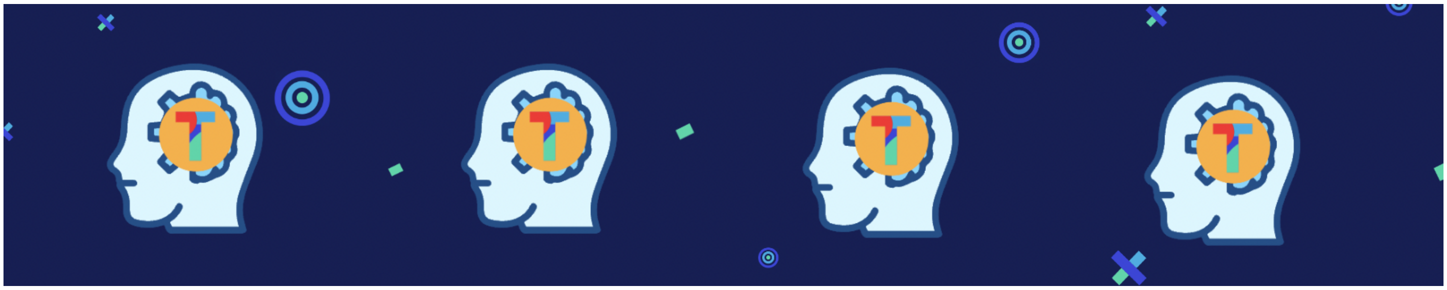
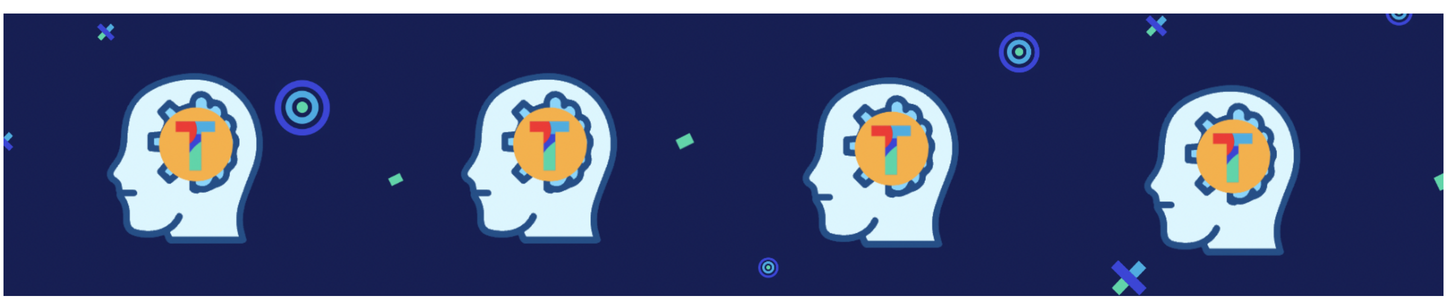
TolaData



TolaData

USER GUIDE 2

Admin Guide



TolaData

2. TolaData User Guide: Admins

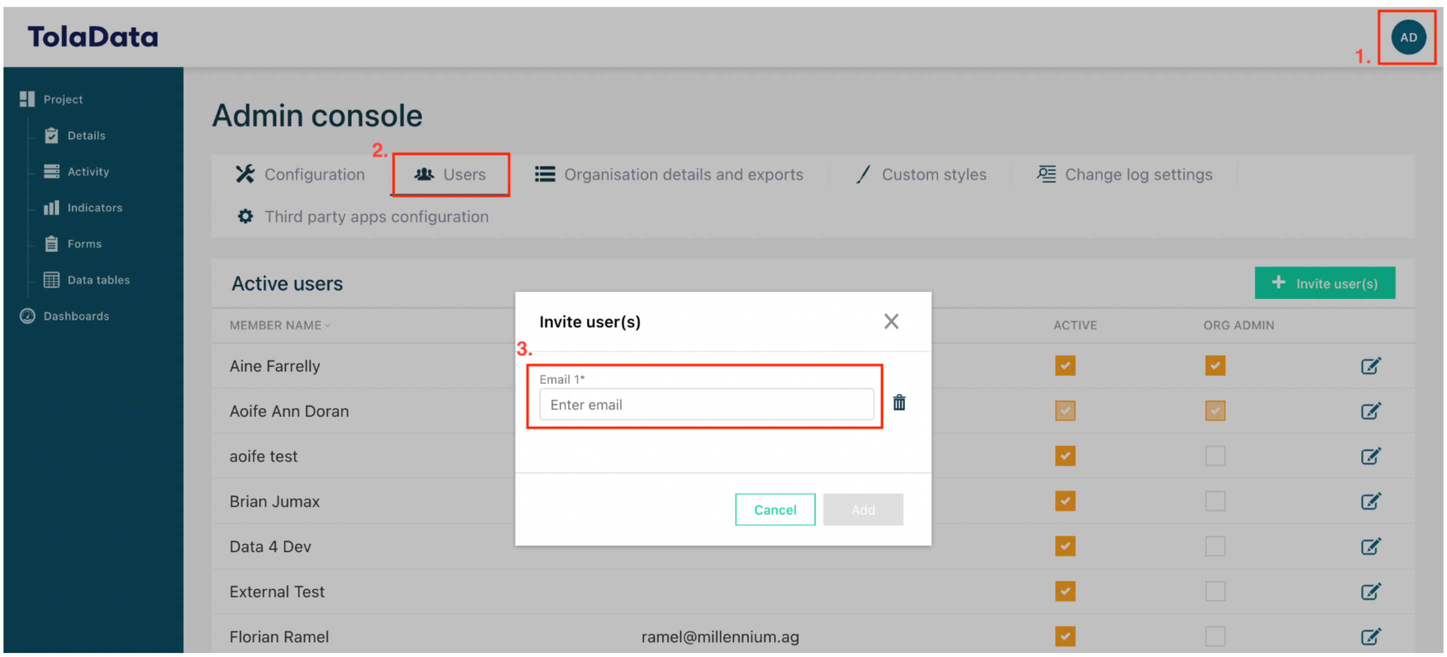
Contents

1. Managing users

1.1. Invite new users: The user accounts for your organisation are managed in the Admin Console, which you find by clicking the blue circle icon at the top right of the screen.

1.2. You will be brought to the 'Users' tab, where you can then select the green button 'Invite user(s)'.

1.3. Enter their email address and click 'Add'. The user will receive an email inviting them to set up their TolaData account.



1.4. Deactivate users: You can only deactivate users who have already been invited to your organisation unit, and have completed their account setup. Navigate to the admin console as explained in 1.1.

1.5. If the checkbox related to the user has an orange tick, then the user is active. Simply uncheck this box to deactivate the user. A warning message will appear to confirm the deactivation.

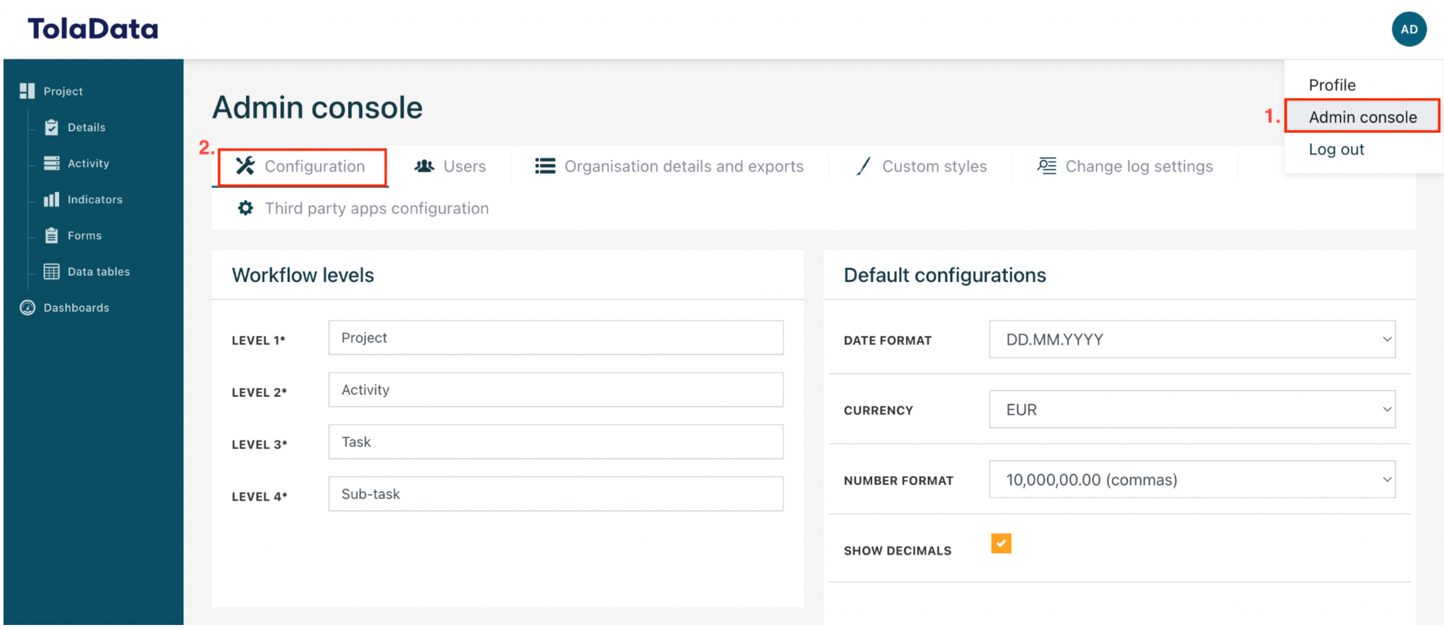
1.6. See Annex A for more information on TolaData user accounts and permissions.

Exercise A.

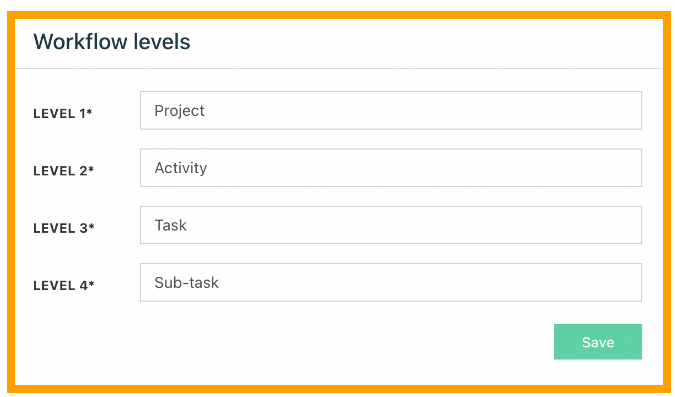
- ☐ Invite a team member to your organisation account
- ☐ Set their permissions, consult Annex A to select the correct permission

2. Configuring the system

2.1. Admin console: You can access the admin console by clicking the blue circle icon at the top right of the screen. Selecting the 'Configuration' tab will allow you to configure the system as explained below.

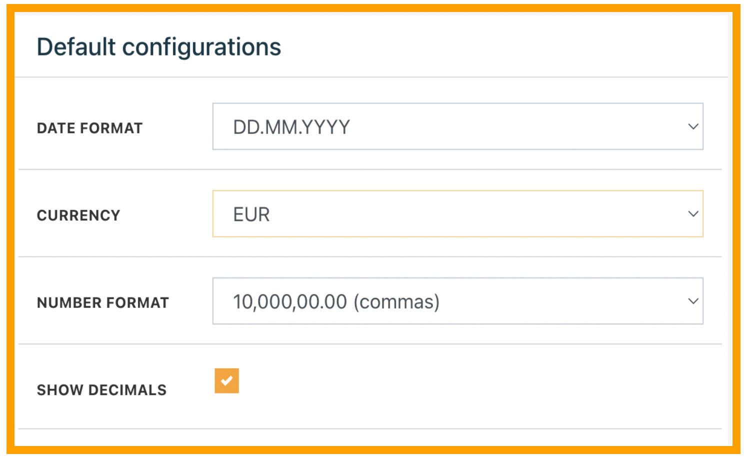


2.2. Workflow levels: The three workflow levels are by default named 'Project', 'Activity' and 'Task'. Should you wish to change the terminology used in the system, you can edit the names and click the green 'Save' button.



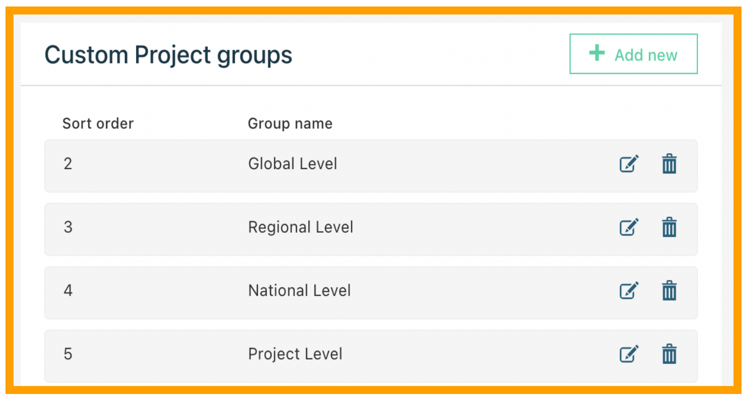
2.3. Please note that these names are not translated by the system when a user sets their profile to a different language

2.4. Default configurations: You can set the default date and number format, and currency configurations. Select from the options in the drop-down menus and then click 'Save'. Your selections will apply for all users of your organisation.



