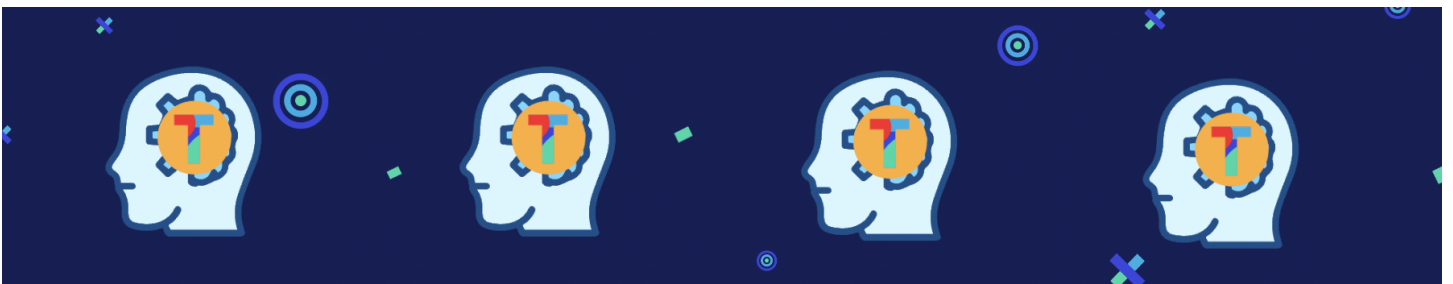




## TolaData

# USER GUIDE 2

### Admin Guide



## 2. TolaData User Guide: Admins

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## 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.

The screenshot shows the TolaData Admin console interface. At the top right, there is a blue circle icon with 'AD' inside, labeled '1.'. Below it, the 'Users' tab is selected, labeled '2.'. In the center, an 'Invite user(s)' modal is open, with the 'Email 1\*' field highlighted by a red box, labeled '3.'. The modal has 'Cancel' and 'Add' buttons. The background shows a table of active users with columns for 'MEMBER NAME', 'ACTIVE', and 'ORG ADMIN'. The 'ACTIVE' column has orange checkmarks for all listed users.

MEMBER NAME	ACTIVE	ORG ADMIN
Aine Farrelly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aoife Ann Doran	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
aoife test	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Brian Jumax	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data 4 Dev	<input checked="" type="checkbox"/>	<input type="checkbox"/>
External Test	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Florian Ramel	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- 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.

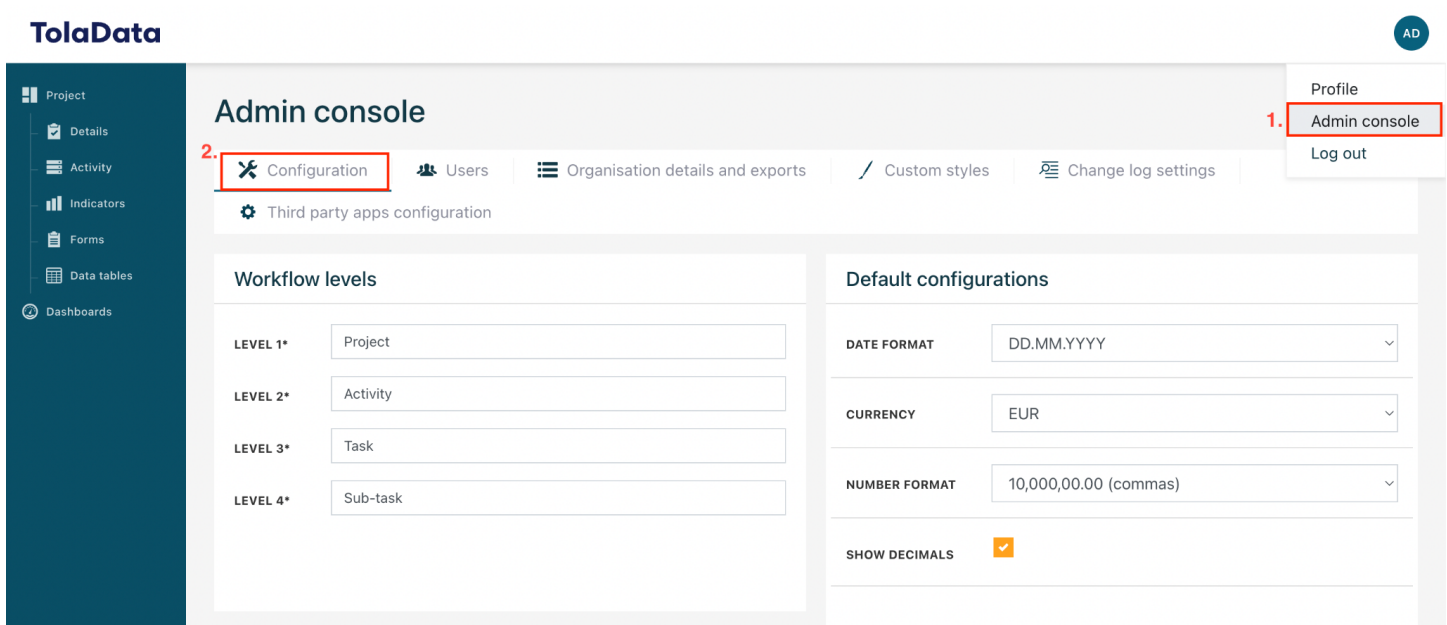


### Exercise A.

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

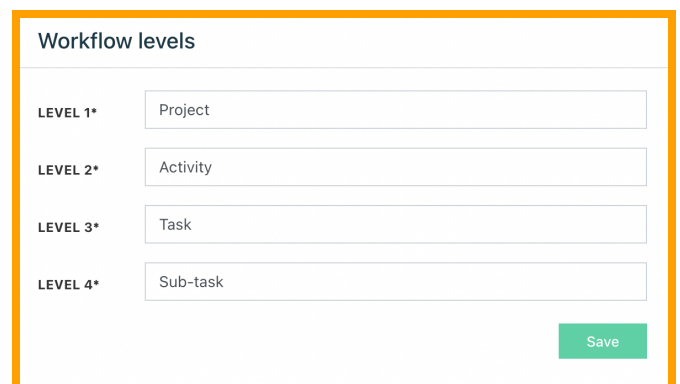
## 2. Configuring the system

- 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.

