DataShare User Manual

DataShare User Manual

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1. Introduction

DataShare System Overview

The DataShare Knowledge management system is a software solution that provides access and sharing of information through a web-based platform for quick access as well as collaboration among various stakeholders and the general public.

The overall objective of the Knowledge Management System is broken down into the following parts:

- For stakeholders to be able to work with and share digital content.
- Provide a document and content repository.
- The ability for the organization to utilize automated routing of documents within processes.
- For FCDC to have a strong and secure platform.

The Kenya Frontier Counties Development Council (FCDC) contracted Fabtech Solutions Ltd to design, develop and deploy this knowledge management and sharing platform.

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FCDC provided a terms of reference document with instructions to implement a web-based management information system with the following deliverables:

1. **System Design & Development**

   - Projects information center

   - Dashboard section

   - Resource Center for sharing reports and other publications

   - Discussion Forums section to share expert knowledge

2. **System Deployment**

   - System testing

   - Training of trainers (ToT) and administrators.

3. **Operationalization phase**

   - System support phase (1 yr)

Modules

- Project Center

- Resource Library

- Forums

- Reports

Publishing Content

- Publish Projects

- Publish Documents

Public Access

- Dashboards

- Projects

- Resource Center

- Feedback

- Content Subscriptions

- Forums

2. Getting Started

Get started with DataShare

This guide provides all the information and guidance to all public users and stakeholders to navigate through the FCDC knowledge management and sharing platform.

This documentation has various steps on how to navigate both the public and private portals of the system.

The following diagrams illustrate various components that make the entire knowledge sharing platform:
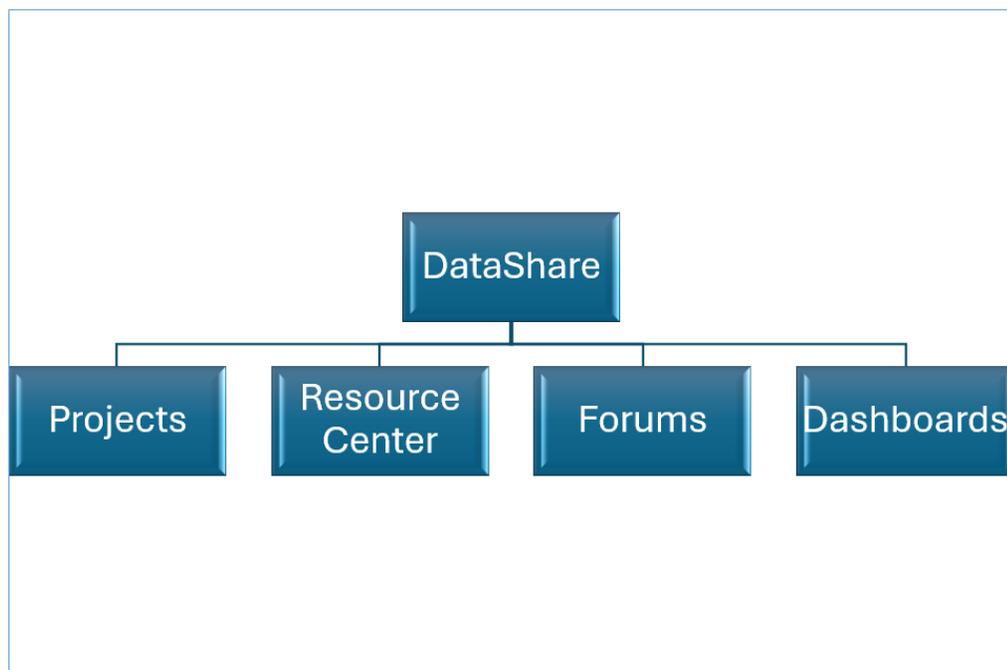
2.1. About DataShare

About DataShare Platform

1. **System Architecture**

DataShare is a web application system built on the Microsoft .Net Framework stack. The system implements a client server architecture that is comprised of a web server, database and client machines.

The server technology used includes the following:

- Application: ASP.Net scripting technology (C#)
- Server: Microsoft IIS webserver
- Database: MS SQL server
- Client: Major Browsers (IE, Edge, Mozilla, Chrome, Safari, Opera, etc.

The following diagram illustrates a client-server architecture model:

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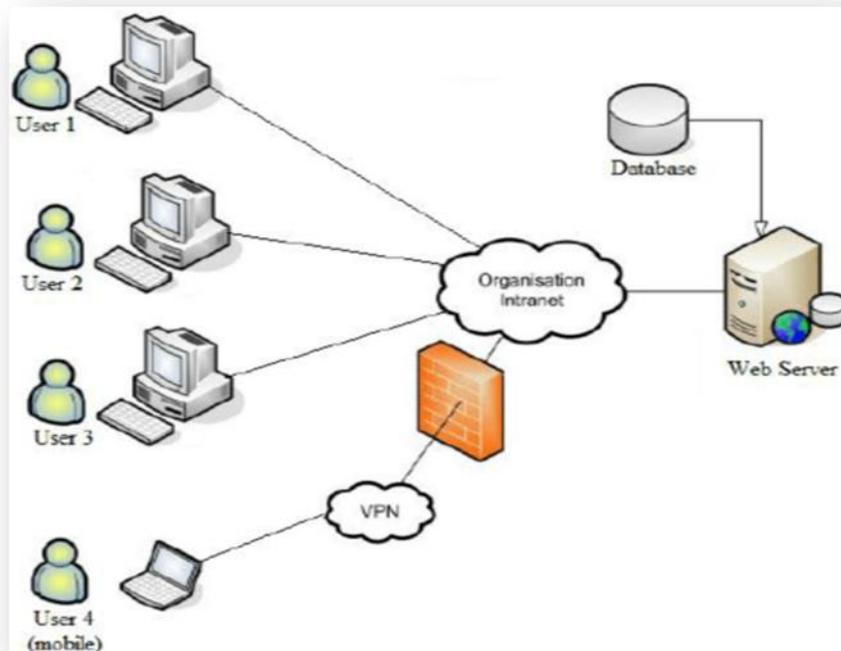
2. System structure

DataShare system is made up of three main components. These are:

- **Public Portal:**

This section provides a public gateway to all the published content from FCDC and other partners. The published content will include project records, document reports as well as other related content.

- **Private Portal:**

This section is composed of various modules specifically designed for the input, processing and publishing of approved content. This portal has a restricted access to only a set of user groups and accounts created and managed by the system administrator.

- **Back-end Service:**

This section provides a background service that hosts and runs various user notifications, alerts and scheduled reports.

2.2. System Access

Accessing DataShare Portals

DataShare public and private portals that can be accessed through the following steps:

- **Public portal:**

1. Open any web browser (Edge, Mozilla Firefox, Google Chrome, Opera, Safari, etc.)

2. Navigate to: http://datashare.fcdc.or.ke

Once accessed, the browser will display the public portal's homepage as shown in the screenshot below
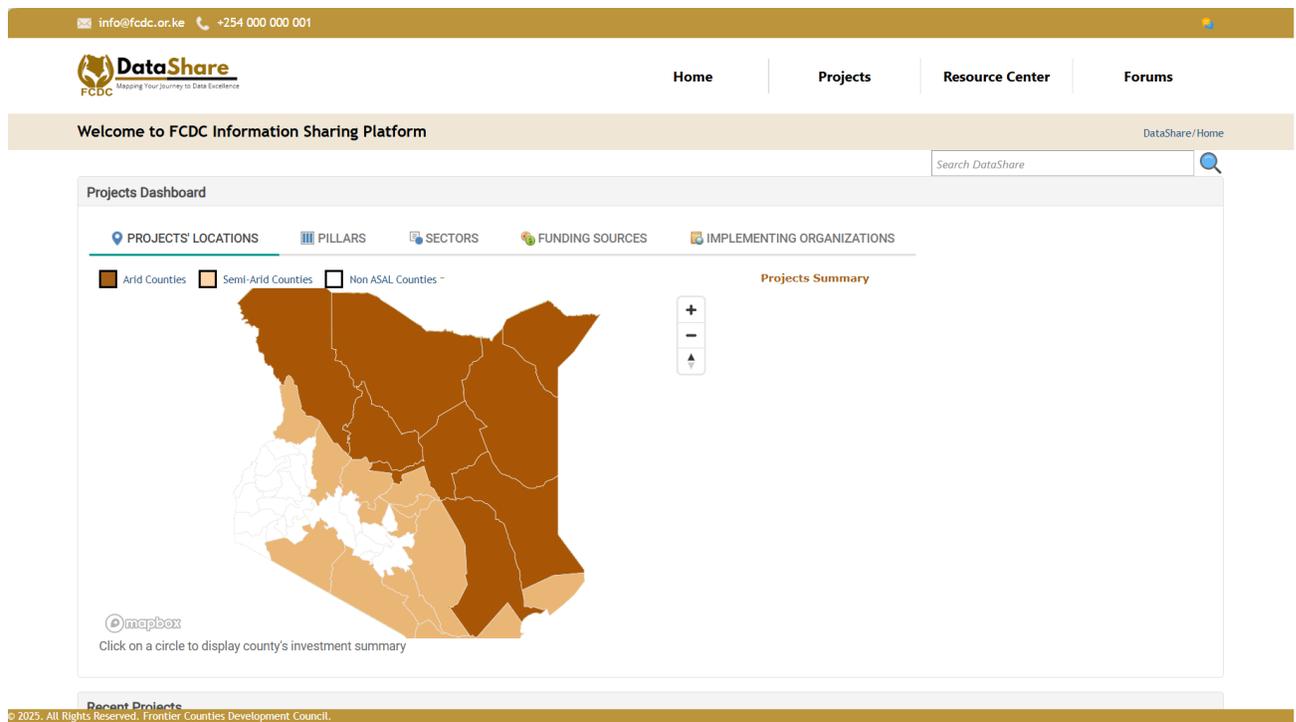
ℹ The public portal requires no user login/account to access content.

