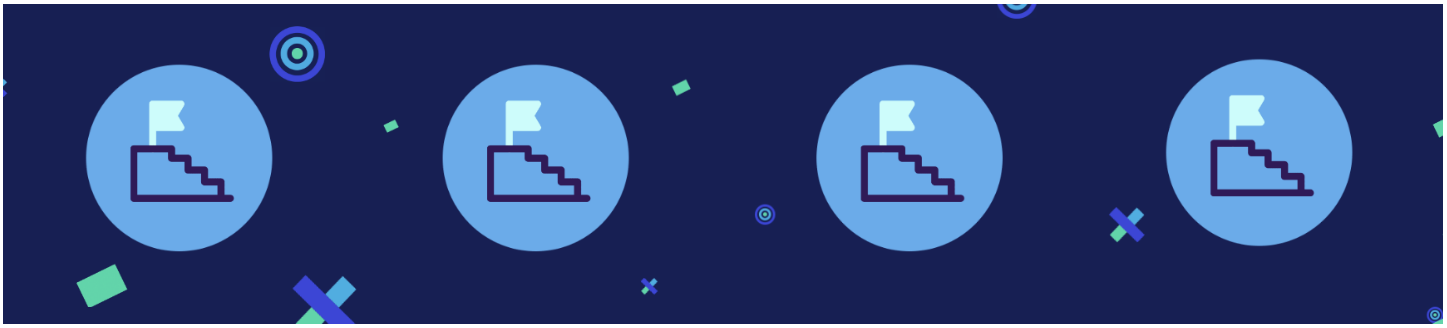
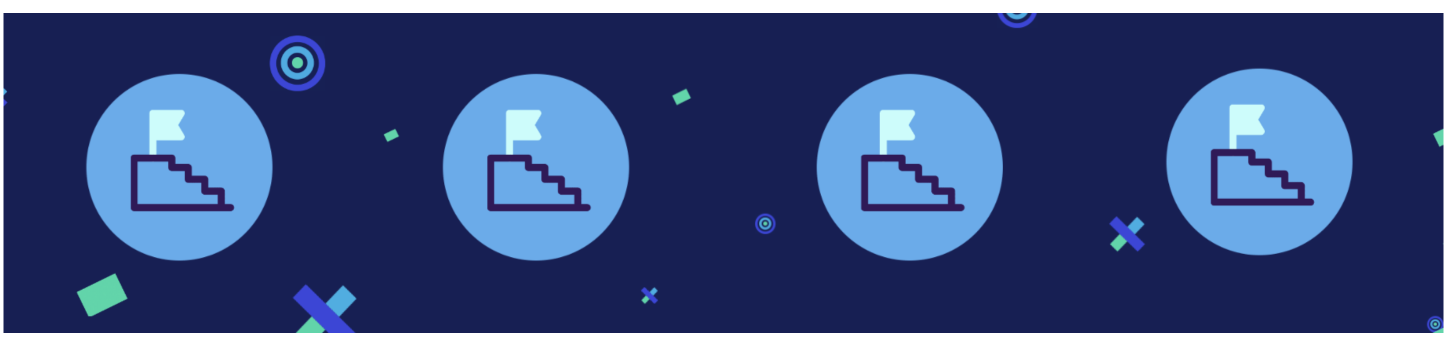
TolaData



TolaData

USER GUIDE 3

Activities Guide



TolaData

3. TolaData User Guide: Activities

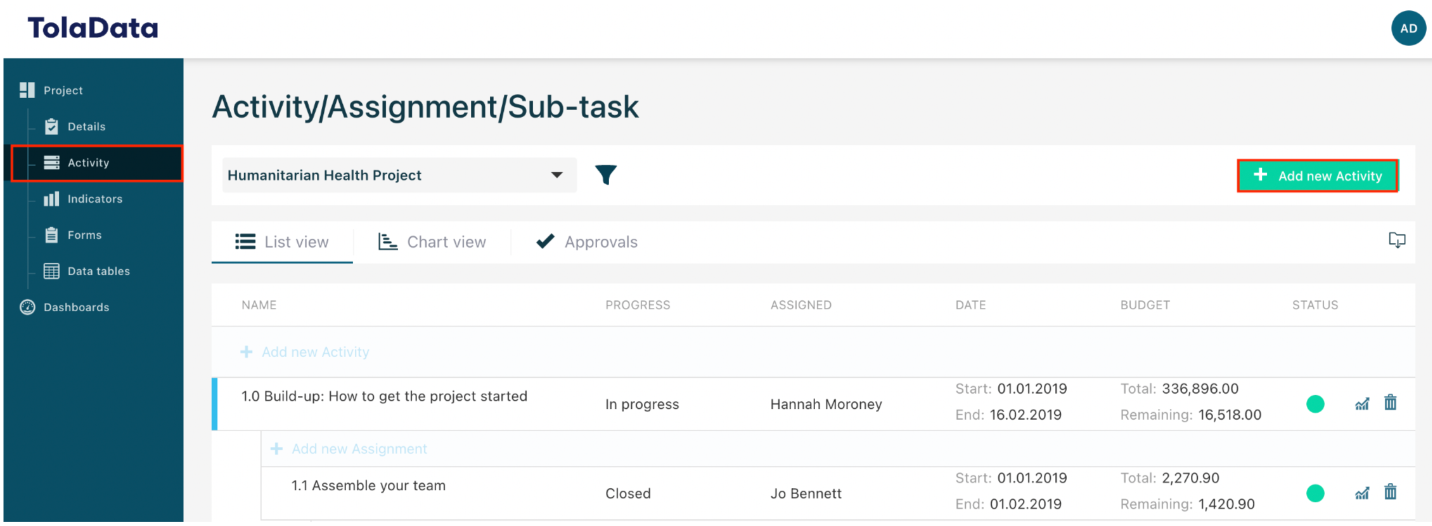
Contents

The Activity Plan

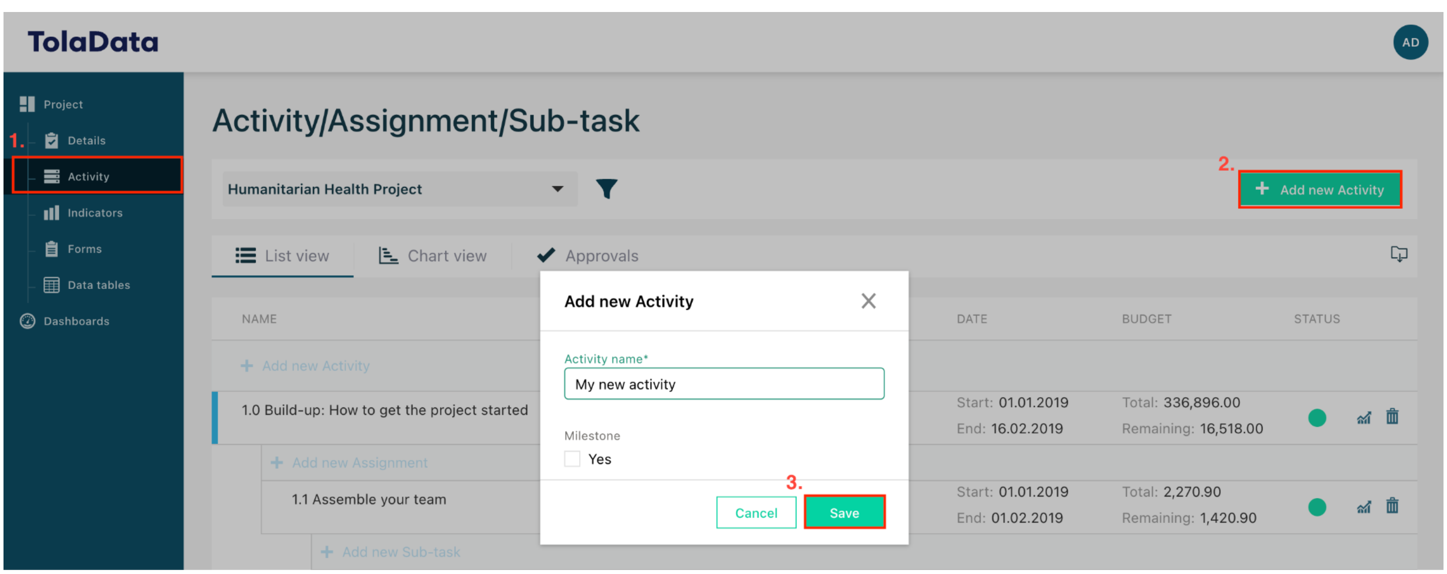
The activity section allows you to build activity plans, assign tasks and approvals to team members, upload document links, update your projects as they progress and visualise tasks in a Gantt chart.

1. Create an activity plan

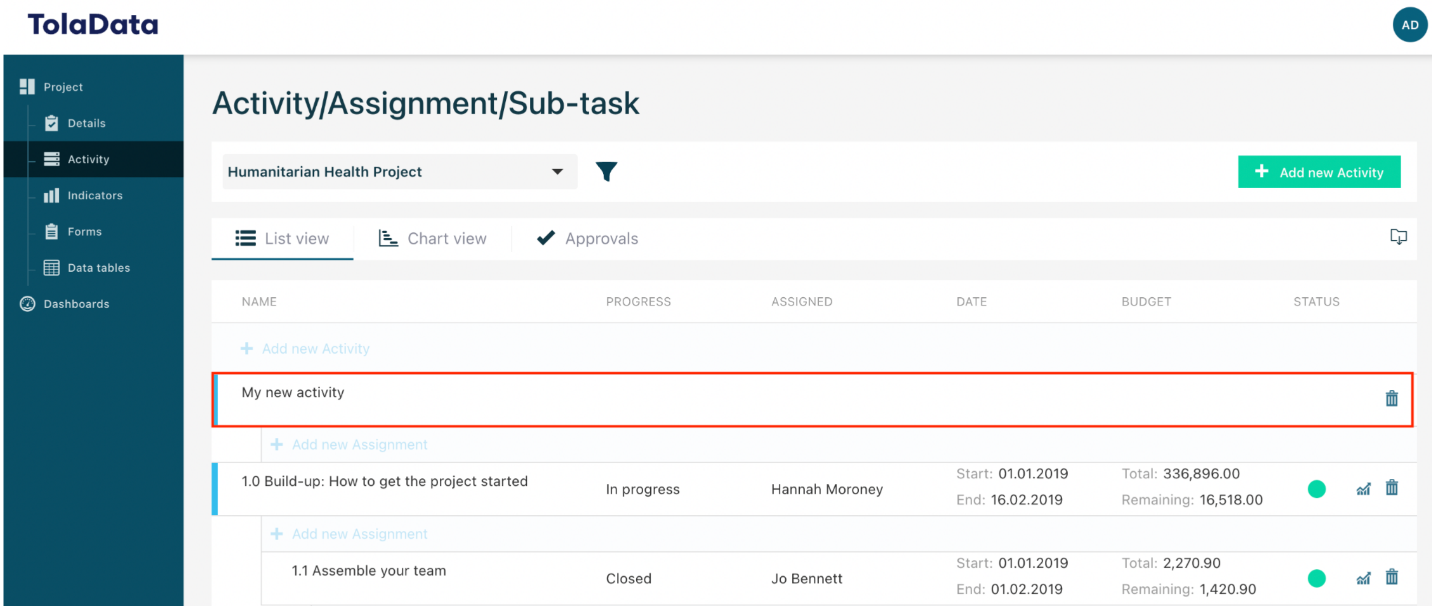
1.1. Begin by selecting the project you will be working on from the drop down menu and navigate to the 'Activity' tab on the left hand side. To add a new activity to your activity workflow, select the green 'Add new activity' button



