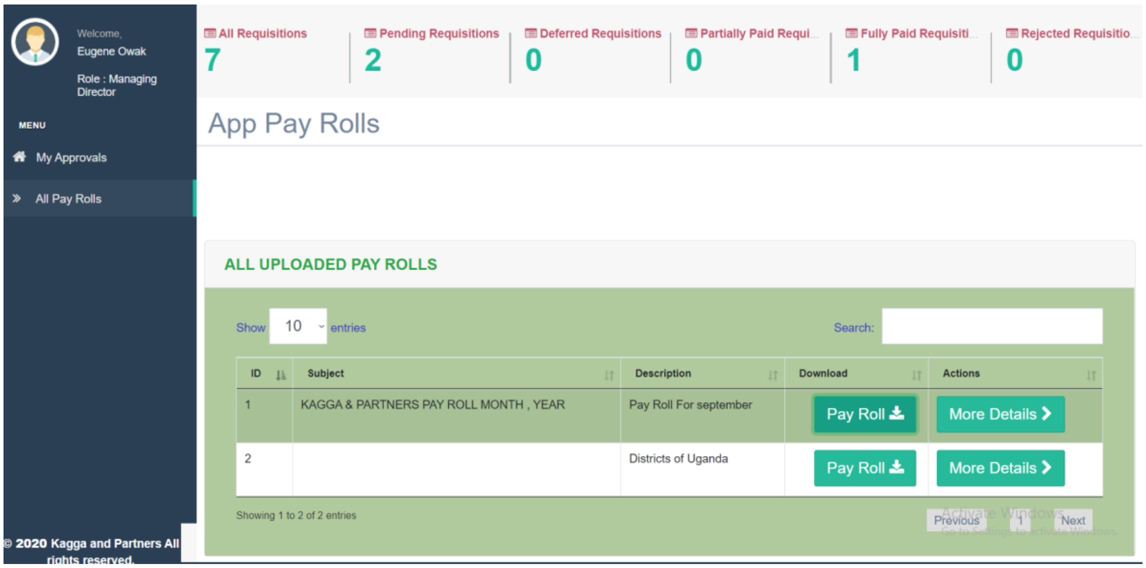

Figure 47 Screenshot showing List of submitted Pay rolls.

Approvals: To approve a request for funds, the managing director shall click “My Approvals” from the left-hand side vertical menu. A list of requests shall be displayed as shown below.

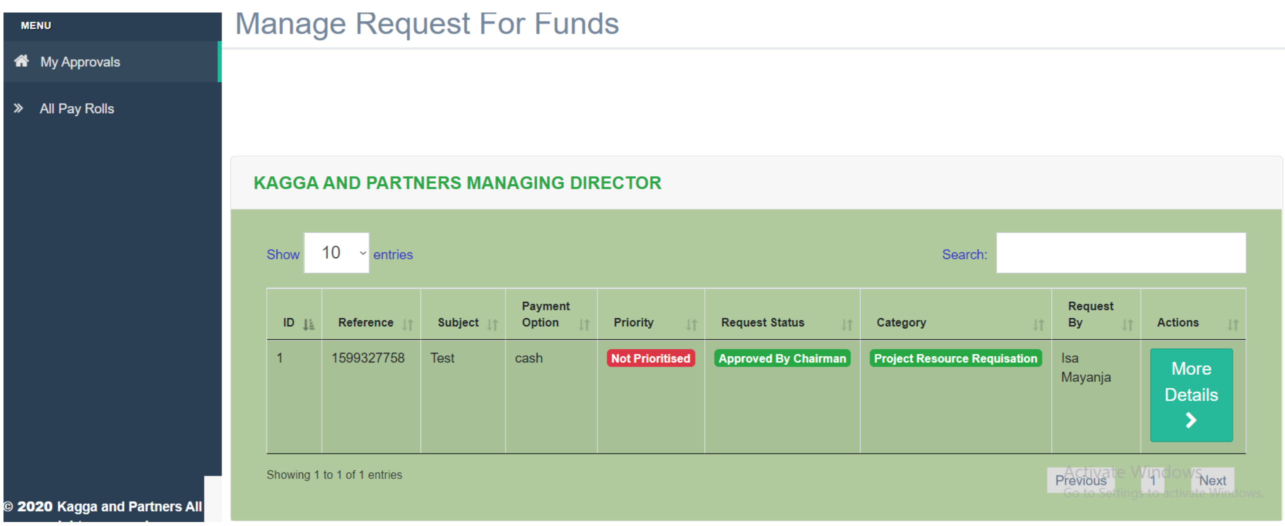

Figure 48 Screenshot showing a list of Fund Requests.

