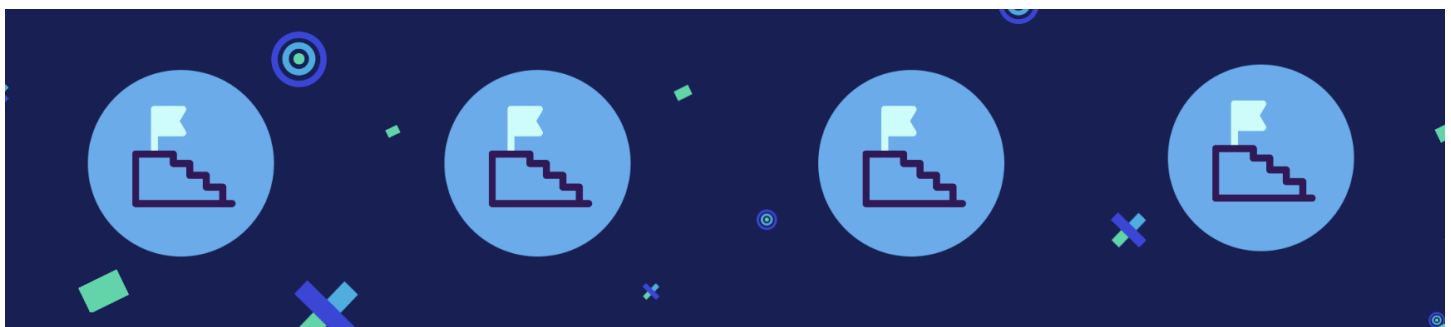


TolaData

USER GUIDE 3

Activities Guide

The central section of the page is a large dark blue rectangle. It contains the text "TolaData" in orange, "USER GUIDE 3" in large orange letters, and "Activities Guide" in white. The background is filled with a pattern of small, scattered geometric shapes in green and blue, including squares, circles, and crosses.

3. TolaData User Guide: Activities

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The Activity Plan

The activity section allows you to build activity plans, assign tasks and approvals to team members, upload document links, update your projects as they progress and visualise tasks in a Gantt chart.

1. Create an activity plan

- 1.1. Begin by selecting the project you will be working on from the drop down menu and navigate to the 'Activity' tab on the left hand side. To add a new activity to your activity workflow, select the green 'Add new activity' button

TolaData AD

Activity/Assignment/Sub-task

Humanitarian Health Project + Add new Activity

List view | Chart view | Approvals

NAME	PROGRESS	ASSIGNED	DATE	BUDGET	STATUS
+ Add new Activity					
1.0 Build-up: How to get the project started	In progress	Hannah Moroney	Start: 01.01.2019 End: 16.02.2019	Total: 336,896.00 Remaining: 16,518.00	●
+ Add new Assignment					
1.1 Assemble your team	Closed	Jo Bennett	Start: 01.01.2019 End: 01.02.2019	Total: 2,270.90 Remaining: 1,420.90	●
+ Add new Sub-task					

- 1.2. Next, enter the name of your activity or task, then select 'Save'.

TolaData AD

Activity/Assignment/Sub-task

Humanitarian Health Project + Add new Activity

List view | Chart view | Approvals

Add new Activity ✕

Activity name*

Milestone
 Yes

Cancel Save

NAME	DATE	BUDGET	STATUS
+ Add new Activity			
1.0 Build-up: How to get the project started	Start: 01.01.2019 End: 16.02.2019	Total: 336,896.00 Remaining: 16,518.00	●
+ Add new Assignment			
1.1 Assemble your team	Start: 01.01.2019 End: 01.02.2019	Total: 2,270.90 Remaining: 1,420.90	●
+ Add new Sub-task			

1.3. Your new activity will appear at the bottom of your list. To order it, simply drag and drop.

TolaData AD

Activity/Assignment/Sub-task

Humanitarian Health Project + Add new Activity

List view | Chart view | Approvals

NAME	PROGRESS	ASSIGNED	DATE	BUDGET	STATUS
+ Add new Activity					
My new activity 🗑️					
+ Add new Assignment					
1.0 Build-up: How to get the project started	In progress	Hannah Moroney	Start: 01.01.2019 End: 16.02.2019	Total: 336,896.00 Remaining: 16,518.00	🟢 📊 🗑️
+ Add new Assignment					
1.1 Assemble your team	Closed	Jo Bennett	Start: 01.01.2019 End: 01.02.2019	Total: 2,270.90 Remaining: 1,420.90	🟢 📊 🗑️



Exercise A.

- Add 3 activities to your activity plan
- Drag and drop them to change the order.

2. Add modules to your activities

2.1. By selecting the name of your Activity, you can add additional information. In the details section you can:

- Assign a staff member responsible for the activity
- Update the progress
- Add a status colour
- Tie the activity to a project phase
- Add a start and end date
- Add a description which can include images, hyper links, and text.