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



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



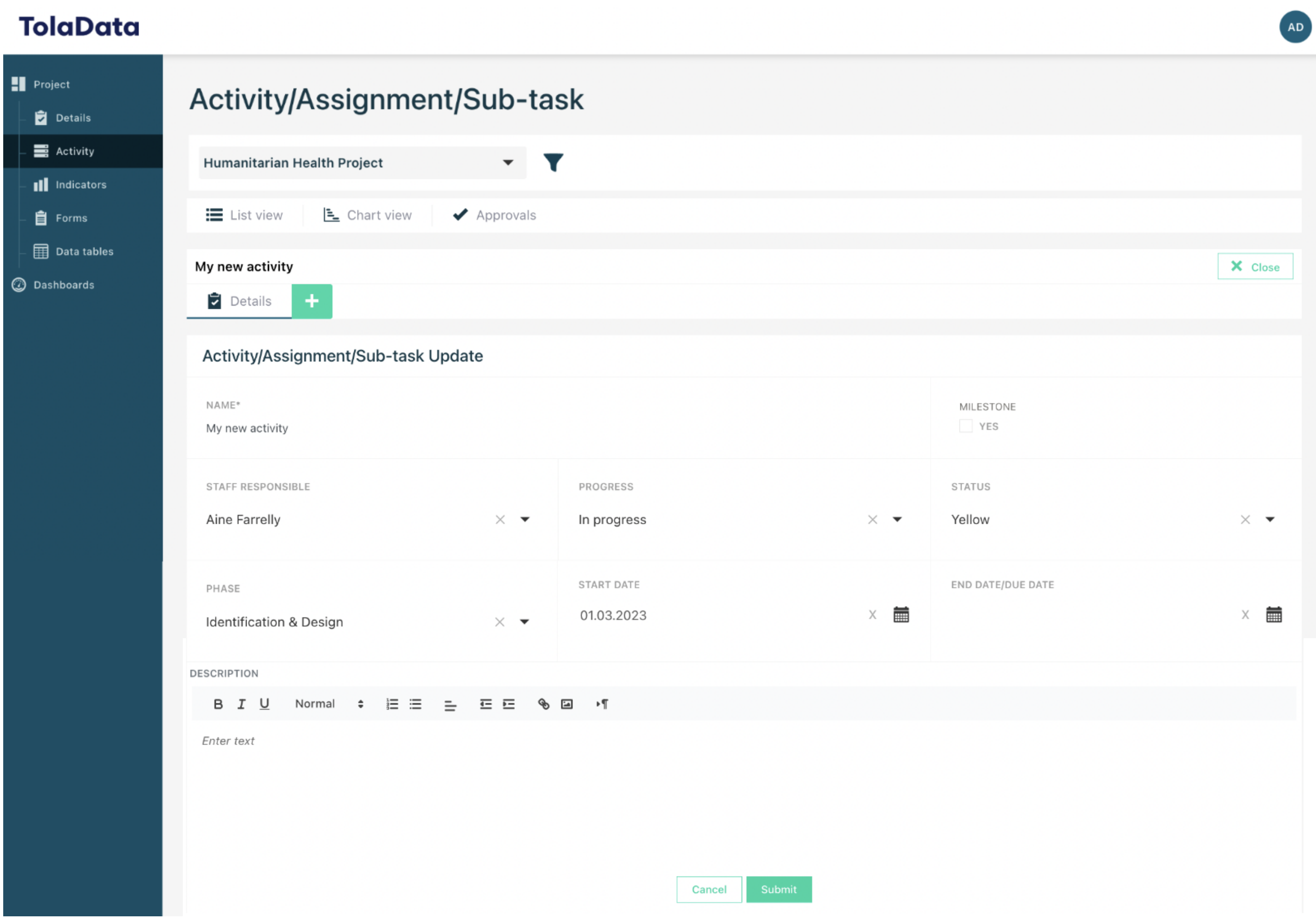
Exercise A.

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

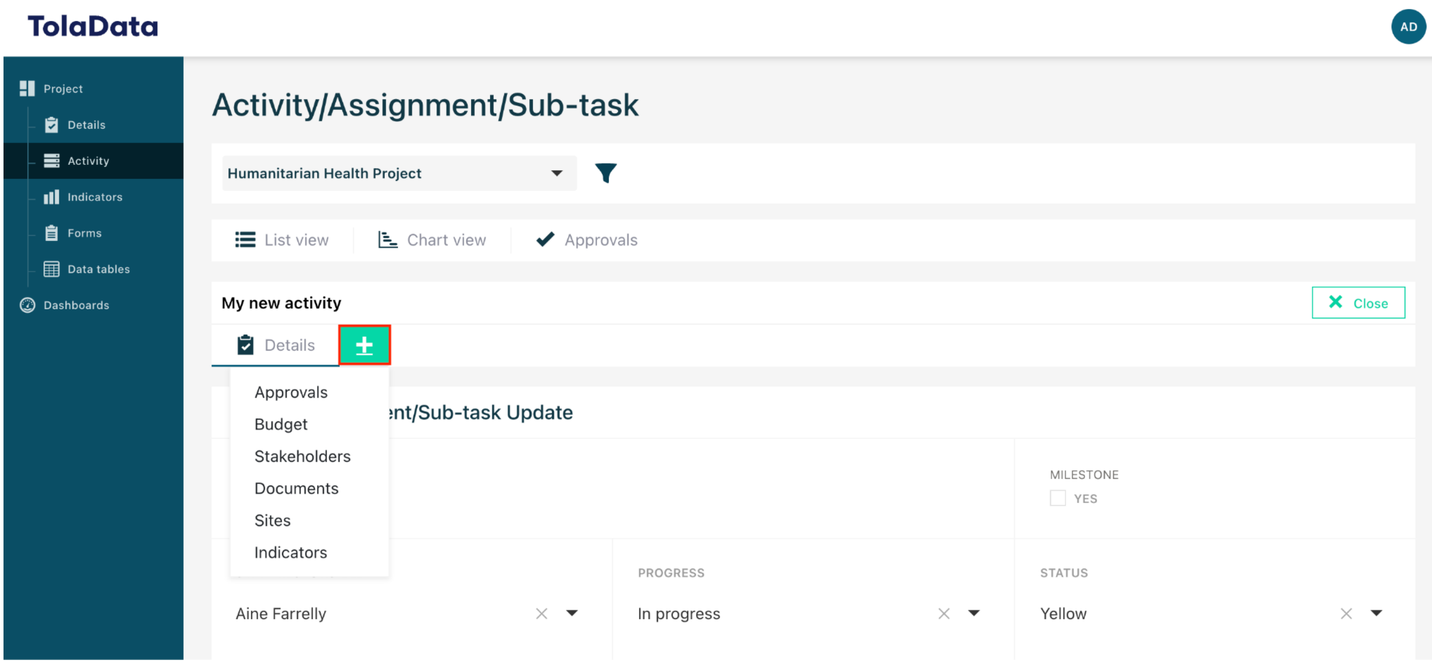
2. Add modules to your activities

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.



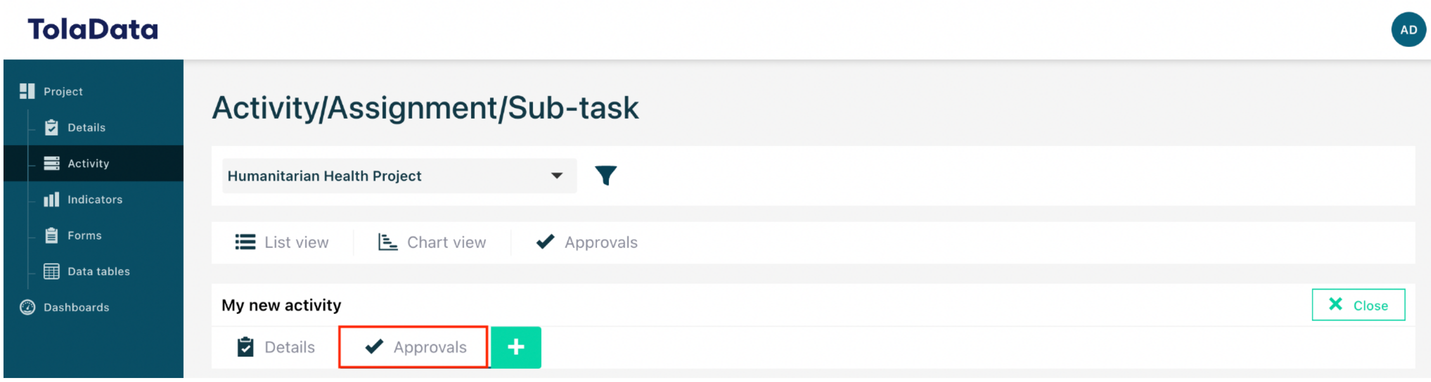
2.2. To add additional modules to your activity, select the '+' symbol beside the details tab. A drop down will appear and you now have the option to add approvals, budgeting information, link stakeholders, documents and sites as well as tying your activity to an indicator.