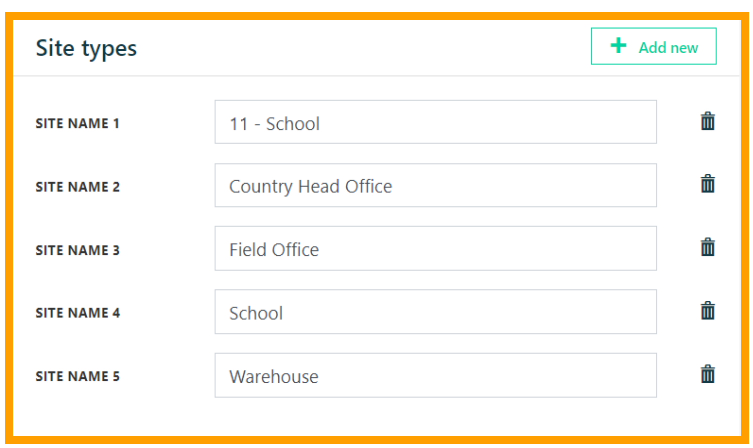
2.5. Custom Project groups: Define custom project groups to organise your projects into, making it easier to navigate through the platform.

2.6. Click "Add new" and enter the name of the group name you want to appear in the group filter down list, enter the order of your group and then click "Save"



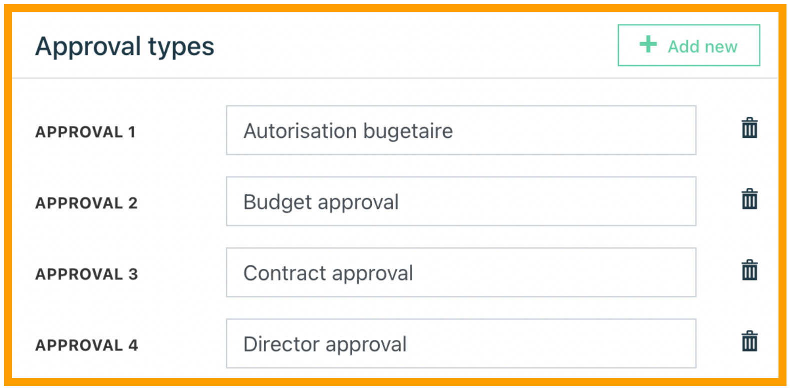
2.7. Site types: You set the site types that can be selected by users when they create a new site.

2.8. Click "Add new" and enter the name of the site type you want to appear in the site type drop down list and then click "Save"



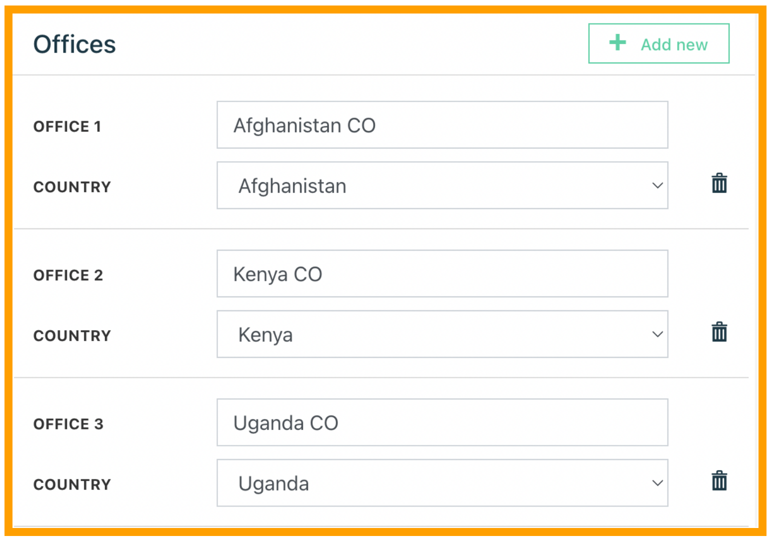
2.9. **Approval types:** You set the approval types that can be selected by users when they create a new approval in the activities section.

2.10. Click "Add new" and enter the name of the approval type you want to appear in the approval type drop down list and then click "Save"



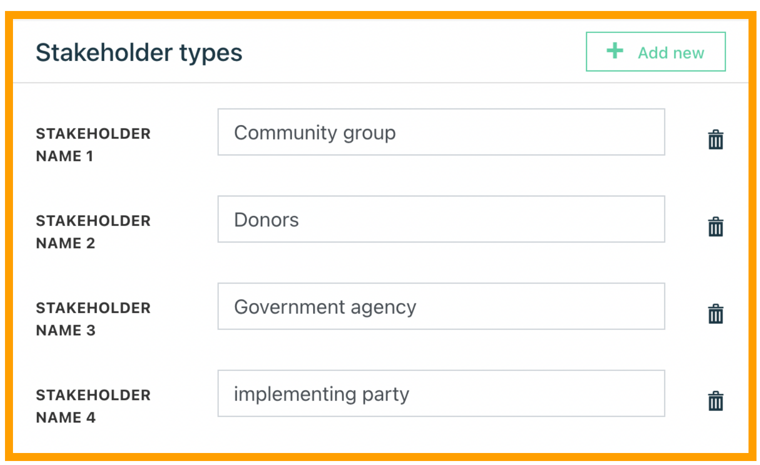
2.11. **Offices:** You set the offices that can be selected by users when they create a new site to show which office of your organisation the site is managed by.

2.12. Click "Add new" and enter the name of the office and its country location and then click "Save"

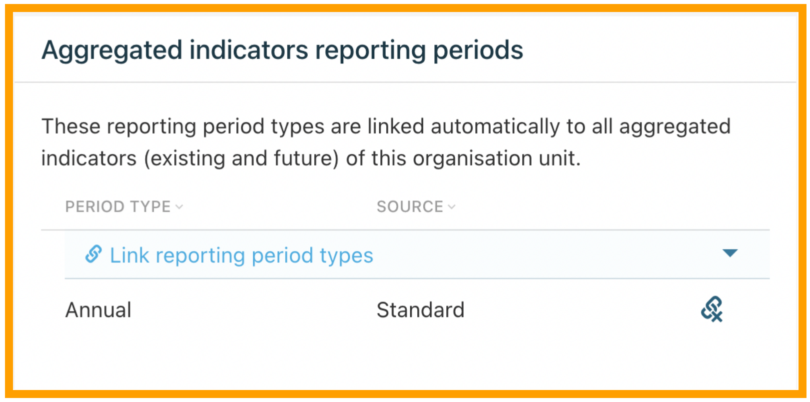


2.13. **Stakeholder types:** You set the stakeholder types that can be selected by users when they create a new stakeholder.

2.14. Click "Add new" and enter the name of the stakeholder type you want to appear in the stakeholder type drop down list and then click "Save"



2.15. **Aggregated indicators reporting periods:** Link reporting reporting period types to all existing and future aggregated indicators in the organisation unit.



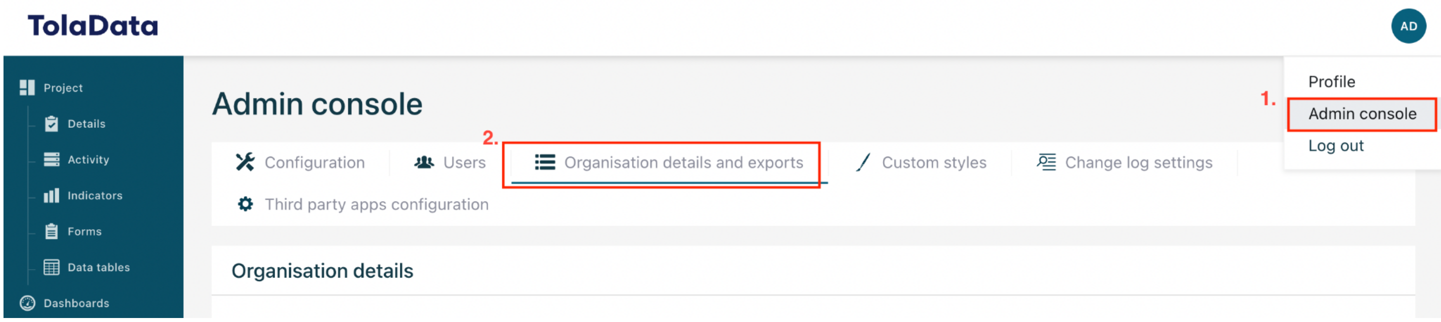
2.16. Select the "Link reporting period types" dropdown and select a reporting period. To unlink a reporting period from your aggregated indicators, select the unlink icon on the right hand side.

Exercise B.

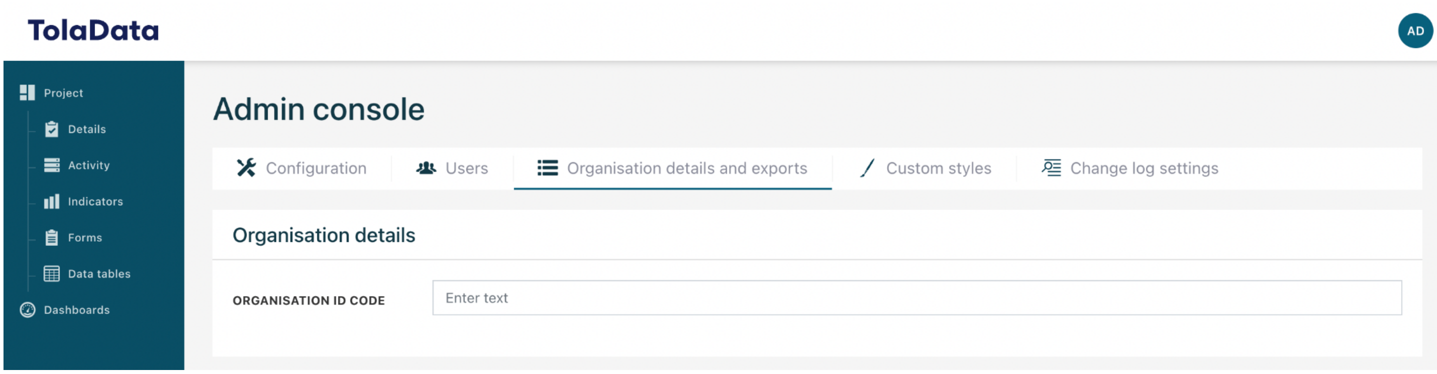
- ☐ Configure three elements of the platform:
  - ☐ Create a custom group
  - ☐ Create an approval type
  - ☐ Create a site

3. Organisation details and exports

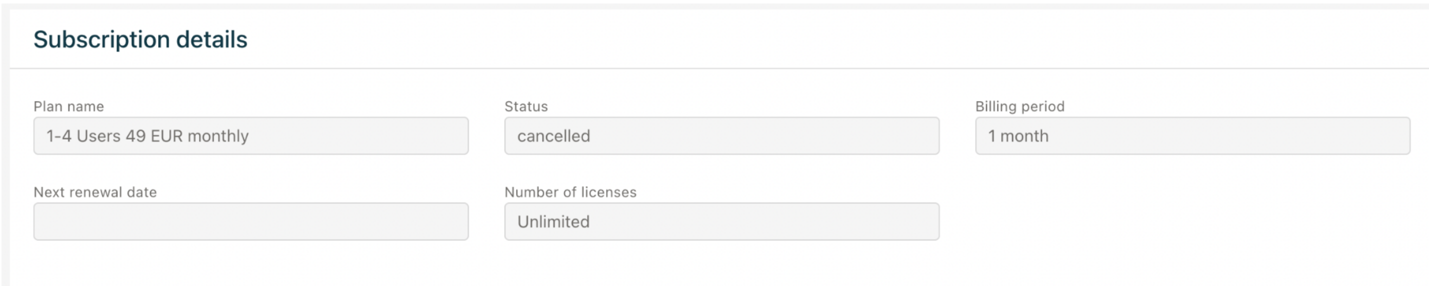
3.1. **Admin console:** You can access the admin console by clicking the blue circle icon at the top right of the screen. Selecting the 'Organisation details and exports' tab will allow you to configure your organisation details, view your subscription plan and manage your data for export.