The screenshot displays the TolaData user interface for editing an activity. The sidebar on the left contains navigation links: Project, Details, Activity (selected), Indicators, Forms, Data tables, and Dashboards. The main content area is titled 'Activity/Assignment/Sub-task' and is associated with the 'Humanitarian Health Project'. It features view toggles for 'List view', 'Chart view', and 'Approvals'. A 'My new activity' section includes a 'Details' tab and a green '+' button. Below this is a form for 'Activity/Assignment/Sub-task Update' with the following fields:

NAME*		MILESTONE
My new activity		<input type="checkbox"/> YES
STAFF RESPONSIBLE	PROGRESS	STATUS
Aine Farrelly	In progress	Yellow
PHASE	START DATE	END DATE/DUE DATE
Identification & Design	01.03.2023	

Below the form is a 'DESCRIPTION' field with a rich text editor toolbar (Bold, Italic, Underline, Normal, Bulleted list, Numbered list, Indent, Outdent, Link, Image, Undo, Redo) and a placeholder text 'Enter text'. At the bottom of the form are 'Cancel' and 'Submit' buttons.

2.2. To add additional modules to your activity, select the '+' symbol beside the details tab. A drop down will appear and you now have the option to add approvals, budgeting

information, link stakeholders, documents and sites as well as tying your activity to an indicator.

TolaData AD

Activity/Assignment/Sub-task

Humanitarian Health Project

List view | Chart view | Approvals

My new activity Close

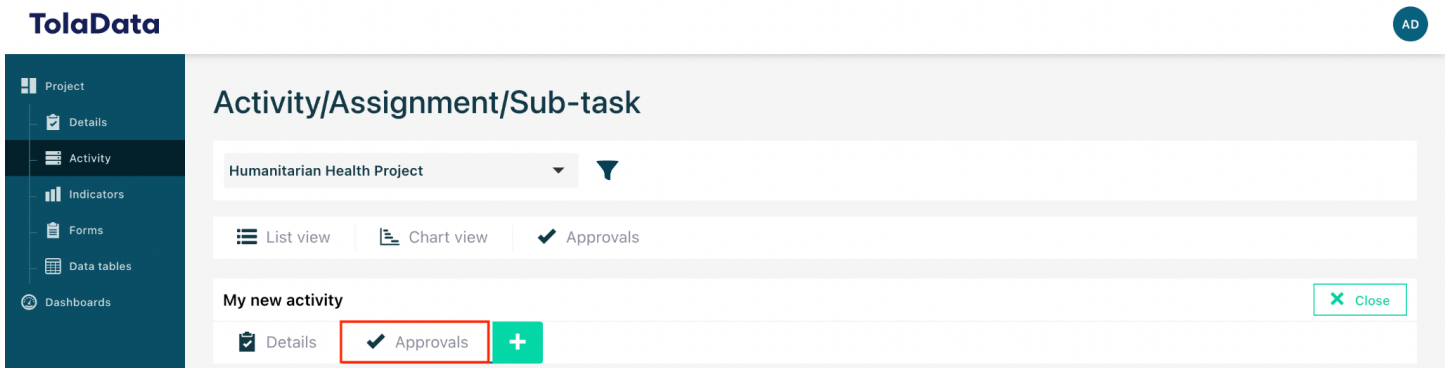
Details +

- Approvals
- Budget
- Stakeholders
- Documents
- Sites
- Indicators

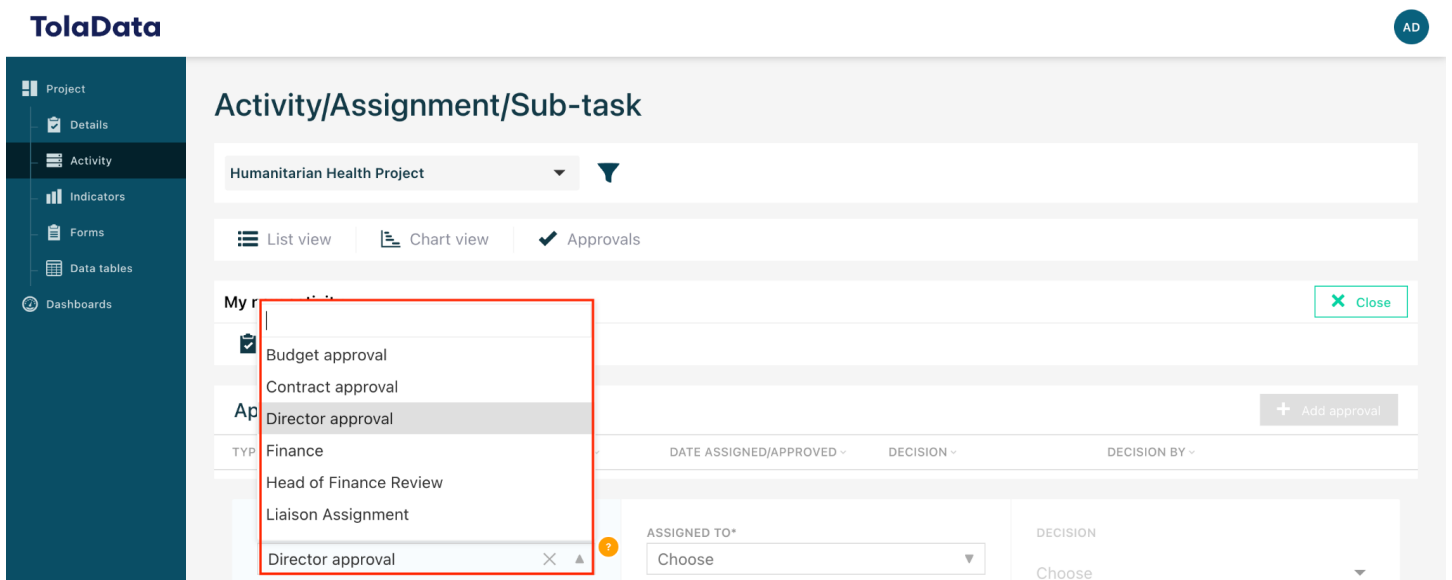
Activity/Assignment/Sub-task Update		
	PROGRESS	STATUS
Aine Farrelly	In progress	Yellow