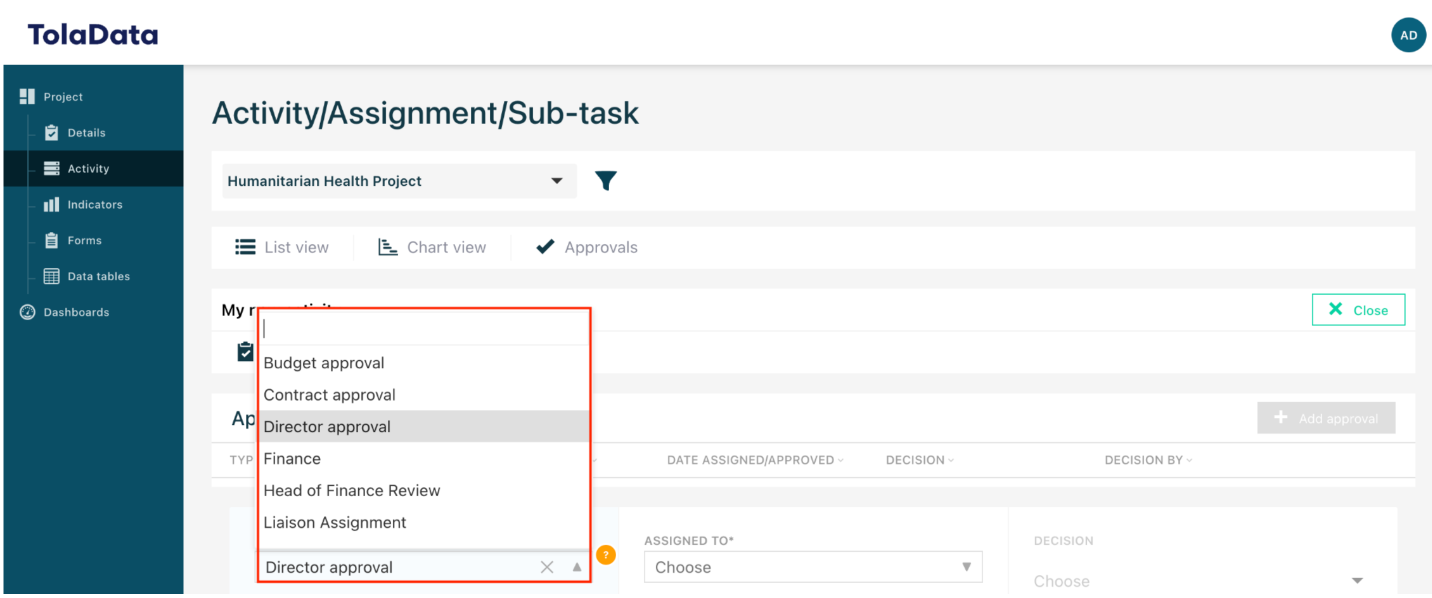
3. Approval workflows

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.

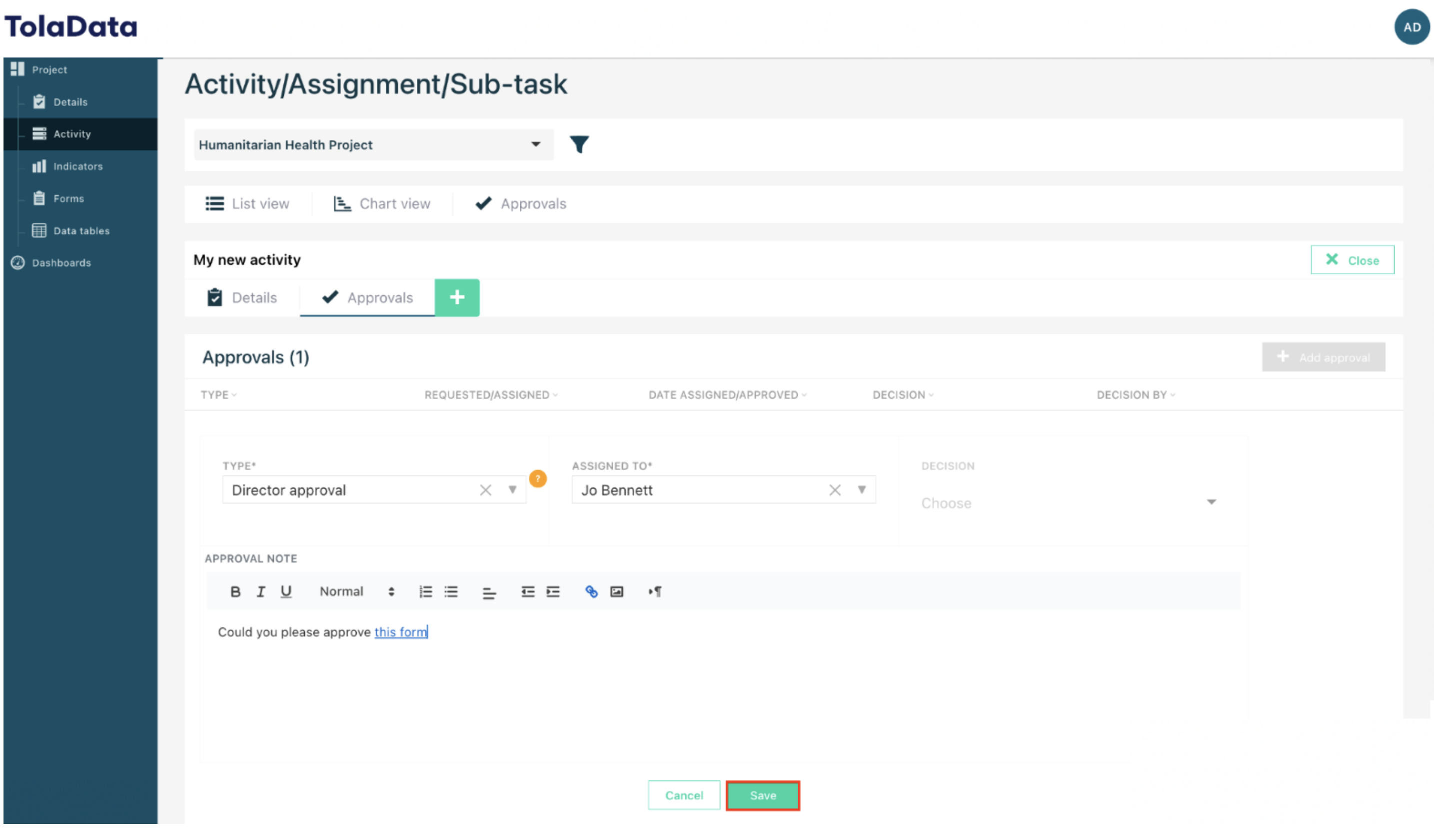
3.2. To add an approval, you will first need to add the approval module to your activity. To do this select the '+' symbol and select 'Approval' from the drop down.



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.

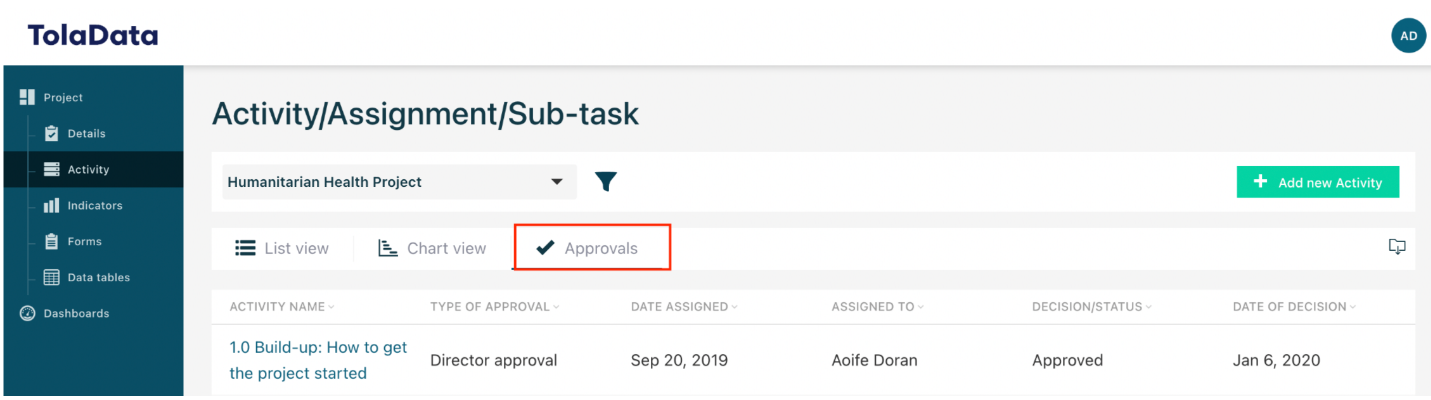


3.4. Once you have added the relevant information, select save.



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.



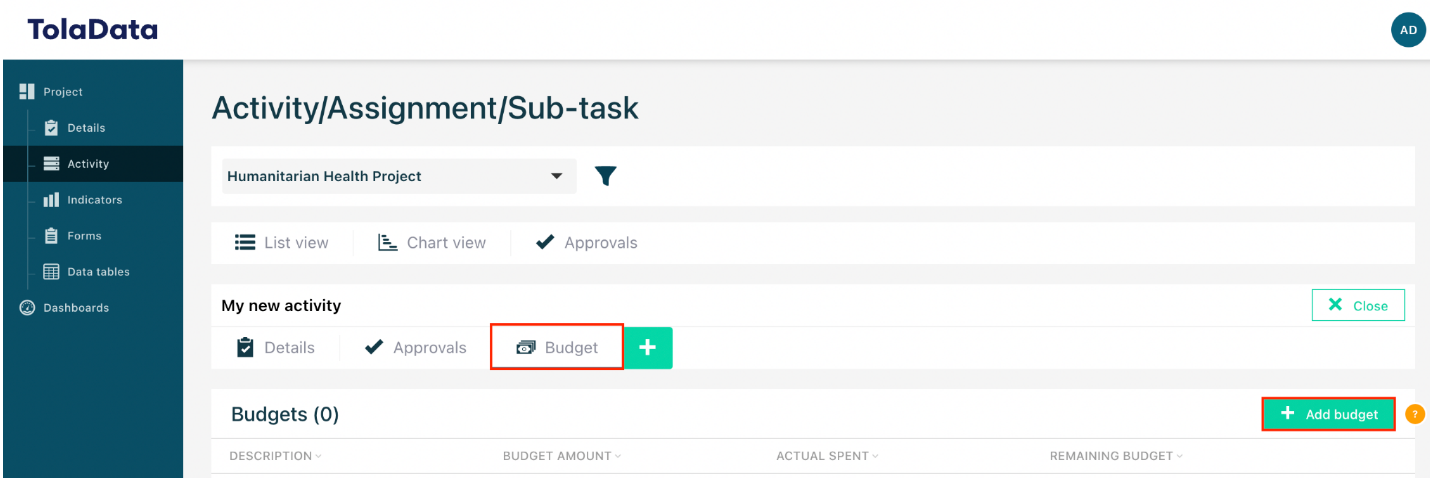
Exercise B.