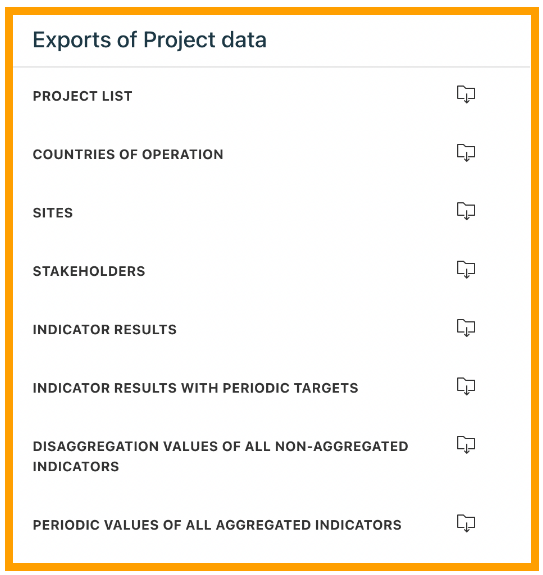
3.2. **Organisation details:** Enter an organisation ID code if necessary to be included in your exports. If you have IATI exports switched on, in this section you can add organisation specific information necessary for your IATI reporting.



3.3. **Subscription details:** In the subscription details section you can see an overview of the TolaData plan your organisation has purchased, the plans status, the next billing period, the next renewal date and the number of licenses available to your organisation unit.



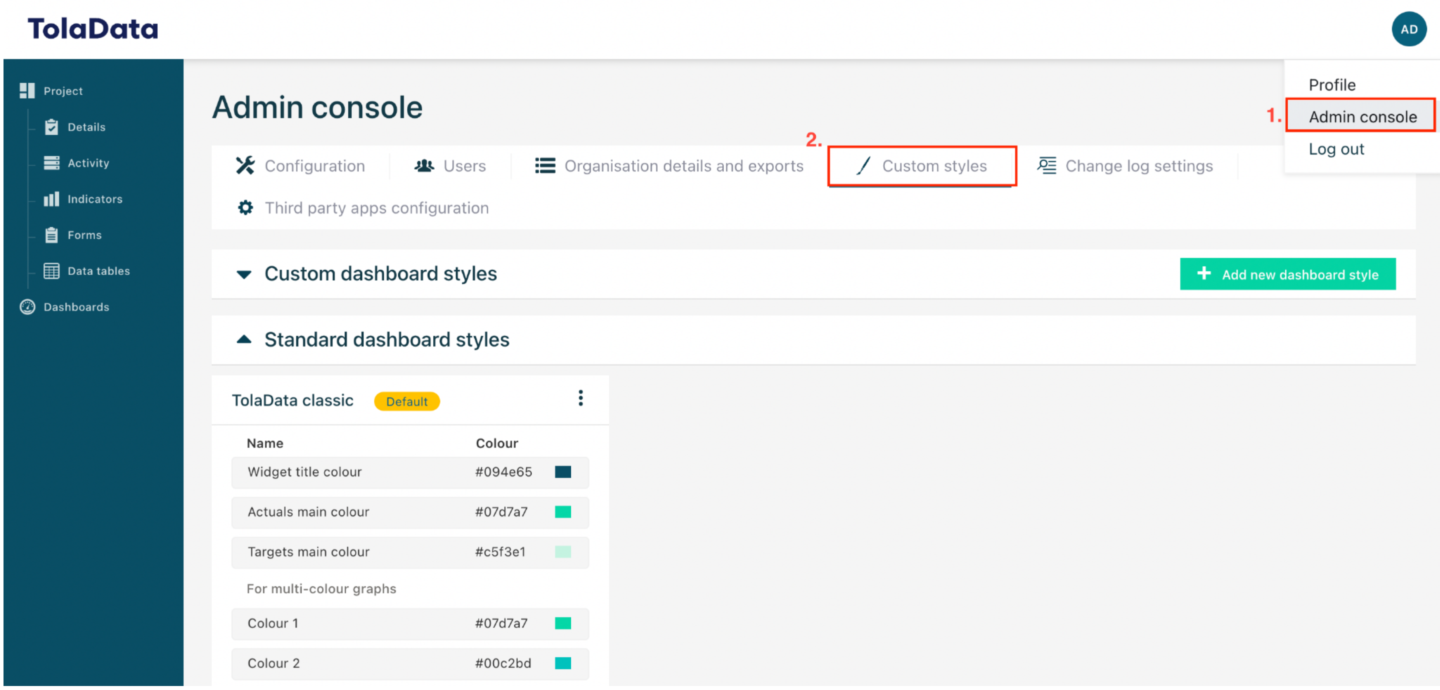
3.4. **Exports of Project data:** In this section, you can export different sections of your project data in CSV format.



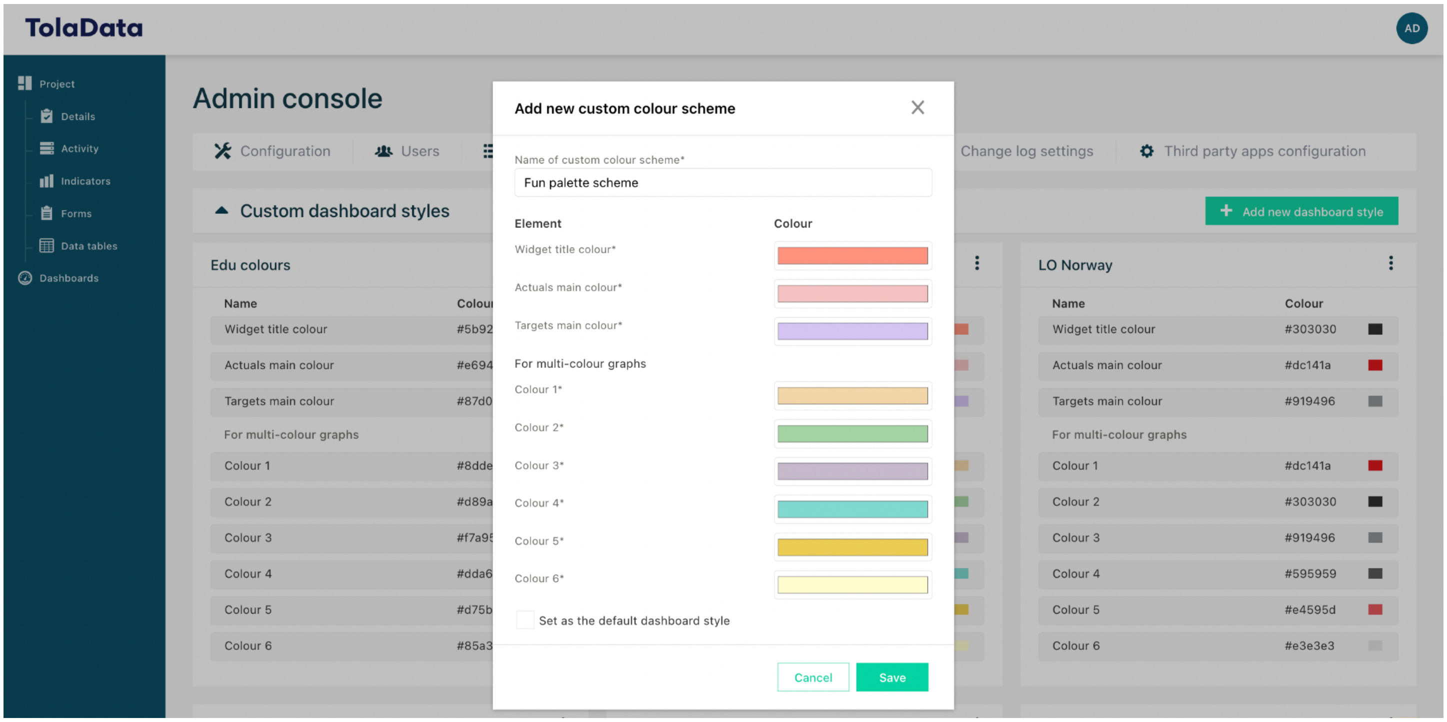
3.5. **IATI export:** If your organisation has switched on IATI reporting, this section allows you to export your project data in the defined IATI reporting. For more information on the integration between TolaData and IATI, see our free guide - https://www.toladata.com/iati-full-guide/

4. Custom styles

4.1. **Admin console:** You can access the admin console by clicking the blue circle icon at the top right of the screen. Selecting the ‘Custom styles’ tab will allow you to create a colour package to be used in the dashboard section.



4.2. To add a new colour pattern, click the “Add new dashboard style” button. Enter a name for your custom colour scheme and add a colour for each element of the platform.

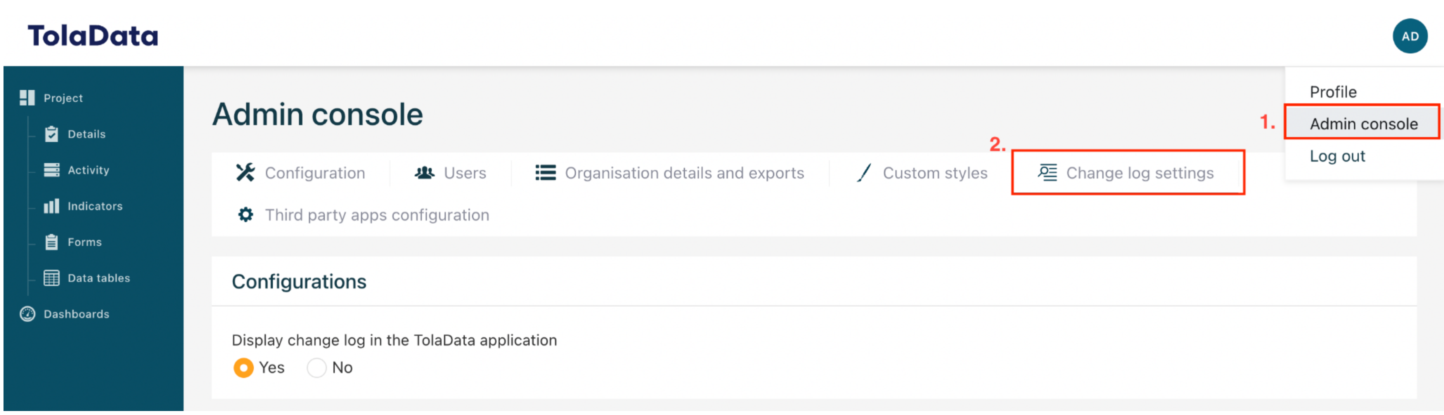


Exercise C.

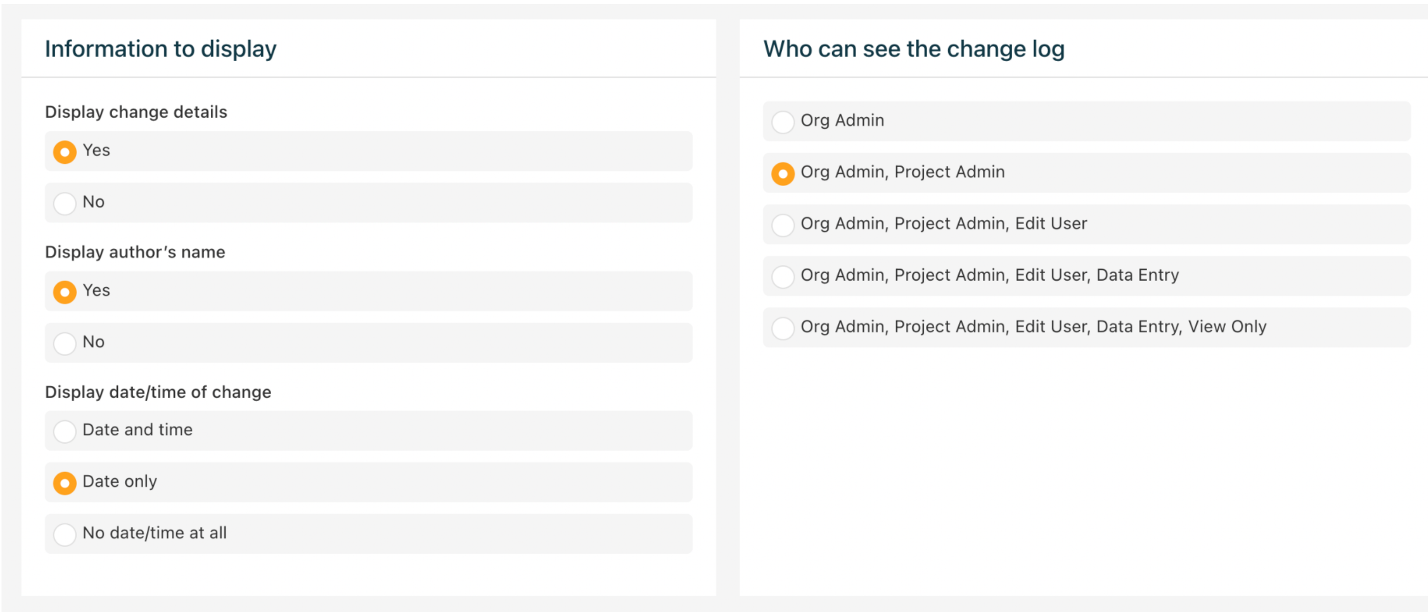
☐ Create a custom dashboard style package!