- Click “More Details” to view the particulars of the request, scroll to the end of the page to approve by clicking the “Approve” button.

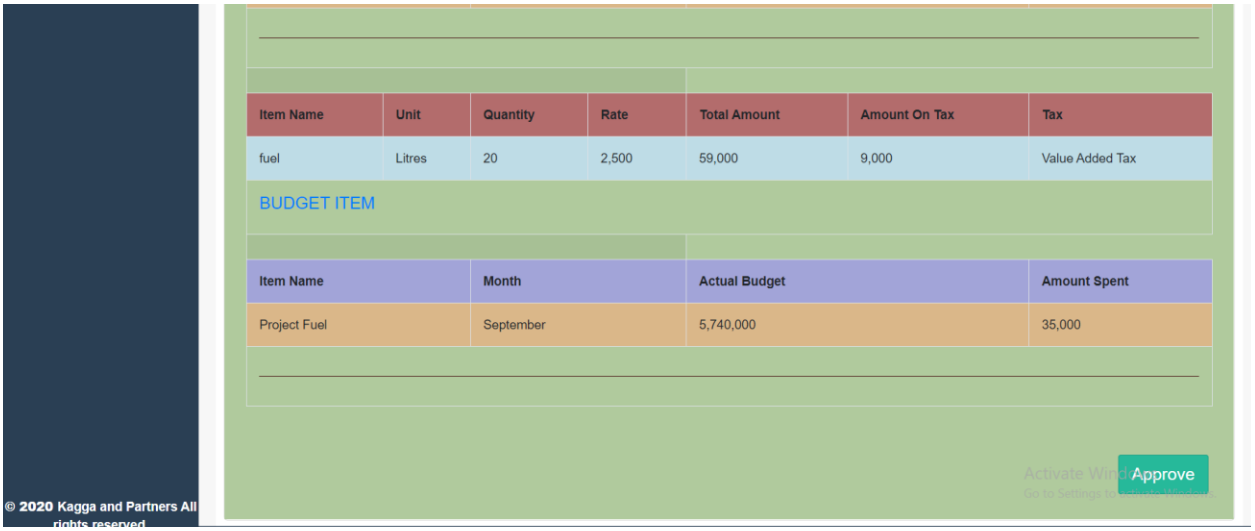

Figure 49 Screenshot showing part of fund request to be approved.

- A popup window shall appear (as shown below), select to approve either a full or partial payment, provide a reason for the approval and click the “Approve Requisition” button to complete the payment.