### Default configurations

DATE FORMAT

DD.MM.YYYY

CURRENCY

EUR

NUMBER FORMAT

10,000,00.00 (commas)

SHOW DECIMALS

☒

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

### Custom Project groups

+ Add new

Sort order	Group name		
2	Global Level		
3	Regional Level		
4	National Level		
5	Project Level		

- 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"

### Site types

+ Add new

SITE NAME 1	11 - School	
SITE NAME 2	Country Head Office	
SITE NAME 3	Field Office	
SITE NAME 4	School	
SITE NAME 5	Warehouse	

**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”

Approval types

+ Add new

APPROVAL 1	Autorisation bugetaire	
APPROVAL 2	Budget approval	
APPROVAL 3	Contract approval	
APPROVAL 4	Director approval	

**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”

Offices

+ Add new

OFFICE 1	Afghanistan CO		
COUNTRY	Afghanistan	▼	
OFFICE 2	Kenya CO		
COUNTRY	Kenya	▼	
OFFICE 3	Uganda CO		
COUNTRY	Uganda	▼	

**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”

Stakeholder types

+ Add new


STAKEHOLDER NAME 1	Community group	
STAKEHOLDER NAME 2	Donors	
STAKEHOLDER NAME 3	Government agency	
STAKEHOLDER NAME 4	implementing party	

**2.15. Aggregated indicators reporting periods:** Link 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.

### Aggregated indicators reporting periods

These reporting period types are linked automatically to all aggregated indicators (existing and future) of this organisation unit.

PERIOD TYPE ▾	SOURCE ▾	
<a href="#">Link reporting period types</a> ▾		
Annual	Standard	

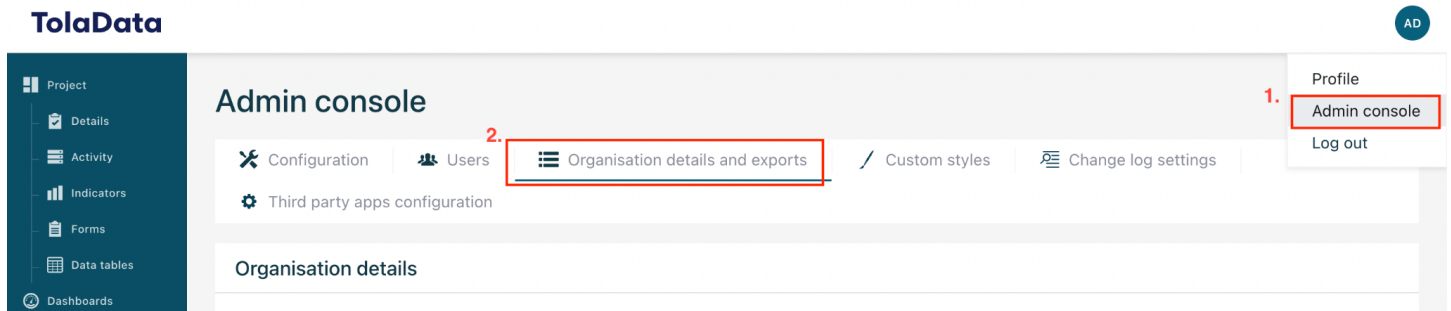


## Exercise B.

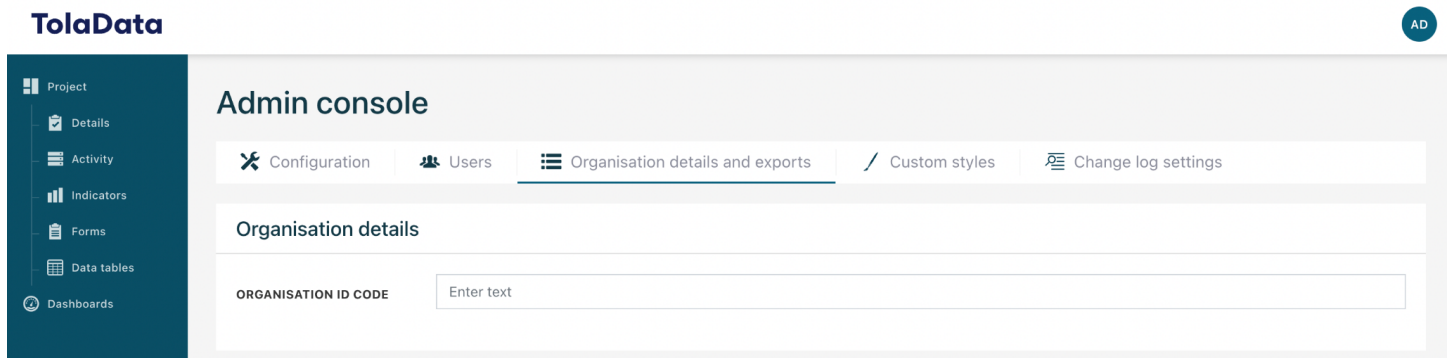
- ☐ Configure three elements of the platform:
  - ☐ Create a custom group
  - ☐ Create an approval type
  - ☐ Create a site

## 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.

### Subscription details

Plan name	Status	Billing period
1-4 Users 49 EUR monthly	cancelled	1 month
Next renewal date	Number of licenses	
	Unlimited	