5. Change log settings

5.1. Admin console: You can access the admin console by clicking the blue circle icon at the top right of the screen. Selecting the ‘Change log settings’ tab to activate and configure the change log feature.

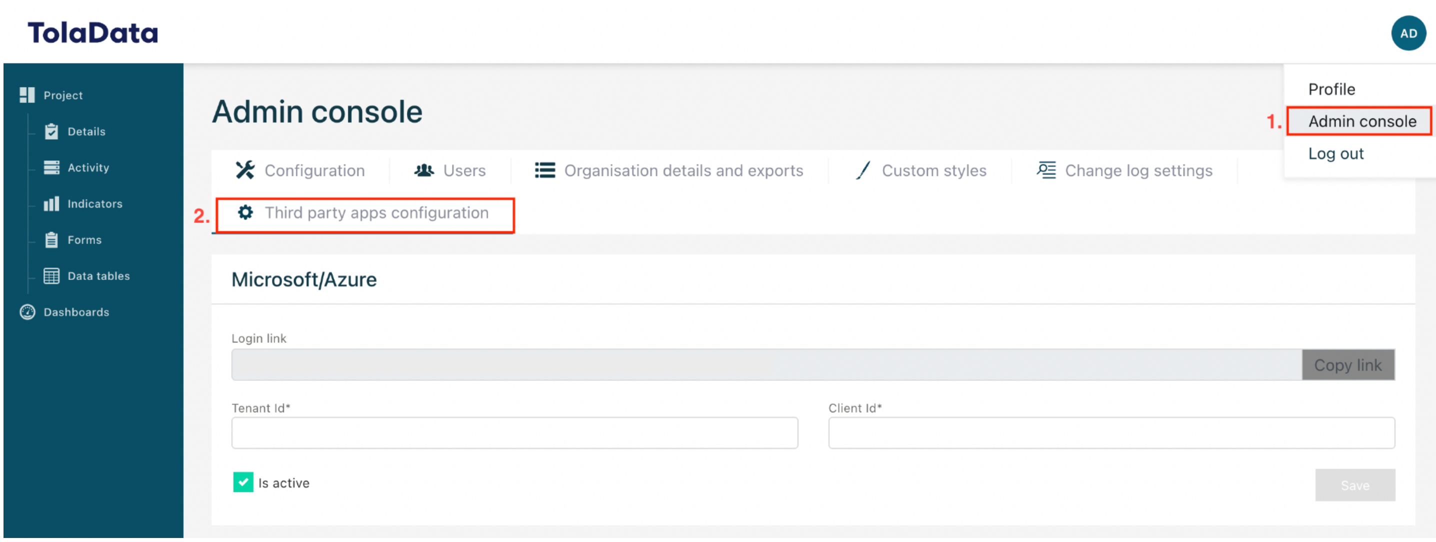


5.2. **Configurations:** To activate the change log, select the 'Yes' button in the configurations box. You can then define the information you would like to record, such as the change details, the author's name and the date and time of the change. You can also define which user has the ability to view the change log.



6. Third party apps configuration

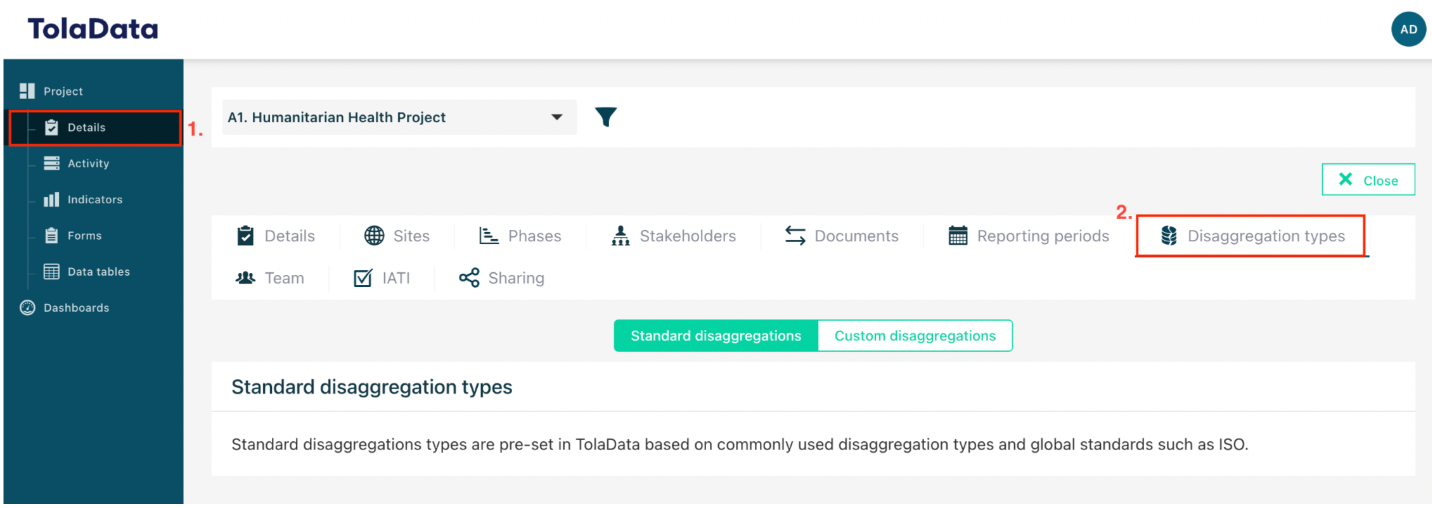
6.1. If your organisation has opted for the custom integration with Microsoft Azure, you can view the single sign-on information in the 'Third party app configuration' tab.



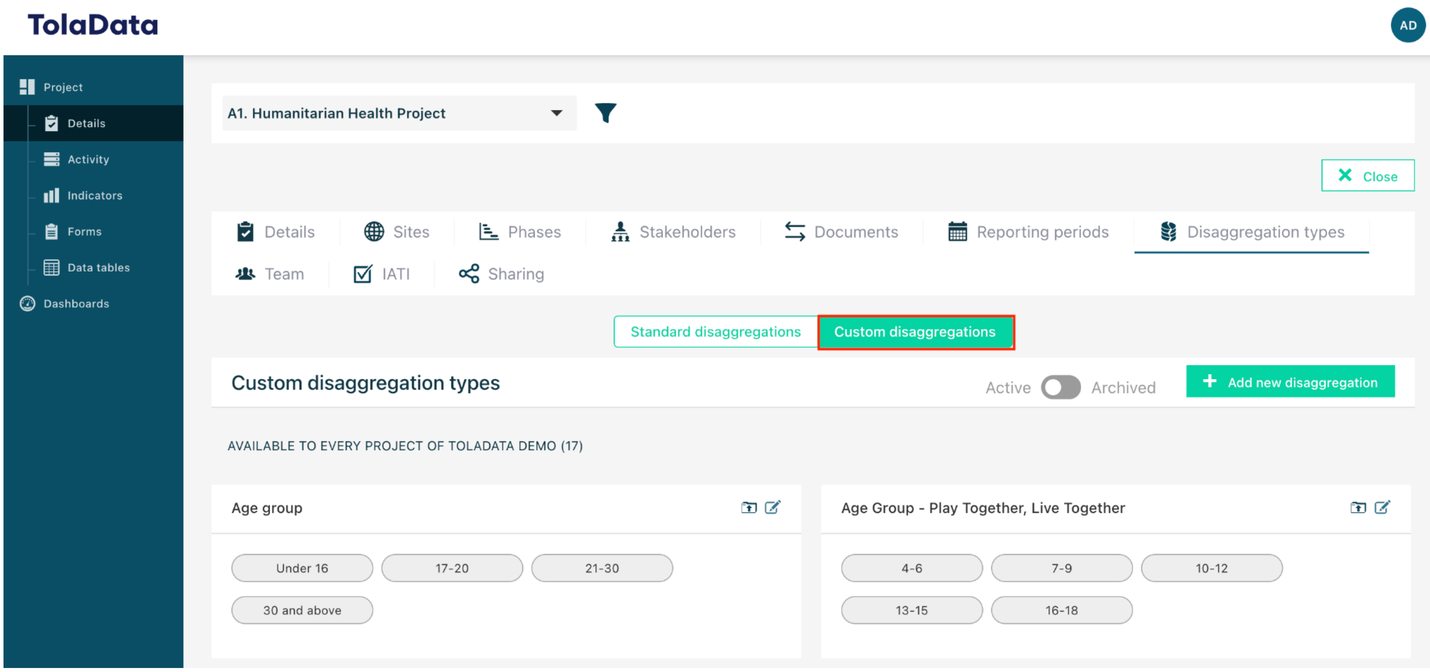
7. Managing disaggregation types

7.1. Disaggregation types are managed in the 'Disaggregation types' tab at the project level

7.2. **Standard disaggregation types:** these are pre-set in TolaData based on commonly used disaggregation types and global standards such as ISO.

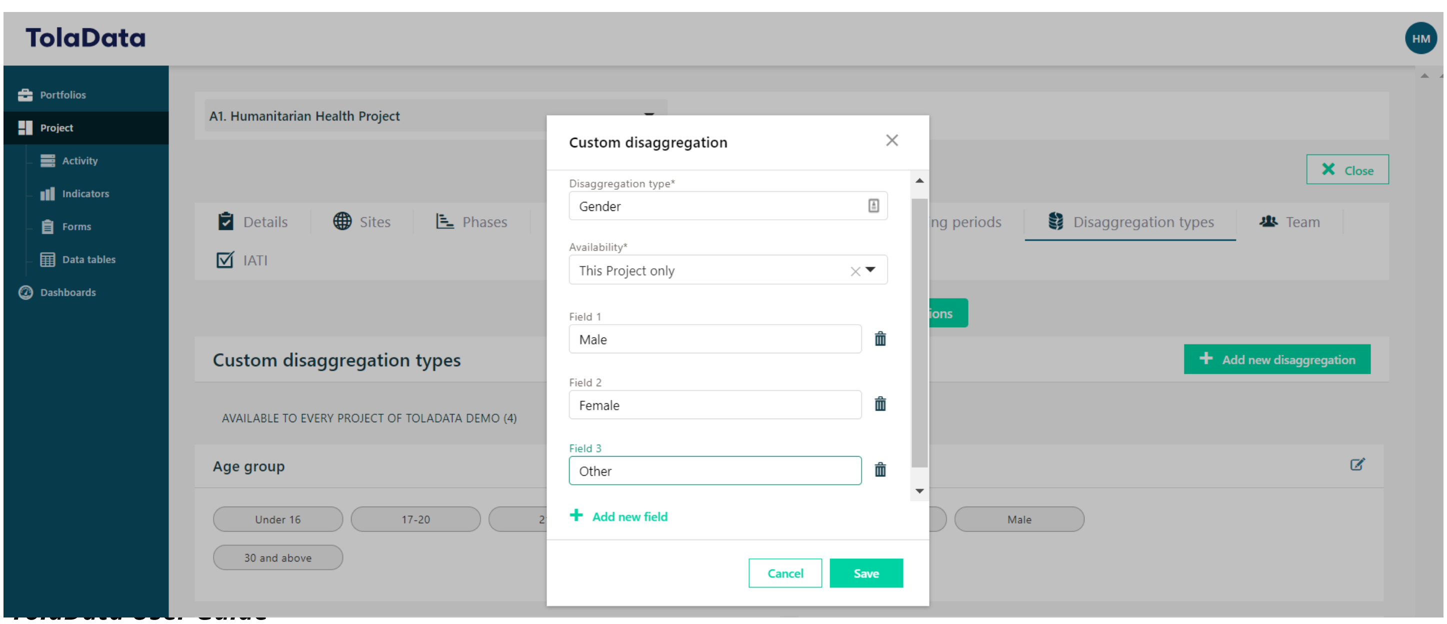


7.3. **Custom disaggregation types:** you can create custom disaggregation types for use across all projects of your organisation or specific for certain projects.