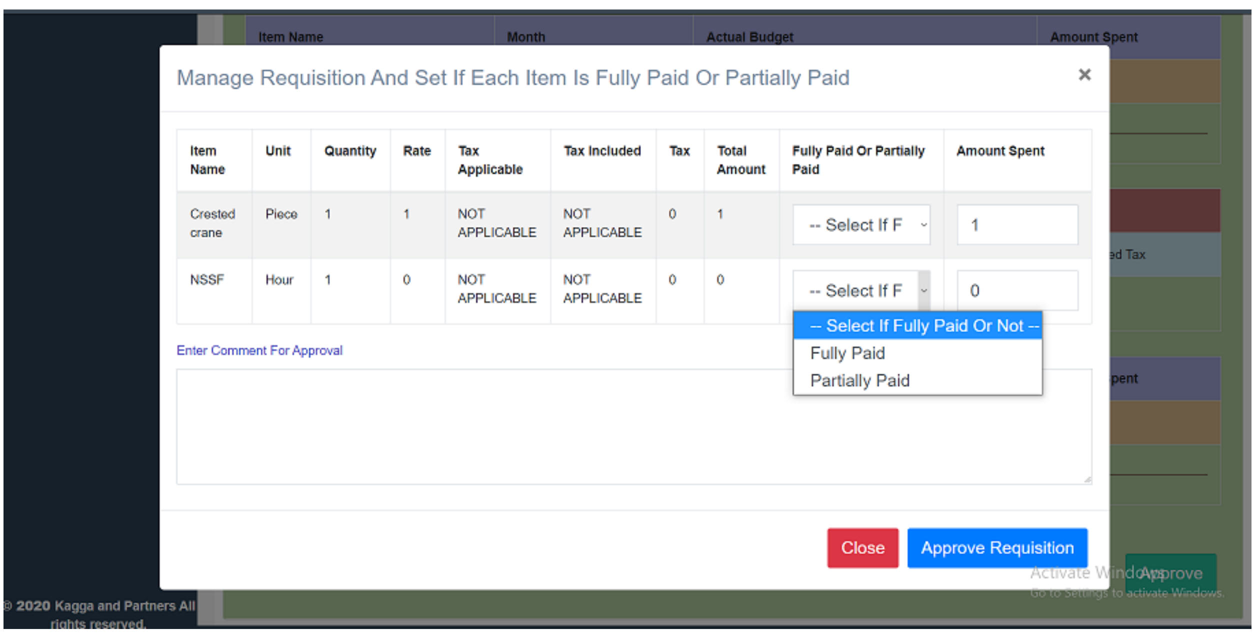

Figure 50 Screenshot showing Managing Director's Approval form for a given requisition request.

Upon clicking “Approve Requisition”, a popup dialog (shown below) will be displayed to confirm whether the Managing Director intends to complete the transaction. Two buttons: “Yes, save it!” and “Cancel” are provided at end of the dialog to either save or cancel the transaction respectively.

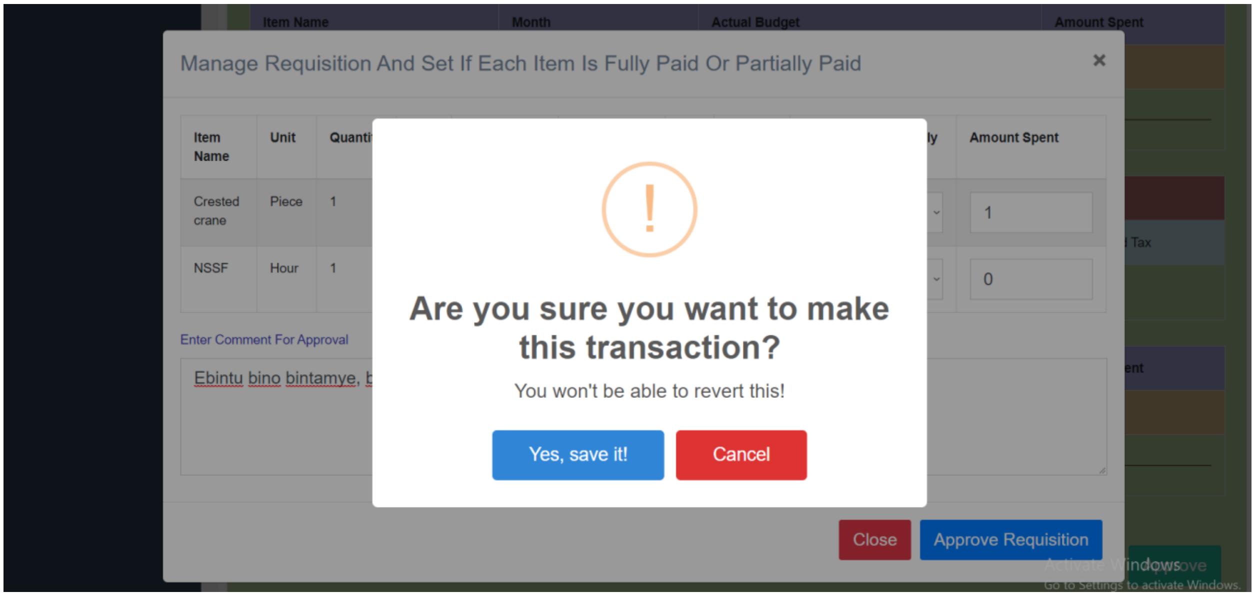

Figure 51 Screenshot showing confirmation dialog to save a transaction.