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- **Private portal:**

1. Launch a web browser.

2. Navigate to http://datashare.fcdc.or.ke/Account/Login.aspx

3. Enter correct username/email and password

4. Click on 'Login' button.

This portal provides a restricted access to users that have system accounts created by the administrators. The landing page of this portal is a login page that prompts the user to provide his/her login credentials.

The login page is as shown in the screenshot below:
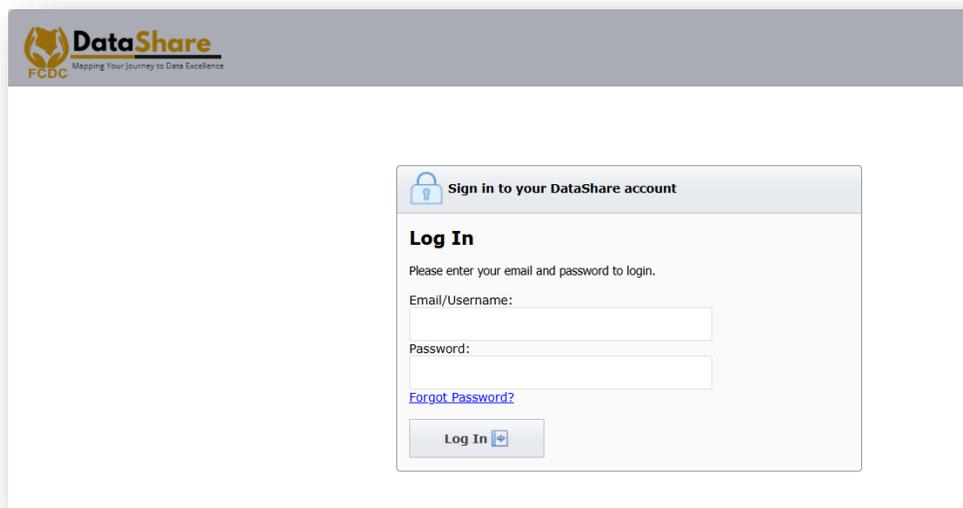
⚠️ Private portal can only be accessible to administrators, supervisors and staff user groups

The login process is part of the authentication module which enables users to authenticate themselves prior to accessing any other module in the system.

The default page of this portal is the login page. This interface allows registered users to login using either their email or username.

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In case a user forgot their password, a 'Forgot Password' link is available that resets the user's account password and sends a password recovery email message.

This module also allows users to change their biodata and update their passwords.

Once logged in, the user is redirected to a default page as shown in the figure below:
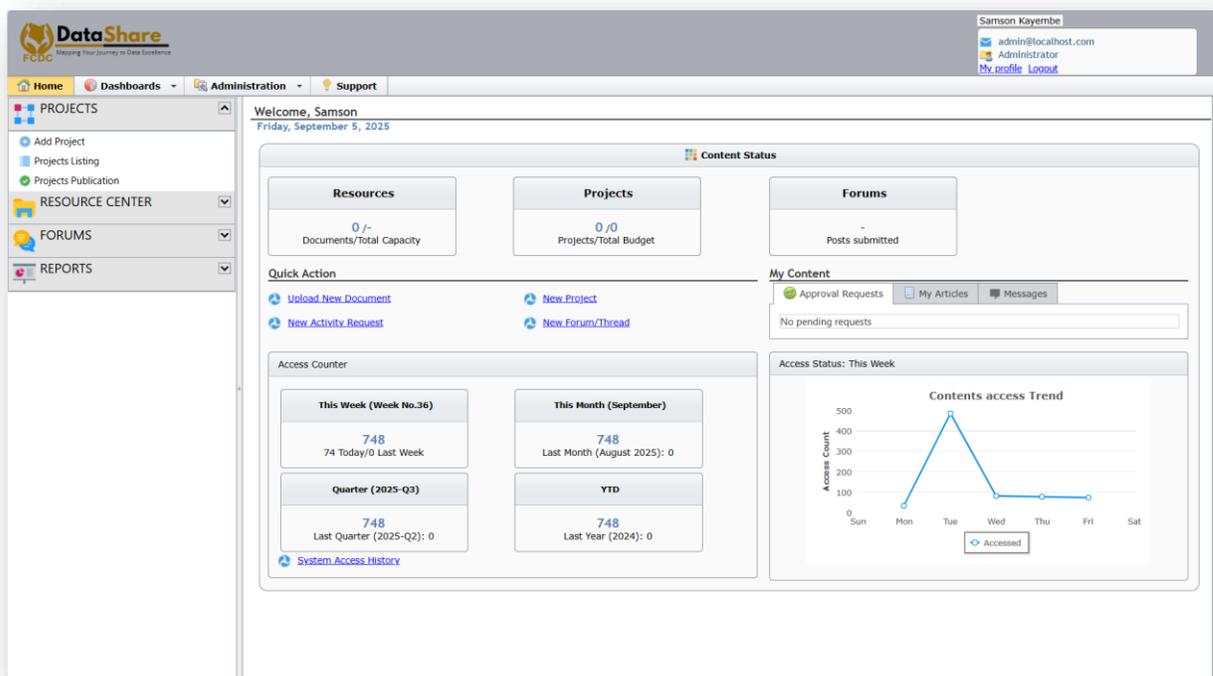
The authentication module also prompts a user to change his/her password in case this is over 90 days old.

Other features of this module include:
- 5 maximum invalid password attempts
- 10 min password attempt window
- 1 minimum required non-alphanumeric character in password text
- Unique email for every user account
- 30-minute timeout session window

2.3. Content Types

Content Types & Approval

1. Content Types

The DataShare platform allows users to make use of the private portal to capture, transform and publish data.

This input data can be of the following nature:

- **Project Records**

These will include all projects captured by staff on the Projects module. Once published, these projects become accessible on the public portal for knowledge sharing.

- **Resource Documents**

All the publications and reports from FCDC and other stakeholders will form as the main data input in this group. These documents will be presented in respective categories on the public portal as defined by administrators.

- **Forum Posts**

This type of content will derive data from stakeholders expert opinions shared on various topics in the discussion forums.

2. Content Approval

All the documents uploaded to the platform are required to go through a structured approval mechanism prior to publication on the public portal.

On approval, the content visibility will be set to public allowing the document, report, research paper or media files to be accessible to the stakeholders group and the general public.
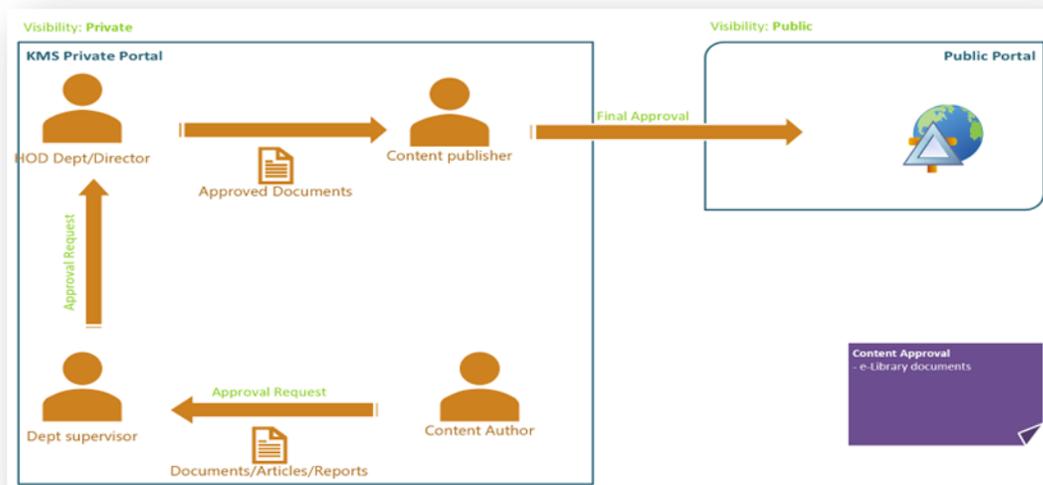
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2.4. User Groups

DataShare User Groups

The DataShare system maintains a role-based approach of user groups.