7.4. Click the green ‘Add new disaggregation’ button to create a new disaggregation type.

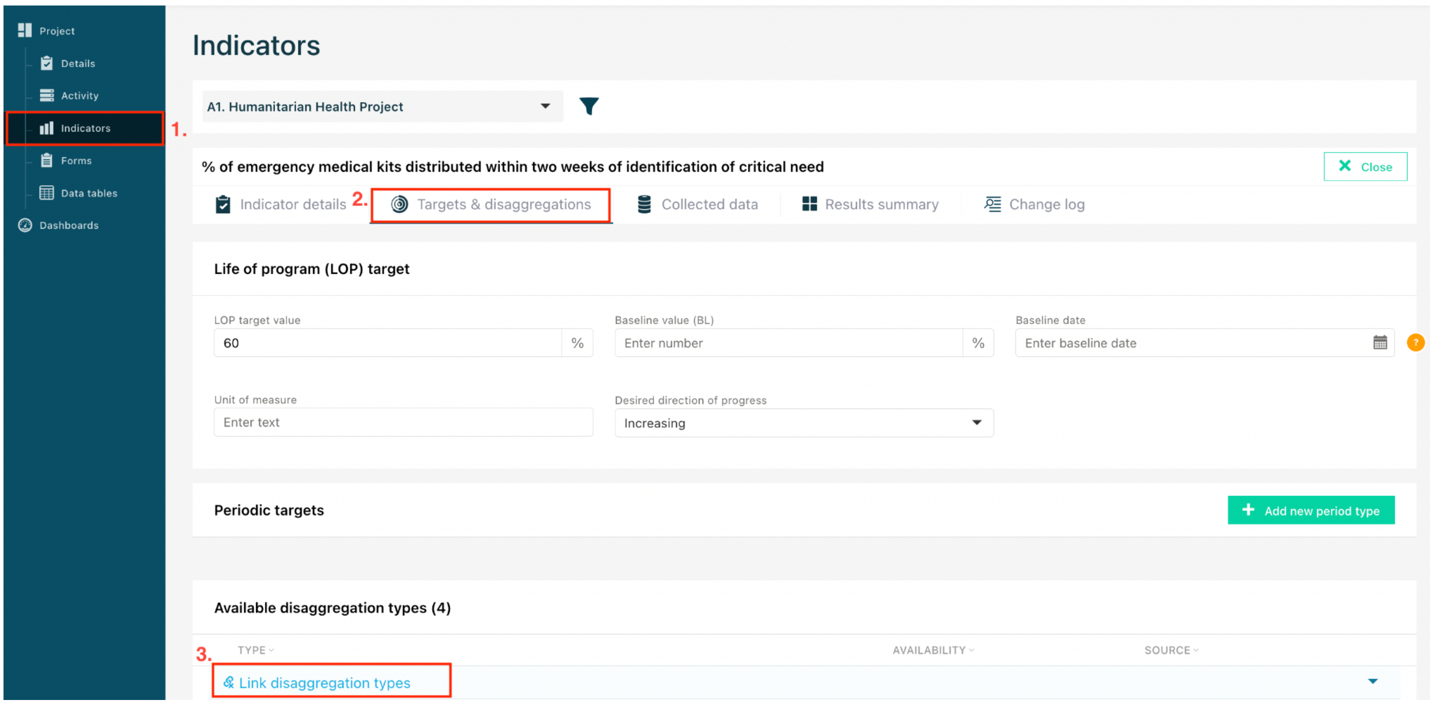
7.5. Enter the name for the disaggregation type (eg. Gender) and select its availability . The availability determines if a disaggregation type can be reused on any project of your organisation or if it will only be used on the project in which you are currently working.



Workflow levels

7.6. Enter the disaggregation values. You must enter at least two values and can add more by clicking "Add new value". When you are finished, click 'Save'.

7.7. Disaggregation types can be linked to the indicators that they are relevant to at the indicator level on the "Targets and disaggregation" tab of each indicator.



Exercise D.

- ☐ Create a custom disaggregation type
- ☐ Link the disaggregation type to an indicator

8. Managing reporting periods

8.1. Reporting periods are managed in the 'Reporting periods' tab at the project level

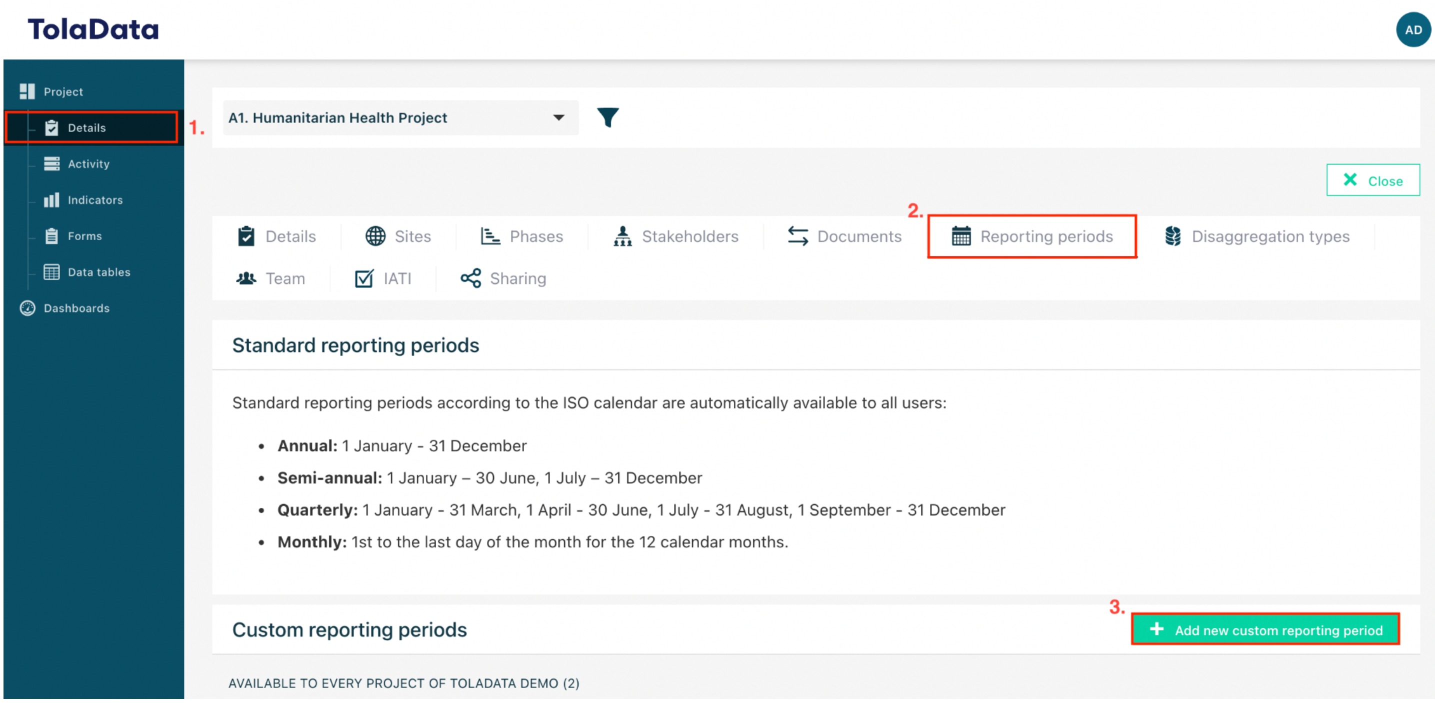
8.2. **Standard reporting periods** are pre-set according to the ISO calendar and automatically available to all users:

- Annual: 1 January - 31 December
- Semi-annual: 1 January – 30 June, 1 July – 31 December
- Quarterly: 1 January - 31 March, 1 April - 30 June, 1 July - 31 August, 1 September - 31 December

- Monthly: 1st to the last day of the month for the 12 calendar months.

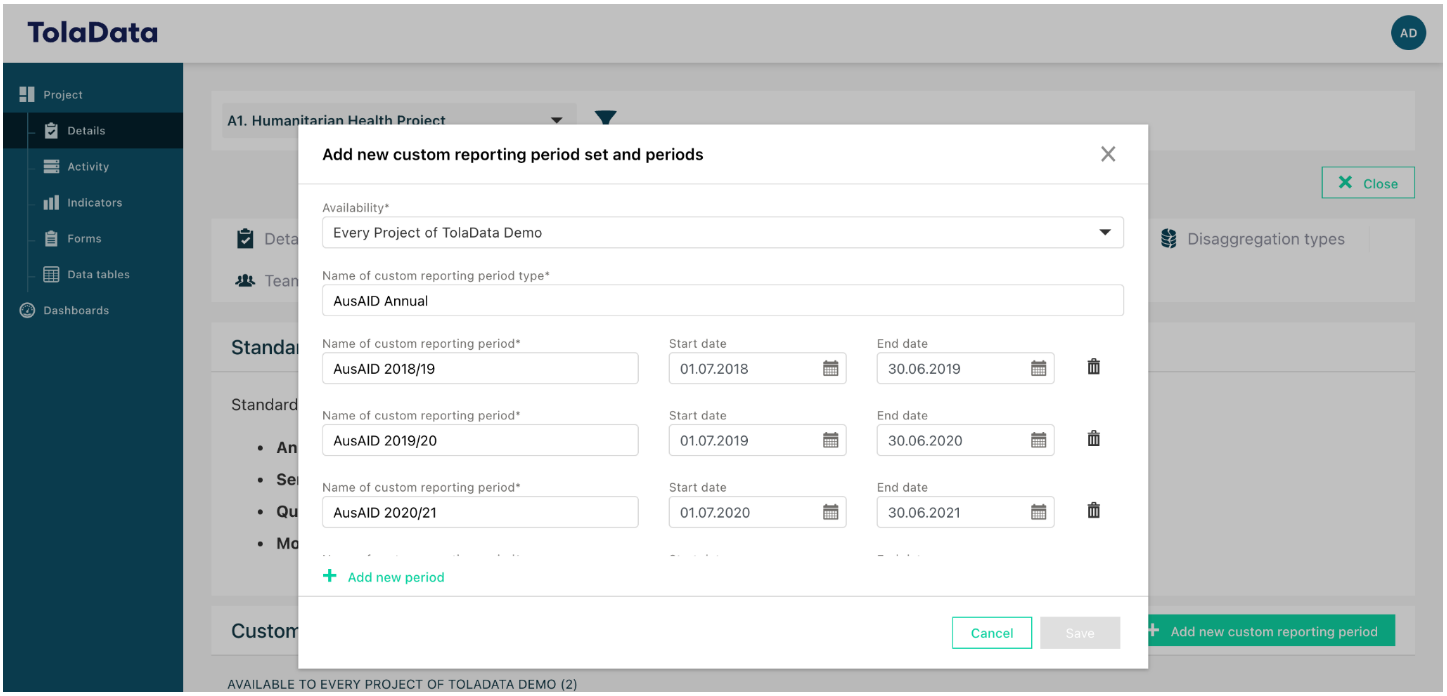
8.3. **Custom reporting periods** allow you to create custom periods required for a project or donor, for example, annual periods from 1st of July to 30th of June.

8.4. Click the green 'Add new custom reporting period' button



8.5. Enter the name for the period type (eg. USAID Annual) and select its availability . The availability determines if a reporting period can be reused on any project of your organisation or if it will only be used on the project in which you are currently working.

8.6. Then enter each reporting period you want as part of this set, give them a name (eg USAID Q1 2021) and a start and an end date and click 'Save'.



8.7. You can add as many periods as you want by clicking “Add new period”. You might want to set up periods for the next several years for now and then come back every year and add more periods by editing the Custom reporting period sets.

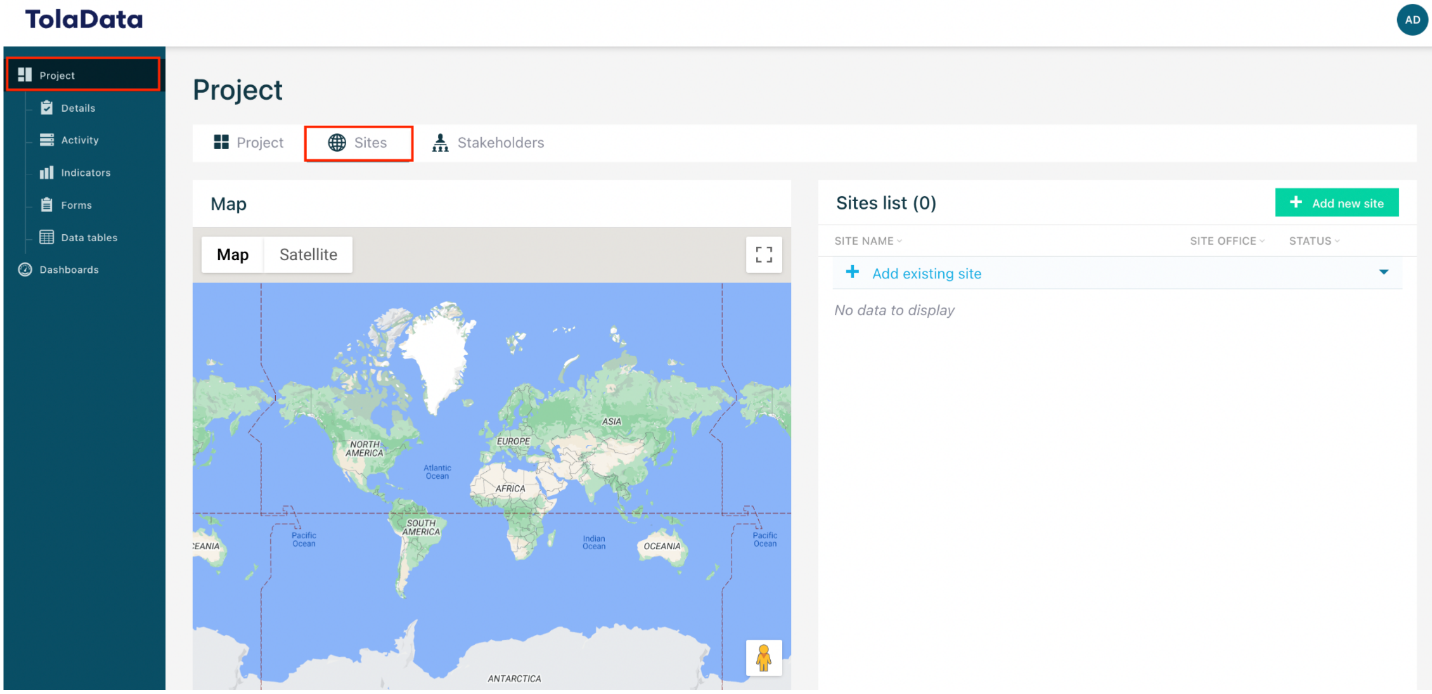
8.8. We recommend you don’t delete past reporting periods after you create them so they are retained for your historical data.

