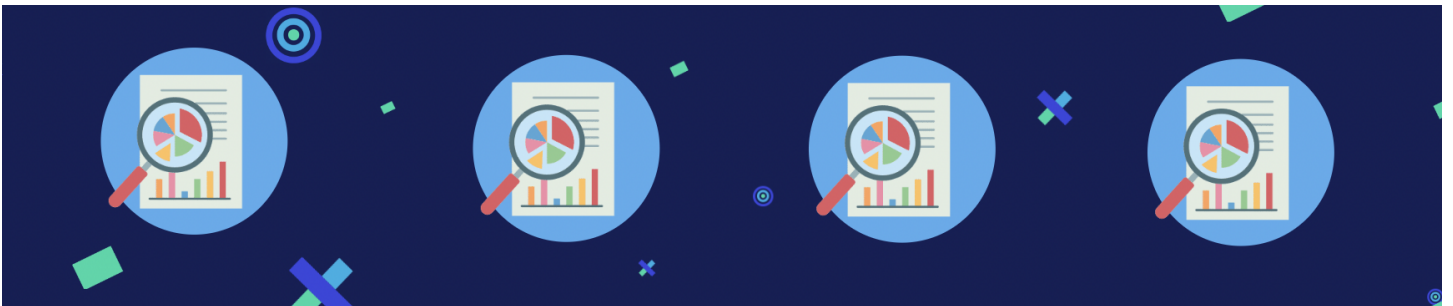


TolaData

USER GUIDE 4

Dashboard Guide

A large central panel with a dark blue background, decorated with scattered geometric shapes (squares, crosses, circles) in light blue and green. The text is centered and reads: "TolaData" in orange, "USER GUIDE 4" in large orange letters, and "Dashboard Guide" in white.

4. TolaData User Guide: Dashboard

Contents

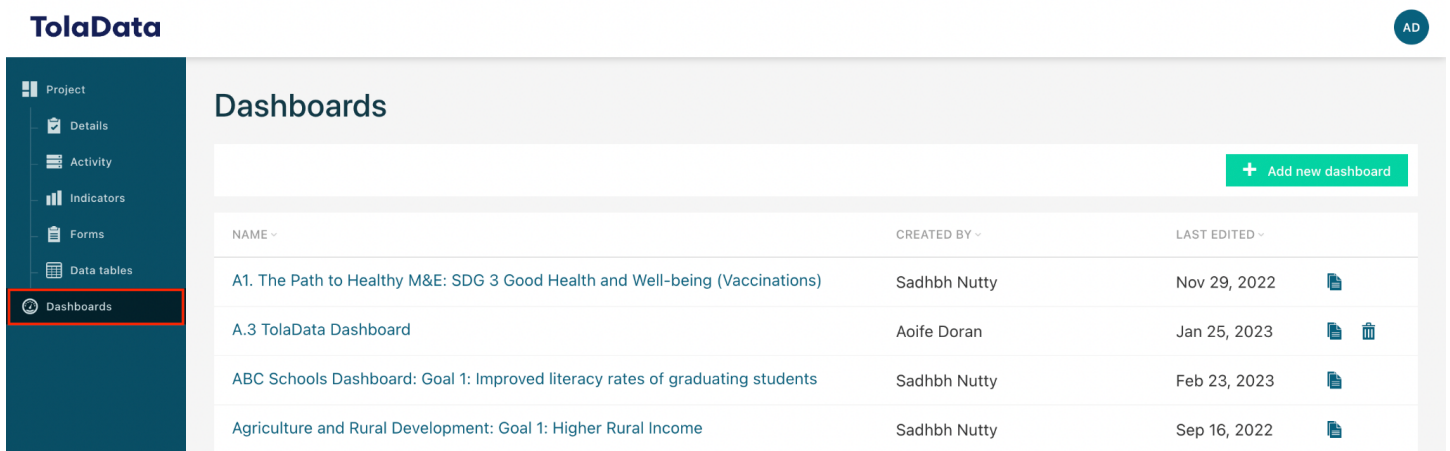
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The Dashboard Section

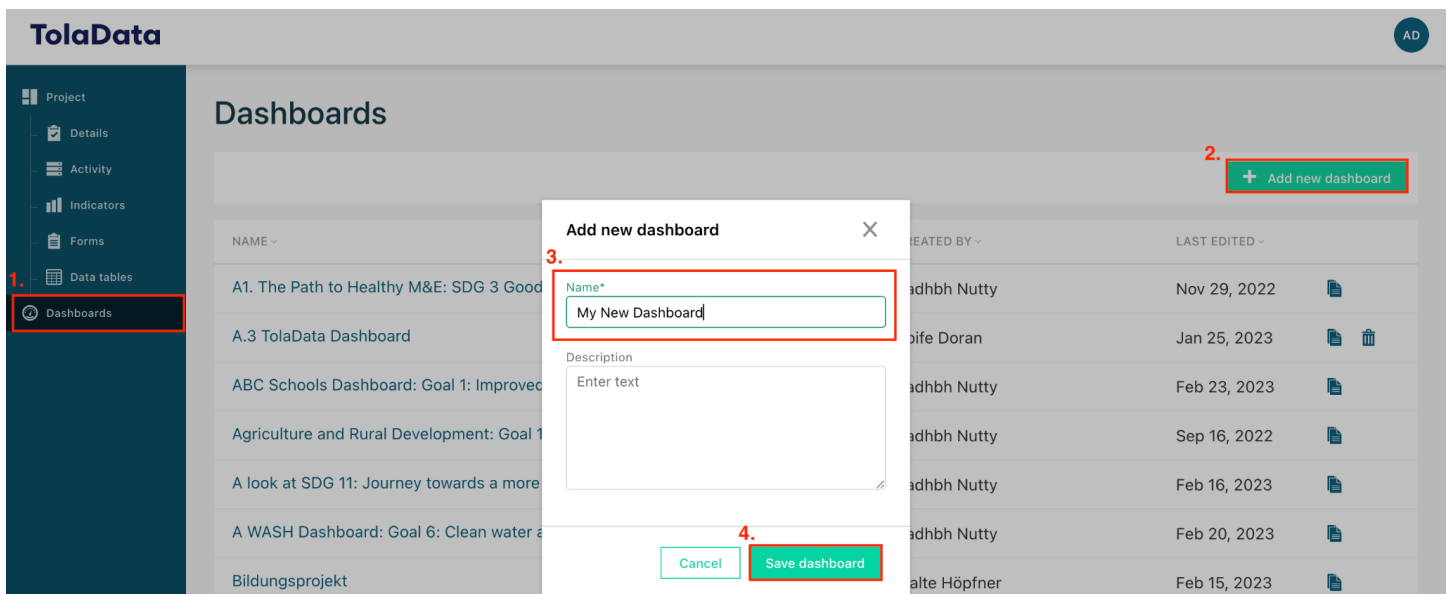
The dashboard section allows you to create a digital report of your projects and results. You can customise your dashboards by adding widgets that visualise your results in charts or graphs. You can also add text and images to provide narrative and context to your reports. Dashboards can be shared by the creator of the dashboard internally to team members or externally to stakeholders using a public URL link. Dashboards are fully customizable and automatically update with new data entered at an indicator level.