Each user will be defined as part of a role which has a predefined set of permissions. The below are distinct user groups in both the private and public portals:
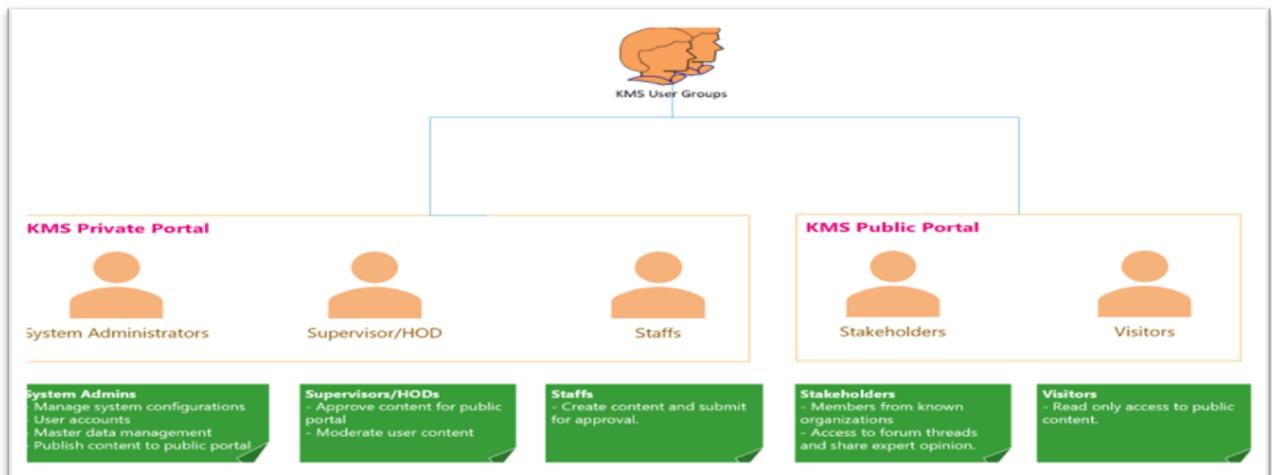
- **System Administrators**

This group of users are responsible for system setup, master data management, system configurations and user account management for efficient routine operations of the system. Administrators will also be responsible for publishing content to the public portal

- **Staff**

This group of users are responsible for capturing content such as projects or uploading new documents in the resource library module.

- **Supervisors**

This group of users are responsible for approving content submitted from content authors

- **Stakeholders**

This group includes all the partners and other related agencies who need to share and collaborate on expert knowledge in the platform.

- **Visitors**

Visitors include any unauthenticated users who access the public portal.

2.5. System Setup

Application System Setup

To mount the system ready for access, the following components should be setup:

- The KMSData Database:

The system administrator should install Microsoft SQL server software and restore the KMSLive database on the instance. A backup of the KMSLive database is provided in the KMS installation folder. For details on how to install SQL server software and restoring databases, a reference to Microsoft Docs website can be useful. (https://docs.microsoft.com/en-us/sql/?view=sql-server-ver15)

- KMS folder permissions:

The administrator needs to grant 'Full Control' permission to 'Everyone' group of users on the KMS root folder. This will allow the web server to have read/write/delete privileges to upload and manage various documents that will be saved on the root folder.

- Web server (Microsoft IIS):

The system administrator should configure the server to have web server role. Run IIS from start menu and add a website (KMS) that points to the root (KMS) folder containing the application scripts.

- Configuring Connection strings:

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This section is critical in determining the connection to database (KMSLive). The administrator can configure the connection strings either from the IIS by accessing the Connection Strings menu or by opening the web.config file from the KMS root folder.

DataShare system provides the following connection string names to databases:

• KMSConnectionString

This connection string specifies connection to the main database. The administrator should provide credentials for the database

• ApplicationServices

This connection handle authentication and authorization mechanisms of the system. This connection string should bear the same parameters as the KMSConnectionString.

With this setup, the system can be accessible through the website link provided in the IIS server.

References:

How to setup IIS Website:

https://support.microsoft.com/en-gb/help/323972/how-to-set-up-your-first-iis-web-site

Setting up connection strings:

https://blog.arvixe.com/setting-up-connection-string-with-iis-manager/

3. User Guide

DataShare User Manual

This section provides a step-by step guide on how to carry out various tasks on the DataShare platform.

This user guide is divided into the following parts

System Setup	Private Portal	Public Portal
System configurations to enable users to start using the system.	A set of tools in various modules that allow authorized users to create and publish content	The platform that allows users to access and share published knowledge with stakeholders and general public.

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3.1. System Administration

System Setup

DataShare provides the 'Administration' module that allows IT administrators to manage user accounts, setup master data and view user audit trails.

The main tasks in this module include:

- Create and manage user accounts
- Access user audit trail
- Set and manage master data
- Manage approval workflows

⚠️ Only administrators are permitted to access and perform these tasks

To login onto the administration module, perform the following steps:

1. Launch a web browser and navigate to the private portal
2. Enter admin username and password
3. The above functions can be accessed from the top menu as shown in the screenshot below
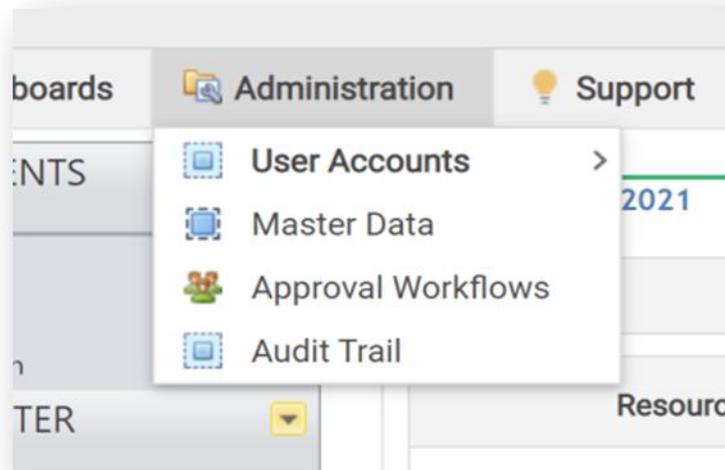
Manage User Accounts

This functionality allows the IT administrator to create new or manage existing user accounts.

New user account

The IT admin can create new user accounts by providing new user details and specifying the role for the user as shown in the figure below

To create a new user account, follow the following steps:

1. Once logged in, from the top menu point the cursor on 'Administration' menu

2. Select 'User Accounts' menu

3. Click on 'New user account' menu

The below interface will show up

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 Fill in the details of the new account and click on 'Create User' button.

If the 'Notify new user by email' option is checked, the system will notify the user by email of his/her new account and the password would be reset.

In case this option unchecked, the system will create the new account with the specified password provided by the administrator.

Manage User Accounts

This module also allows IT administrators to manage existing user accounts.