Accountant

Payrolls: To upload a pay roll, the accountant shall click “Upload Pay Roll” from the left-hand side vertical menu, upload a file and provide a description as required. Screen shot shown below.

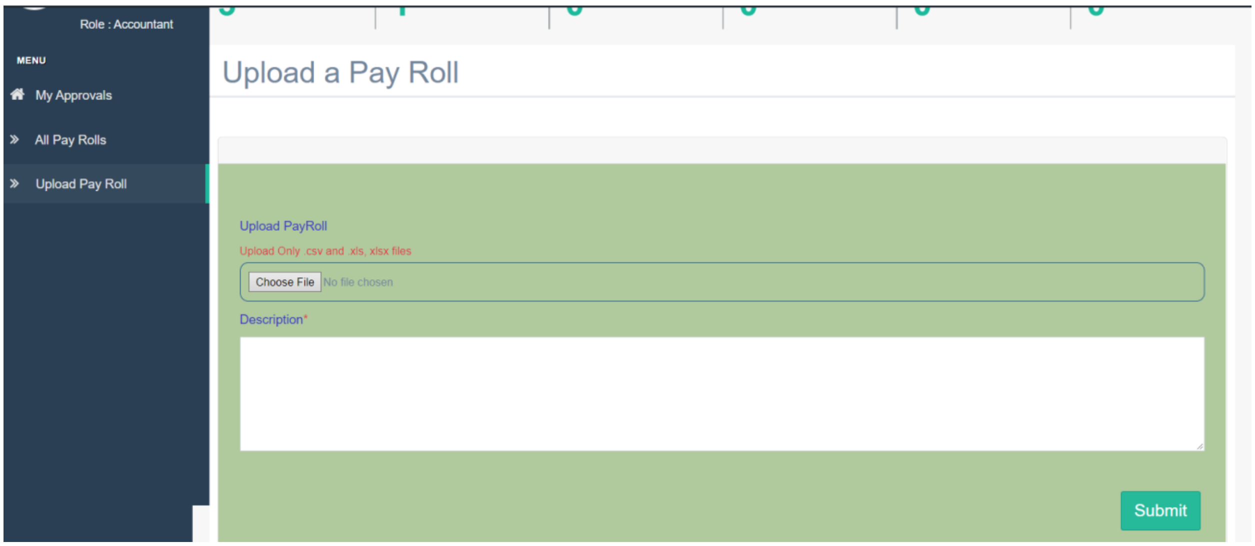

Figure 52 Screenshot showing form used to upload a payroll.

To view a list of all submitted pay rolls, the accountant shall click “All Pay Rolls” from the left-hand side vertical menu. To download the pay roll, the accountant may click “Pay Roll” from the Download column: from the Actions column, they may view the content of the pay roll by clicking “More Details”. Screenshot shown below.