1. Creating a Dashboard

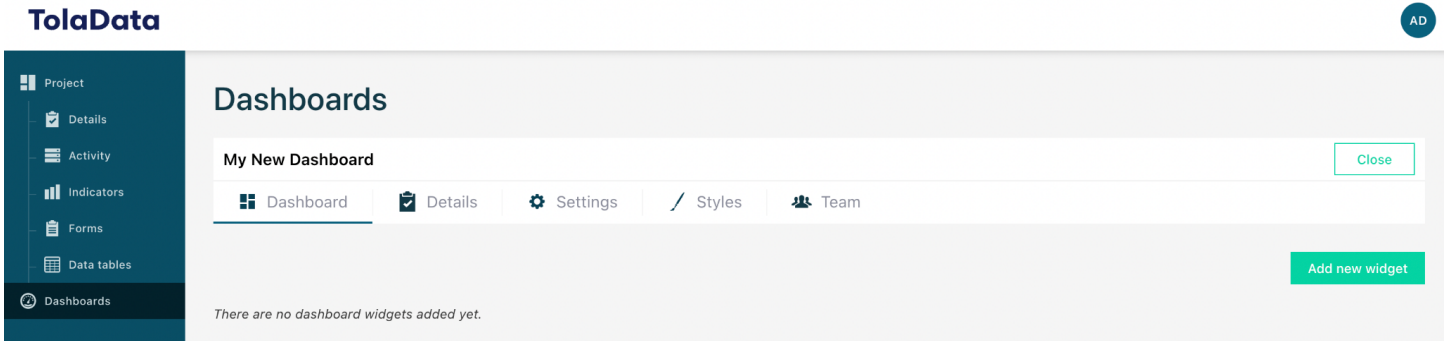
1.1. To create a new dashboard, firstly navigate to the 'Dashboard' section



1.2. Click 'Add new dashboard.' Enter a name and optional description, click 'Save dashboard.'



- 1.3. Your new Dashboard will automatically open, you can now begin building out your dashboard by adding widgets.



- 1.4. Check out these dashboards for inspiration:

1.4.1. Dashboard 1 -

<https://toladata.io/dashboards/public/75243513-3fbe-4fc6-b13a-33ce9b1498c1/1a2j-5e8a48ff20bed09402de>

1.4.2. Dashboard 2-

<https://toladata.io/dashboards/public/970385f0-ed71-4e2f-8d5e-476a92e9b758/1923-8601543998dcf1925b14>

1.4.3. Dashboard 3 -

<https://toladata.io/dashboards/public/1d42b495-f110-40b7-a4a9-e786d2f8fe15/1cx3-39558d48e3ab827a39ec>

1.4.4. Dashboard 4 -

<https://toladata.io/dashboards/public/3a6b838b-bd04-42dc-a44d-1928c76635f6/ws-u-719ef79110e3824dd3da>

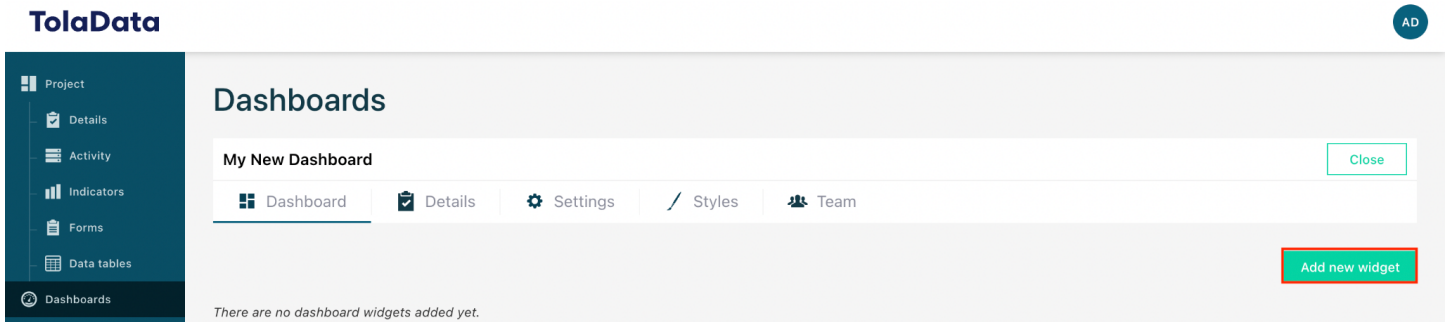


Exercise A.

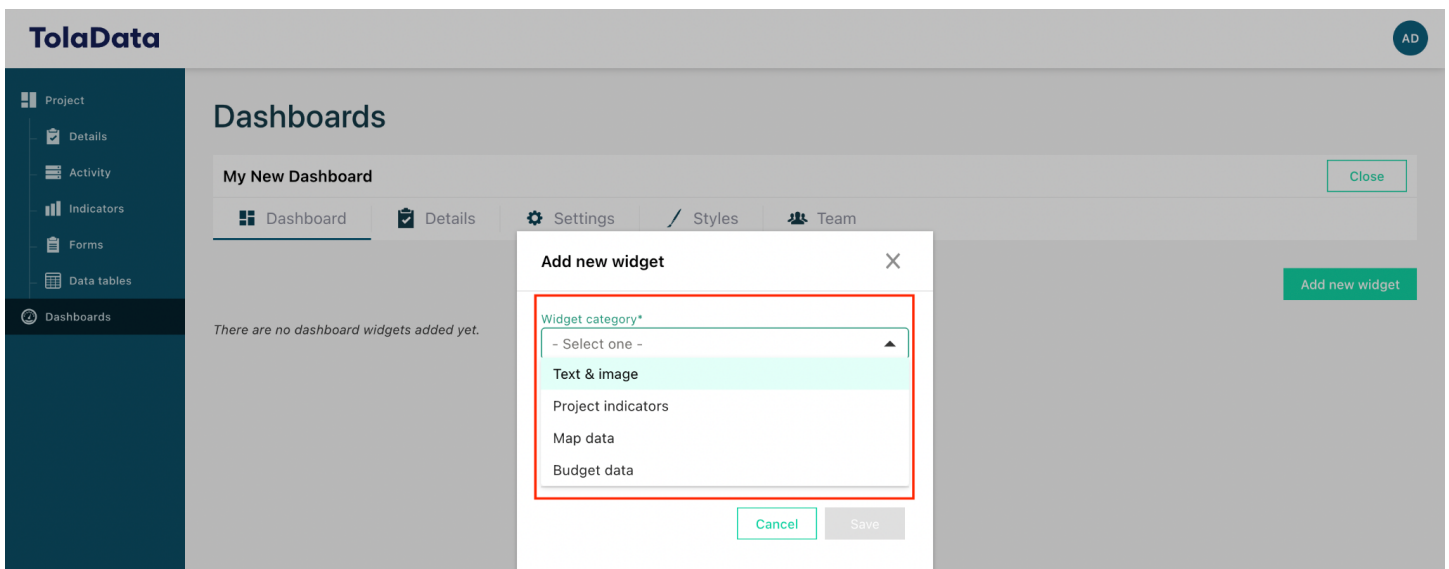
- Navigate to the dashboard section and create a new dashboard
- Give your dashboard a name
- Add a dashboard description