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

### Exports of Project data

PROJECT LIST	
COUNTRIES OF OPERATION	
SITES	
STAKEHOLDERS	
INDICATOR RESULTS	
INDICATOR RESULTS WITH PERIODIC TARGETS	
DISAGGREGATION VALUES OF ALL NON-AGGREGATED INDICATORS	
PERIODIC VALUES OF ALL AGGREGATED INDICATORS	

- 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/>

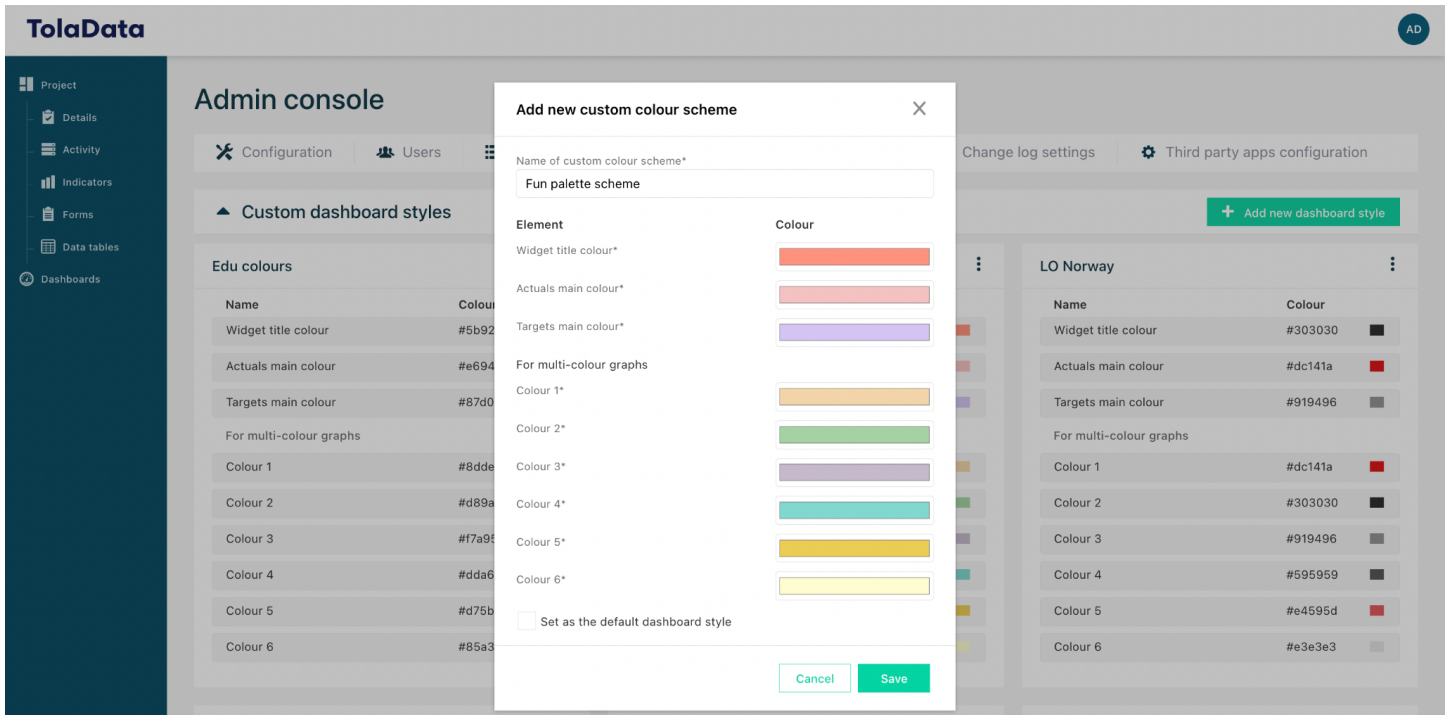
## 4. Custom styles

- 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.

The screenshot displays the TolaData Admin console interface. On the left is a dark blue sidebar with navigation links: Project, Details, Activity, Indicators, Forms, Data tables, and Dashboards. The main area is titled 'Admin console' and features a horizontal tab bar. The 'Custom styles' tab is selected and highlighted with a red box, with a red '2.' next to it. A dropdown menu is open at the top right (labeled with a red '1.'), showing 'Profile', 'Admin console' (highlighted with a red box), and 'Log out'. Below the tabs, the 'Custom dashboard styles' section is visible, followed by the 'Standard dashboard styles' section. This section contains a table for 'TolaData classic' (Default) with the following data:

Name	Colour
Widget title colour	#094e65
Actuals main colour	#07d7a7
Targets main colour	#c5f3e1
For multi-colour graphs	
Colour 1	#07d7a7
Colour 2	#00c2bd

- 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.