3. Approval workflows

- 3.1. The approval section allows you to stay up to date with the approvals required for your projects through an auditable trail of assigned approval tasks and the date and outcome of the decision.
- 3.2. To add an approval, you will first need to add the approval module to your activity. To do this select the '+' symbol and select 'Approval' from the drop down.



- 3.3. Once the approval module has been added, you can now select your approval type, the user you want to assign it to and add any additional notes. "Approval Type" is a configurable field that is set by your Org Admin. If this drop down list is blank please contact your Org Admin to input values in the Admin Console. If you are the Org Admin, you can consult our Admin Console Guide to configure Approval Types.



3.4. Once you have added the relevant information, select save.

Activity/Assignment/Sub-task

Humanitarian Health Project

List view | Chart view | **Approvals**

My new activity Close

Details | **Approvals** | +

Approvals (1) + Add approval

TYPE -	REQUESTED/ASSIGNED -	DATE ASSIGNED/APPROVED -	DECISION -	DECISION BY -
TYPE* Director approval	ASSIGNED TO* Jo Bennett		DECISION Choose	

APPROVAL NOTE

B I U Normal | [Rich Text Editor Icons]

Could you please approve [this form](#)

Cancel Save

3.5. Only the user to whom the task is assigned to will be able to input a decision. The decision will be saved alongside the user's name and date. This ensures that this is an auditable record of approvals as no other user can submit a decision.

3.6. You can review a summary of all the approvals for a project by navigating to the approvals tab. A list view will appear displaying each approval and its current status of decision.

Activity/Assignment/Sub-task

Humanitarian Health Project + Add new Activity

List view | Chart view | **Approvals**

ACTIVITY NAME -	TYPE OF APPROVAL -	DATE ASSIGNED -	ASSIGNED TO -	DECISION/STATUS -	DATE OF DECISION -
1.0 Build-up: How to get the project started	Director approval	Sep 20, 2019	Aoife Doran	Approved	Jan 6, 2020



Exercise B.

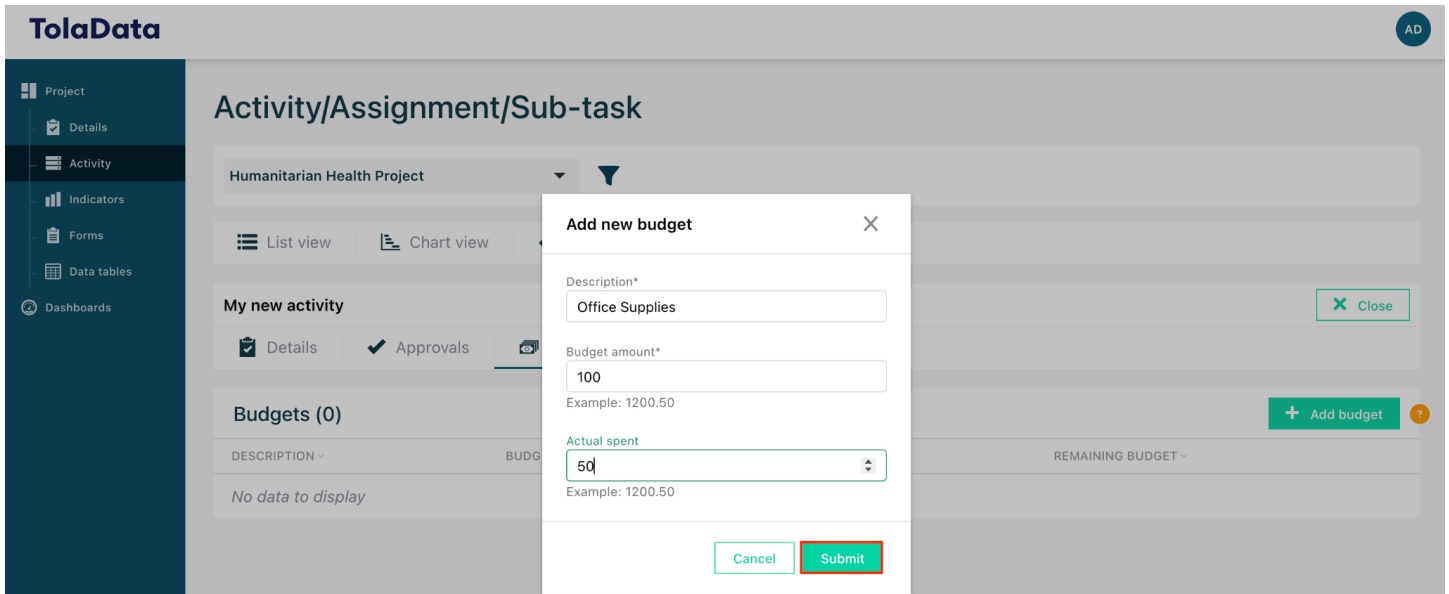
- Add a new approval
- Assign the approval to a team member
- Check the approval workflow.