2. Adding Widgets to your Dashboard

2.1. To add a new widget, click '+ Add new widget' button in your dashboard.

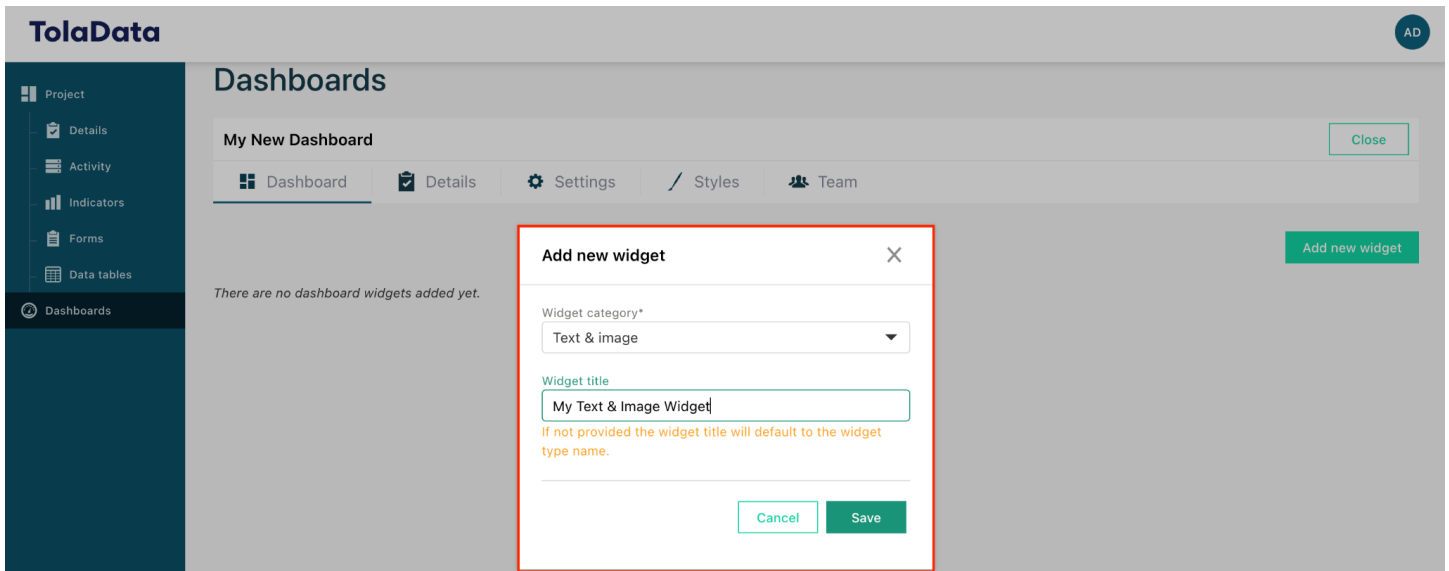


2.2. A widget pop-up window will appear where you can add a title for your widget and select the widget category. Choose from 'Text & Image', 'Project indicators', 'Map Data' or 'Budget data'. We will discuss each below.

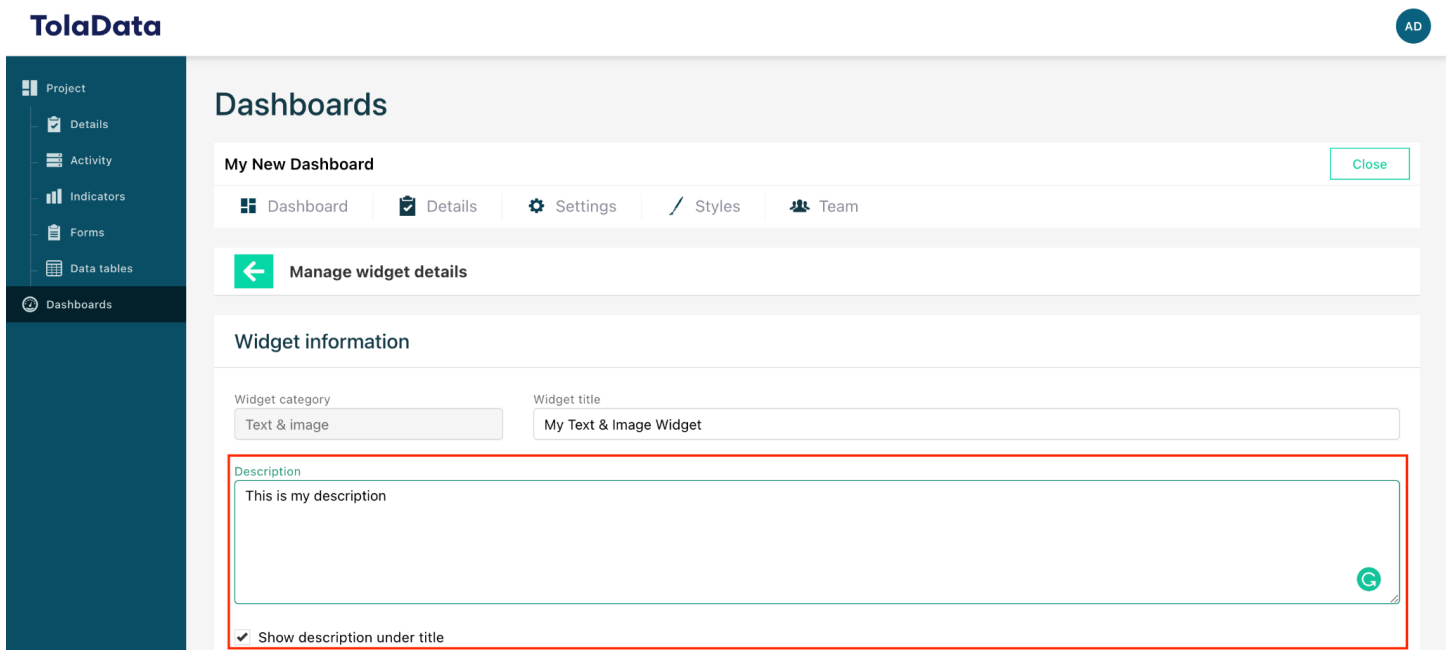


3. Text & image widget

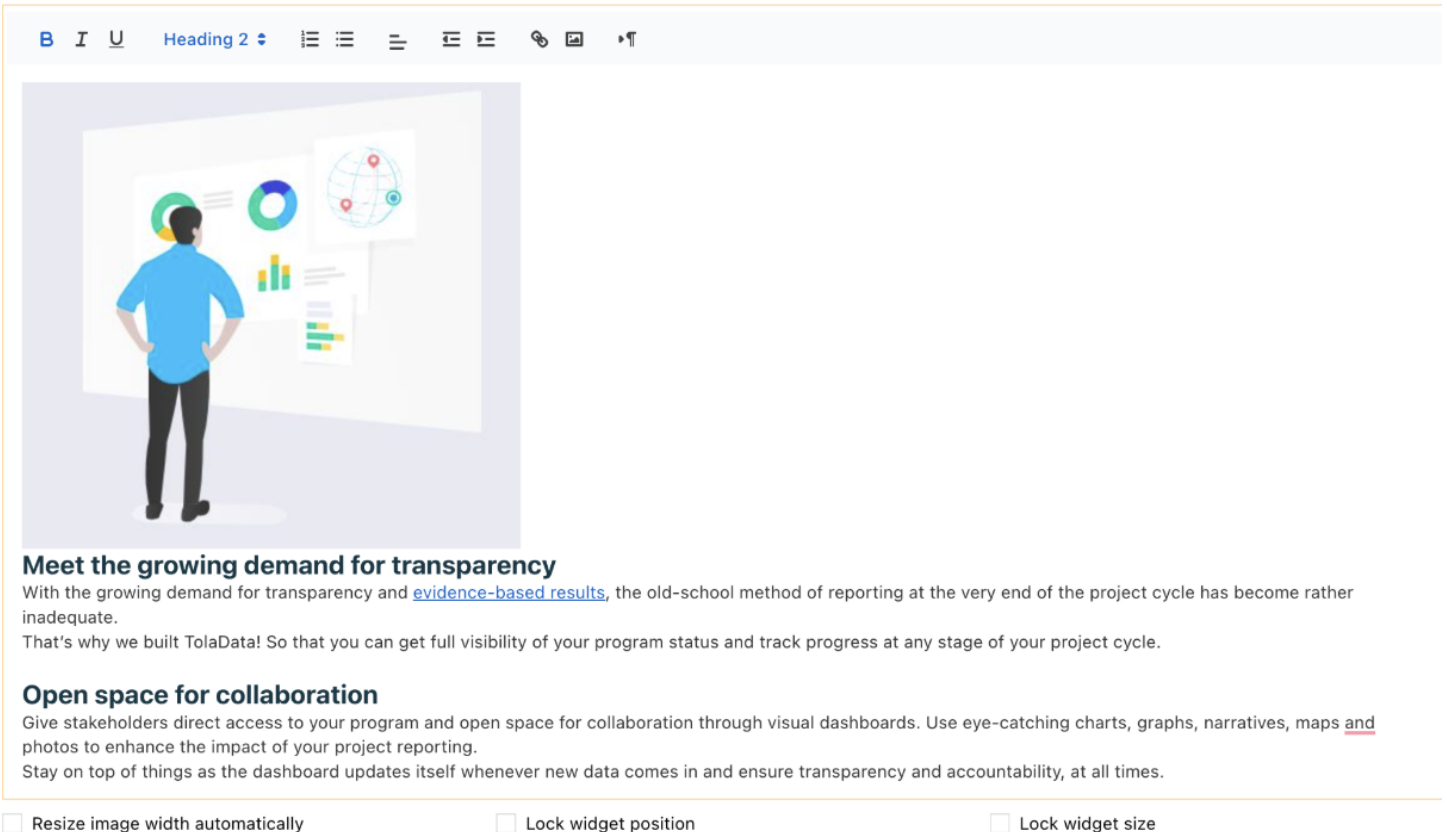
3.1. Select the 'Text & Image' option from the dropdown and add a widget title if you have one.