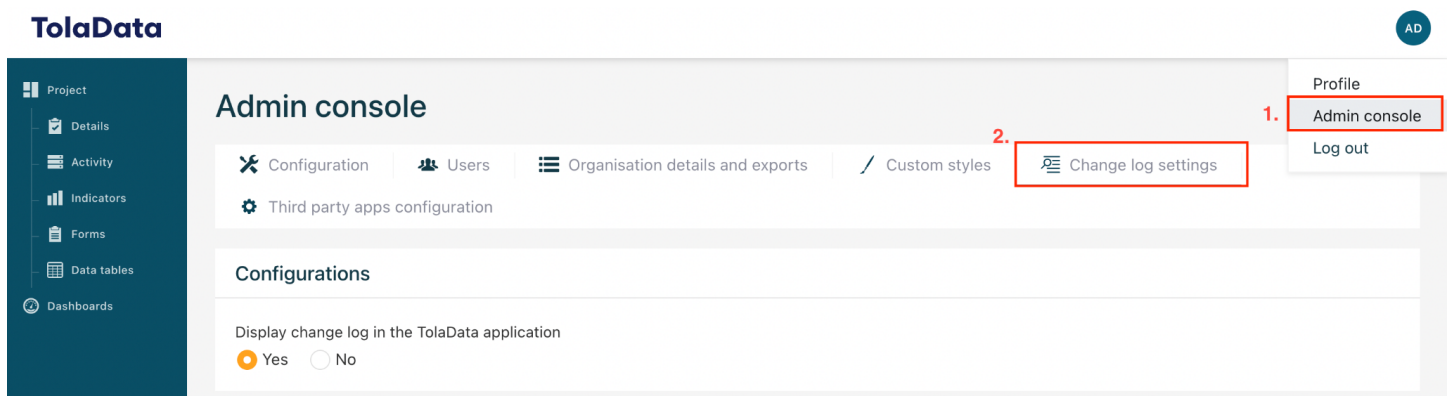


## Exercise C.

- ☐ 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.

### Information to display

Display change details

☒ Yes

☐ No

Display author's name

☒ Yes

☐ No

Display date/time of change

☐ Date and time

☒ Date only

☐ No date/time at all

### Who can see the change log

☐ Org Admin

☒ Org Admin, Project Admin

☐ Org Admin, Project Admin, Edit User

☐ Org Admin, Project Admin, Edit User, Data Entry

☐ Org Admin, Project Admin, Edit User, Data Entry, View Only

## 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.

### TolaData

- Project
- Details
- Activity
- Indicators
- Forms
- Data tables
- Dashboards

### Admin console

1. **Admin console**

2. **Third party apps configuration**

Configuration Users Organisation details and exports Custom styles Change log settings

#### Microsoft/Azure

Login link  [Copy link](#)

Tenant id\*  Client id\*

☒ Is active [Save](#)

## 7. Managing disaggregation types

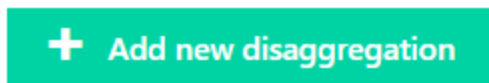
- 7.1. Disaggregation types are managed in the 'Disaggregation types' tab at the project level
- 7.2. **Standard disaggregation types:** these are pre-set in TolaData based on commonly used disaggregation types and global standards such as ISO.

The screenshot shows the TolaData web application interface. On the left is a dark blue sidebar with a 'Project' section containing a list of navigation items: 'Details', 'Activity', 'Indicators', 'Forms', 'Data tables', and 'Dashboards'. The 'Details' item is highlighted with a red box and labeled with a red '1.'. The main content area has a header with a dropdown menu showing 'A1. Humanitarian Health Project' and a filter icon. Below this is a horizontal toolbar with icons for 'Details', 'Sites', 'Phases', 'Stakeholders', 'Documents', 'Reporting periods', 'Team', 'IATI', and 'Sharing'. The 'Disaggregation types' icon is highlighted with a red box and labeled with a red '2.'. To the right of the toolbar is a 'Close' button. Below the toolbar are two tabs: 'Standard disaggregations' (active) and 'Custom disaggregations'. The 'Standard disaggregations' tab shows the title 'Standard disaggregation types' and a descriptive text: 'Standard disaggregations types 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.

The screenshot shows the TolaData interface for project 'A1. Humanitarian Health Project'. The left sidebar contains navigation options: Project, Details, Activity, Indicators, Forms, Data tables, and Dashboards. The main content area is titled 'Disaggregation types' and includes tabs for Details, Sites, Phases, Stakeholders, Documents, Reporting periods, and Disaggregation types. The 'Disaggregation types' tab is active, showing a list of custom disaggregation types. A green button labeled 'Add new disaggregation' is located in the top right corner of the section.

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.

The screenshot shows the TolaData interface with a 'Custom disaggregation' dialog box open. The dialog box has a title bar with a close button. It contains the following fields: 'Disaggregation type\*' with the value 'Gender', 'Availability\*' with the value 'This Project only', and three fields for 'Field 1' (Male), 'Field 2' (Female), and 'Field 3' (Other). A green button labeled 'Add new field' is at the bottom left of the dialog box. The background shows the 'Disaggregation types' section of the interface.

- 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.

**Indicators**

A1. Humanitarian Health Project

% of emergency medical kits distributed within two weeks of identification of critical need

Indicator details **Targets & disaggregations** Collected data Results summary Change log

**Life of program (LOP) target**

LOP target value: 60 %

Baseline value (BL): Enter number %

Baseline date: Enter baseline date

Unit of measure: Enter text

Desired direction of progress: Increasing

**Periodic targets**

**Available disaggregation types (4)**

TYPE - AVAILABILITY - SOURCE -

[Link disaggregation types](#)