4. Managing activity budgets

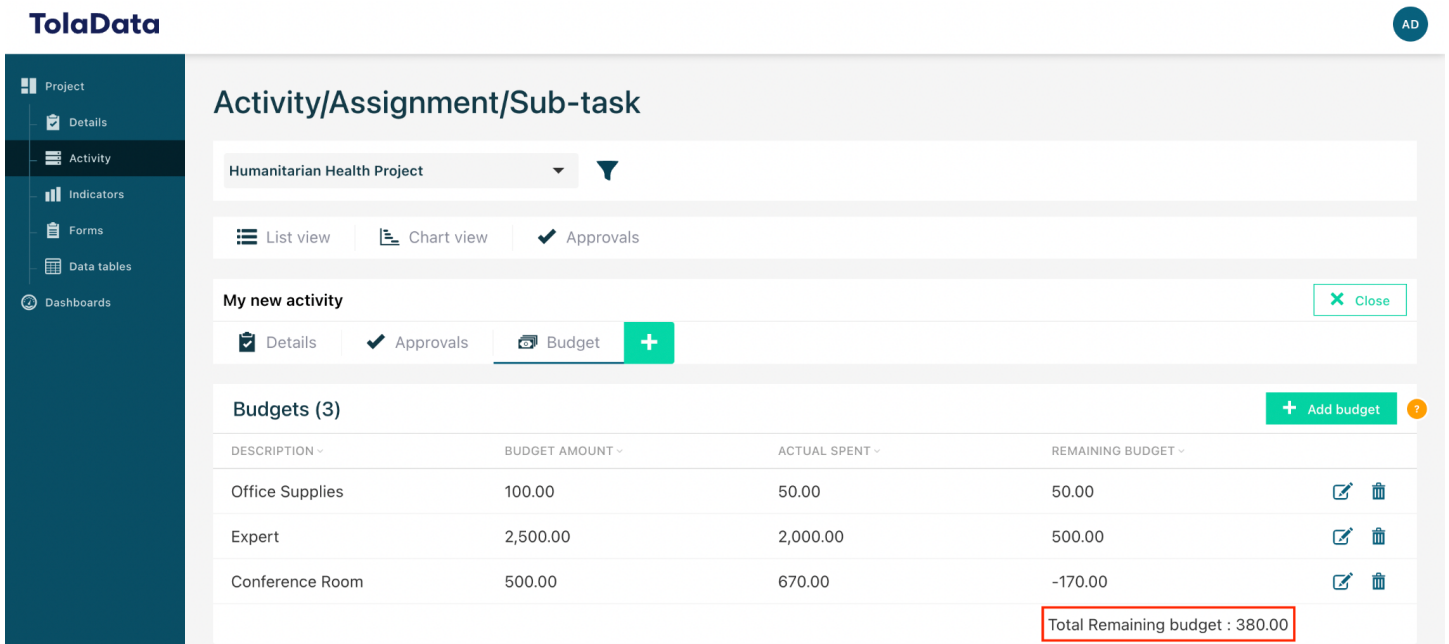
- 4.1. The budget feature allows you to keep track of your project's spending.
- 4.2. To add a budget to your activity, you will first need to add the budget module to your activity. To do this select the '+' symbol and select 'Budget' from the drop down.

The screenshot shows the TolaData interface for a project named 'Humanitarian Health Project'. The left sidebar contains navigation options: Project, Details, Activity (selected), Indicators, Forms, Data tables, and Dashboards. The main content area is titled 'Activity/Assignment/Sub-task' and shows a dropdown menu for the project name. Below this, there are view options: List view, Chart view, and Approvals (checked). A section titled 'My new activity' contains buttons for Details, Approvals, Budget (highlighted with a red box), and a green '+' button. At the bottom, there is a table header for 'Budgets (0)' with columns: DESCRIPTION, BUDGET AMOUNT, ACTUAL SPENT, and REMAINING BUDGET. A green '+ Add budget' button is located in the bottom right corner of the table area.

- 4.3. Once the budget module has been added, select the green 'add budget' button to begin entering your spending information.
- 4.4. You will be prompted to enter a description of your budget spending, budget amount and the budget spent. Once you have entered these details, select 'submit'.