- 3.2.** Select 'save' and the 'Text & Image' widget will open. To begin you can add a description to your 'Text & Image' widget. Select the check box if you would like to display this description under the widget



- 3.3.** In the content section you can add text, images or URLs to the widget. Use this space to add additional information related to your reporting, organisation or project. You can also use 'Text & Image' widgets to contextualise your charts or to structure your Dashboard.



Meet the growing demand for transparency

With the growing demand for transparency and [evidence-based results](#), the old-school method of reporting at the very end of the project cycle has become rather inadequate.

That's why we built TolaData! So that you can get full visibility of your program status and track progress at any stage of your project cycle.

Open space for collaboration

Give stakeholders direct access to your program and open space for collaboration through visual dashboards. Use eye-catching charts, graphs, narratives, maps [and photos](#) to enhance the impact of your project reporting.

Stay on top of things as the dashboard updates itself whenever new data comes in and ensure transparency and accountability, at all times.

Resize image width automatically Lock widget position Lock widget size

- 3.4.** Once you have added all relevant information, select 'Save'. The widget will appear on your dashboard. You can move its position by dragging and dropping or resize it by pulling the corners.

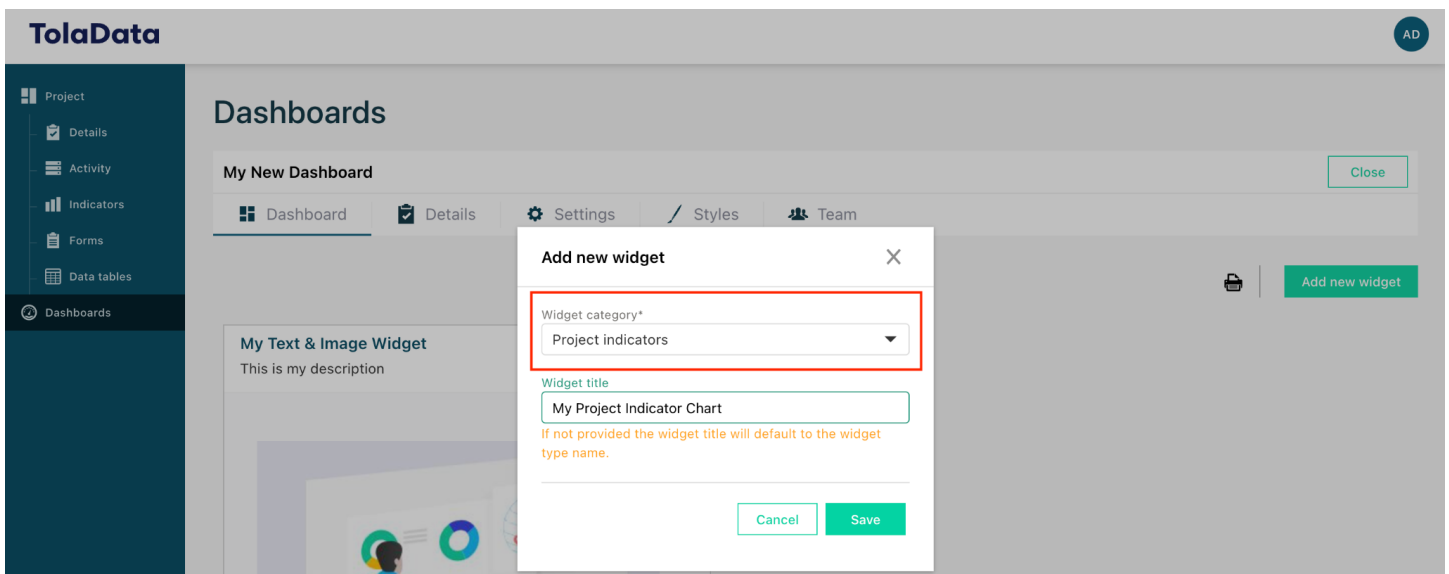
Exercise B.



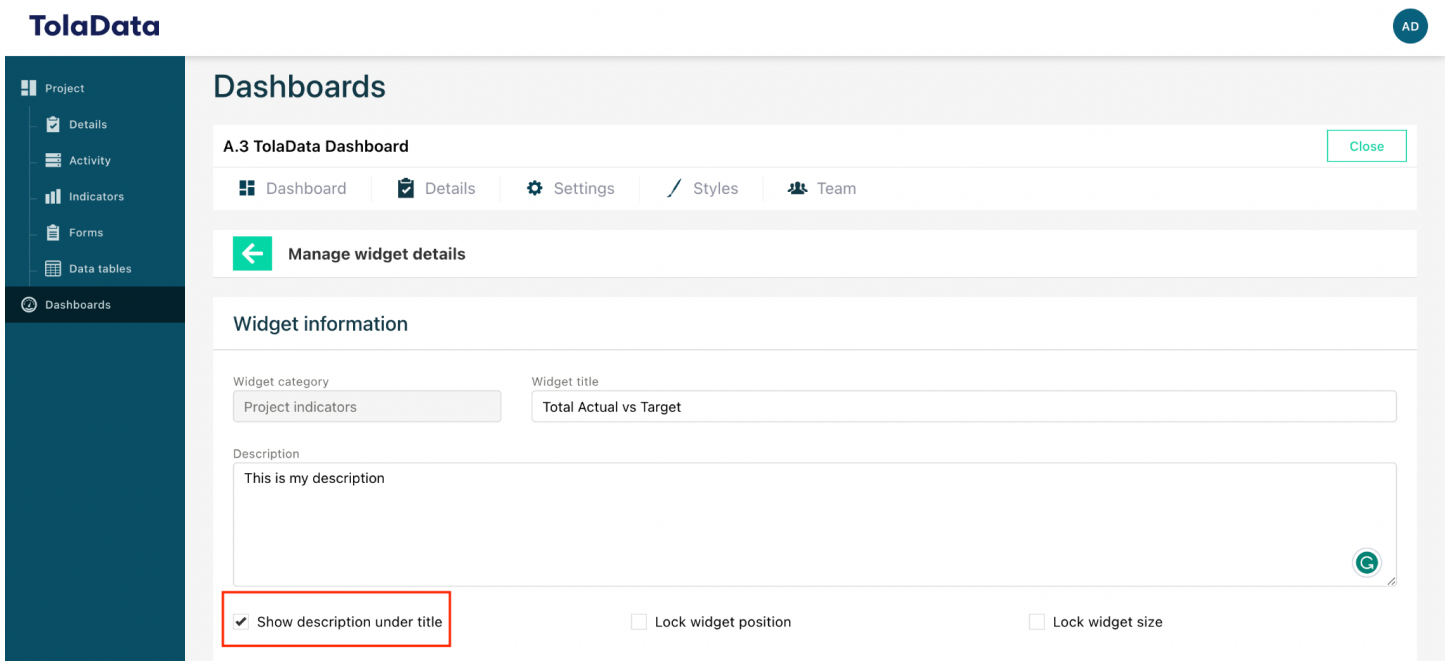
- Add a 'Text & Image' widget
- Add some text using different text formatting options
- Add an image and an URL

4. Project indicators

- 4.1. Select the 'Project Indicator' option from the dropdown and add a Widget Title if you have one.