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

4. Managing activity budgets

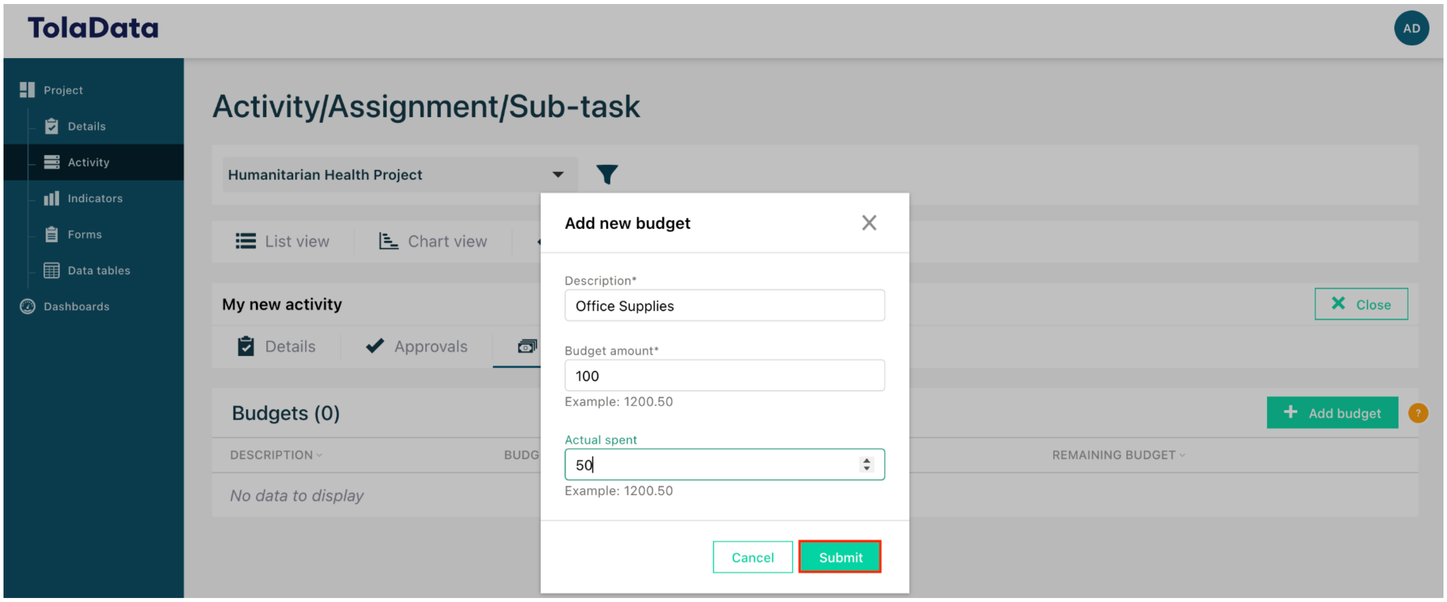
4.1. The budget feature allows you to keep track of your project's spending.

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.

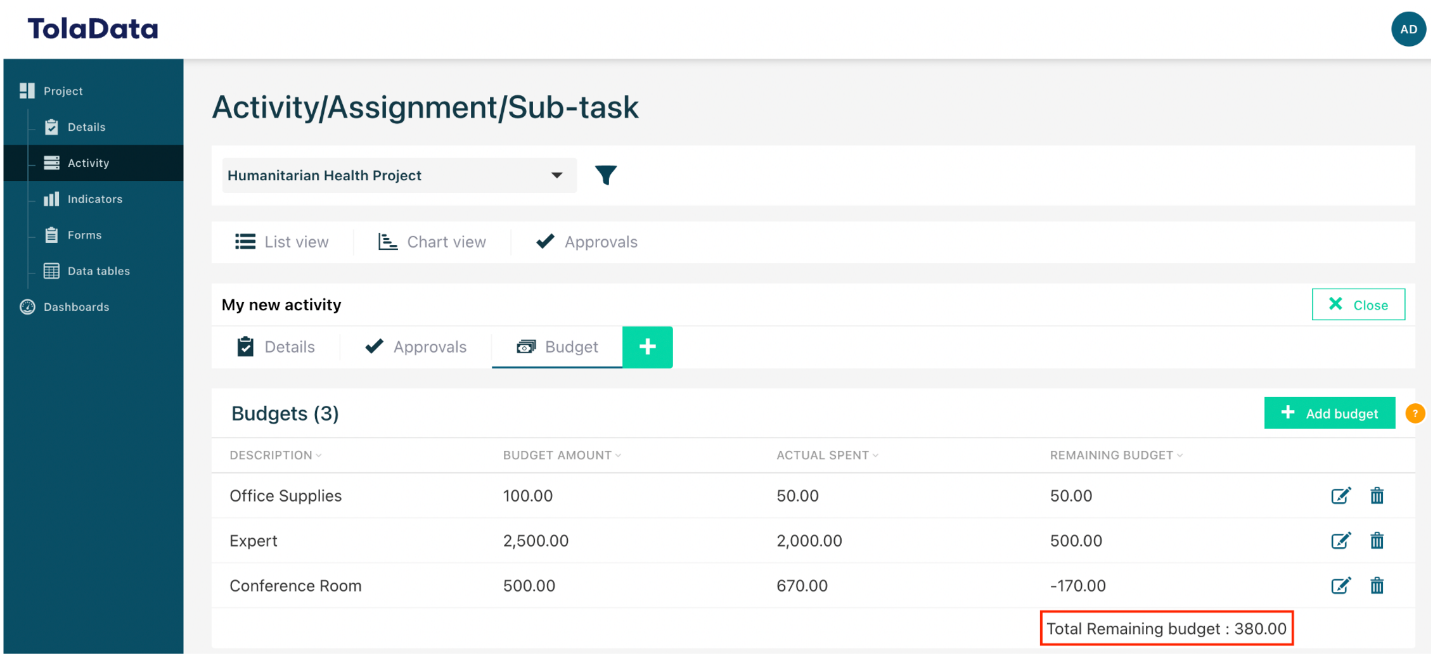


4.3. Once the budget module has been added, select the green 'add budget' button to begin entering your spending information.

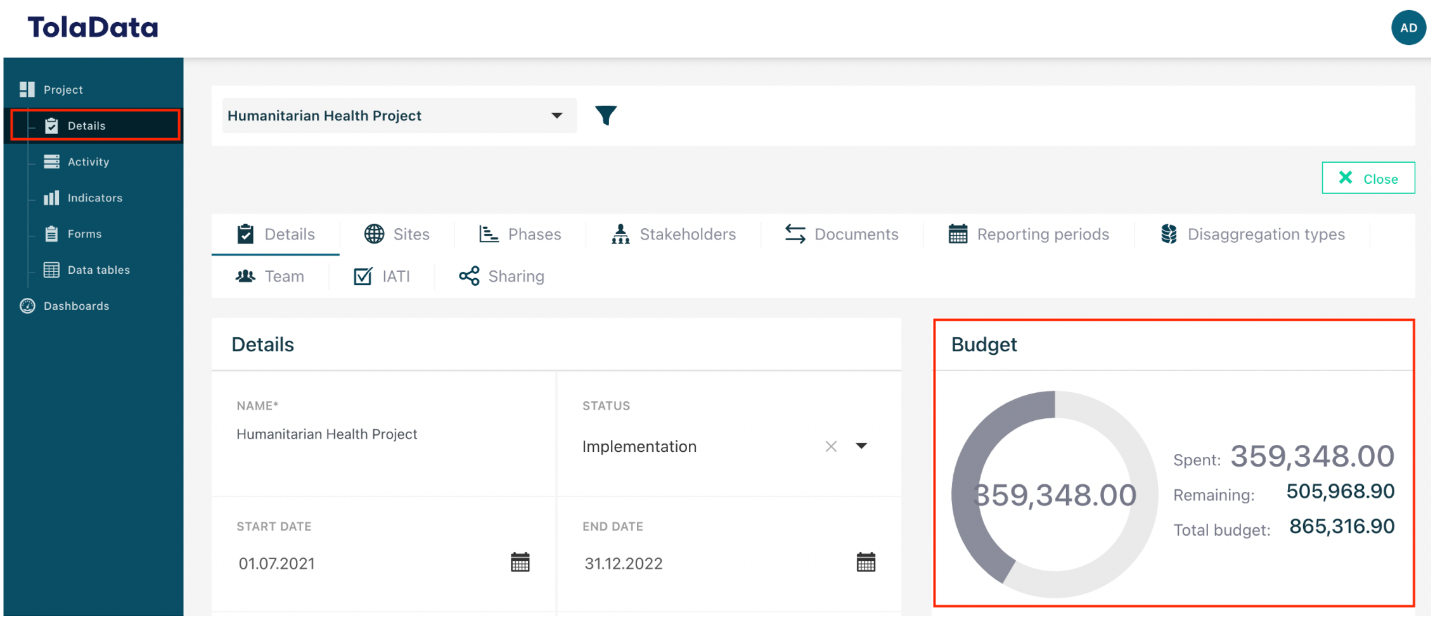
4.4. You will be prompted to enter a description of your budget spending, budget amount and the budget spent. Once you have entered these details, select 'submit'.