## 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.

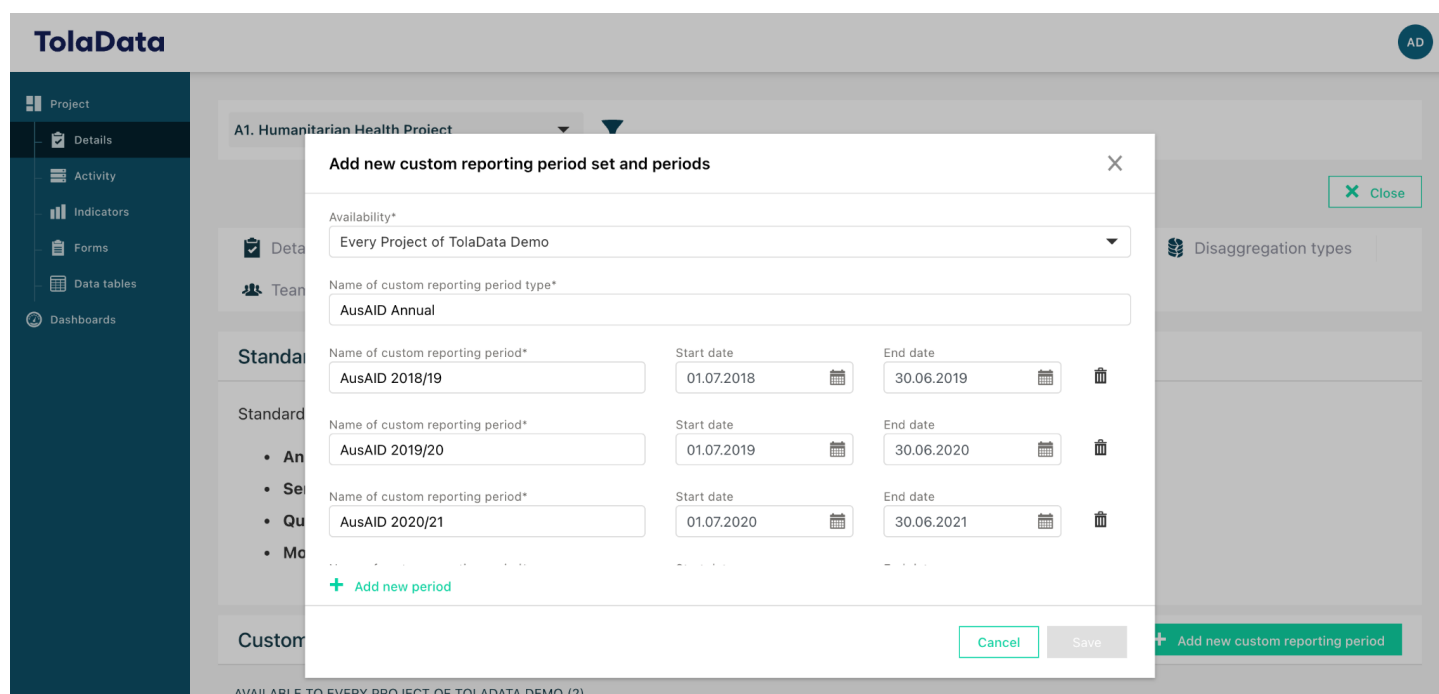
**8.3. Custom reporting periods** allow you to create custom periods required for a project or donor, for example, annual periods from 1st of July to 30th of June.

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

The screenshot shows the TolaData web application interface. On the left is a dark blue sidebar with navigation links: Project, Details (highlighted with a red box and labeled '1.'), Activity, Indicators, Forms, Data tables, and Dashboards. The main content area is white and shows the 'A1. Humanitarian Health Project' details. At the top right of the main area is a 'Close' button. Below the project name is a horizontal menu with tabs: Details, Sites, Phases, Stakeholders, Documents, Reporting periods (highlighted with a red box and labeled '2.'), and Disaggregation types. Below the tabs is a section titled 'Standard reporting periods' which lists standard reporting periods according to the ISO calendar: 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), and Monthly (1st to the last day of the month for the 12 calendar months). Below this is a section titled 'Custom reporting periods' with a green button labeled '+ Add new custom reporting period' (highlighted with a red box and labeled '3.'). At the bottom of the page, it says 'AVAILABLE TO EVERY PROJECT OF TOLADATA DEMO (2)'.

**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.



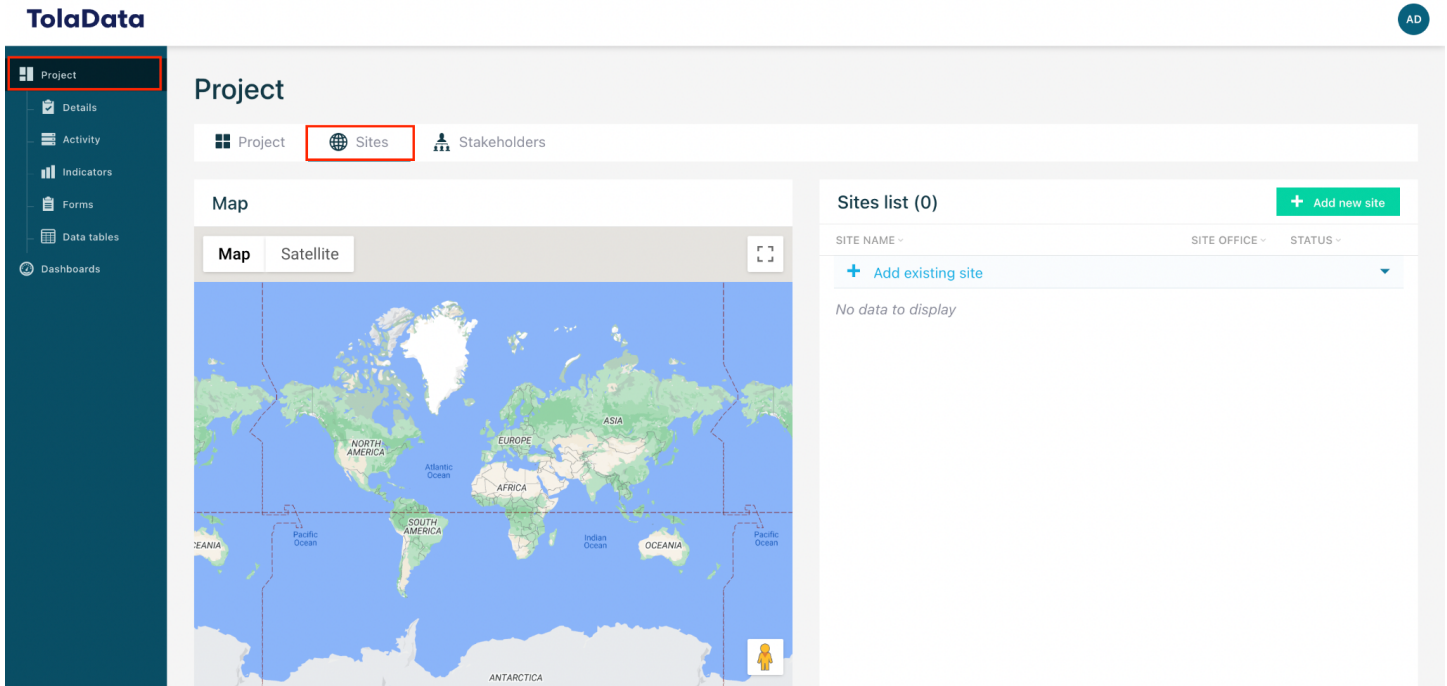
## Exercise E.