4.5. Additional budget information can be added by repeating this step. You can return to the budget module at any time to update your 'budget spent' amount.



4.6. All individual budget items entered at the activity level are aggregated and can be viewed in the project overview level allowing you to see the total spent against the remaining budget.

The screenshot shows the TolaData interface for a project named 'Humanitarian Health Project'. The left sidebar contains navigation options: Project, Details (highlighted with a red box), Activity, Indicators, Forms, Data tables, and Dashboards. The main content area has a search bar with the project name and a filter icon. Below this is a toolbar with icons for Details, Sites, Phases, Stakeholders, Documents, Reporting periods, and Disaggregation types. A secondary toolbar includes Team, IATI (checked), and Sharing. The 'Details' section is a table with the following data:

Details	
NAME*	STATUS
Humanitarian Health Project	Implementation
START DATE	END DATE
01.07.2021	31.12.2022

The 'Budget' section, highlighted with a red box, features a donut chart showing 359,348.00 spent out of a total budget of 865,316.90. The remaining budget is 505,968.90.

Budget	
Spent: 359,348.00	Remaining: 505,968.90
Total budget: 865,316.90	



Exercise C.

- Add 2 budget items
- Review overall budget information in the project details page

5. Linking documents to an activity

- 5.1. TolaData allows you to link documents and files from cloud file servers such as Google Drive, OneDrive and DropBox or link to the URL of any online document or website.
- 5.2. To link documents to your activity, you will first need to add the documents module to your activity. To do this select the '+' symbol and select 'Documents' from the drop down.

TolaData AD

The screenshot shows the 'Activity/Assignment/Sub-task' page for the 'Humanitarian Health Project'. The left sidebar contains navigation options: Project, Details, Activity (selected), Indicators, Forms, Data tables, and Dashboards. The main content area has a dropdown for 'Humanitarian Health Project' and view options: List view, Chart view, and Approvals. Below this is a section titled 'My new activity' with a 'Close' button. It contains tabs for Details, Approvals, Budget, and Documents (highlighted with a red box and a green '+' button). Underneath is a 'Documents (0)' section with a 'Google Drive' button and an 'Add URL/location' button. A table header is visible with columns: FILE NAME, LEVEL, ADDED BY, and DATE ADDED. The table currently shows 'No data to display'.

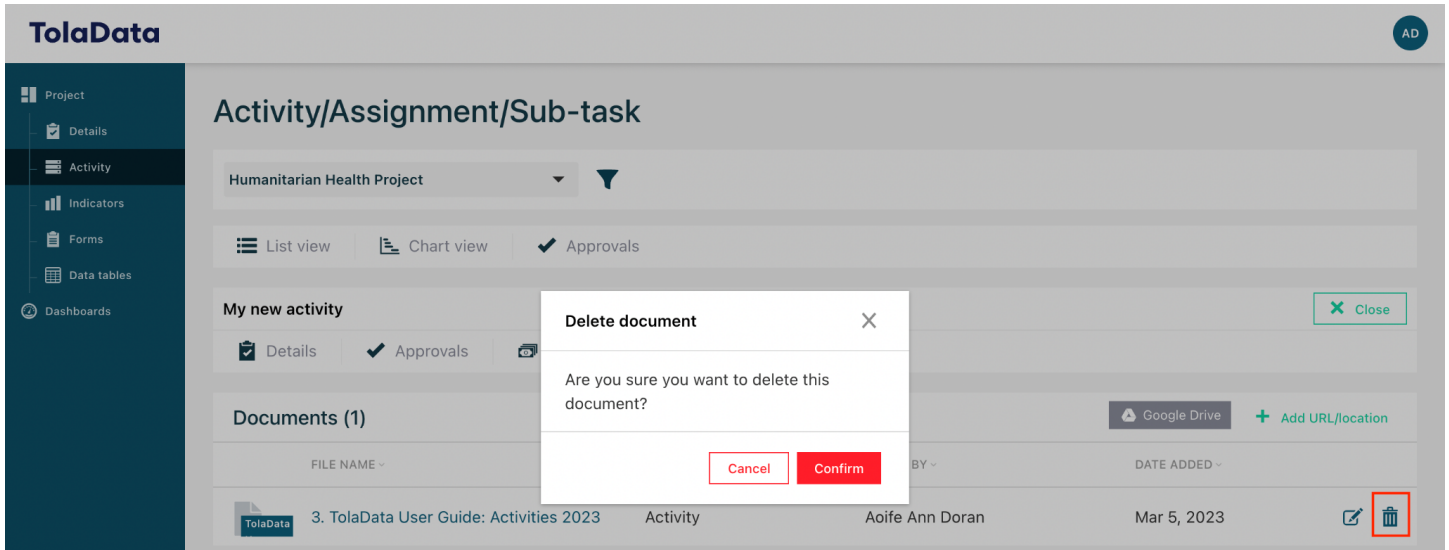
- 5.3. Once added, select to either add a file link from Google Drive or click "Add URL" to add a link from any other file server.