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.



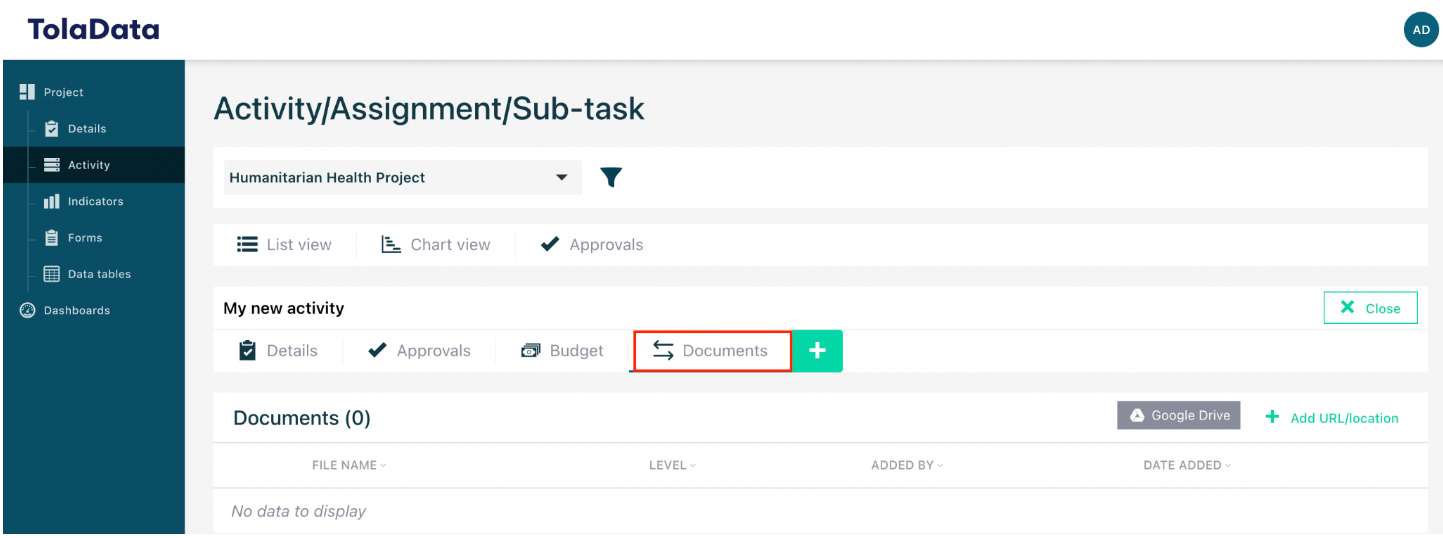
Exercise C.

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

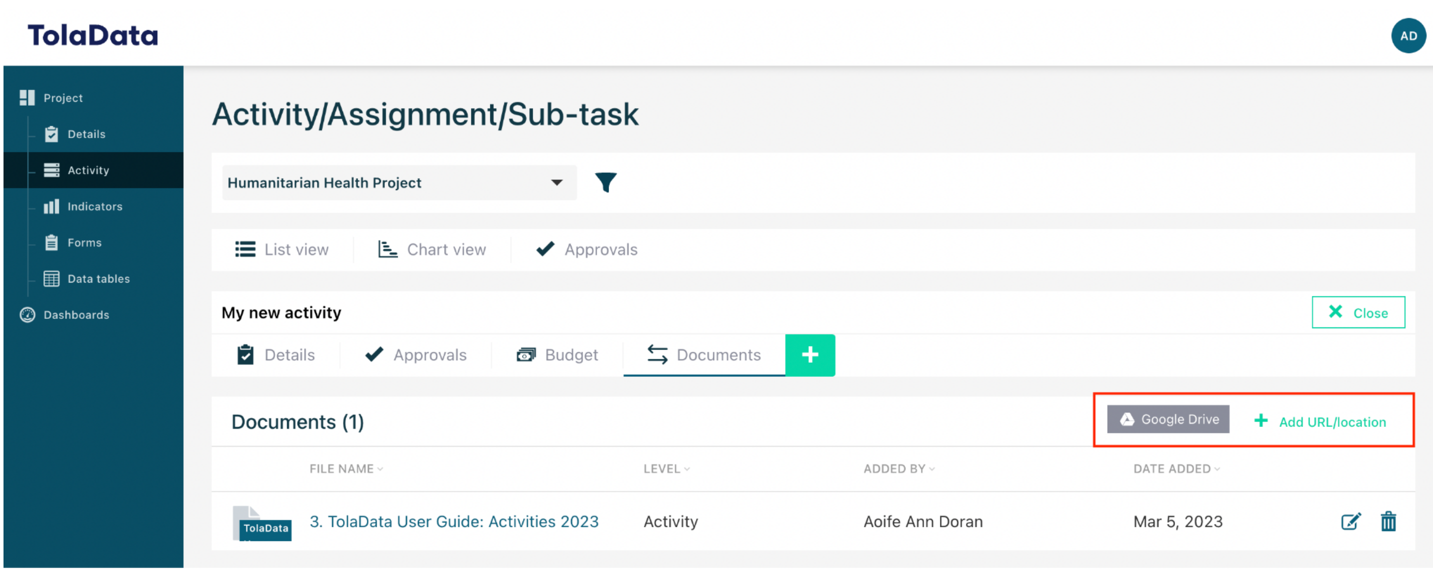
5. Linking documents to an activity

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.



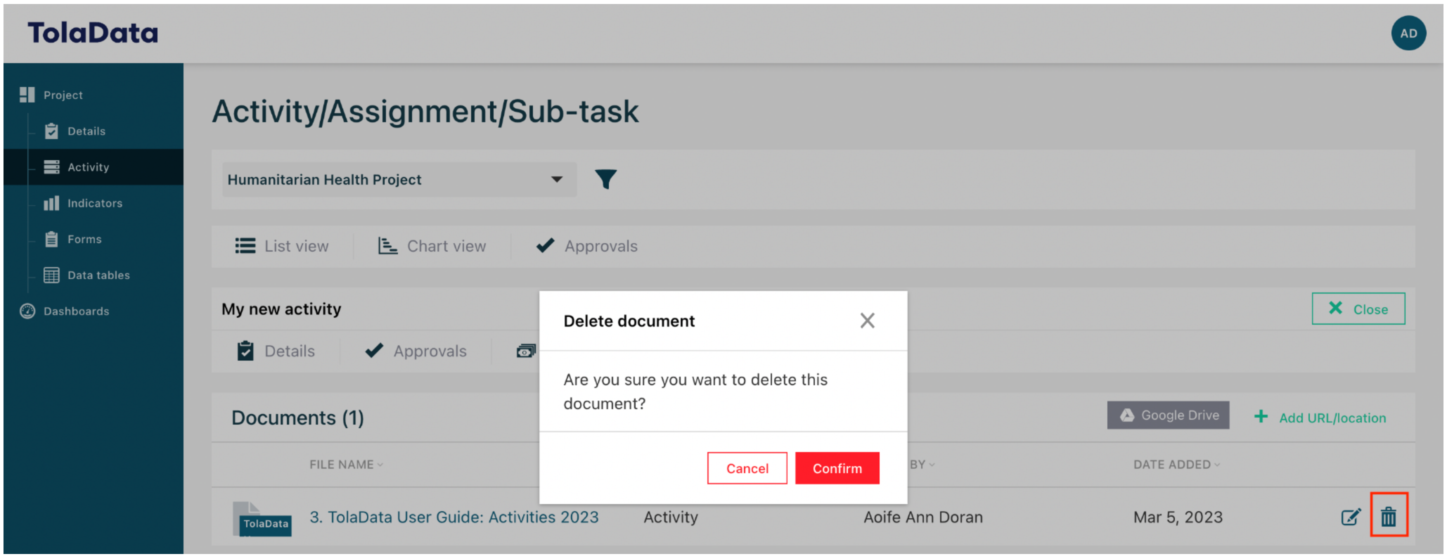
5.3. Once added, select to either add a file link from Google Drive or click "Add URL" to add a link from any other file server.



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.



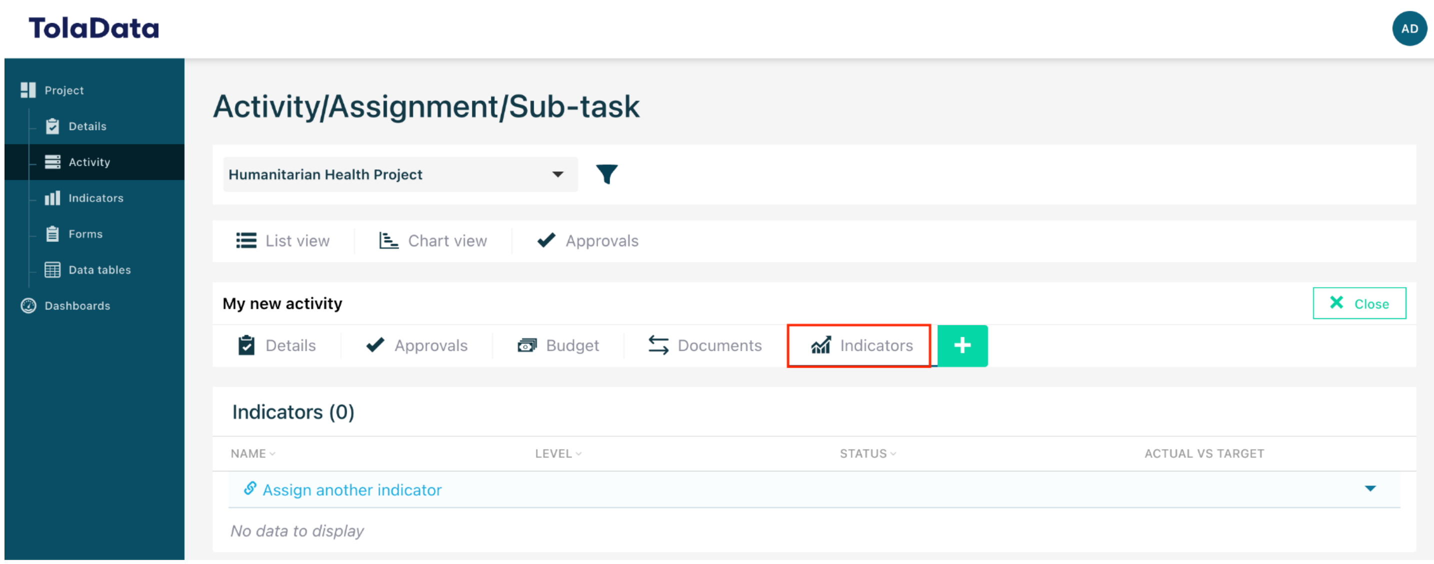
Exercise D.