To create a new user account, follow the following steps:

1. Once logged in, from the top menu point the cursor on 'Administration' menu

2. Select 'User Accounts' menu

3. Click on 'Manage user accounts' menu
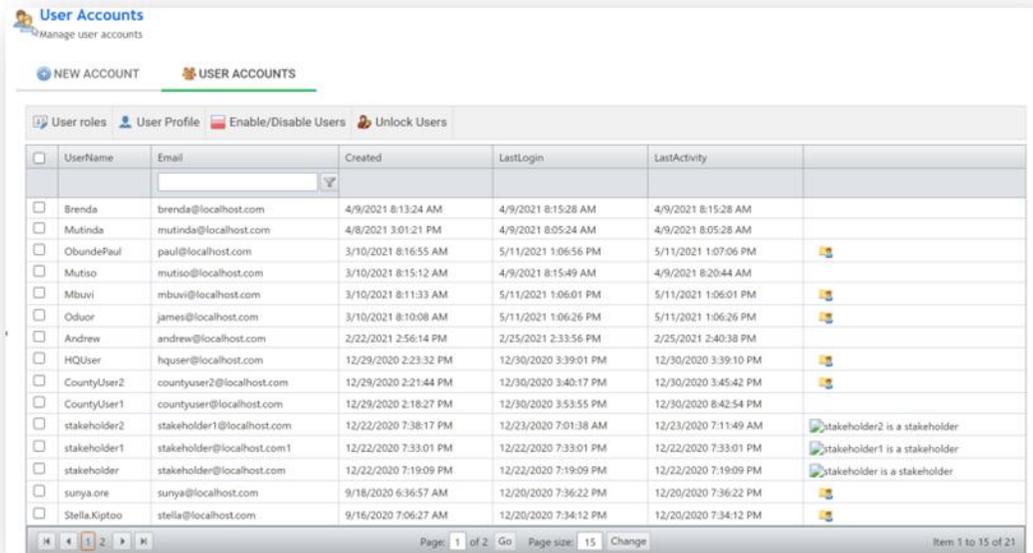
This interface will allow the admin to carry out the following tasks:

- Unlock user accounts (Locked accounts through invalid login attempts)

- Enable/Disable user accounts

- Delete user accounts

- Update user roles

- Manage user profile

Audit Trails

This interface will allow the admin to view all the actions carried out by the users who access and perform routine operations on the system

The following steps can be performed in order to view users' audit trails:

1. Once logged in, from the top menu point the cursor on 'Administration' menu

2. Click on 'Audit trail' menu

The details collected for an audit trail include:

- Action date and time

- Task

- User

- User IP address

Master Data Management

This interface provides the admins with a one-time setup of vital information for the smooth operation of the system.

This setup involves the following:

- Pillars listing

- Sectors listing

- Funding Agreements

- Departments

- Document Categories, etc.

To access master data management, perform the following steps:

1. Once logged in, from the top menu point the cursor on 'Administration' menu

2. Click on 'Master Data' menu

3. Select a specific data type to manage

4. Click on 'New' to create a new record

5. Click on 'Save Changes' link to save all the records created

6. To edit a record, click on the column cell to make text editable.

Workflows

This interface allows administrators to setup approval workflows for different resource types in the system.

Prior to publication, the documents will be subject to a sequential approval flow from one user to the next as prescribed by the administrator.

To create an approval workflow follow the below steps:

1. Once logged in, from the top menu point the cursor on 'Administration' menu

2. Click on 'Approval Workflows' menu

3. On the process/document name textbox, type the name of the new workflow

4. To add approvers to the workflow, select one or more users from the 'All staffs' listbox and use the '>' button to add to the 'approval sequence' list box. Approval order in the sequence will begin from the top entry to the last bottom entry. Use the 'up' and 'down' buttons of the 'approval sequence' listbox to amend the order of approval.
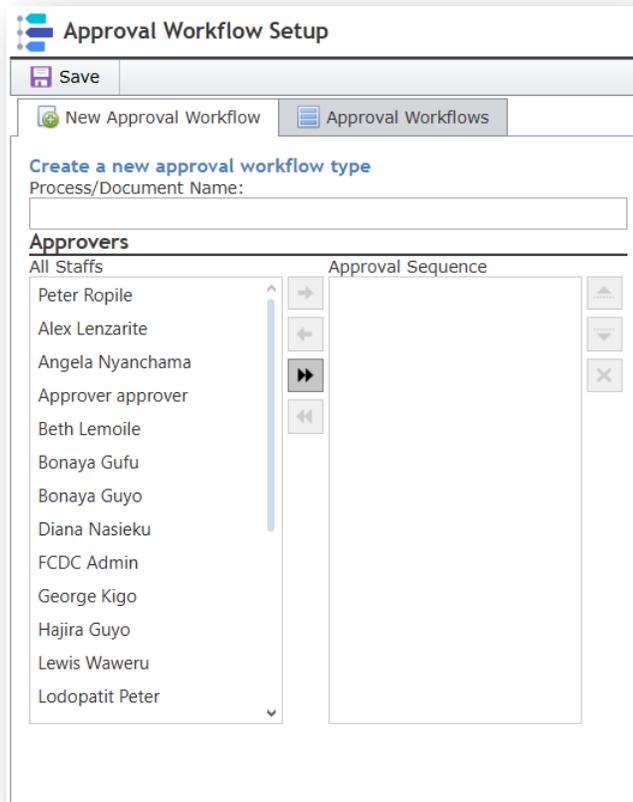
Manage Forum Groups

The forum module on the private portal allows system administrators to create and manage different forum groups that public users and stakeholders can contribute expert knowledge to.

To create a forum group follow the below steps:

1. Once logged in as administrator, under 'Forums' module click on 'New Forum Group' sub module.

2. This displays a page that allows the administrator to capture the forum group name/title, description and assign forum moderators as shown in the screenshot below

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3. Click on 'Save' menu to save the forum group. This forum group can now be visible and accessible on the public portal to allow users to create posts under the group.

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3.2. Private Portal

DataShare – Private Portal

DataShare private portal comprises of 4 core and 2 support modules. These are shown in the screenshot below:
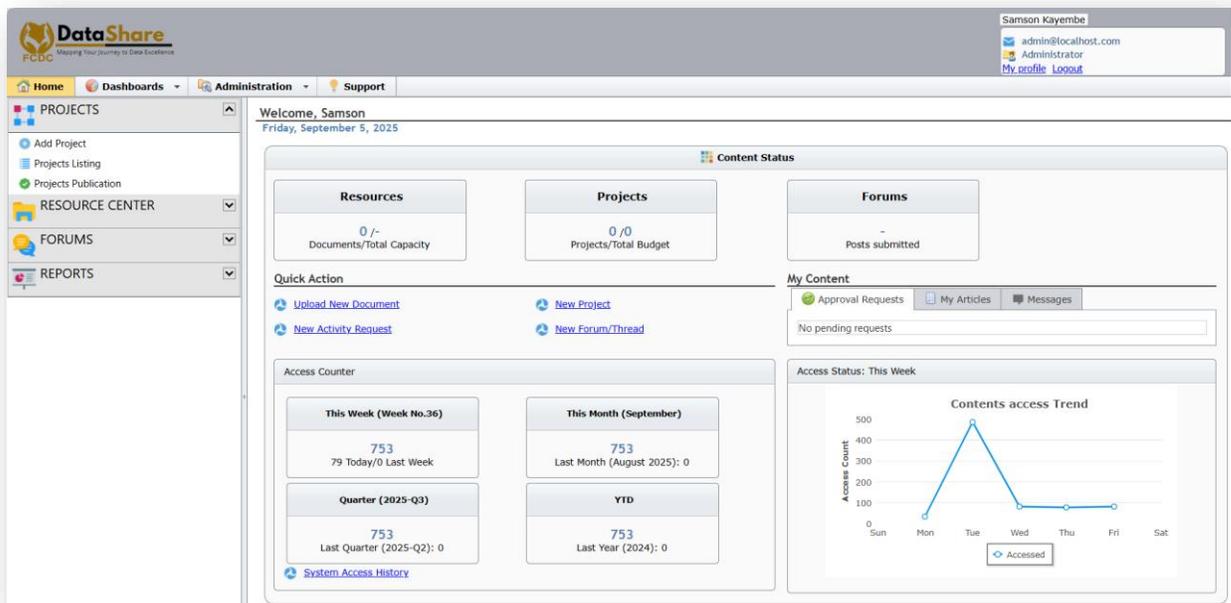
• **Projects Module**

This module handles both the FCDC and other partners' projects. The module provides tools and interfaces for project design, monitoring and reporting.

• **Resource Center**

This module is a repository of all the electronic documents originating from FCDC and other stakeholders. This enables users to share and control documents.

• **Discussion Forums**

This module allows administrators to create various user groups and allow the members to share expert opinions on various topics.

• **Administration Module – (Support module)**

This module allows IT administrators to manage user accounts, manage notification settings, scheduled reports and other preferences.

• **Authentication Module – (Support module)**

 This module is responsible for user authentication and authorization. This is the system gateway to other modules

3.2.1 Projects

Project Management - Projects

Projects module is one of the core modules of the system that allows users to capture, manage and publish projects records to the public portal.

 The module will also allow other stakeholders to publish their projects so as to share them on the platform.

 The following are the main tasks that this module offers:

- Add a new project record
- Capture and manage project objectives and output KPIs.
- Capture and manage project quarterly targets and achievement.
- Capture and manage project support documents
- Submit and publish project records to public portal.

Add a new project record

ℹ The following task can only be performed by Staff, Supervisors and Administrator user groups only

To create a new project record, follow the below steps:

1. Once logged in, under Projects, click on 'Add Project' link

2. This opens a page that allows the user to capture details of a new project as shown in the screenshot below

3. Fill in the project details in all sections

The form has three key sections, namely: Project Basic Details, Project Implementation Details and Other details.

Each section has fields to be filled appropriately by the user.