Exercise E.

- [ ] Create a custom reporting period

9. Managing Sites

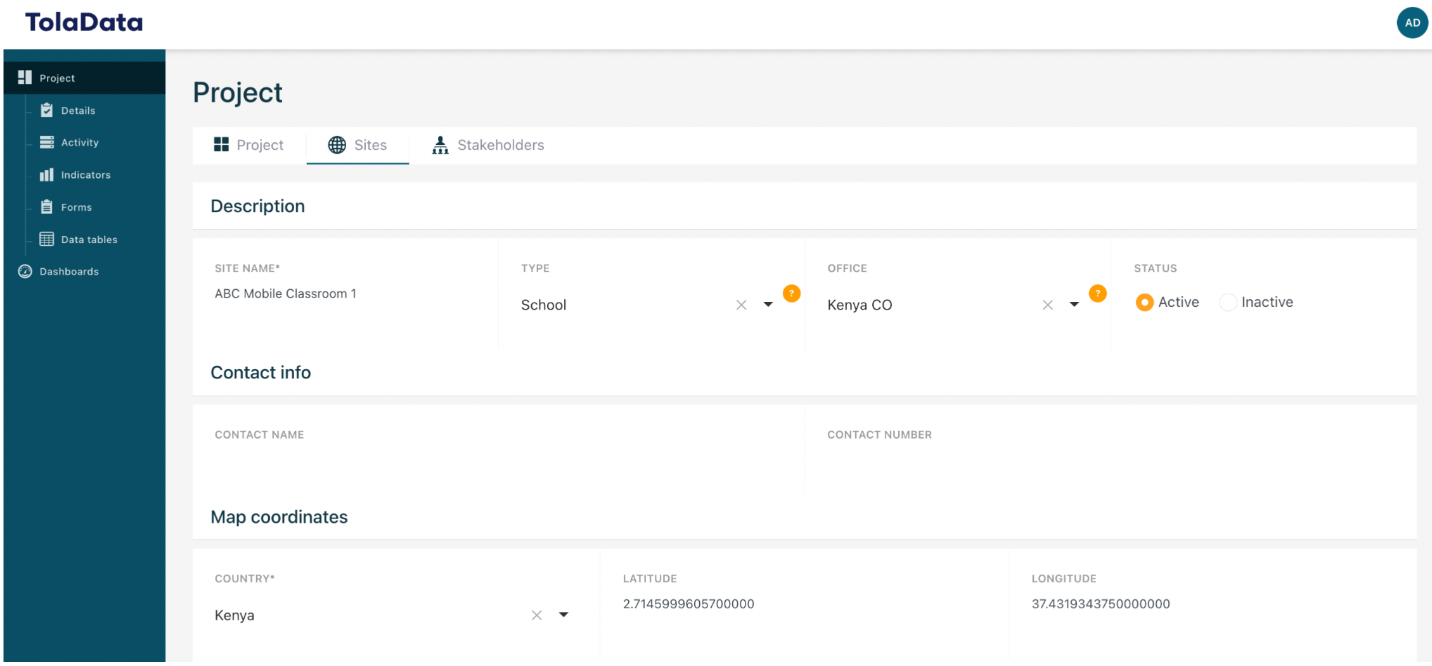
9.1. **Sites:** You can manage your organisation’s sites library by selecting ‘Project’ in the navigation bar on the left-hand side, then selecting the ‘Sites’ tab.



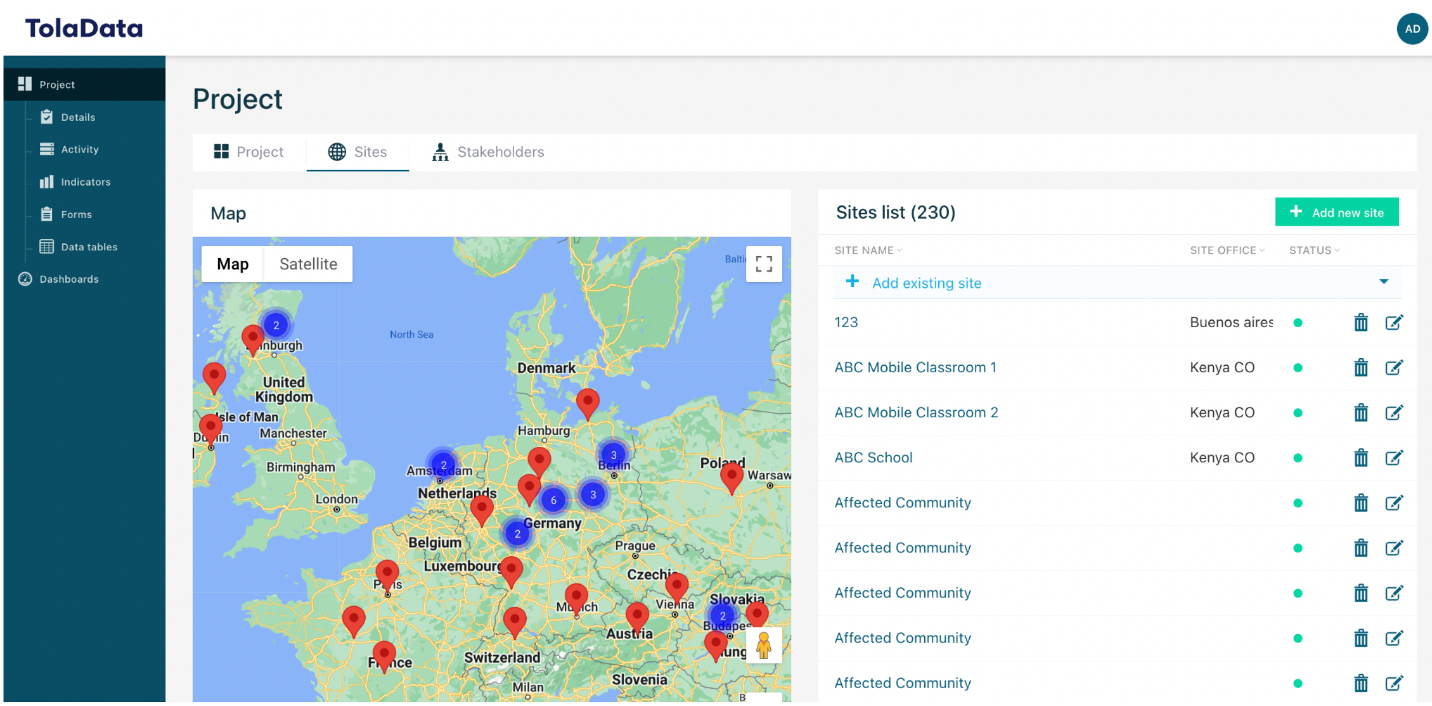
9.2. **Add a site** by clicking the green ‘Add new site’ button

9.3. Enter the site name, type (managed in the admin console, see section 2), office and status. You can also enter contact info

9.4. Set the location of your site by choosing the country from the drop-down list and then drag and drop the pointer on the map to the exact location, or enter the longitude and altitude directly.



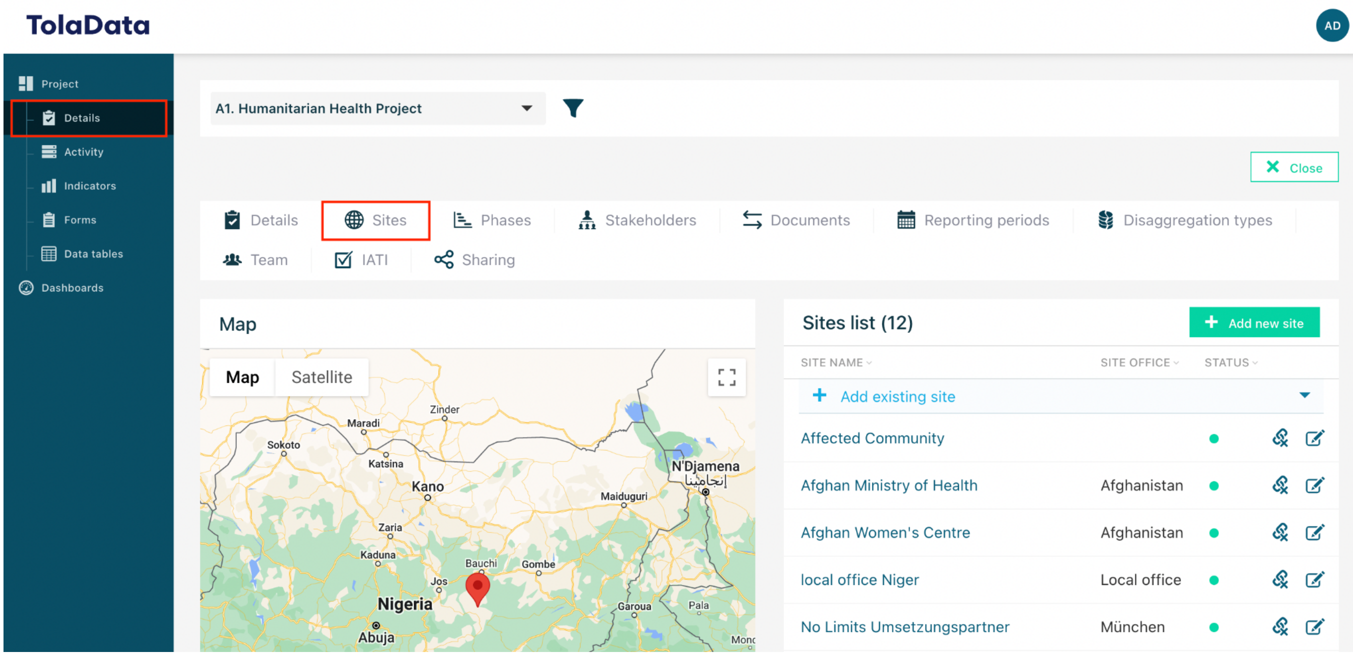
9.5. Once you're finished entering this information, click 'Submit'.



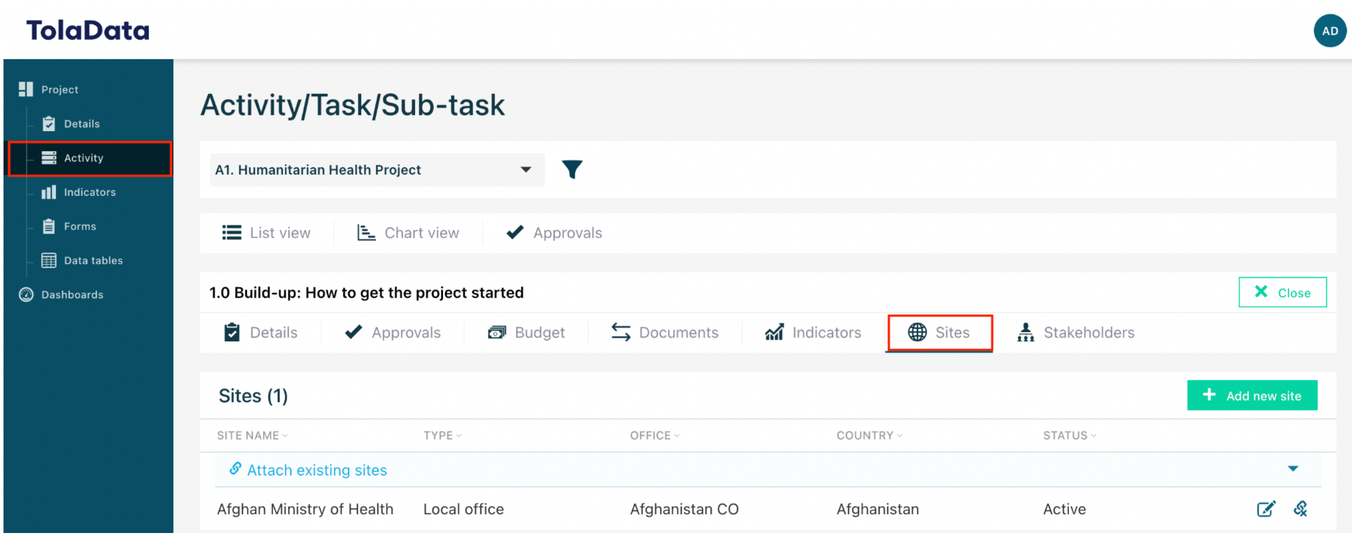
9.6. You can edit the details of a site in this library. Any changes you make will update this site everywhere it is being used in the system

9.7. Sites can only be deleted from within this library. If you delete a site it will be removed from all projects where it has been linked.