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

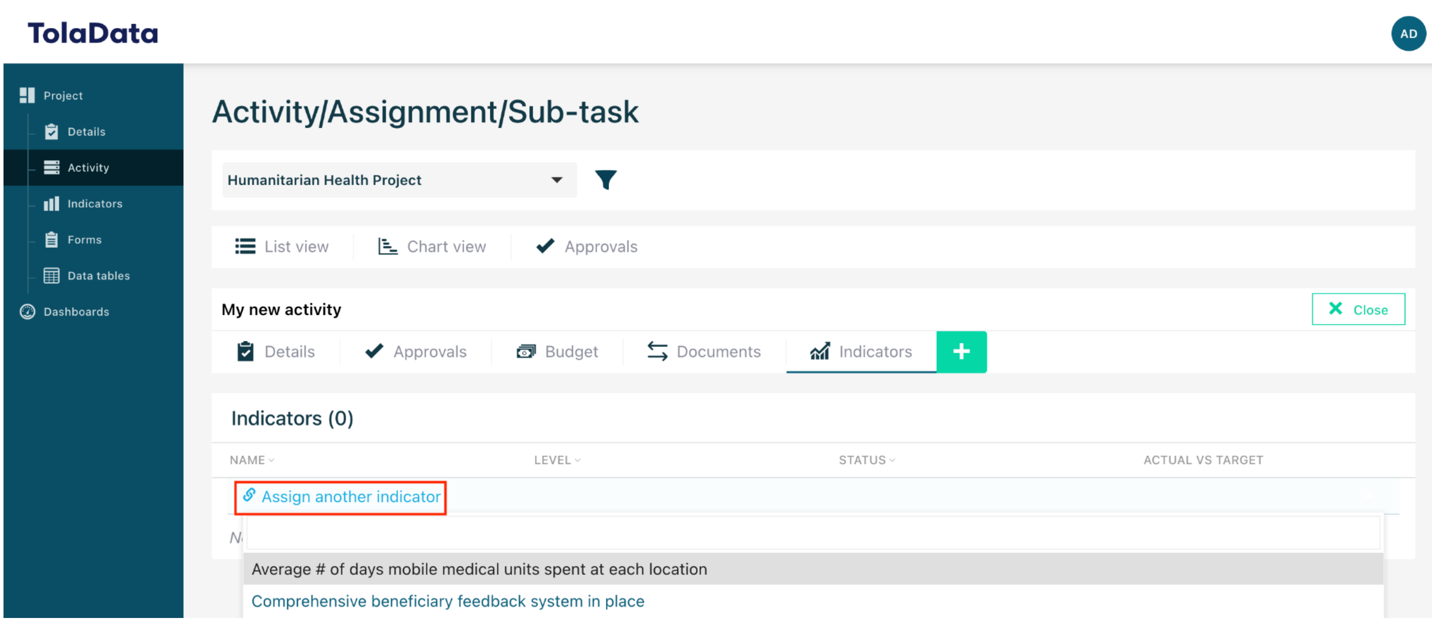
6. Linking indicators to an activity

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.

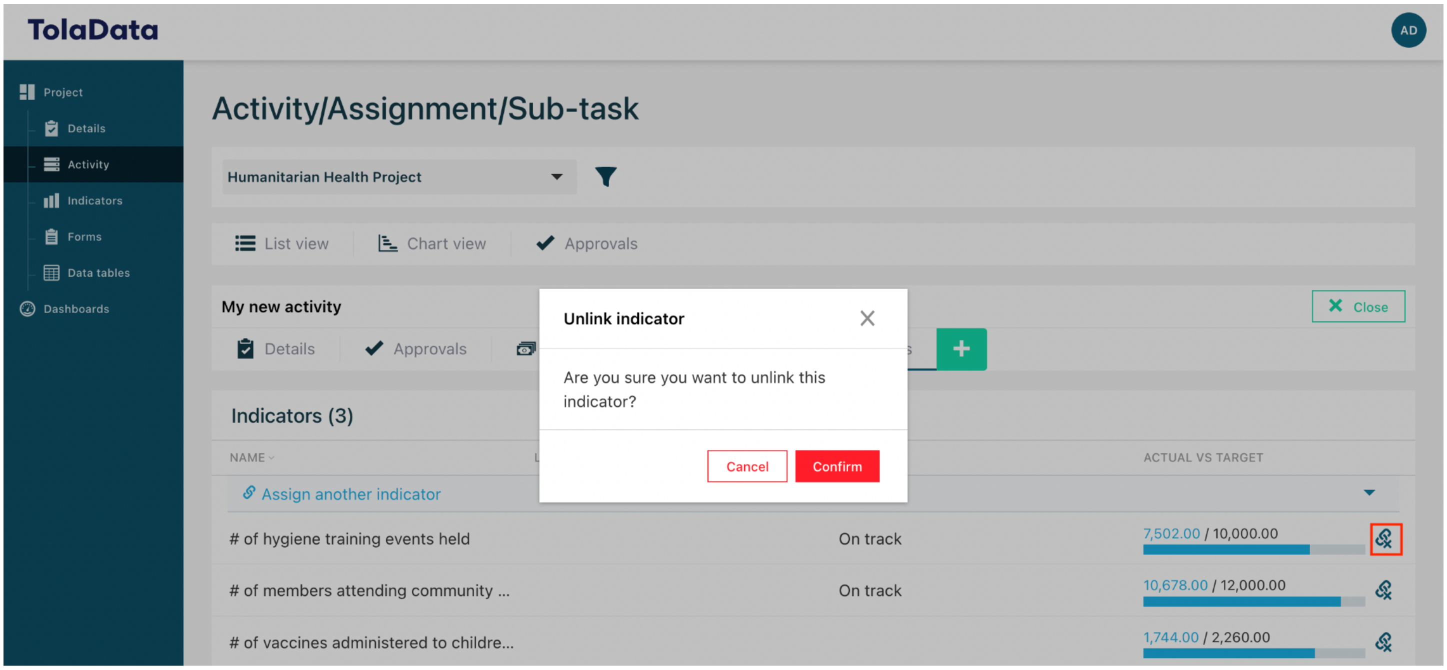
6.2. To link indicators to your activity, you will first need to add the indicators module to your activity. To do this select the '+' symbol and select 'Indicators' from the drop down.



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



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



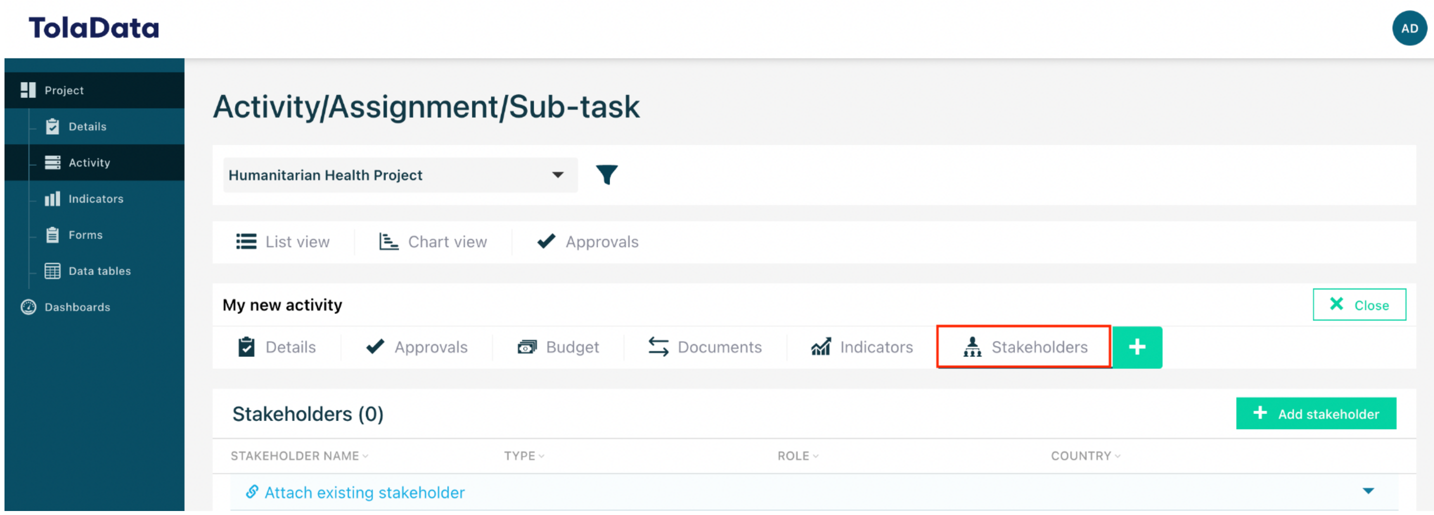
Exercise E.