The required sub sections include geographic coverage, objectives, outputs and sectors .

Keywords are used to provide an intuitive way for users to search for the record in future.

4. Click on 'Save Project' menu on top to save the project.

5. The page redirects to the list of projects where a user can add/manage other features of a project.

6. At the listing page, the user can submit this project for publication by selecting the record and clicking on 'Submit For Publication' menu at the top. This notifies the administrator of a pending project record to publish to the public portal.

Manage Project Records

This section allows users to edit project record, update indicators, targets & achievements and support documents.

To access and manage project records, follow the below steps:

1. Once logged in, under Projects, click on 'Projects listing' sub module

2. This opens a page that lists all project records as shown in the screenshot below

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Edit Project record

The feature enables a user to update a project details.

To edit a project, follow the below steps:

- Under Projects, click on Projects Listing sub module

- From the list of projects, select a desired record by clicking on the record's checkbox

- Click on 'Edit' menu at the top of the page

- A page with project details as shown below is displayed.

- Update the project details and click on 'Update Project' menu at the top.

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Manage Project KPIs

This page also allows users to manage project key performance indicators.

The user can capture, edit and delete KPIs of a given project under each output that was specified when capturing the project record.

To manage KPIs of a project, follow the below steps:

- Under Projects, click on Projects Listing sub module
- From the list of projects, select a desired record by clicking on the record's checkbox
- Click on 'K.P Indicators' menu at the top of the page
- A popup interface as shown below is displayed.
- Add and edit output indicators

Targets and Achievements

Users can make use of this functionality to set quarterly targets for various indicators created in the previous step.

To manage different target and achievement values of a project, follow the below steps:

- Under Projects, click on Projects Listing sub module

- From the list of projects, select a desired record by clicking on the record's checkbox

- Click on 'Target & Achievements' menu at the top of the page

- A popup interface as shown below is displayed.

- Set and edit different targets and achievement values

- Click on 'Save Changes' menu at the top to commit the changes to database.

Manage project support documents

The Projects module allows users to add and manage support documents to project records.

To add and manage support documents of a project, follow the below steps:

- Under Projects, click on Projects Listing sub module

- From the list of projects, select a desired record by clicking on the record's checkbox

- Click on 'Support Documents' menu at the top of the page

- A popup interface as shown below is displayed.

- To add a new document:

  - Type in the document name/title

  - Specify the document type

  - Provide a description of the support document

  - Click on 'Select document' textbox to browse and select a file from your computer's filesystem.

  - Click on 'Upload document' to upload and display the support document to the right hand side of the interface

Submit a project for publication

To submit a project for publication on the public portal, follow the below steps:

- Select a desired record that you wish to publish
- Click on the 'Submit for publication' menu.
- An email notification is sent to the administrator who will in turn publish it to the public portal.

Publishing Project Records

This feature enables users to publish project records to the public portal.

To do so, Under Projects,

1. Click on 'Projects Publication' sub menu and an interface like below will appear
2. Select the project records to publish
3. Click on 'Publish Projects' menu

⚠️ Only administrators are allowed to publish data to the public portal

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This interface also allows users to unpublished records already available on the public portal.

3.2.2. Resource Center

Resource Center Module

This core module of the DataShare system allows users to upload, manage and share documents to the public portal.

The documents are categorized in various groups specified by the administrator.

This module offers the following functionalities:

Documents Upload

This feature allows the user to add different types of documents with related details.

Uploading a single document

To upload a single document, follow the below steps:

1. Once logged in, under Resource Center, click on 'New Document Upload' sub module.

2. This opens a page that allows the user to capture details of a document as shown in the screenshot below

3. Fill in the following below details

   - Document name: This is the document title that will be displayed on the public portal

Document type: This is a document category that is used to classify the document. This list is managed by the administrator as master data.

- Document version: This version number identifies the document revision and can be used to capture multiple document versions with the same title.

-Description: This short narrative is used to describe the document purpose and content. This narrative is also published on the public portal to enable the reader get an overview of the document.

- File attachment: This section allows users to select a file from their computer storage. Once a file is selected, the interface will start uploading the file temporarily to a staging folder prior to user's final commitment of the record upload. During this time, the interface will display a progress indicator with an amber flashing icon. Upon completion of the temporary upload, the icon turns to green color to indicate that a valid file has been selected. In case of an invalid file (Wrong file extension or beyond the allowed maximum file size), the icon turns red color.

Only .pdf, .doc and .docx file extensions are allowed.

- Approval workflow: this section allows the user to select the applicable set of approvers for the document when it is submitted for approval.

- Users access: this section allows the user to provide document access to different users across various departments.

- More details: this section enables the user to specify optional details such as

the document author, unique number, year of publication, theme sector and early warning details in case it is an early warning bulletin document.

4. Click on 'Upload Document' button to save the document.

Bulk document upload

This feature allows the user to upload multiple documents at once.

To upload multiple documents, follow the below steps:

1. Once logged in, under Resource Center, click on 'New Document Upload' sub module

2. This opens a page that allows the user to capture details of a document as shown in the screenshot below

3. From your computer's file explorer, select multiple documents and drop them at the 'Drag your document here' box

4. The interface starts showing an upload progress bar.

5. On 100% completion, the files are automatically uploaded to the documents library. A user can also package multiple files in a zip package and drop the zip file on the same box to unpack and upload individual files to the documents library.

6. Document properties like document type, description and other details are not filled in during the bulk upload operation.
To edit the bulk uploaded documents' properties, perform the following tasks:
 a. Under Resource Center, click on 'My documents Library' sub module
 b. Select a document from the list and click on 'Edit' menu to display the below popup

c. Edit the different document details

d. Click on 'Update' button to save the changes.

Documents Management

This involves sharing, viewing and version control of documents in the 'My documents Library' sub module.

This can be accessed by clicking on the "My Documents Library " sub module under Resource Center to display an interface as shown below:
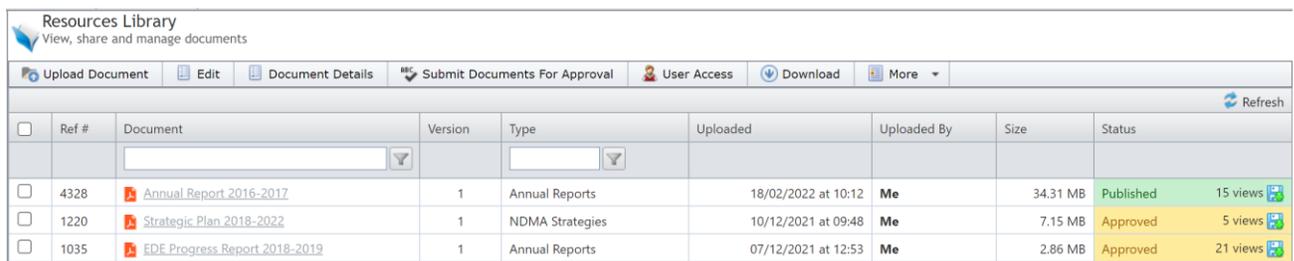
The page also allows users to do the following tasks:

- Edit: This feature allows the user to change a document properties (Title/name, document type, description, version, etc.)
- Document details: this section enables the user to view document access link, track download count and user access list.
- Download: this feature allows the user to download a document from the browser.

Documents Submission & Approval

This functionality enables users to submit documents to approvers.

To submit a document for approval, follow the below steps:

1. Once logged in, under Resource Center, click on 'My Documents Library' sub module

2. This opens a page with list of uploaded documents.

3. Select the desired documents to submit

4. Click on 'Submit Documents For Approval' link

5. An email notification is sent to the first approver in the approval workflow

ℹ️ Approval workflow for various document types is defined by the system admin in the master data section.

To approve or reject a submitted document, the approver can do so by clicking relevant links in the email message submitted to him/her.

Documents Publication

This functionality allows the user to publish all documents that have been approved. It also displays the document name, when the document was uploaded, publishing status, approvers and publish date (if already published).

⚠️ Only administrators are allowed to publish documents to the public portal

To publish a document to the public portal, follow the below steps:

1. Once logged in, under Resource Center, click on 'Documents Publication' sub module

2. This opens up a page with list of approved documents.

3. Select the desired documents to submit

4. Click on 'Publish Documents' link

5. The selected documents will be accessible on the public portal

This page also allows the user to recall a published document by selecting the desired document and clicking on 'Recall Published Documents' menu

3.2.3. Reports

DataShare Reports

The reports module allows users to extract various information from the system in a structured and printable format.

This support module provides various reports from core modules. The following are some of the report groups that this module offers

- Project Reports

- Resource center reports

To generate a report, Under Reports Module, click on a report group and from the page that displays, click on 'Generate' button to display results as shown in the screenshot below:

This module also allows users to filter reports by different parameters. The parameters are dynamic depending on report group the user is visiting.