- 4.2. Select 'save' and the 'Project Indicator' widget will open. To begin you can add a description to your widget. Select the check box if you would like to display this description under the widget title.



- 4.3.** Select the widget type in the chart and orientation section. There is a choice of 8 different chart types in the dropdown. For information on each project indicator widget type, consult the widget configuration guide:

<https://www.toladata.com/docs/knowledge-base/dashboards/configurable-widgets/>

Widget category: Project indicators

Widget title: My Project Indicator Chart

Description: Enter text

Show description under title

Lock widget position

Lock widget size

Charts & orientation

Widget Type*

- Actuals vs Targets: Overall target
- Actuals vs Targets: Periodic targets
- Time-based results: actuals by date collected
- Time-based results: actuals by period
- Time-based results: % achieved over time
- Disaggregated results

- 4.4.** Select the project and relevant indicators you want to include in the chart by 'Adding indicators to list'. You can repeat this, selecting different projects and their indicators to add to the chart.

- 4.5.** Below we will walk through some widget configuration options.

Charts & orientation

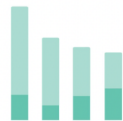
1.

Widget Type*
Actuals vs Targets: Overall target

Absolute value charts

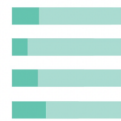


Stacked horizontal



Stacked vertical

% achieved charts



Stacked horizontal



Stacked vertical

Data source

2.

Select Project*
Humanitarian Health Project

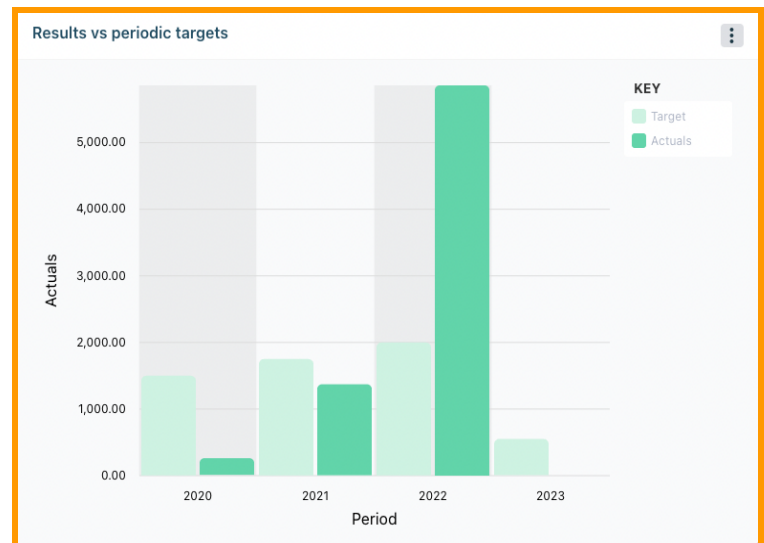
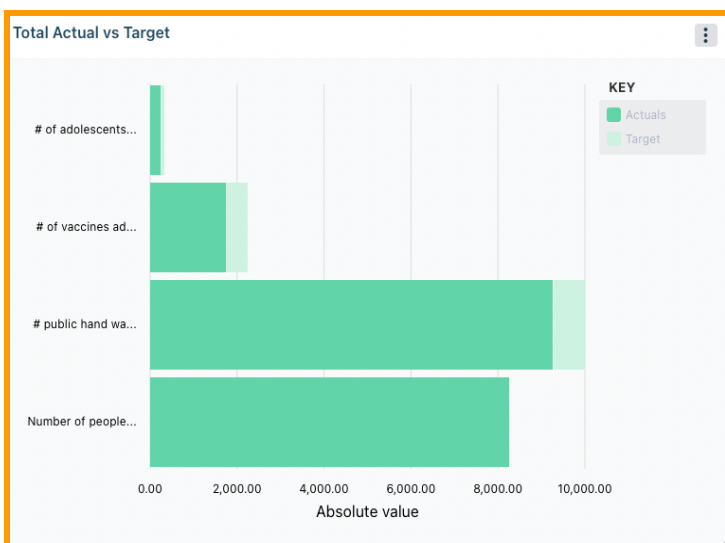
3.

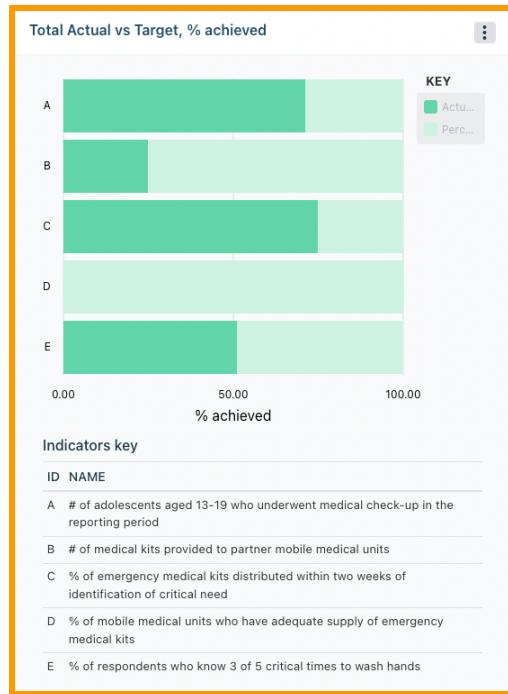
Select indicators to add to the widget

- # of hygiene training events held
- # of medical kits provided to partner mobile medical units
- # of members attending community health workshops

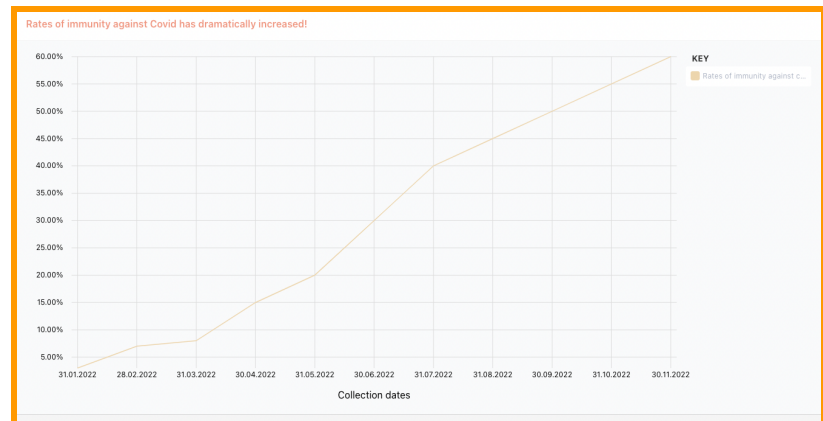
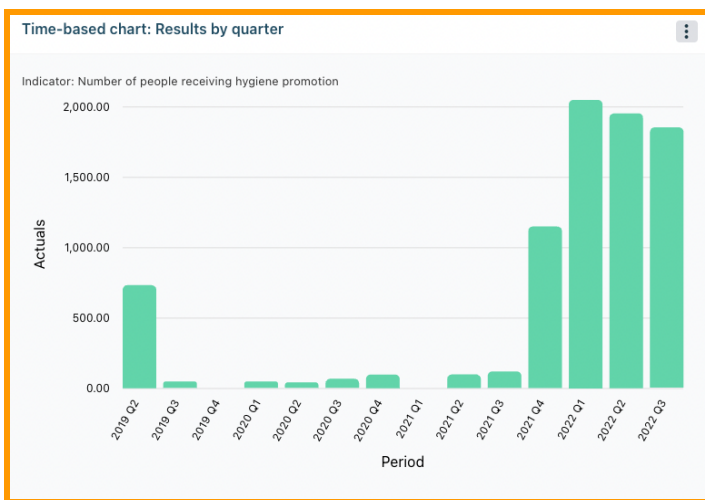
You can only select indicators of the same format (numeric) and direction (increasing).