TolaData AD

This screenshot is similar to the previous one but shows the 'Documents (1)' section. The 'Add URL/location' button is now highlighted with a red box. The table below now contains one entry:

FILE NAME	LEVEL	ADDED BY	DATE ADDED
3. TolaData User Guide: Activities 2023	Activity	Aoife Ann Doran	Mar 5, 2023

- 5.4. To link from Google drive, simply locate the file you want and select 'Save'
- 5.5. To add a URL, copy and paste the URL into the URL box and add a document name
- 5.6. Documents can be unlinked by selecting the trash can icon.



The screenshot shows the TolaData web application interface. On the left is a dark blue sidebar with navigation options: Project, Details, Activity (selected), Indicators, Forms, Data tables, and Dashboards. The main content area is titled 'Activity/Assignment/Sub-task' and shows a dropdown menu for 'Humanitarian Health Project'. Below this are view options: List view, Chart view, and Approvals (checked). A 'My new activity' section contains 'Details' and 'Approvals' tabs. A 'Documents (1)' table is visible with columns for FILE NAME, BY, and DATE ADDED. A document entry is shown: '3. TolaData User Guide: Activities 2023' by 'Aoife Ann Doran' added on 'Mar 5, 2023'. A 'Delete document' dialog box is open in the center, asking 'Are you sure you want to delete this document?' with 'Cancel' and 'Confirm' buttons. A trash can icon in the bottom right of the document row is highlighted with a red box.



Exercise D.

- Link 1 document from your Google Drive to your activity
- Link 1 document in URL form to your activity

6. Linking indicators to an activity

- 6.1. Each individual activity can be associated with indicators by linking the two! This provides a clear indication to your team of what activities are to be conducted and what is to be measured.
- 6.2. To link indicators to your activity, you will first need to add the indicators module to your activity. To do this select the '+' symbol and select 'Indicators' from the drop down.

TolaData AD

Activity/Assignment/Sub-task

Humanitarian Health Project

List view | Chart view | Approvals

My new activity Close

Details | Approvals | Budget | Documents | **Indicators** +

Indicators (0)

NAME	LEVEL	STATUS	ACTUAL VS TARGET
Assign another indicator			
No data to display			

- 6.3. To assign an indicator to your activity, select 'assign indicator' and select the relevant indicators from the drop down menu.

TolaData AD

Activity/Assignment/Sub-task

Humanitarian Health Project

List view | Chart view | Approvals

My new activity Close

Details | Approvals | Budget | Documents | **Indicators** +

Indicators (0)

NAME	LEVEL	STATUS	ACTUAL VS TARGET
Assign another indicator			
Average # of days mobile medical units spent at each location			
Comprehensive beneficiary feedback system in place			

6.4. To unlink an indicator, select the unlink icon on the right hand side

The screenshot shows the TolaData interface for a project named 'Humanitarian Health Project'. A dialog box titled 'Unlink indicator' is open, asking 'Are you sure you want to unlink this indicator?' with 'Cancel' and 'Confirm' buttons. The background shows a table of indicators with columns for NAME, status, and ACTUAL VS TARGET. The first indicator, '# of hygiene training events held', is highlighted with a red box around its unlink icon.

NAME		ACTUAL VS TARGET
Assign another indicator		
# of hygiene training events held	On track	7,502.00 / 10,000.00
# of members attending community ...	On track	10,678.00 / 12,000.00
# of vaccines administered to childre...		1,744.00 / 2,260.00



Exercise E.

- Link two indicators to your activity
- Try unlinking one of these indicators from your activity