- ☐ Create a custom reporting period

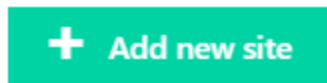
## 9. Managing Sites

- 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.



TolaData

AD

Project

Details

Activity

Indicators

Forms

Data tables

Dashboards

Project

Sites

Stakeholders

Description

SITE NAME\*

ABC Mobile Classroom 1

TYPE

School

×

?

OFFICE

Kenya CO

×

?

STATUS

Active

Inactive

Contact info

CONTACT NAME

CONTACT NUMBER

Map coordinates

COUNTRY\*

Kenya

×

?

LATITUDE

2.7145999605700000

LONGITUDE

37.4319343750000000

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

TolaData

AD

Project

Details

Activity

Indicators

Forms

Data tables

Dashboards

Project

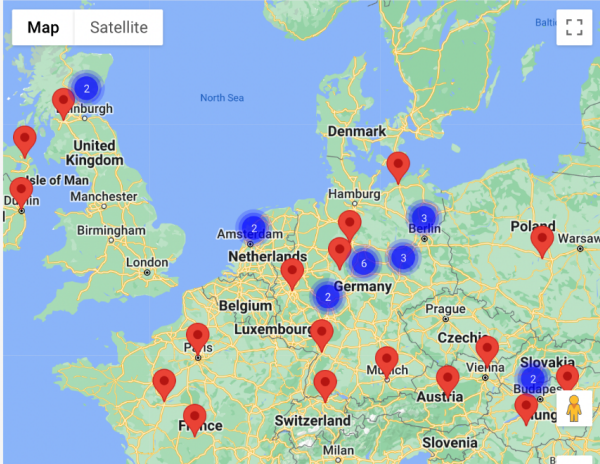
Sites

Stakeholders

Map

Map

Satellite



Sites list (230)

+ Add new site

SITE NAME

SITE OFFICE

STATUS

+ Add existing site

123

Buenos aires

ABC Mobile Classroom 1

Kenya CO

ABC Mobile Classroom 2

Kenya CO

ABC School

Kenya CO

Affected Community

Affected Community

Affected Community

Affected Community

Affected Community

TolaData User Guide

19

Workflow levels

- 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.

**TolaData** AD

Project

**Details**

Activity

Indicators

Forms

Data tables

Dashboards

A1. Humanitarian Health Project

Close

Details **Sites** Phases Stakeholders Documents Reporting periods Disaggregation types

Team IATI Sharing

Map

Map Satellite

Sites list (12)

+ Add new site

SITE NAME	SITE OFFICE	STATUS	
+ Add existing site			
Affected Community			
Afghan Ministry of Health	Afghanistan		
Afghan Women's Centre	Afghanistan		
local office Niger	Local office		
No Limits Umsetzungspartner	München		

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

**TolaData** AD

Project

**Activity**

Details

Indicators

Forms

Data tables

Dashboards

Activity/Task/Sub-task

A1. Humanitarian Health Project

List view Chart view Approvals

1.0 Build-up: How to get the project started

Close

Details Approvals Budget Documents Indicators **Sites** Stakeholders

Sites (1)

+ Add new site

SITE NAME	TYPE	OFFICE	COUNTRY	STATUS	
Attach existing sites					
Afghan Ministry of Health	Local office	Afghanistan CO	Afghanistan	Active	