Users can also export and download reports to various formats such as PDF, Excel, Word, PowerPoint, etc.

Users can directly preview and print a report from the interface.

3.3. Public Portal

DataShare – Public Portal

The DataShare public portal comprises of published information from various tasks and processes of the private portal. The interface of the public portal is as shown in the screenshot below:
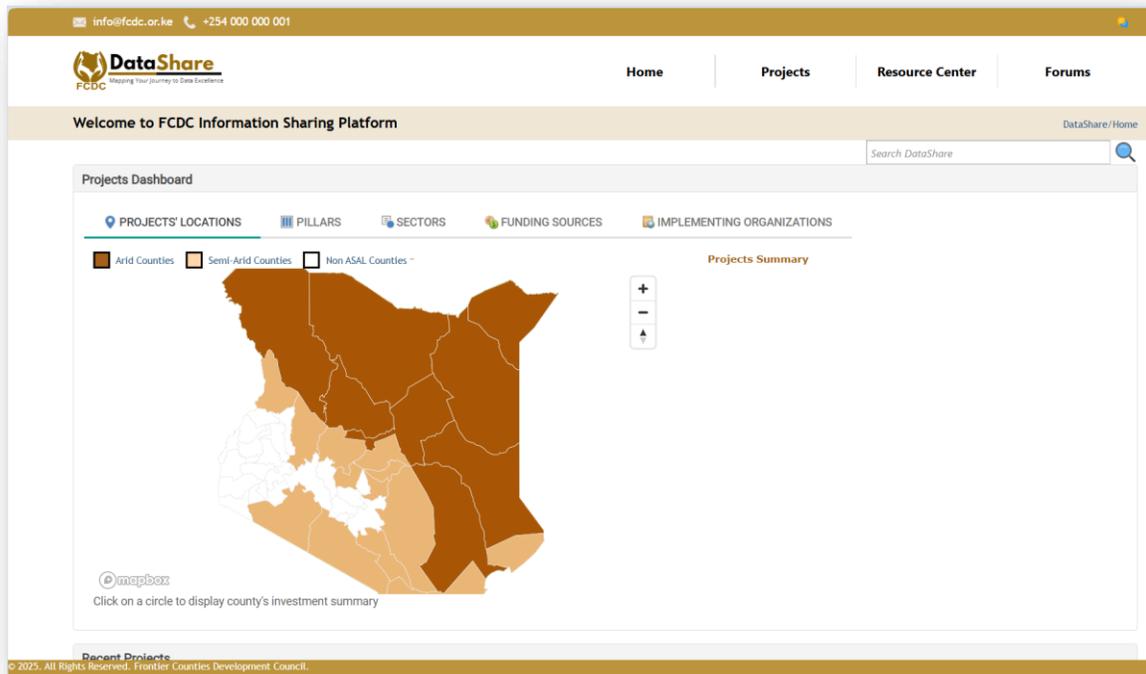
This portal contains the following sections

- Dashboards
- Projects
- Resource Center

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- Forums

- Feedback

- Content Subscription

3.3.1. Navigating The Public Portal

DataShare – Public Portal

Navigation

This page contains the following sections

- [Homepage](#)
- [Accessing Projects](#)
- [Accessing Resources](#)
- [Accessing Forums](#)
- [Feedback](#)
- [Content Subscription](#)

The public portal provides a quick and seamless navigation to access various contents. The top-level menu allows the users to quickly get to any information point with less number of clicks. The screenshot below shows the portal's main menu with dropdown list of links for easy access.
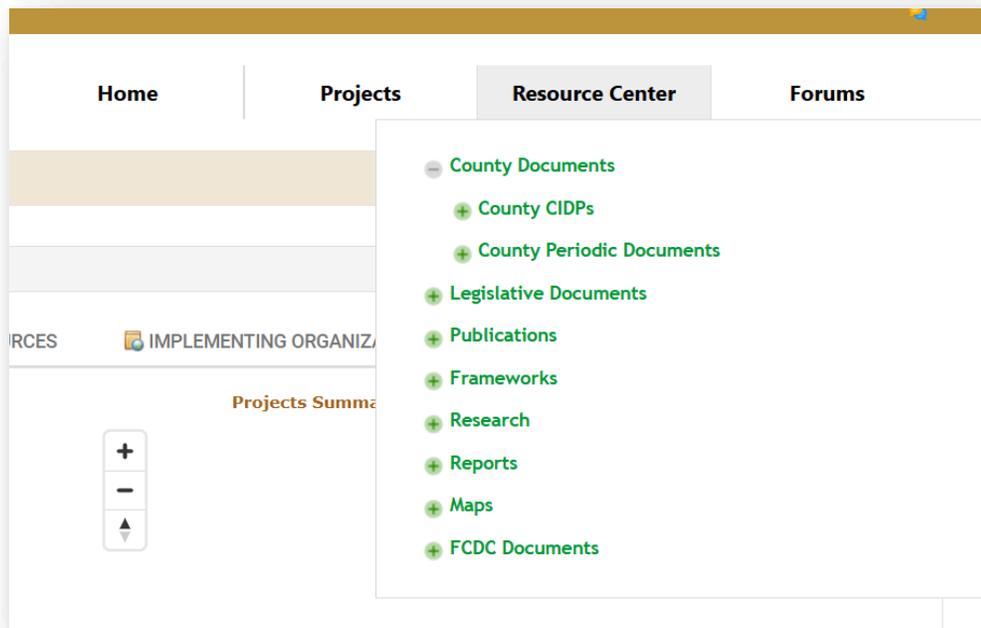
The following are steps on how to navigate and perform various tasks on the public portal

1. Home page

Accessing the Homepage

1. To access the homepage of the public portal, perform the following steps:

2. Open any web browser (Chrome, Mozilla Firefox, Opera or Edge)

3. Type **http://datashare.fcdc.or.ke** in the address bar and press 'enter' key on the keyboard.

4. The knowledge management public portal homepage displays.

Navigating the homepage dashboard

The homepage dashboard consists of various tabbed components. These include maps and charts for various published projects.

- Projects Location

This section provides the user with a map of Kenya showing all the arid and semi arid countries as shown in the screenshot below.

Each bubble on a county represents a number of published projects.

Click on the bubble to show county summary on the right pane.

The county summary shows list of projects grouped by sectors

The summary being displayed on the above screenshot provides links that enable the user to further obtain more details that make up the aggregate values.
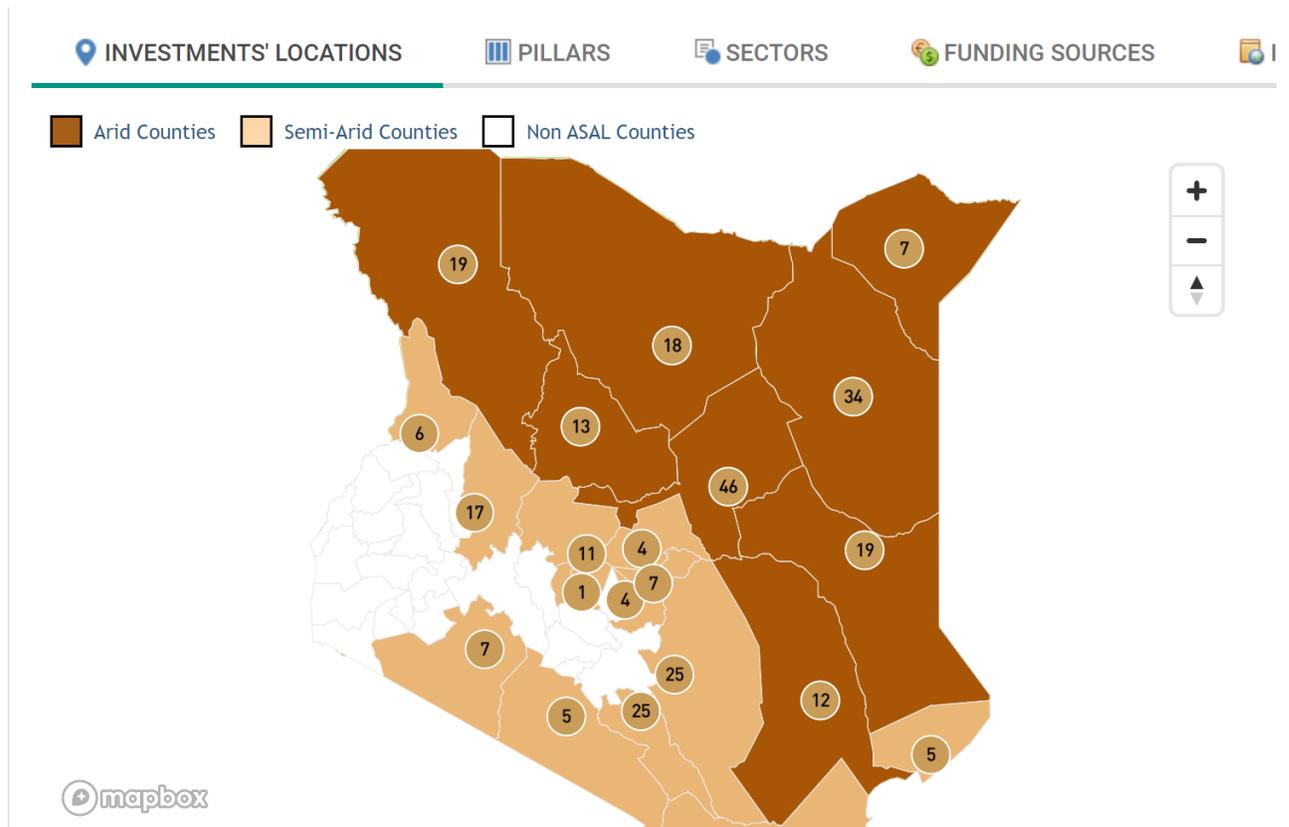
- Charts