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

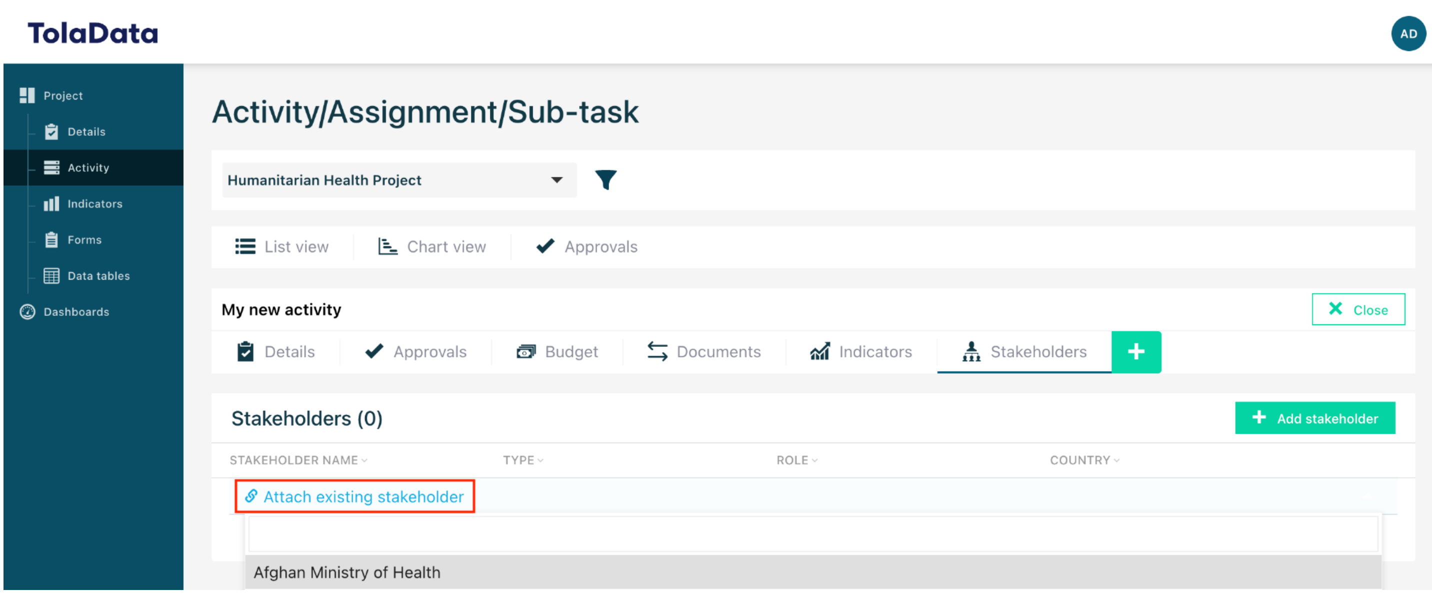
7. Linking stakeholders to an activity

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.

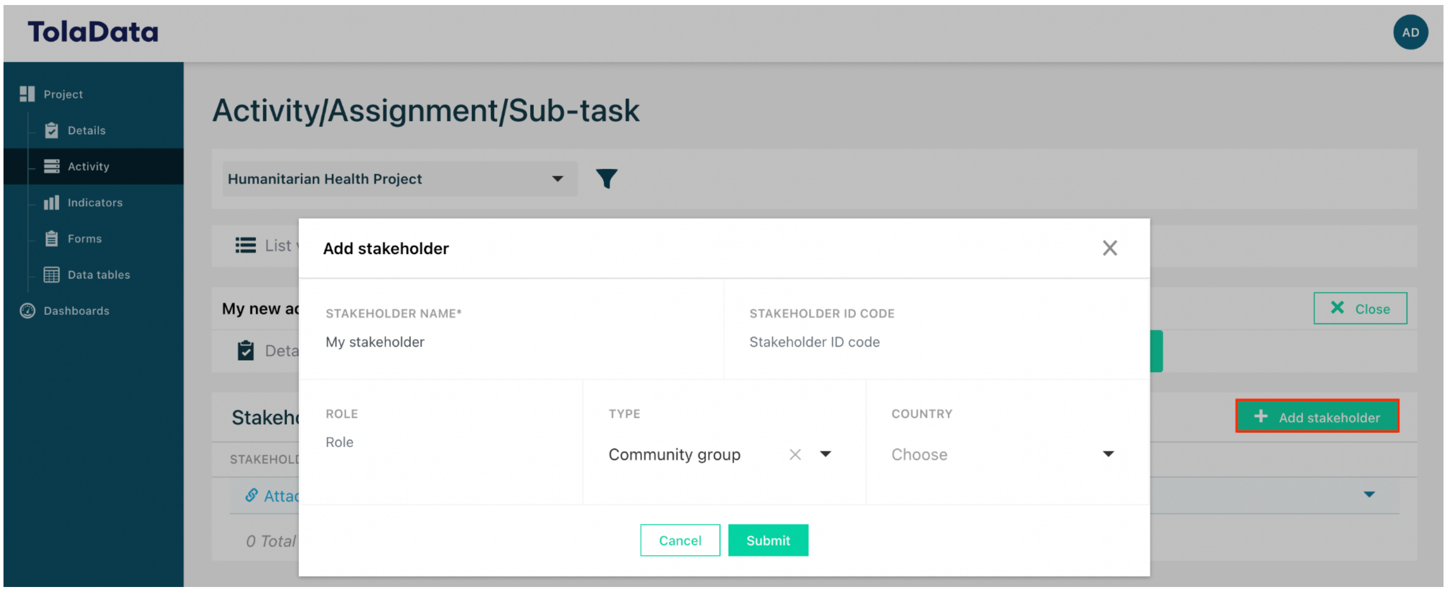


7.3. Once you have added the stakeholder module, you can choose to add an existing stakeholder or create a new one.



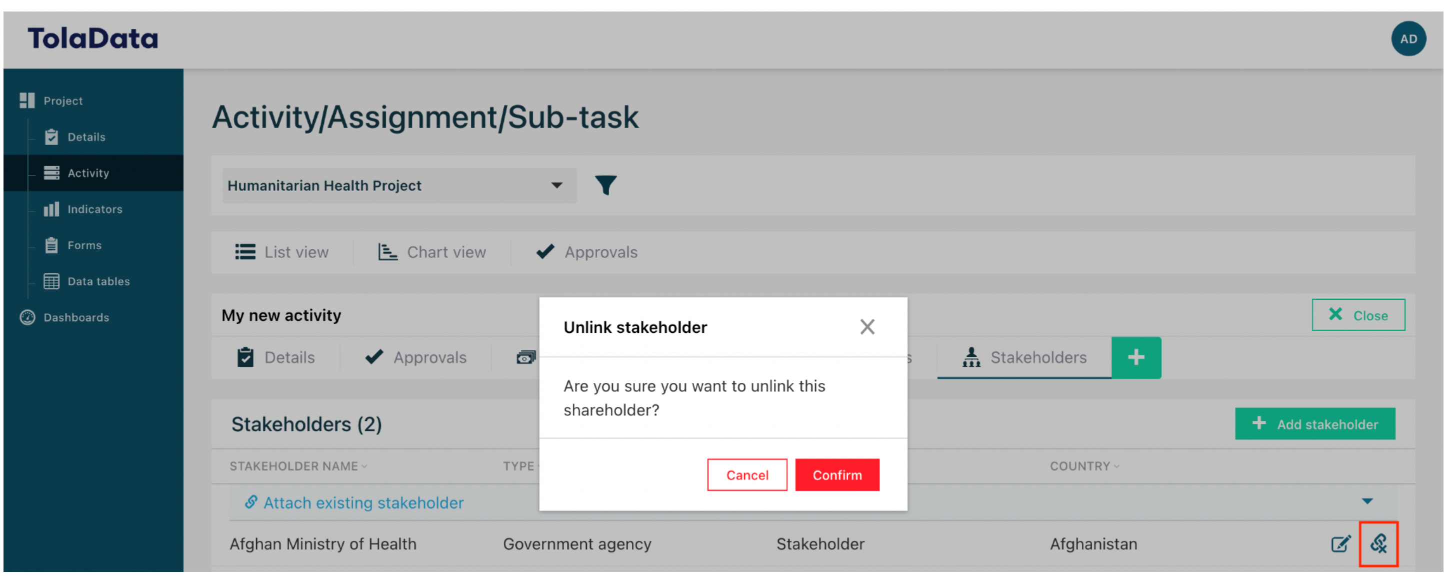
7.4. To add an existing stakeholder, navigate to the 'add existing stakeholder' button and select the desired stakeholders from the dropdown

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'.

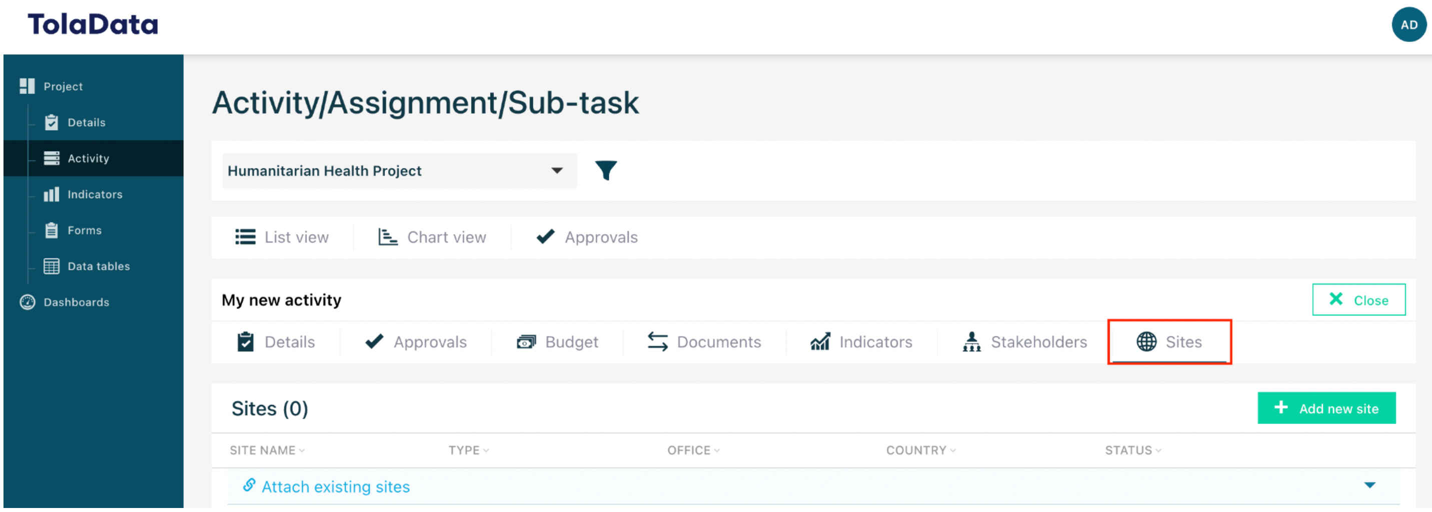
7.7. To unlink a stakeholder from the activity, select the unlink icon.