4.5.1. Actuals vs Targets charts: Track your indicators reporting periods progress against target values using the 'Actual vs Targets' chart. Indicators actuals can be compared to targets in horizontal or vertical charts as absolute values or percentage achieved values. Periodic targets can also be analysed in a grouped stacked bar chart.

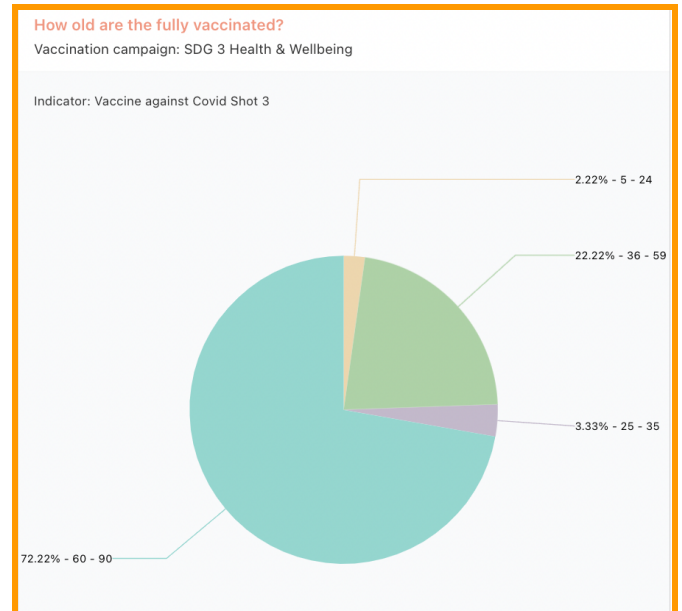
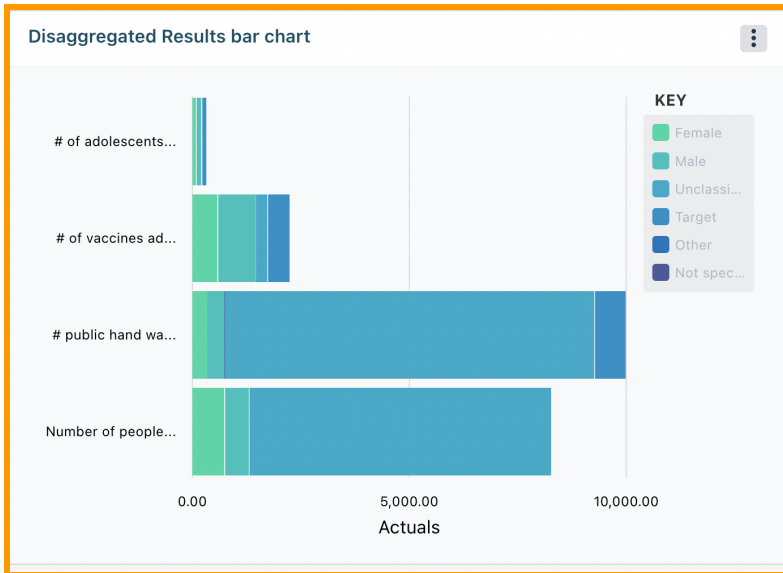




4.5.2. Time based results: Analyse your actuals by time frame. You can analyse results by date collected and display a cumulative or non-cumulative chart. Actuals can also be displayed as a stacked bar chart by reporting period. Track percentage achieved over time through a line chart.



4.5.3. Disaggregated results: View your disaggregated results as stacked or grouped bar charts. You can also present disaggregations as a percentage of total actuals in a pie chart.



4.5.4. Status of selected indicators: Indicators which have a status assigned to them can be displayed in this widget.

Indicator status
Humanitarian Health Project

INDICATOR NAME	INDICATOR STATUS	PROJECT
% of injured community members who make full recovery	On track	Humanitarian Health Project
Comprehensive beneficiary feedback system in place	Partially achieved	Humanitarian Health Project
Reduced occurrence of preventable diseases among affected communities	On track	Humanitarian Health Project



Exercise C.

- Add one 'Actuals vs Target' chart
- Add one 'Time based result' chart
- Add one 'Disaggregated result'

Note that the ability to create each chart is dependent on the data entered in the indicators section.

5. Map Data

- 5.1. Display sites related to your projects on a map using the map data widget. To add a site to the Dashboard, ensure it has been created at the project details level. To add map data select the 'Map Data' option from the dropdown and add a Widget Title if you have one.

The screenshot shows the TolaData dashboard interface. A modal dialog titled "Add new widget" is open in the center. The dialog contains a "Widget category*" dropdown menu with "Map data" selected, a "Widget title" input field with "Title" entered, and "Cancel" and "Save" buttons. The background shows the dashboard with a sidebar on the left and a main content area with a "Close" button and an "Add new widget" button.

- 5.2. Select the project from which you want to display the map data from the drop down.
- 5.3. You can also select to display the project name under the title of your widget.