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

TolaData

Project

Details

Activity

Indicators

Forms

Data tables

Dashboards

Indicators

A1. Humanitarian Health Project

% of injured community members who make full recovery

Indicator details

Targets & disaggregations

Collected data

Results summary

Change log

Status

On track

Total actuals formula\*

Median

Actual vs Target

61.50% / 85.00%

72.35%

Manual entry

Pull from data table

Collected value\*

5

%

Date collected\*

01.02.2023

Identifier

Enter identifier

Site

Select sites

Affected Community

Afghan Ministry of Health

Afghan Women's Centre

local office Niger

No Limits Umsetzungspartner

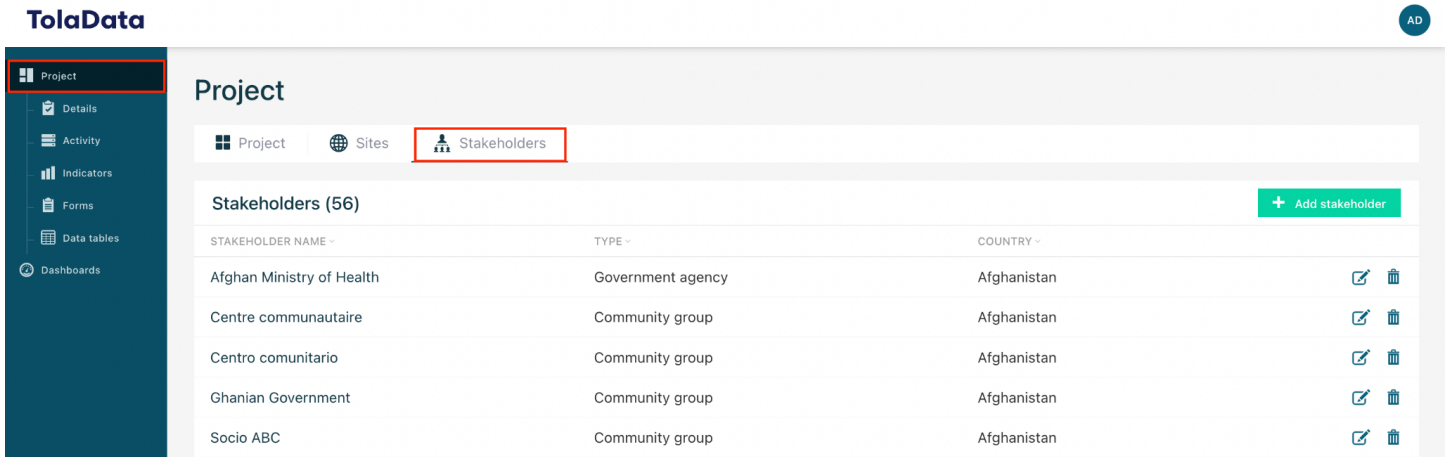
Evidence

Google Drive

Add URL/location as evidence

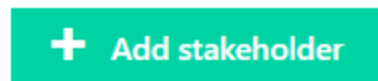
## 10. Managing Stakeholders

- 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.

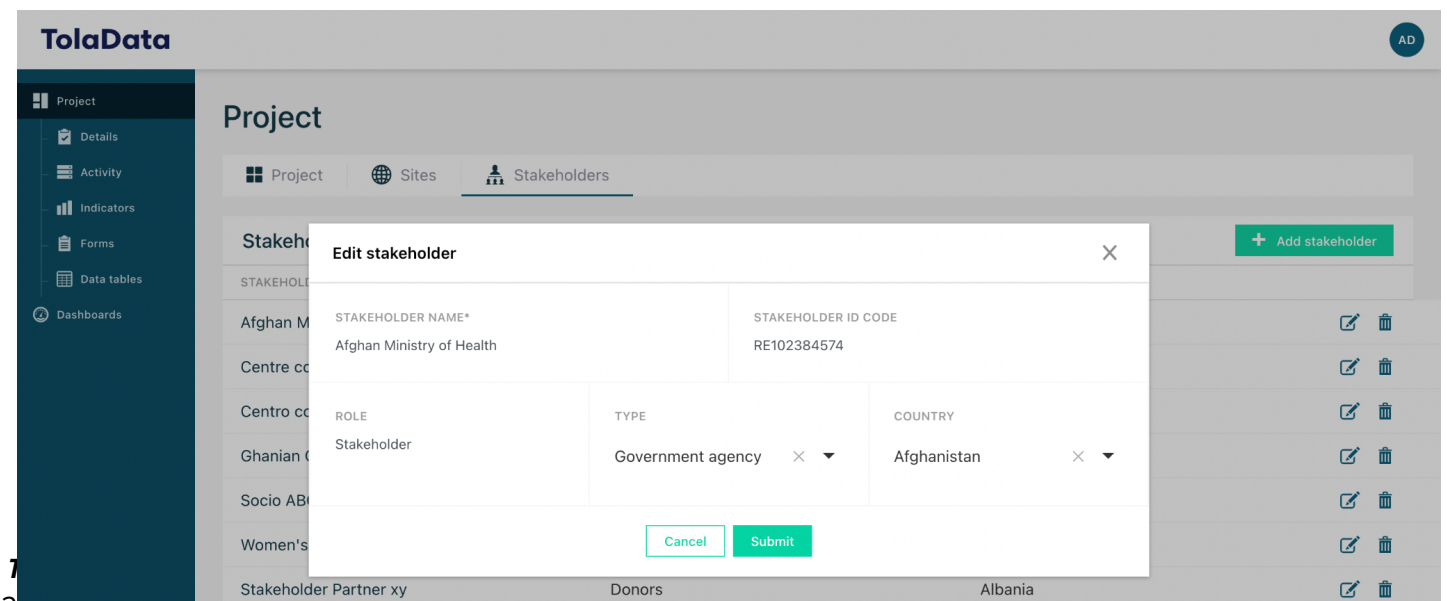


The screenshot shows the TolaData interface. On the left, the 'Project' tab is selected in the navigation bar. In the main area, the 'Stakeholders' tab is also selected. Below the tabs, there is a table titled 'Stakeholders (56)' with columns for 'STAKEHOLDER NAME', 'TYPE', and 'COUNTRY'. The table lists several stakeholders, including 'Afghan Ministry of Health', 'Centre communautaire', 'Centro comunitario', 'Ghanian Government', and 'Socio ABC'. A green '+ Add stakeholder' button is located in the top right corner of the table area.

- 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'.



The screenshot shows the TolaData interface with the 'Edit stakeholder' modal form open. The form has the following fields: 'STAKEHOLDER NAME\*' (with the value 'Afghan Ministry of Health'), 'STAKEHOLDER ID CODE' (with the value 'RE102384574'), 'ROLE' (with the value 'Stakeholder'), 'TYPE' (with the value 'Government agency' and a dropdown arrow), and 'COUNTRY' (with the value 'Afghanistan' and a dropdown arrow). At the bottom of the form, there are 'Cancel' and 'Submit' buttons. The background shows the 'Stakeholders' table with the same data as in the previous screenshot.