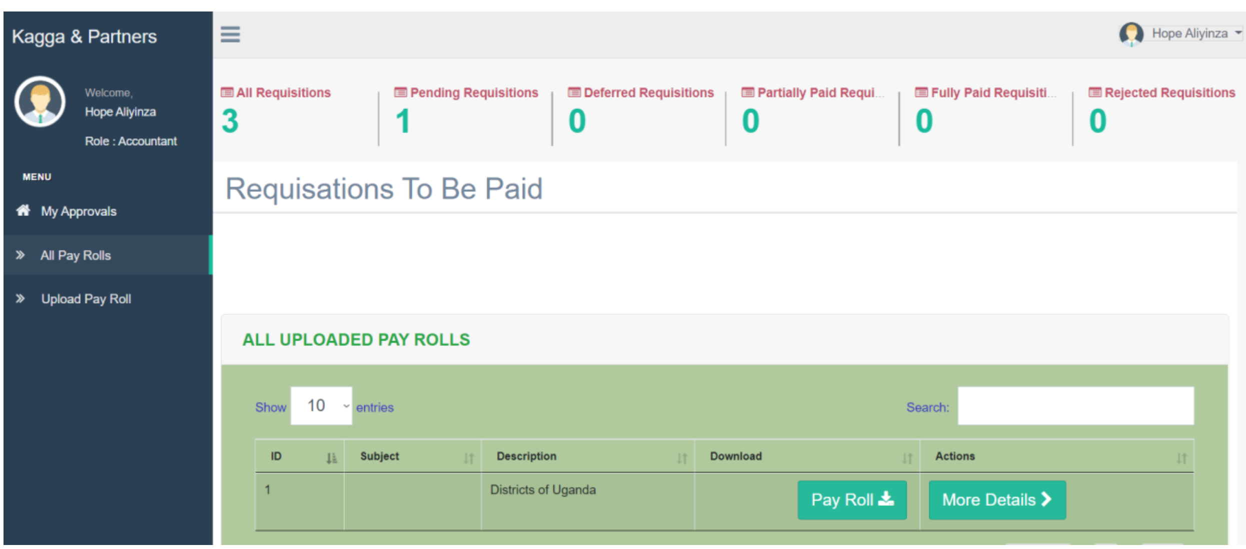

Figure 53 Screenshot showing a submitted payroll.

Process Payment: The accountant shall click “My Approvals” from the left-hand side vertical menu. In the “ID” column from the list displayed is a “”; click it, then click the “Process Payment” button.

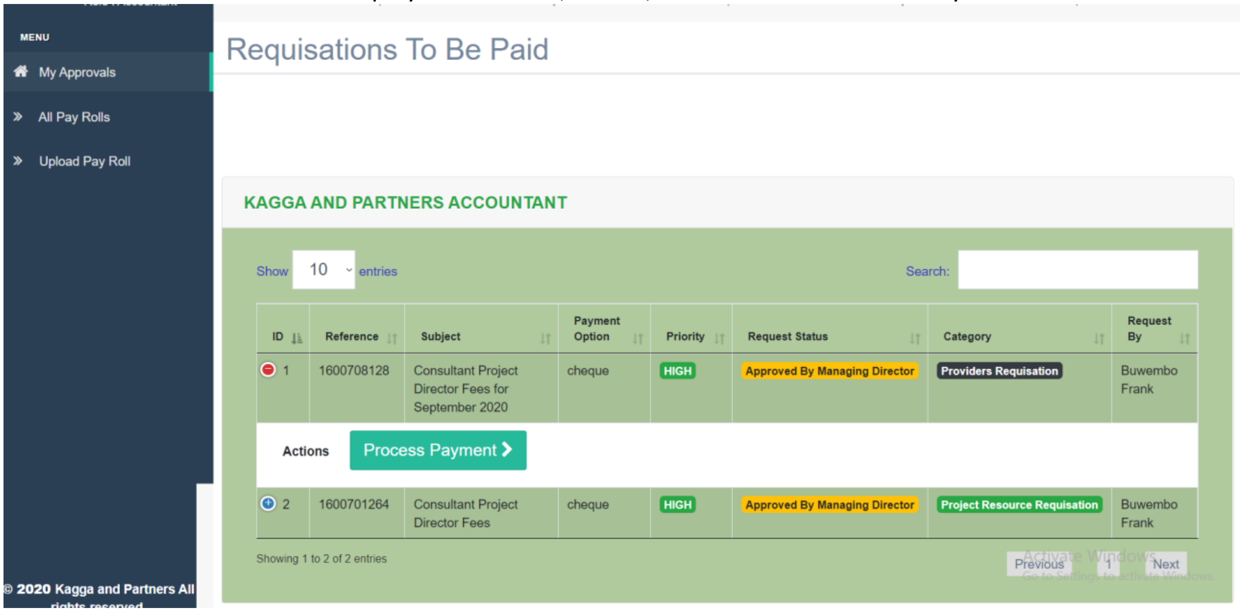

Figure 54 Screenshot showing list of requisitions to be paid.

- The details of the requisition will be shown; scroll to the end of the page to see amount to be paid then click the “Process Payment” button (see figure below) to make the payment.