8. Linking sites to an activity

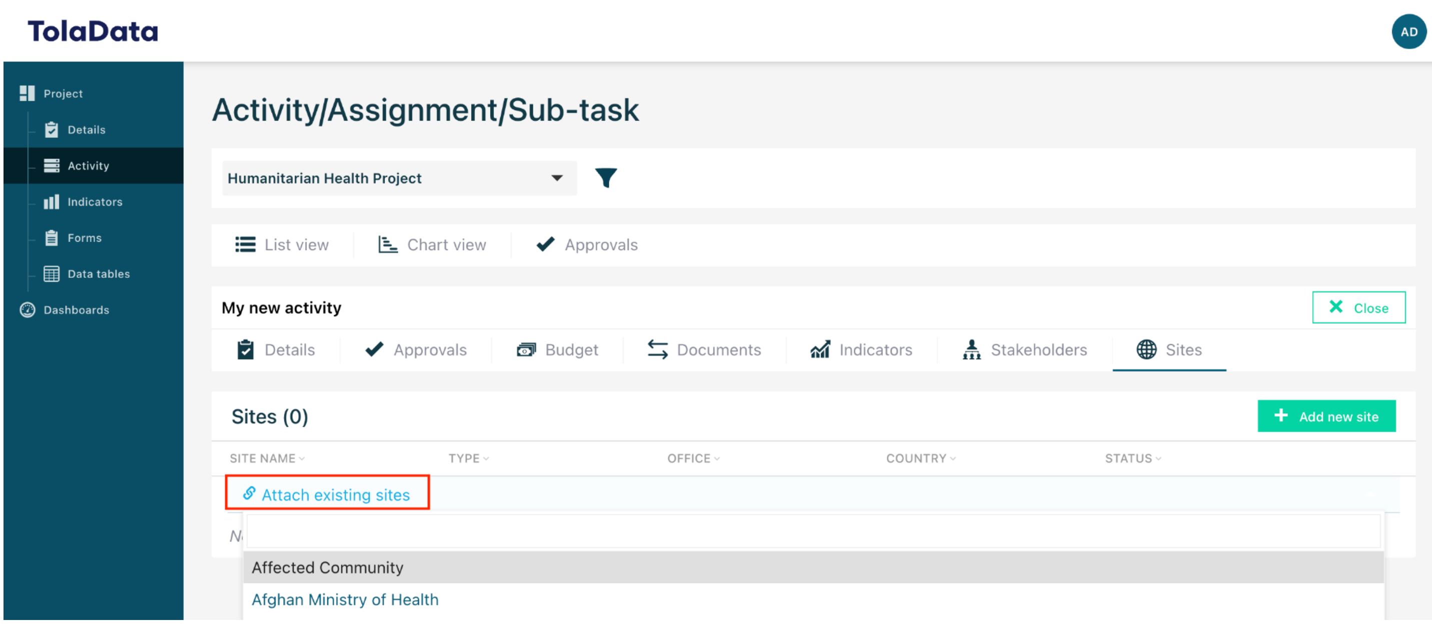
8.1. With the sites section, you can attach a site for which the activity is taking place.

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.



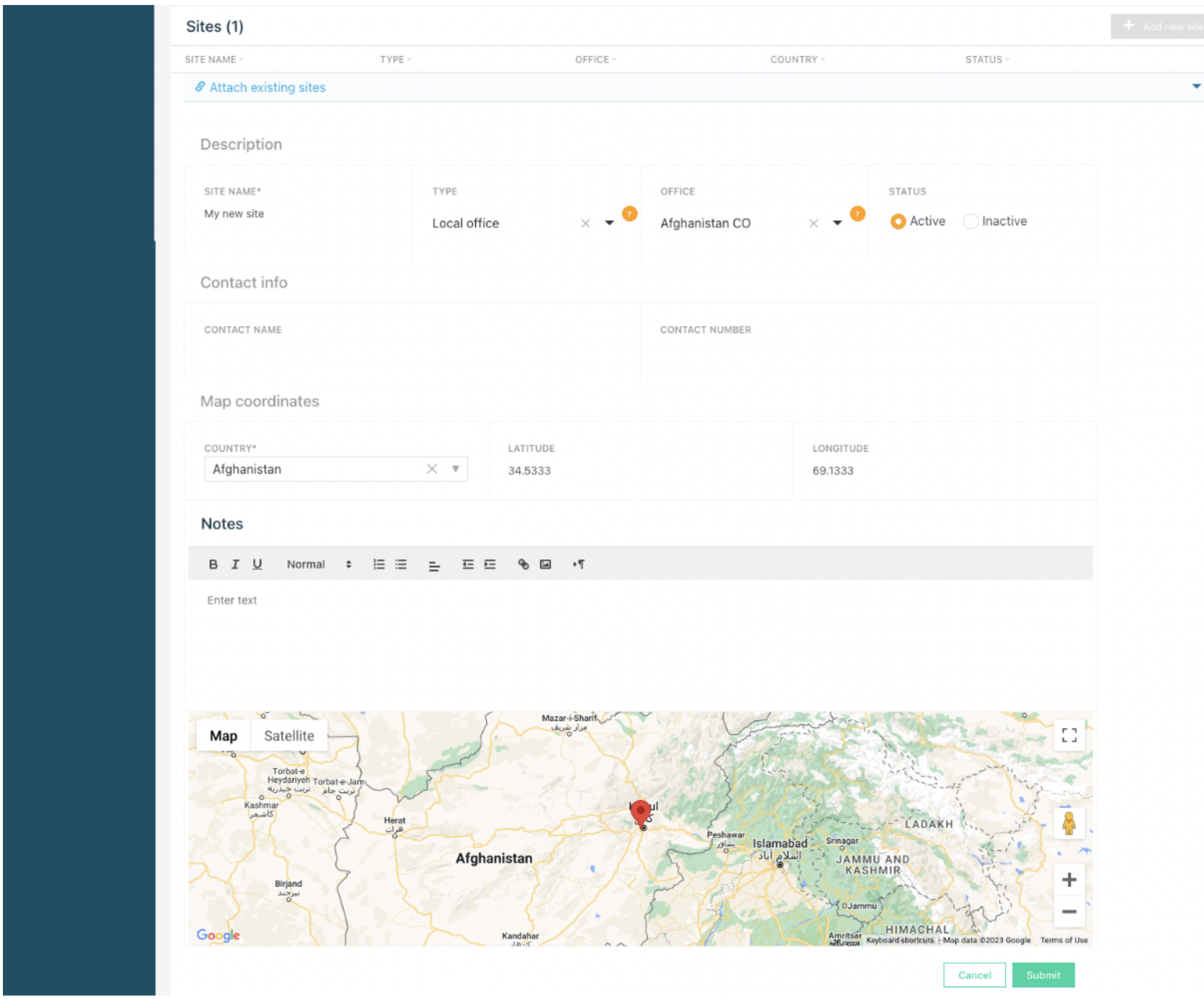
8.3. Once you have added the sites module, you can choose to add an existing site or create a new one.

8.4. To add an existing site, navigate to the 'add existing site" button and select the desired sites from the dropdown

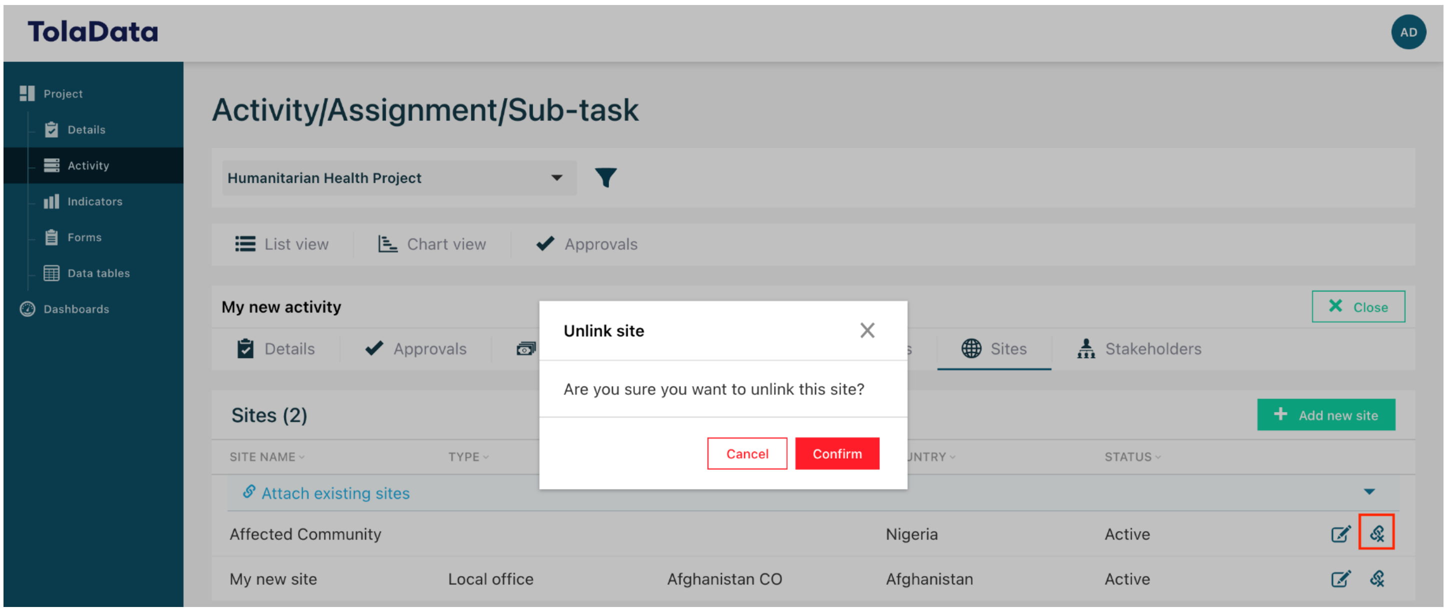


8.5. To add a new site, navigate to the green 'add sites' button and enter the name, role, type and country. Keep in mind the site type field is a configurable field set by the Org Admin of the account. If nothing appears in the dropdown, contact your Org Admin. If you are the Org Admin, you will can 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'.



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



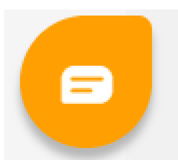
Exercise F.

- ☐ 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