Data source

Select Project*
Humanitarian Health Project

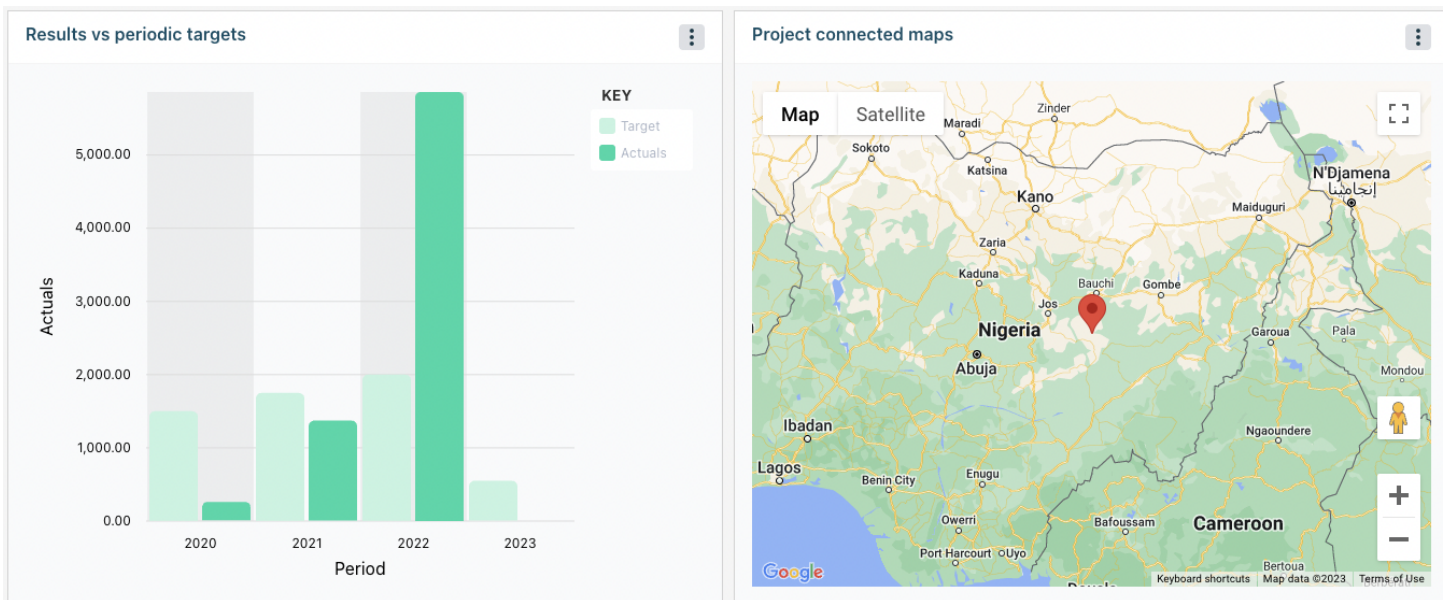
Map preview

Map Satellite

Map showing Nigeria and surrounding regions (Cameroon, Chad) with a red pin on Bauchi.