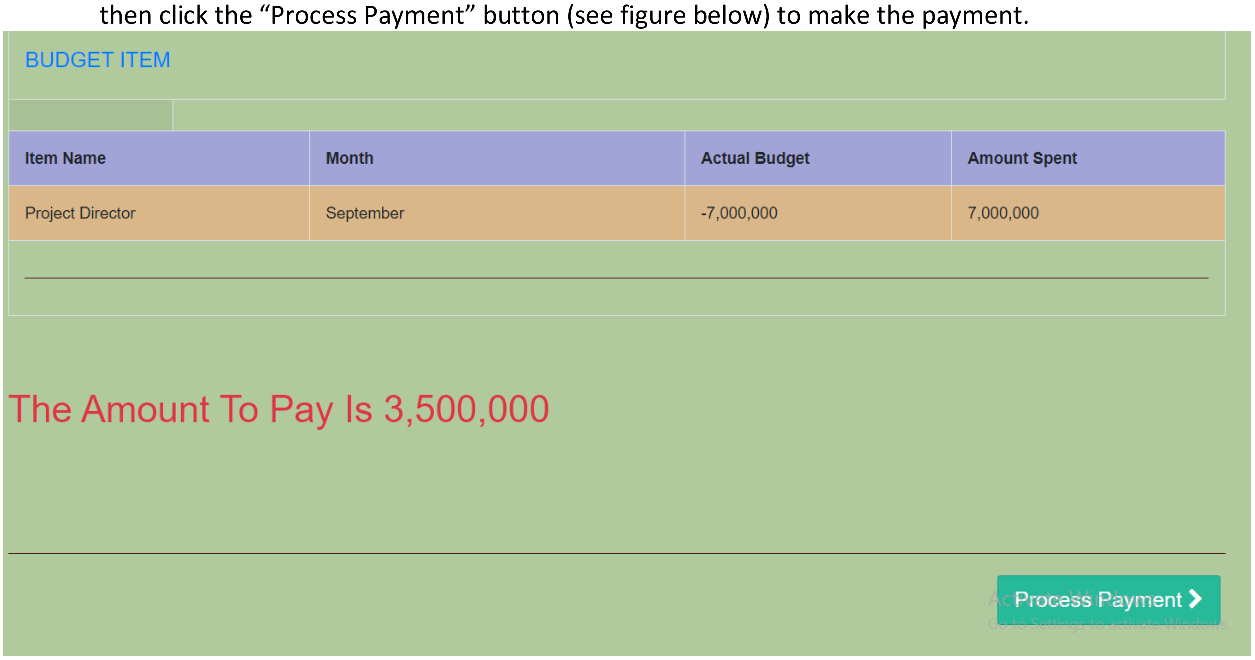

Figure 55 Screenshot showing a payment to be processed.

Payment Schedule: The accountant shall click “My Approvals” from the left-hand side vertical menu; click the checkbox in the “Payment Schedule” column and click the “Generate Payment Schedule” button.