7. Linking stakeholders to an activity

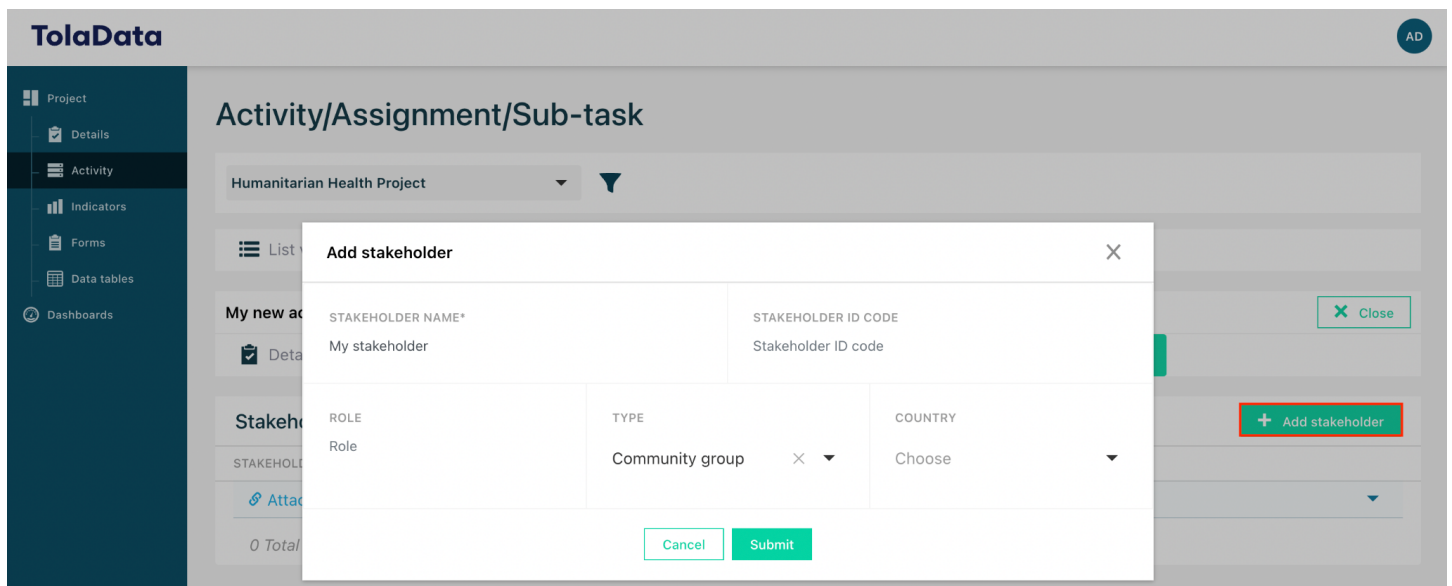
- 7.1. The stakeholder section allows you to attach a stakeholder to the activity to help keep track of which organisations are involved.
- 7.2. To link stakeholders to your activity, you will first need to add the stakeholders module to your activity. To do this select the '+' symbol and select 'Stakeholders' from the drop down.

The screenshot shows the TolaData interface for an 'Activity/Assignment/Sub-task' titled 'Humanitarian Health Project'. A sidebar on the left contains navigation options: Project, Details, Activity, Indicators, Forms, Data tables, and Dashboards. The main content area has a header with the project name and a filter icon. Below this are view options: List view, Chart view, and Approvals. A section titled 'My new activity' contains several module icons: Details, Approvals, Budget, Documents, Indicators, Stakeholders, and a green '+' button. The 'Stakeholders' icon is highlighted with a red box. To the right of this section is a 'Close' button. Below the modules is a 'Stakeholders (0)' section with an 'Add stakeholder' button. A table header is visible with columns: STAKEHOLDER NAME -, TYPE -, ROLE -, and COUNTRY -. A link 'Attach existing stakeholder' is highlighted with a red box.

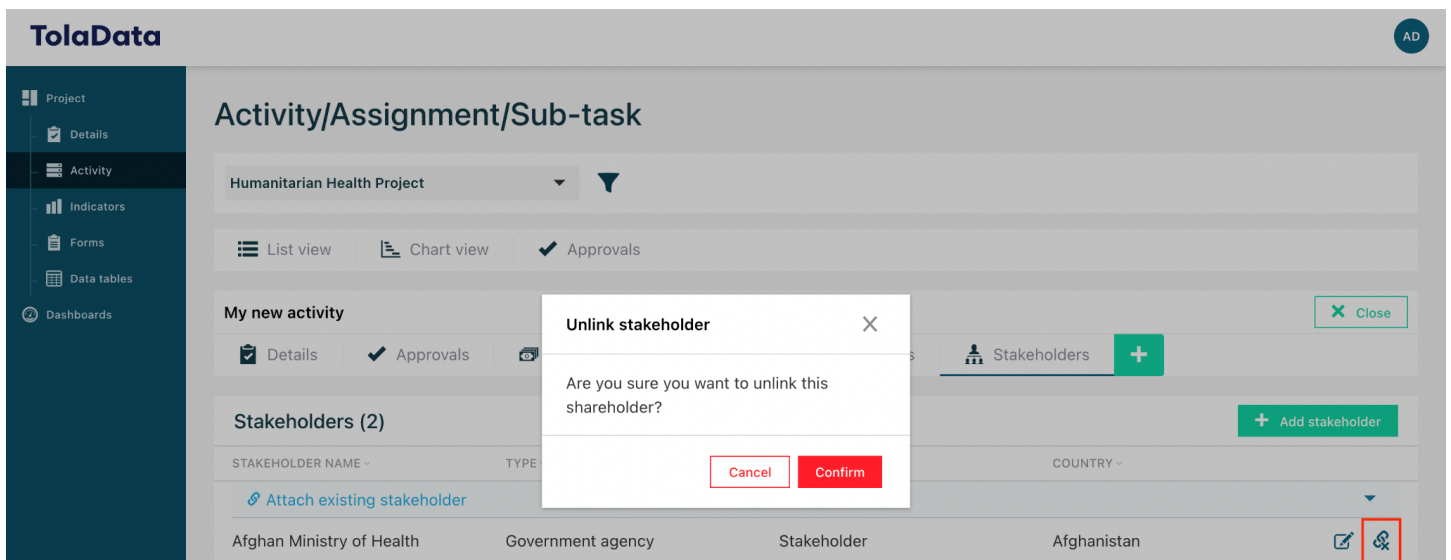
- 7.3. Once you have added the stakeholder module, you can choose to add an existing stakeholder or create a new one.