The homepage provides four different chart sections for visualizing project records by pillars, sectors, funding sources and implementers.

By clicking on relevant tab, the interface displays the desired chart. Consider the screenshots below that show the different charts:
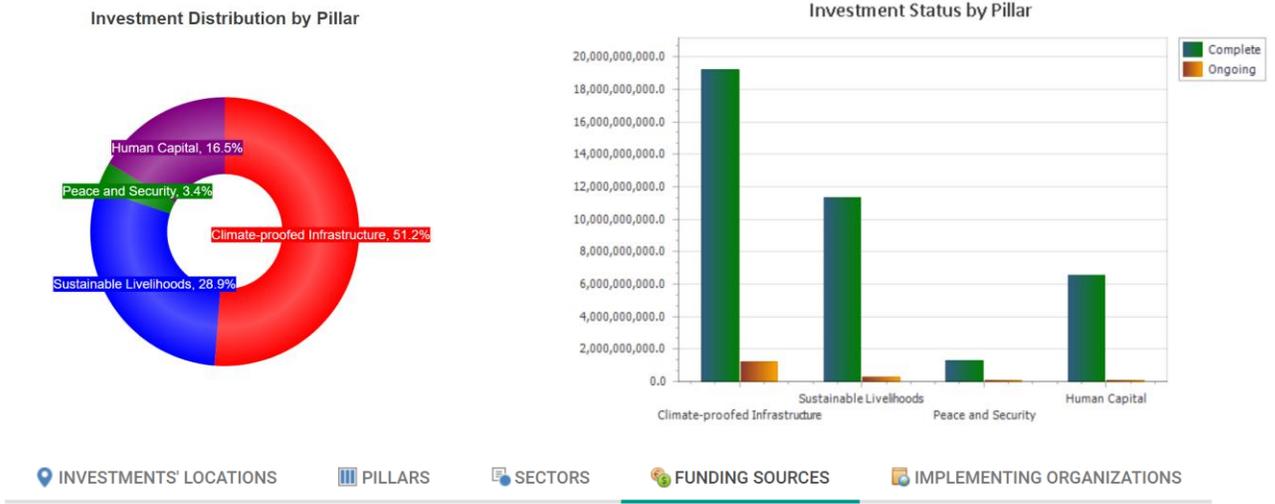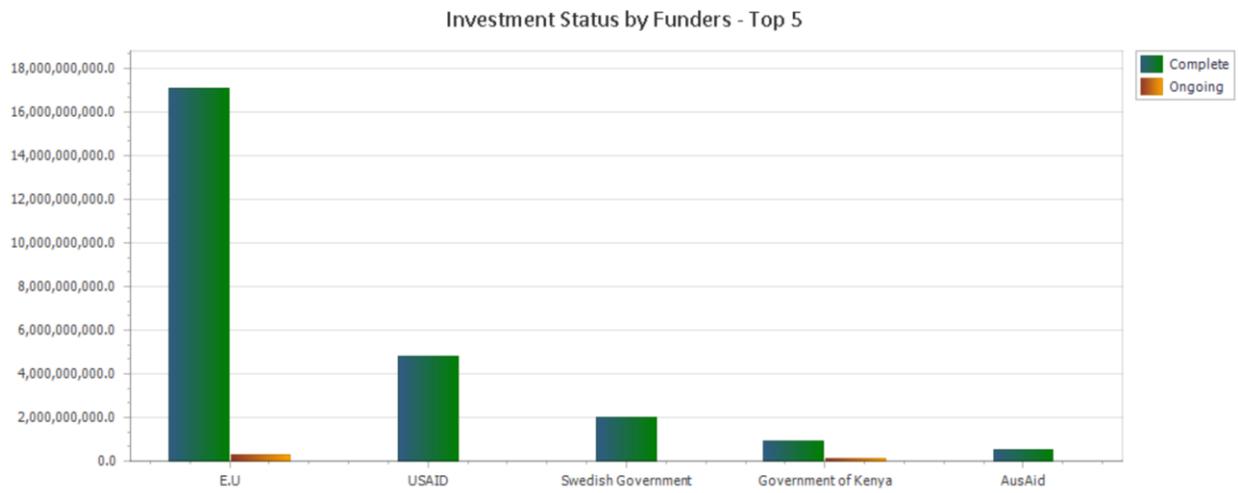
2. Accessing Projects

This section on the public portal allows users to navigate through various published project records.

The section has a similar interface as shown in the screenshot below:

DataShare User Manual

By Clicking on a record's details link, the system will navigate to a project's detail page where a user can read or download a project report in a PDF format.

The following are various ways to access projects on the public portal

- From the top main menu:

Place cursor on 'Projects' on the top main menu.

This displays a list of pillars.

By Clicking a desired pillar, the portal will display a page with respective projects under the selected pillar.

- From Map:

From the map, select a county with a bubble showing number of projects.

This displays a project summary showing projects by sectors on the right panel for the selected county.

- From Browse All Projects:

From the homepage, scroll down to the Projects section. This displays a table of showing projects list with the most recent published ones on top. As shown in the screenshot below, click on 'Browse all projects' to redirect to the projects listing page.
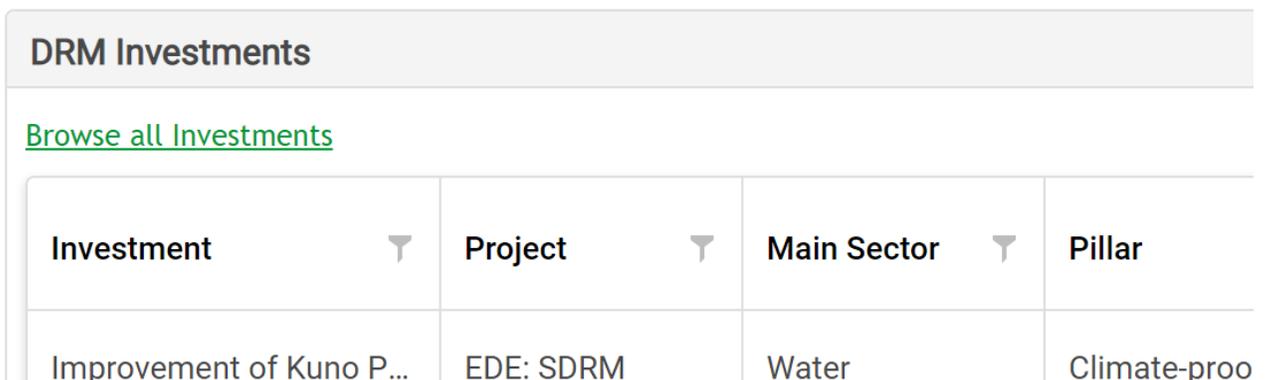
3. Accessing Resources on Public Portal
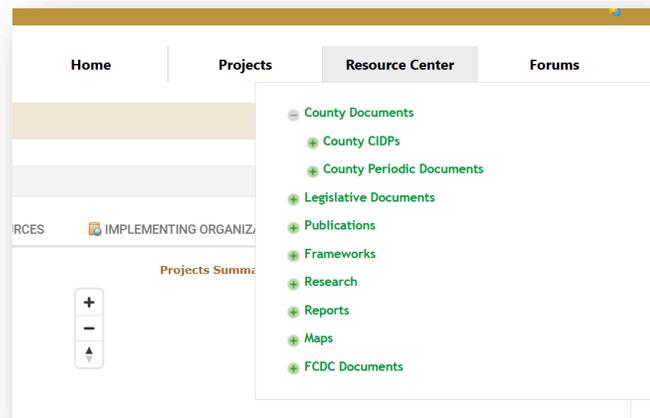
The following are various ways to access various published documents on the public portal

- From the top main menu:

Place cursor on 'Resource Center' on the top main menu.