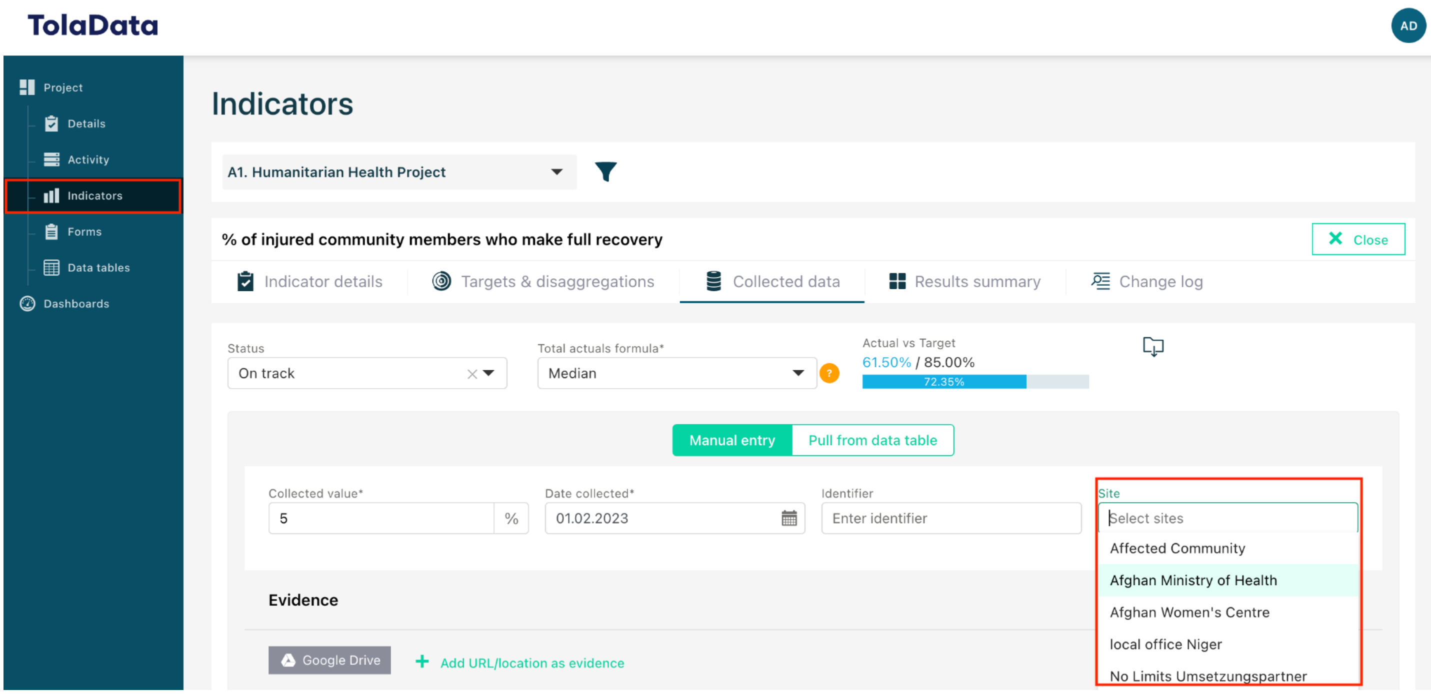
9.8. Once a site has been created, it can be linked to the project details level.



9.9. The site can also be associated with an activity at the activity level

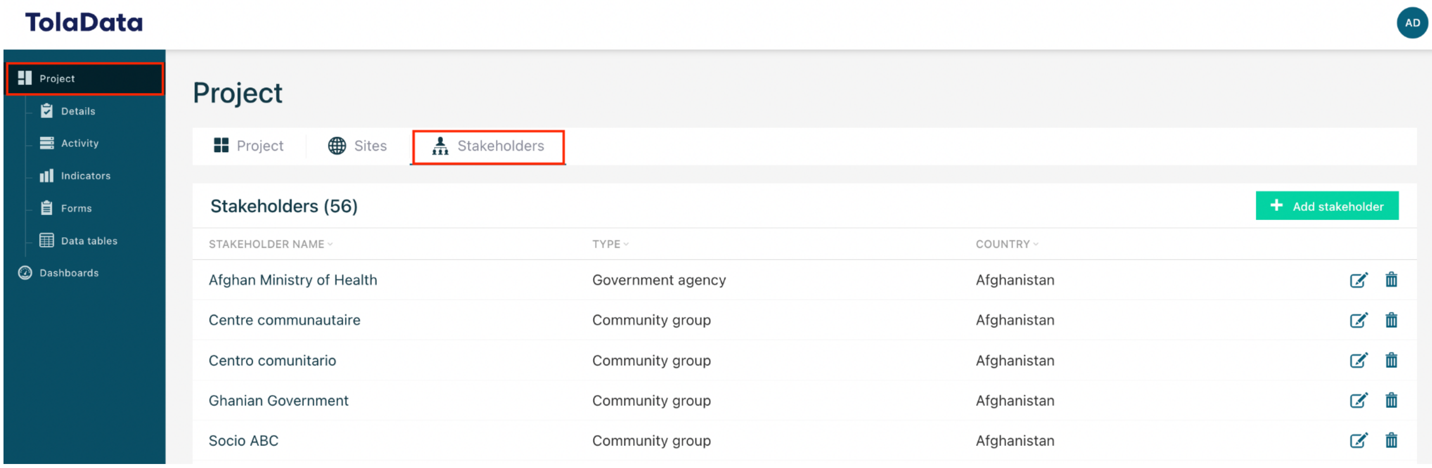


9.10. The site can also be added to individual collected data items



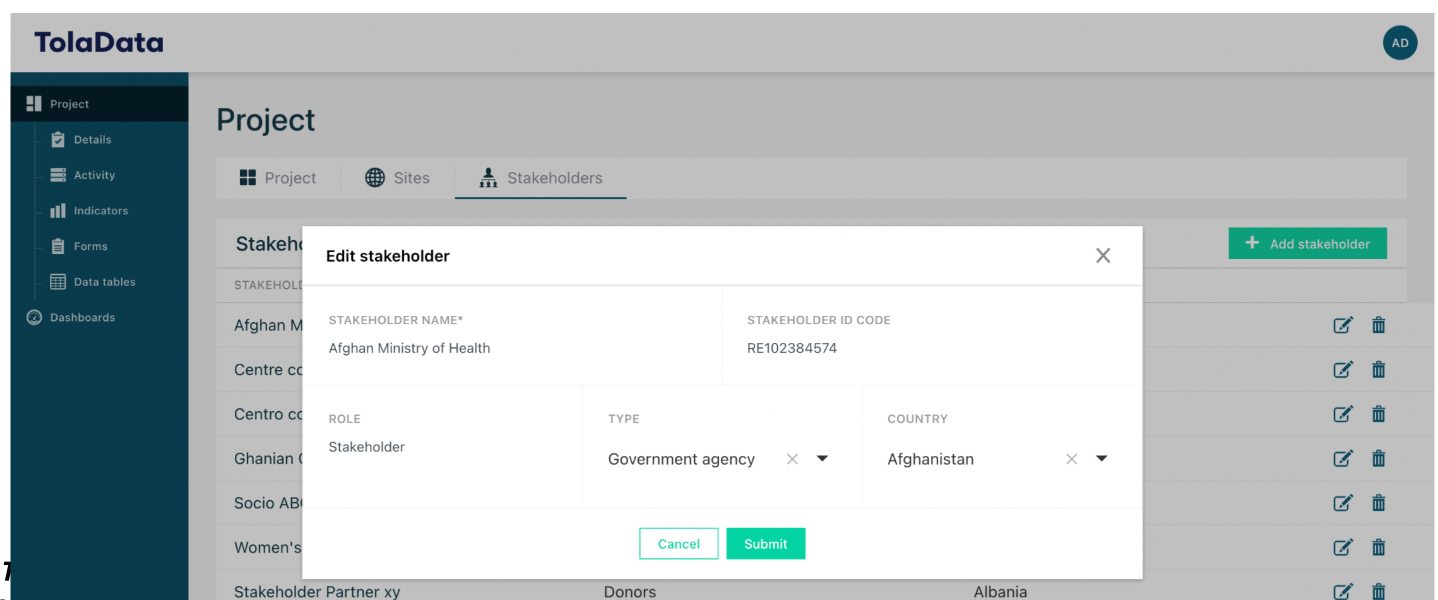
10. Managing Stakeholders

10.1. **Stakeholders:** You can manage your organisation's stakeholder library by selecting ‘Project’ in the navigation bar on the left-hand side, then selecting the ‘Stakeholders’ tab.



10.2. **Add a stakeholder** by clicking the green ‘Add stakeholder’ button

10.3. Enter the name, ID code, role, type (managed in the admin console, see section 2) and country. Once you’re finished entering this information, click ‘Submit’.

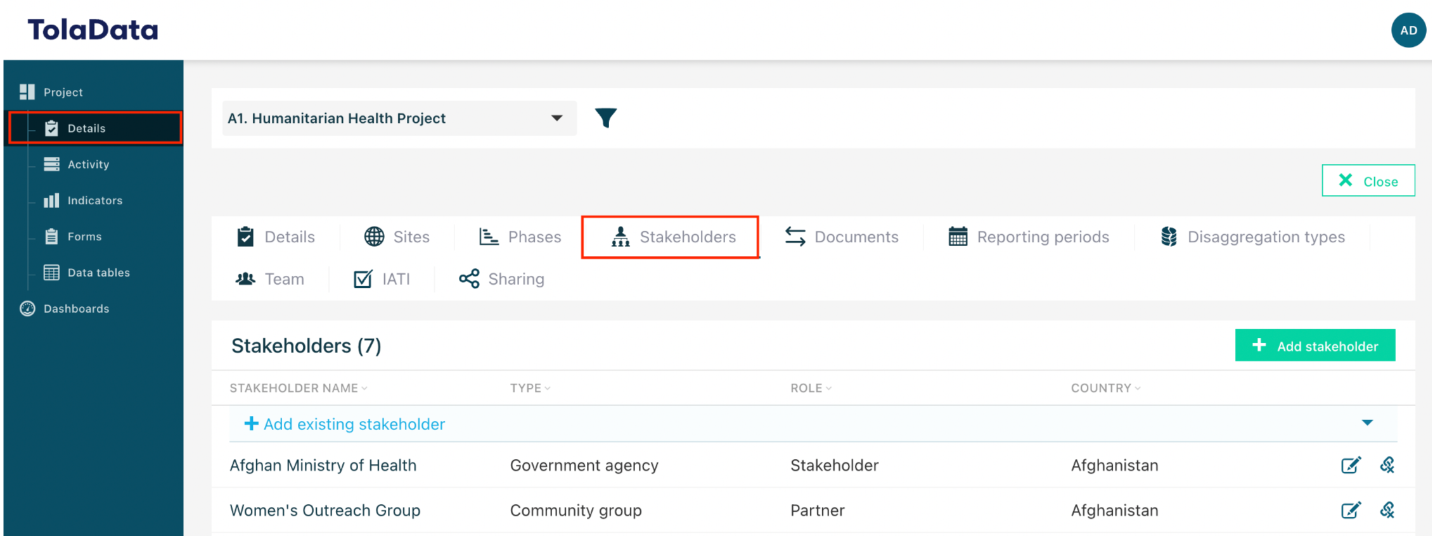


10.4. You can edit the details of a stakeholder in this library. Any changes you make will update this stakeholder everywhere it is being used in the system