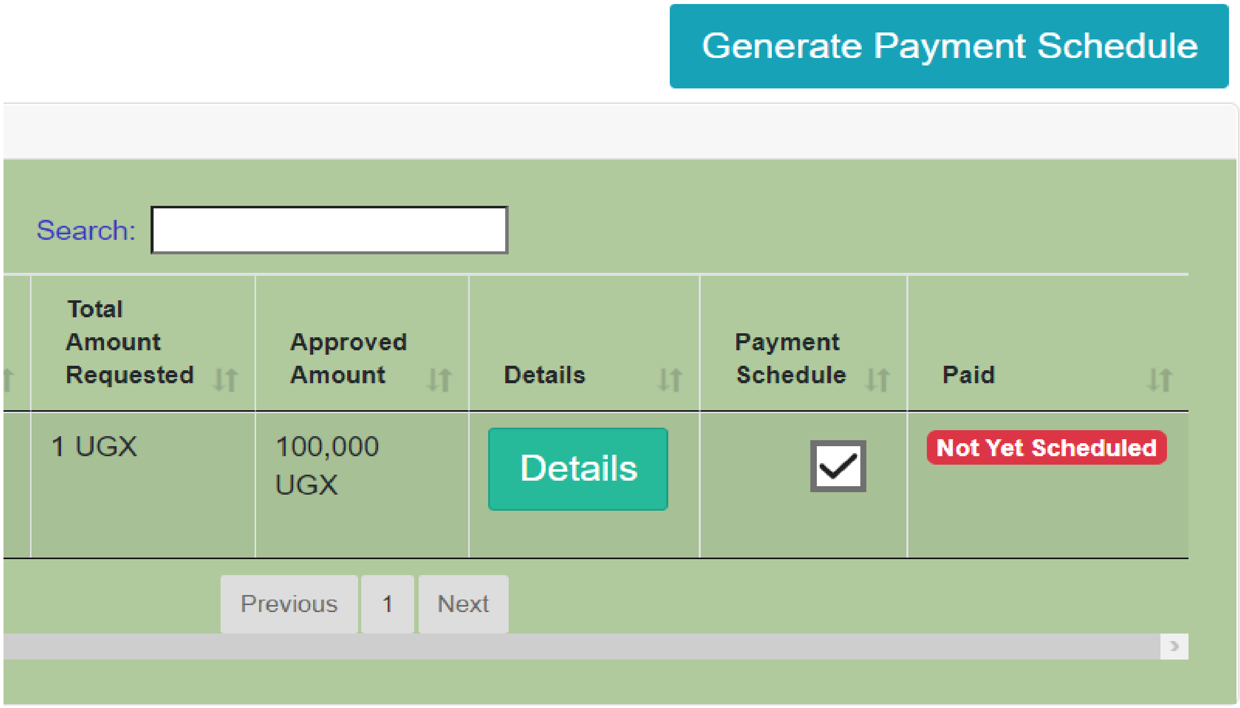

Figure 56 Generate Payment Schedule

Leader Accounts

Bank Accounts: To create a bank account, the leader accounts shall click "Kagga Bank Accounts" from the left-hand side vertical menu. A list of existing bank accounts will be displayed, if any. Click "Add Bank Account" and fill the form accordingly.

To edit or update the balance of a given account, click "Edit" or "Update Balance" buttons from the "Actions" column.

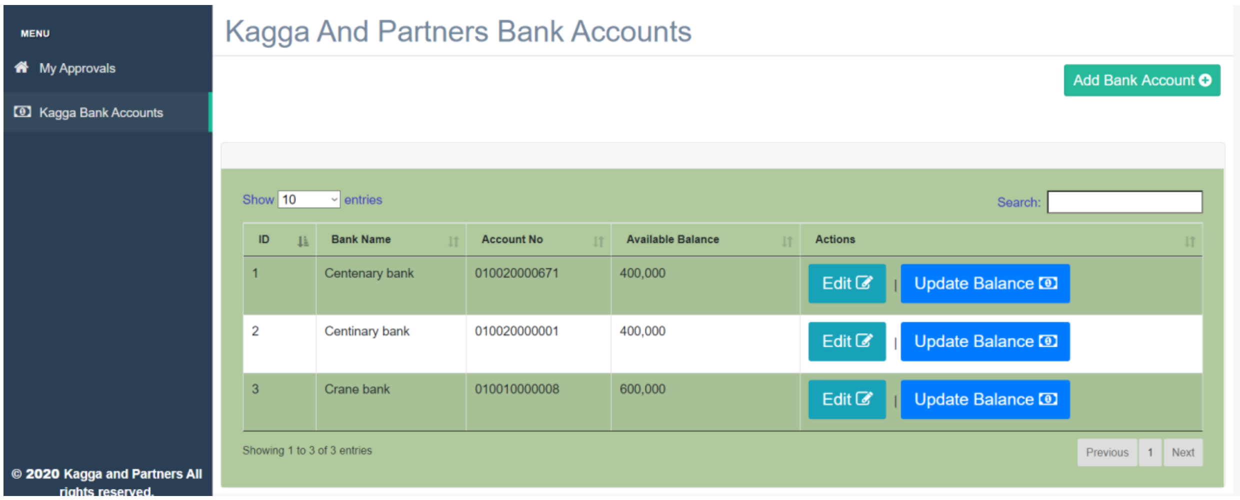

Figure 57 Screenshot showing list of bank accounts.