This displays a list of various document categories with the respective sub-categories as shown below

Click on a sub-category to display a page with list of documents for the selected classification.

- From Homepage:

From the homepage, scroll to the Resources section.

This displays a list of recent published documents on the right-hand side and categories on the left panel.

4. Accessing Forums on Public Portal

The forums section enables visitors and stakeholders to share expert knowledge on various forum groups set by the administrators.

DataShare User Manual

A forum group contains topics which in term will bear messages posted by different community members.

Users can post messages in threads/topics. The interface provides various ways to format these posts by including links, videos and images.

Other users can also reply to messages.

To access the forums page,

1. Click on 'Forums' link on the top main menu.
2. This displays a page with list of forum groups.
3. Each group contains forum threads/topics that users can contribute to. Click on one of the forum groups to display a list of various topics
4. To create a new topic for discussion, click on the 'New Thread/Topic' link. This displays a window prompt for users to type in the topic title.

> ⚠ A user account is required to create a topic or post a message on the forum module.
> If the user is not logged in, the system displays a window prompting the user to create an account or login in case he/she has already an account.
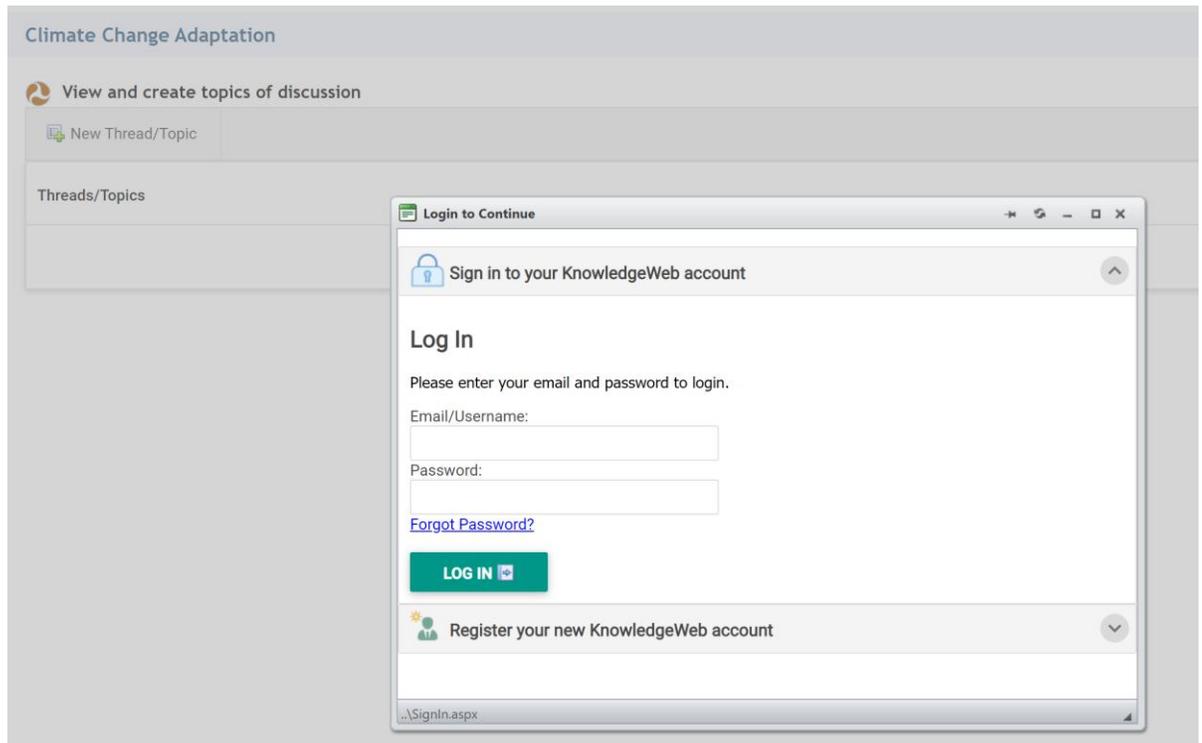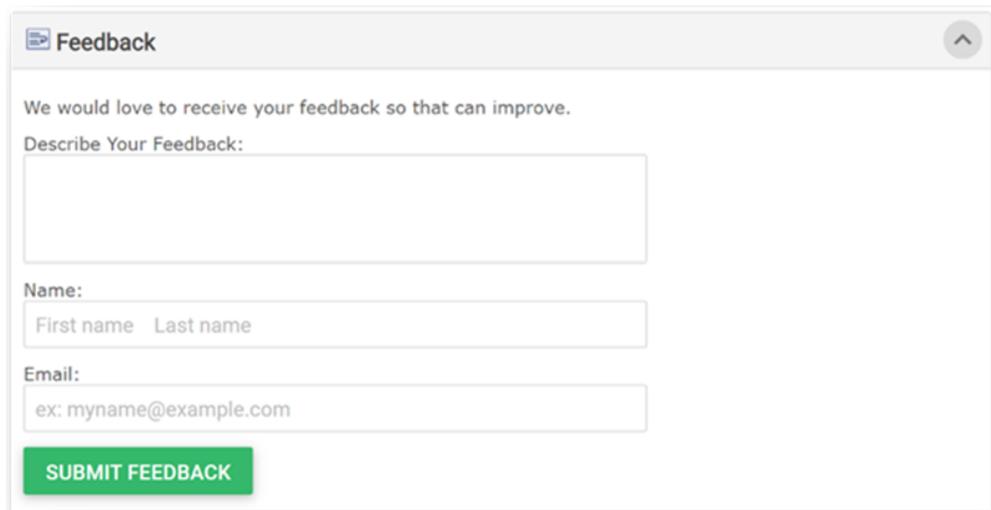
5. From the list of topics, click on a topic title to read other contributors' comments or click on 'New Post/message' link to compose and share a new post.

5. Providing Feedback

The portal allows visitors to provide any type of feedback as shown in the screenshot below. This feedback can be a complain, compliment or general opinion.

Upon submission, the user's details are sent as an email correspondence to an email address provided by administrators on the system's configuration file.

To provide any feedback to the FCDC knowledge management team, follow the below steps:

1. From homepage, scroll to the bottom of the page

2. The left-hand panel provides a section/form to enter details for user feedback

3. Fill in the feedback description, full names and email

4. Click on submit

5. The feedback will be submitted via email to the portal administrators for review.
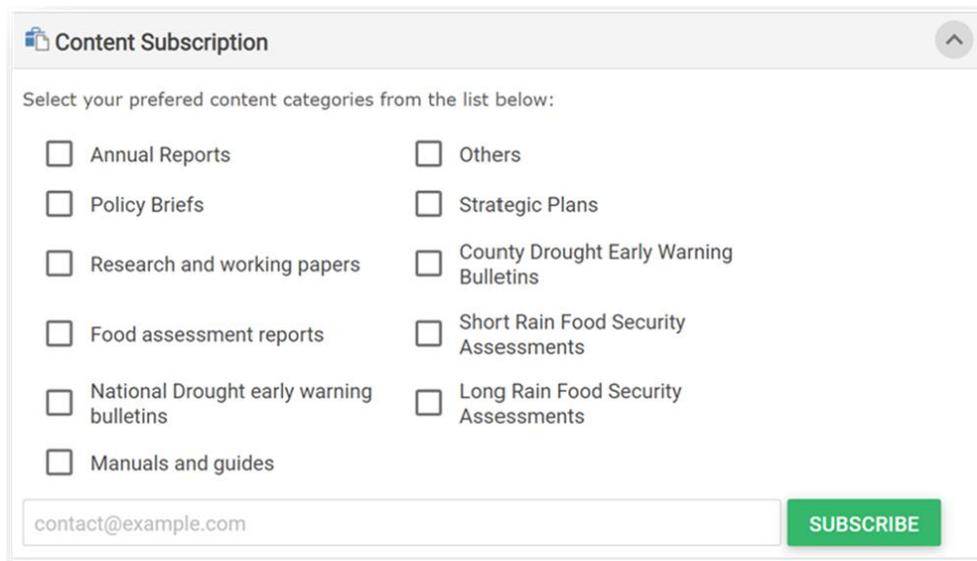
6. Content Subscription

The public portal allows users to subscribe to various content categories. This feature allows subscribers to get email notifications once content of their choice becomes published on the portal.

To subscribe to content:

1. From the homepage, scroll to the bottom of the page and locate the subscription section similar to the screenshot shown below.

2. The right-hand side panel provides a section with list of various content categories.