This screenshot is similar to the previous one, but the 'Attach existing stakeholder' link is highlighted with a red box. Below this link, a dropdown menu is open, showing the text 'Afghan Ministry of Health' as a selected option.

- 7.4. To add an existing stakeholder, navigate to the 'add existing stakeholder' button and select the desired stakeholders from the dropdown
- 7.5. To add a new stakeholder, navigate to the green 'Add stakeholder' button and enter the name, role, type and country. Keep in mind the stakeholder type field is a configurable field set by the Org Admin of the account. If nothing appears in the dropdown, contact your Org Admin. If you are the Org Admin of the account, please consult the Admin UserGuide to configure this field.



- 7.6. Once you have entered this information, select 'Submit'.
- 7.7. To unlink a stakeholder from the activity, select the unlink icon.



8. Linking sites to an activity

- 8.1. With the sites section, you can attach a site for which the activity is taking place.
- 8.2. To link sites to your activity, you will first need to add the sites module to your activity. To do this select the '+' symbol and select 'sites' from the drop down.


The screenshot shows the TolaData interface for an activity titled 'Humanitarian Health Project'. On the left is a navigation menu with options like Project, Details, Activity, Indicators, Forms, Data tables, and Dashboards. The main content area is titled 'Activity/Assignment/Sub-task'. Under 'My new activity', there are several icons: Details, Approvals, Budget, Documents, Indicators, Stakeholders, and Sites. The 'Sites' icon is highlighted with a red box. Below this, there is a section for 'Sites (0)' with a table header including SITE NAME, TYPE, OFFICE, COUNTRY, and STATUS. A green '+ Add new site' button is visible. At the bottom of the 'Sites' section, the 'Attach existing sites' button is highlighted with a red box.

- 8.3. Once you have added the sites module, you can choose to add an existing site or create a new one.
- 8.4. To add an existing site, navigate to the 'add existing site" button and select the desired sites from the dropdown

This screenshot is similar to the previous one but shows the dropdown menu for the 'Attach existing sites' button. The dropdown is open, displaying two options: 'Affected Community' and 'Afghan Ministry of Health'. The 'Attach existing sites' button and the dropdown menu are both highlighted with red boxes.

- 8.5.** To add a new site, navigate to the green 'add sites' button and enter the name, role, type and country. Keep in mind the site type field is a configurable field set by the Org Admin of the account. If nothing appears in the dropdown, contact your Org Admin. If you are the Org Admin, you will can add the site types in the admin console. For further information see the Admin Guide.
- 8.6.** Once you have entered this information, select 'Submit'.

Sites (1)
+ Add new site

SITE NAME -	TYPE -	OFFICE -	COUNTRY -	STATUS -
Attach existing sites				
Description				
SITE NAME* My new site	TYPE Local office x ▼	OFFICE Afghanistan CO x ▼	STATUS <input checked="" type="radio"/> Active <input type="radio"/> Inactive	
Contact info				
CONTACT NAME			CONTACT NUMBER	
Map coordinates				
COUNTRY* Afghanistan x ▼	LATITUDE 34.5333	LONGITUDE 69.1333		
Notes				
<div style="background-color: #f0f0f0; padding: 2px; border: 1px solid #ccc;"> B I U Normal ☰ ☰ ☰ ☰ ☰ 🔗 📧 </div> <p style="margin-top: 5px;">Enter text</p>				
<div style="border: 1px solid #ccc; height: 150px; margin-bottom: 5px;"></div> <div style="display: flex; align-items: center;"> <div style="flex: 1;">  </div> <div style="margin-left: 10px;"> Map Satellite </div> </div>				
Cancel Submit				

8.7. To unlink a site from the activity, select the unlink icon.

The screenshot shows the TolaData interface for an activity titled "Humanitarian Health Project". A modal dialog box titled "Unlink site" is open, asking "Are you sure you want to unlink this site?" with "Cancel" and "Confirm" buttons. In the background, a table lists sites. The "Affected Community" site in Nigeria is highlighted, and its unlink icon (a chain link with a slash) is circled in red. Other sites include "My new site" in Afghanistan. The interface also shows navigation options like "List view", "Chart view", and "Approvals".

SITE NAME	TYPE	COUNTRY	STATUS	Actions	
Affected Community		Nigeria	Active		
My new site	Local office	Afghanistan CO	Afghanistan	Active	



Exercise F.

- Add a new stakeholder to your activity
- Add a new site to your activity

9. Where to get more help

- 9.1. You can find step by step guides to help with all the features in TolaData by clicking on the 'Guides' button in the bottom left hand corner.



- 9.2. Speak with one of our User Support representatives using the live webchat available in the bottom right hand corner.



- 9.3. Find all our user guides, best practice guides and latest product release notes in our knowledge base on our website: <https://www.toladata.com/docs/>
- 9.4. Access a range of tutorial videos on our [TolaData YouTube channel](#)
- 9.5. Contact us at info@toladata.com