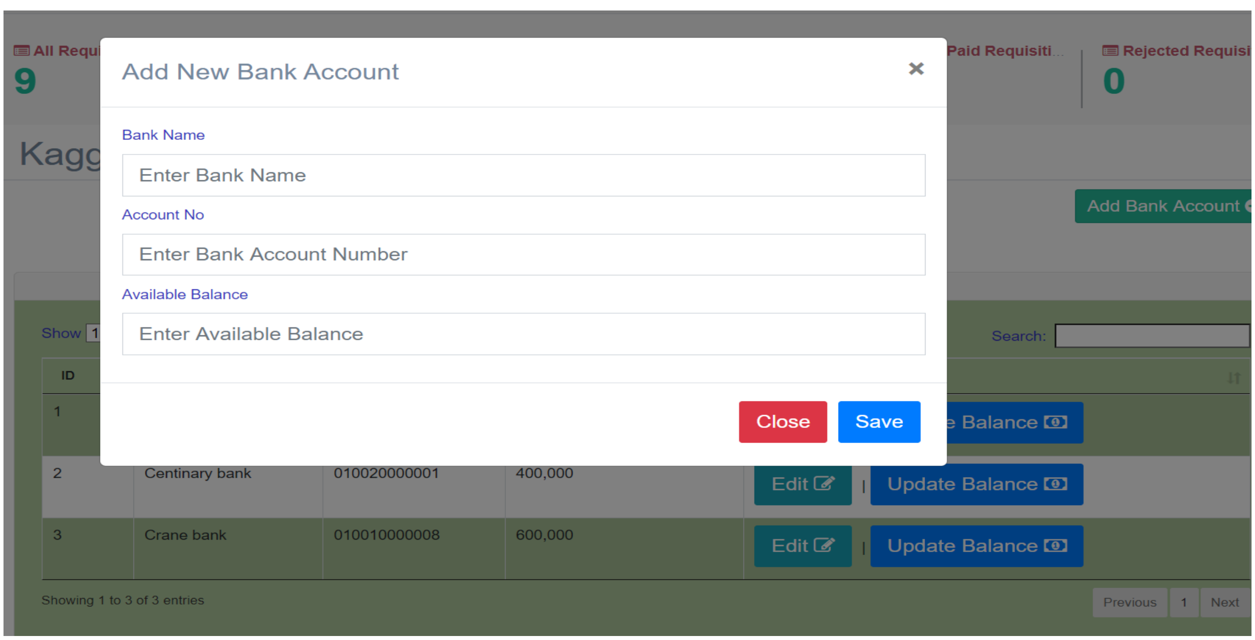

Figure 58 Form used to create bank accounts.

Process Payment: The leader accounts shall click “My Approvals” from the left-hand side vertical menu. A list of pending payments will be displayed, if any. Click the “Paid” button in the paid column to process a given payment.

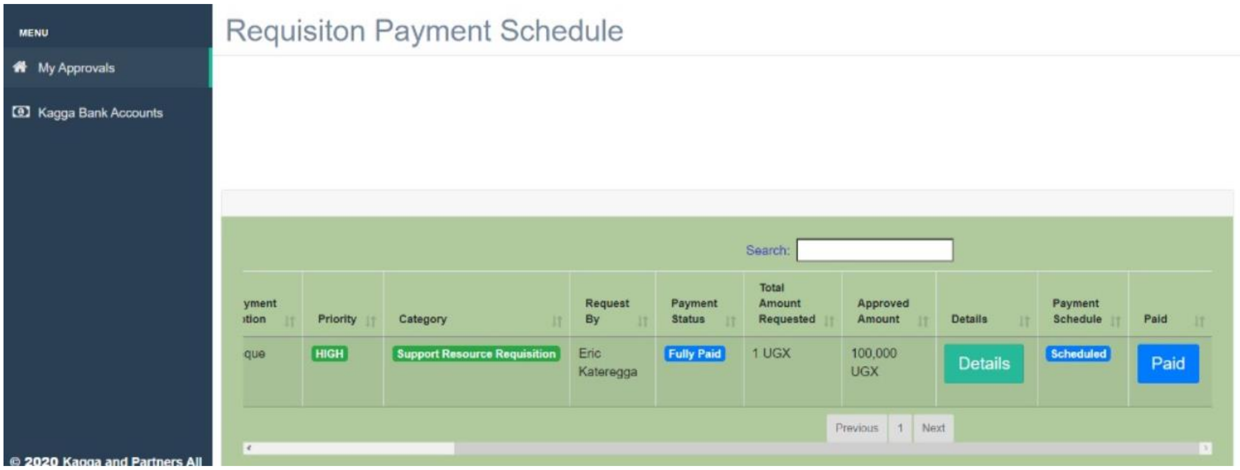

Figure 59 Process payment screenshot