- 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

**TolaData** AD

**Project**

**Details**

A1. Humanitarian Health Project

**Close**

Details Sites Phases **Stakeholders** Documents Reporting periods Disaggregation types

Team IATI Sharing

**Stakeholders (7)** **+ Add stakeholder**

STAKEHOLDER NAME	TYPE	ROLE	COUNTRY
<b>+ Add existing stakeholder</b>			
Afghan Ministry of Health	Government agency	Stakeholder	Afghanistan
Women's Outreach Group	Community group	Partner	Afghanistan

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

**TolaData** AD

**Project**

**Activity**

**Activity/Task/Sub-task**

A1. Humanitarian Health Project

List view Chart view Approvals

**1.0 Build-up: How to get the project started** **Close**

Details Approvals Budget Documents Indicators Sites **Stakeholders**

**Stakeholders (2)** **+ Add stakeholder**

STAKEHOLDER NAME	TYPE	ROLE	COUNTRY
<b>Attach existing stakeholder</b>			
Women's Outreach Group	Community group	Partner	Afghanistan



## Exercise F.

- ☐ Create a site
- ☐ Create a stakeholder

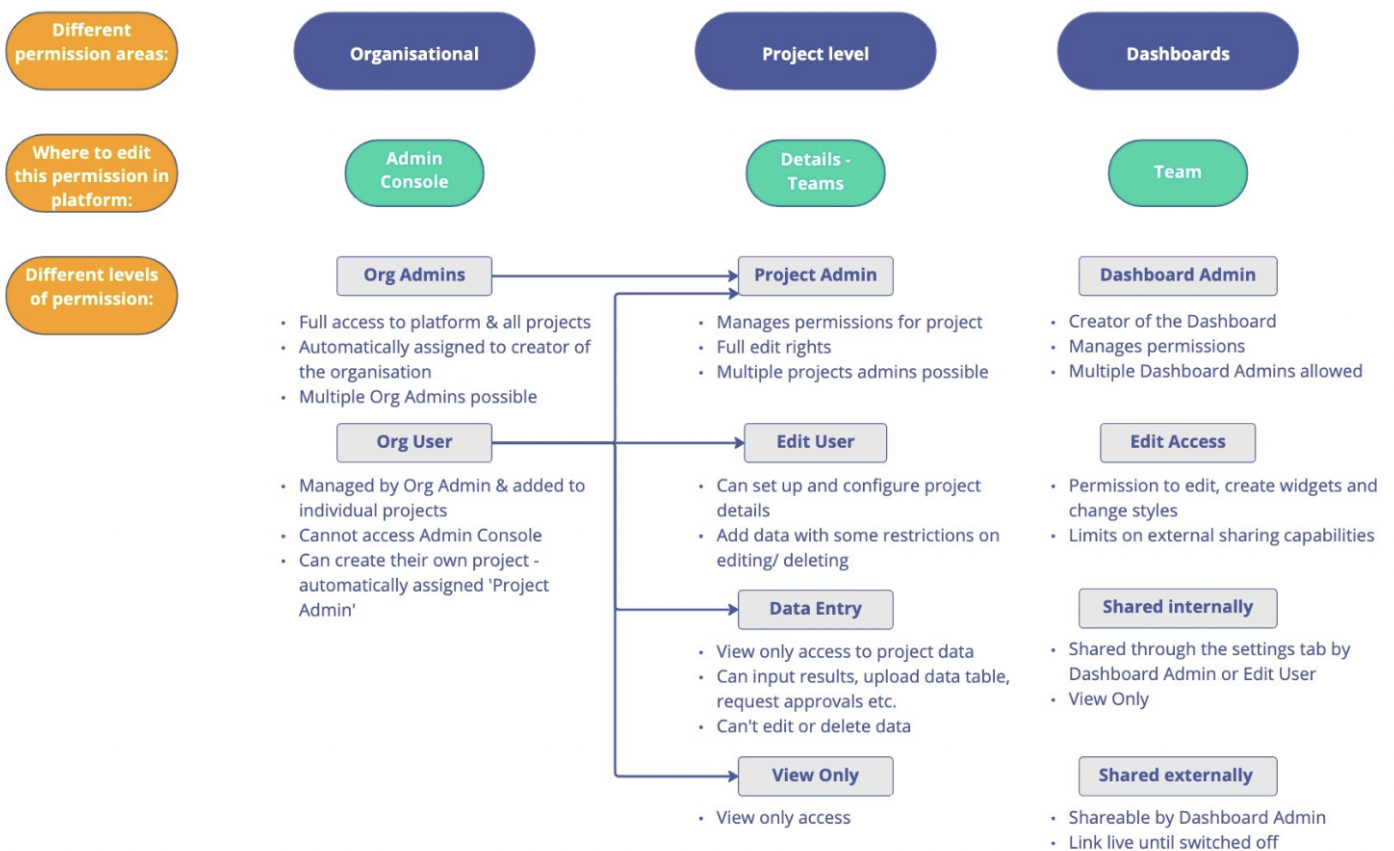
## Annex A: User accounts and permissions

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.<sup>1</sup>

## TolaData



<sup>1</sup> 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
<b>PROJECT (WFL1)</b>				
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
<b>INDICATORS</b>				
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
<b>FORM LIBRARY</b>				
Webforms for data collection	Full access	Full access	Input data via webform URL	Input data via webform URL
<b>DATA TABLES</b>				
Import datasets	Full access	Full access except can't	Full access except can't	View only

		edit or delete datasets imported by another user	edit or delete datasets imported by another user	
<b>ACTIVITY (WFL2/3/4)</b>				
<i>Activity plans and modules</i>	Full access	Full access	View only except can add links to documents on document module	View only
<i>Approvals</i>	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
<b>DASHBOARDS</b>	Dashboard Admin	Edit Access		View Only
<i>Create Dashboards and include data from any projects they have permission to access</i>	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
<i>Sharing dashboards- with outside bodies or team wide</i>	Full access	Full access		No access
<i>Change permissions</i>	Full access *Can change their own permission to 'Edit Access' limiting their own power	View only		No access
<i>Change styles</i>	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