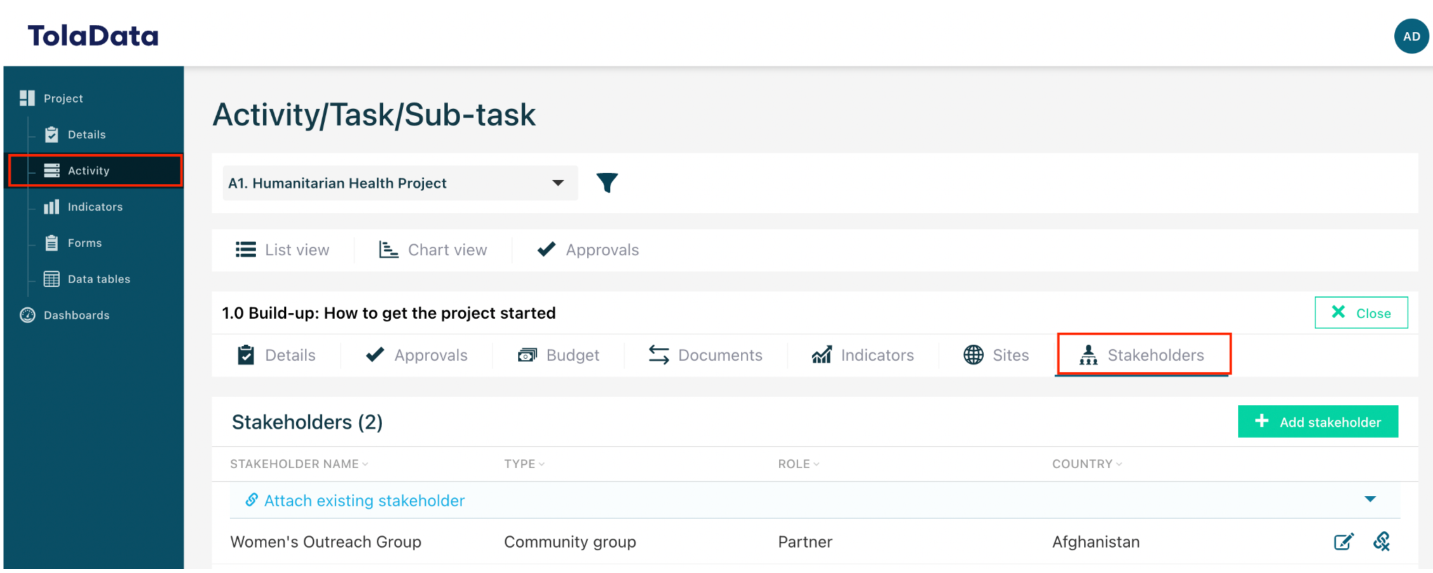
10.5. You can edit the details of a stakeholder in this library. Any changes you make will update this stakeholder everywhere it is being used in the system

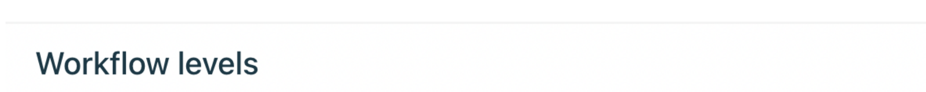
10.6. Stakeholders can only be deleted from within this library. If you delete a stakeholder it will be removed from all projects where it has been linked.

10.7. Once a stakeholder has been created, they can be associated to a project at the project details level



10.8. The stakeholder can also be associated with an activity at the activity level





Exercise F.

- [ ] Create a site
- [ ] Create a stakeholder

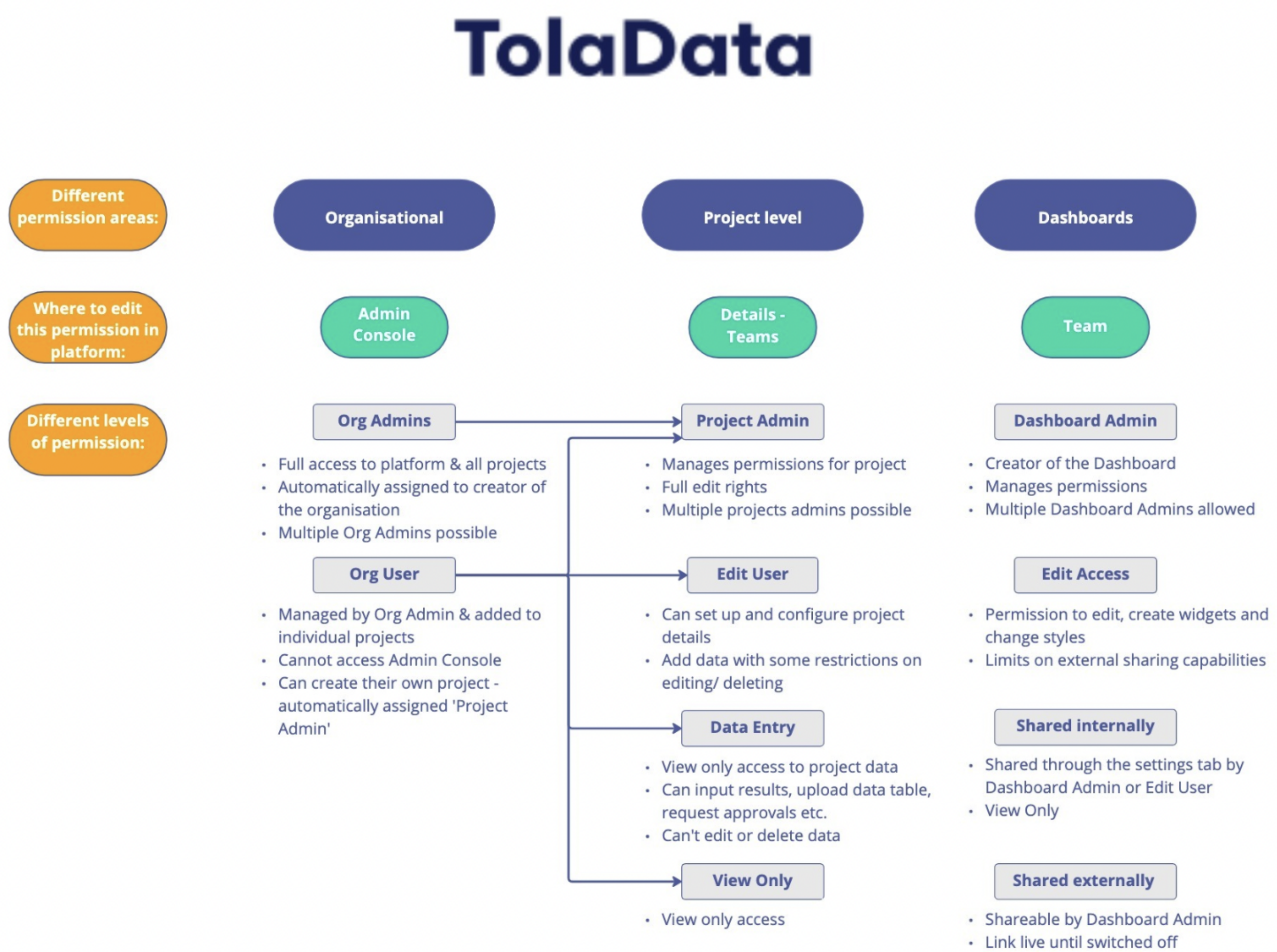
Workflow levels

Annex A: User accounts and permissions

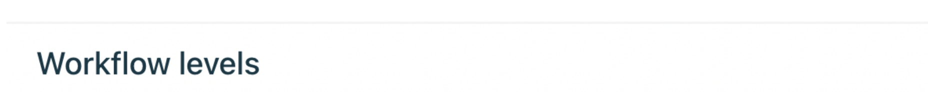
There are two types of user accounts: Org Admins and Org Users.

Org Admin accounts are created and controlled by the TolaData User Support team at the request of the client. Org User accounts are managed by the Org Admin who can invite new users, control permissions within the platform and deactivate user accounts.

- **Org Admins** have full access across the platform to all projects and data and additionally manage system configuration settings. It is possible to request more than one Org Admin account.
- **Org Users** are granted permissions to each project and the associated data by being added to the Project Team with 4 possible levels of access as detailed in the table below.[1]



[1] Any Org User can create a new project. The user that creates a new project is set as the Project Admin for that project by default. Org Users can only see projects created by another user if they are added to the Project Team.



Project Team Roles

Below is a breakdown of the project level permissions and an explanation of each users permissions.

1. **Project Admin:** manages the team and permissions for the project, set up of project structure, full edit rights to the project data which includes additional rights for editing and deleting certain data. It is possible to have more than one Project Admin.

2. **Edit User:** has full edit rights to the project data with some restrictions on what they can edit or delete.

3. **Data Entry:** has view only access to all project data but can't edit or add data, except can input new results, import data tables, request approvals and add document links.

4. **View Only:** has view only access to all project data but can't edit or add data.

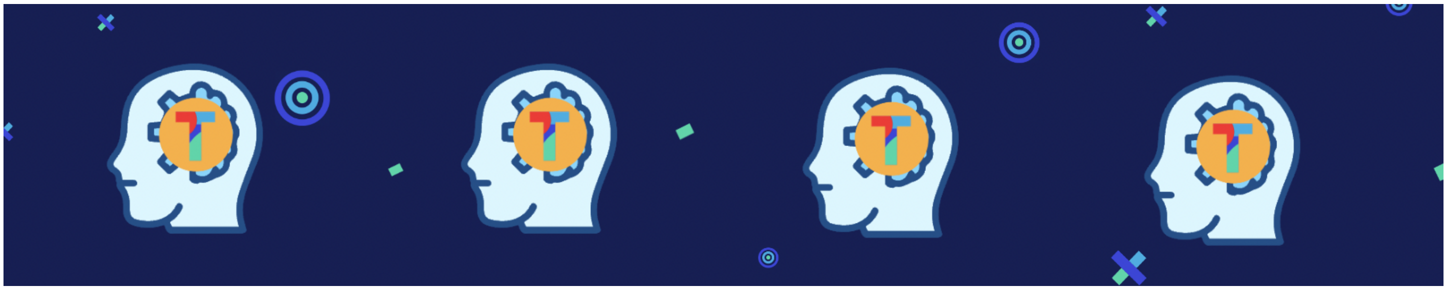
Project Team role	Project Admin	Edit User	Data Entry	View Only
PROJECT (WFL1)				
Project setup and details	Full access	Full access	View only	View only
Project team permission management	Full access	none	none	none
Sharing project data	Can share own project data with any other project on the account	View only	View only	View only
INDICATORS				
Indicator plan, Indicator details and results framework	Full access	Full access except can't delete indicators	View only	View only
Setup and management of disaggregation types	Can add, edit or delete disaggregation types for this project only	View only	View only	View only
Indicator results (collected data)	Full access	Full access except can't edit or delete results reported by another user	Input new results and edit or delete their own results	View only
FORM LIBRARY				
Webforms for data collection	Full access	Full access	Input data via webform URL	Input data via webform URL
DATA TABLES				
Import datasets	Full access	Full access except can't	Full access except can't	View only

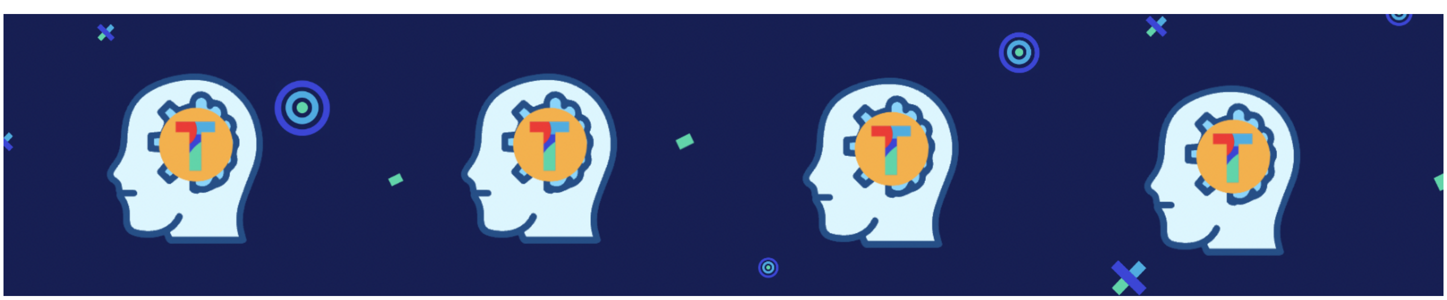
Workflow levels

		edit or delete datasets imported by another user	edit or delete datasets imported by another user	
ACTIVITY (WFL2/3/4)				
Activity plans and modules	Full access	Full access	View only except can add links to documents on document module	View only
Approvals	Full access but can only submit decisions on approvals on assigned to them	Full access but can only submit decisions on approvals on assigned to them	Can create new approvals and submit decisions on approvals assigned to them	View only except submit decisions on approvals assigned to them
DASHBOARDS	Dashboard Admin	Edit Access		View Only
Create Dashboards and include data from any projects they have permission to access	User who creates Dashboard automatically set as Admin	View and edit when added through the 'Teams' tab'		View only when added through the 'Settings' tab
Sharing dashboards- with outside bodies or team wide	Full access	Full access		No access
Change permissions	Full access *Can change their own permission to 'Edit Access' limiting their own power	View only		No access
Change styles	Full access (these must be pre sat by Org Admin in Admin Console)	Full access (these must be pre sat by Org Admin in Admin Console)		No access

Workflow levels

TolaData





Workflow levels