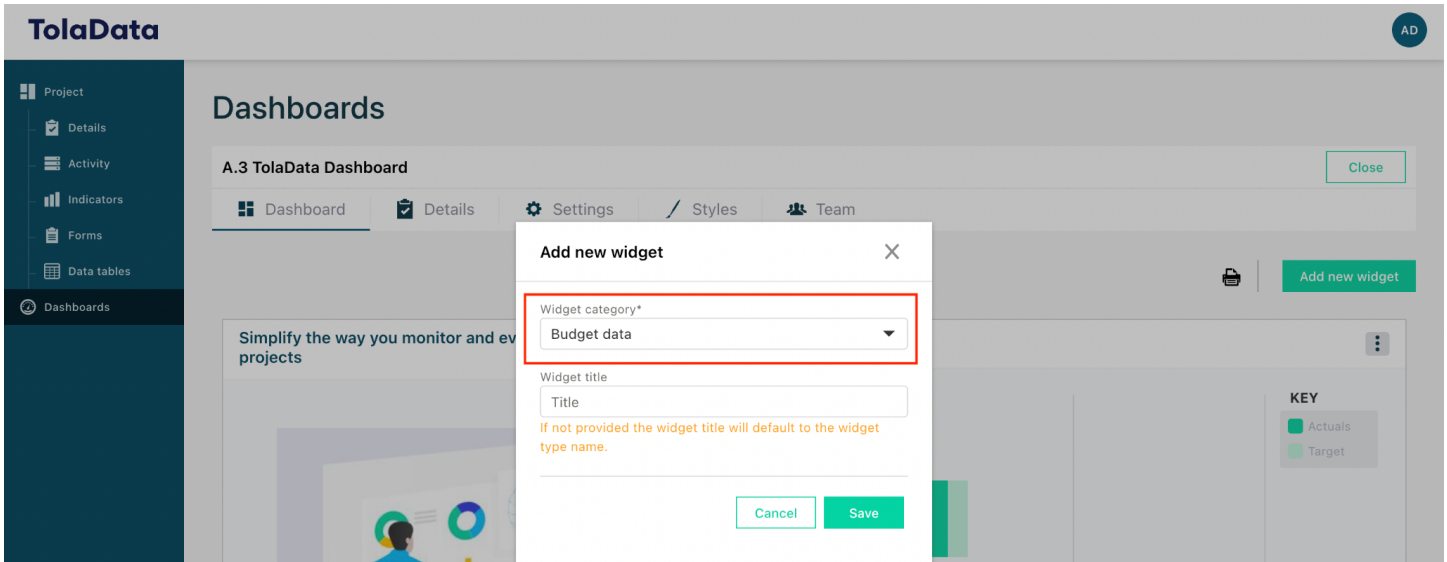
Show Project under title

5.4. Select 'Save' and your map data will appear on your dashboard.

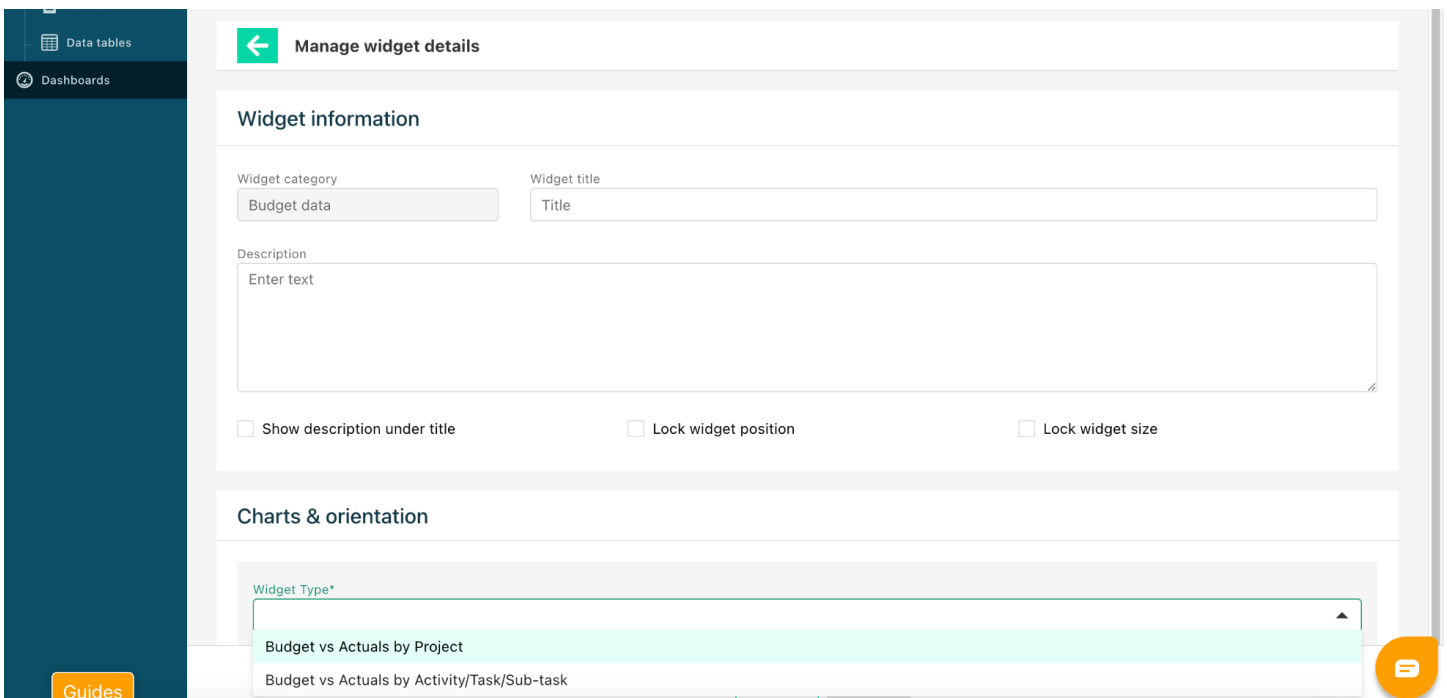


5.5. Budget data

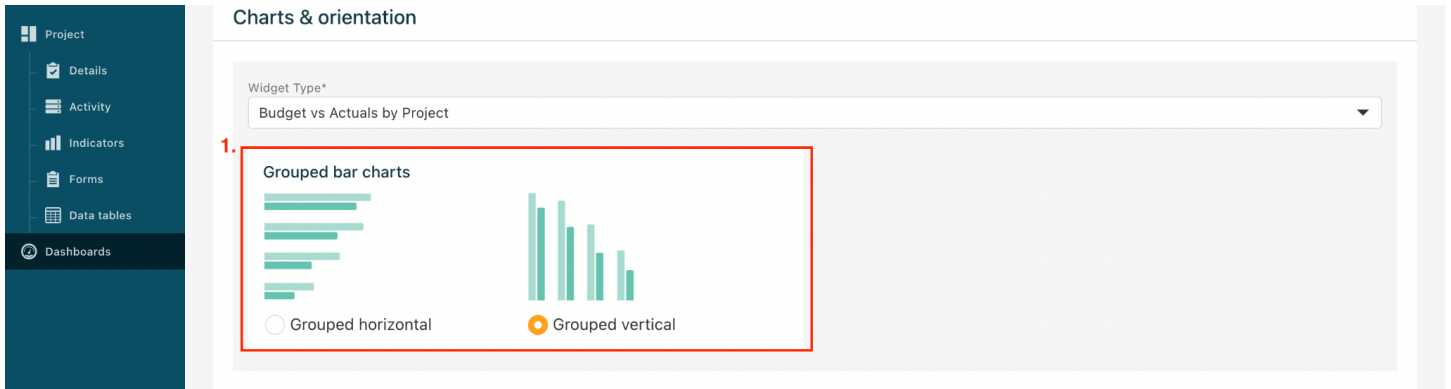
- 5.5.1. Budget data widgets allow data entered at the activity level to be viewed in the budget dashboards. To add budget data select the 'Budget data' option from the dropdown and add a Widget Title if you have one.



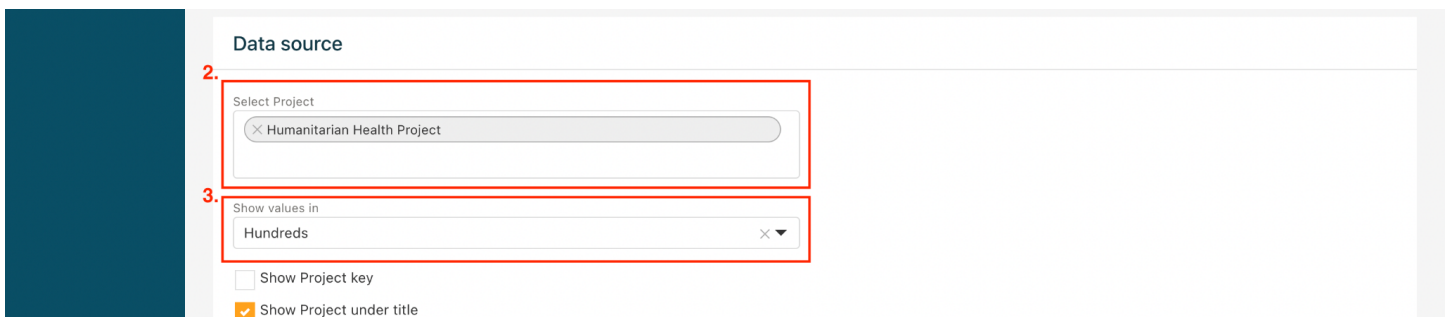
- 5.5.2. Select the chart type under 'Charts and Orientation'. Here you can choose the 'Budget vs Actuals' comparing whole projects or by selecting individual Activities/ Task/ Sub-tasks.



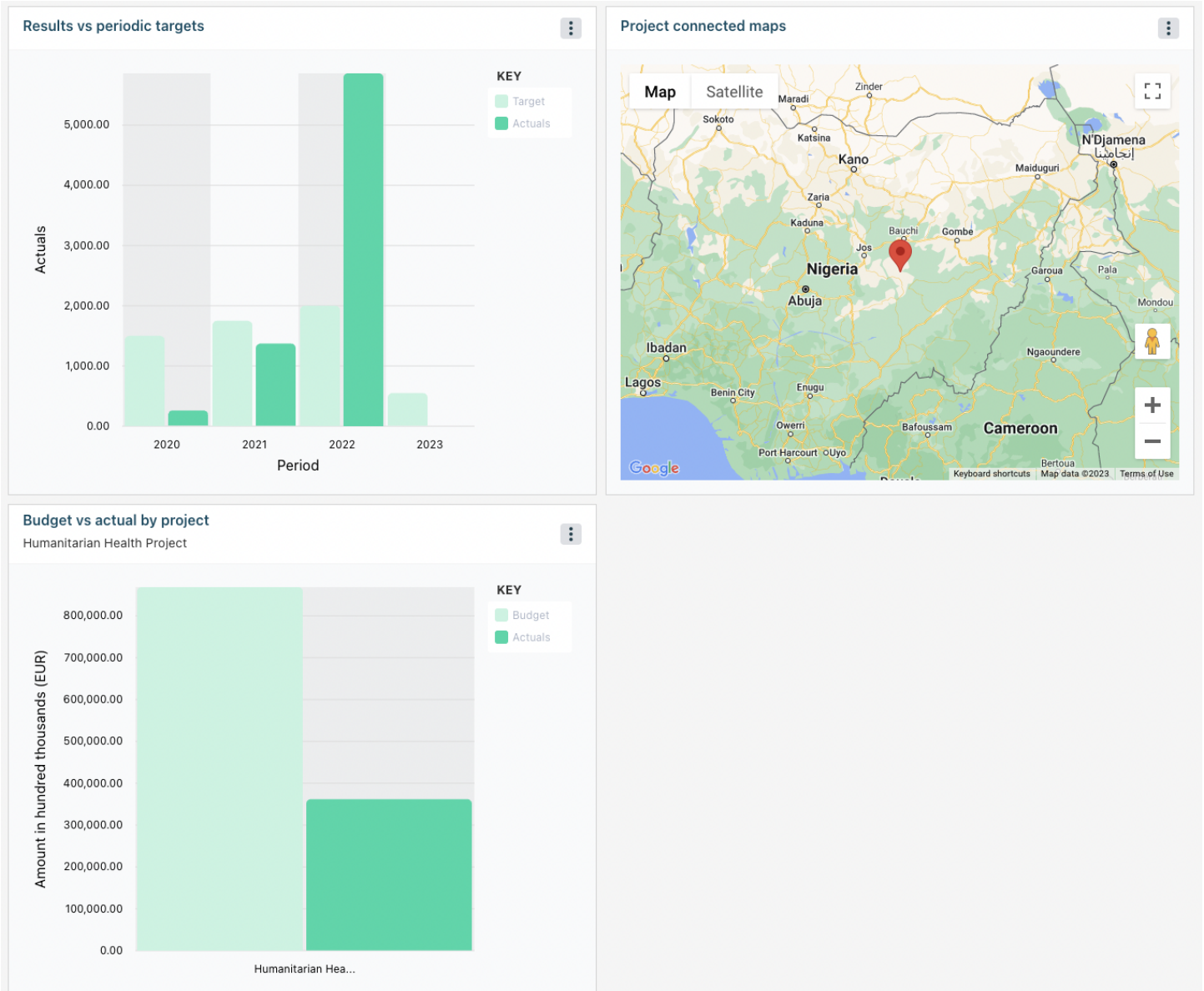
5.5.3. Next, choose between a grouped horizontal or vertical chart type.



5.5.4. Select the Project or Activity you would like to view the budget data from. In the dropdown, select if you want to display these values in hundreds, thousands, hundred thousands or millions. You can also select to show the project or activity key as well as add the project name under the title.



5.5.5. Select 'Save' and your budget data will appear on your dashboard.



Exercise D.

- Add a map data widget to your dashboard.
- Add a budget data widget to your dashboard.

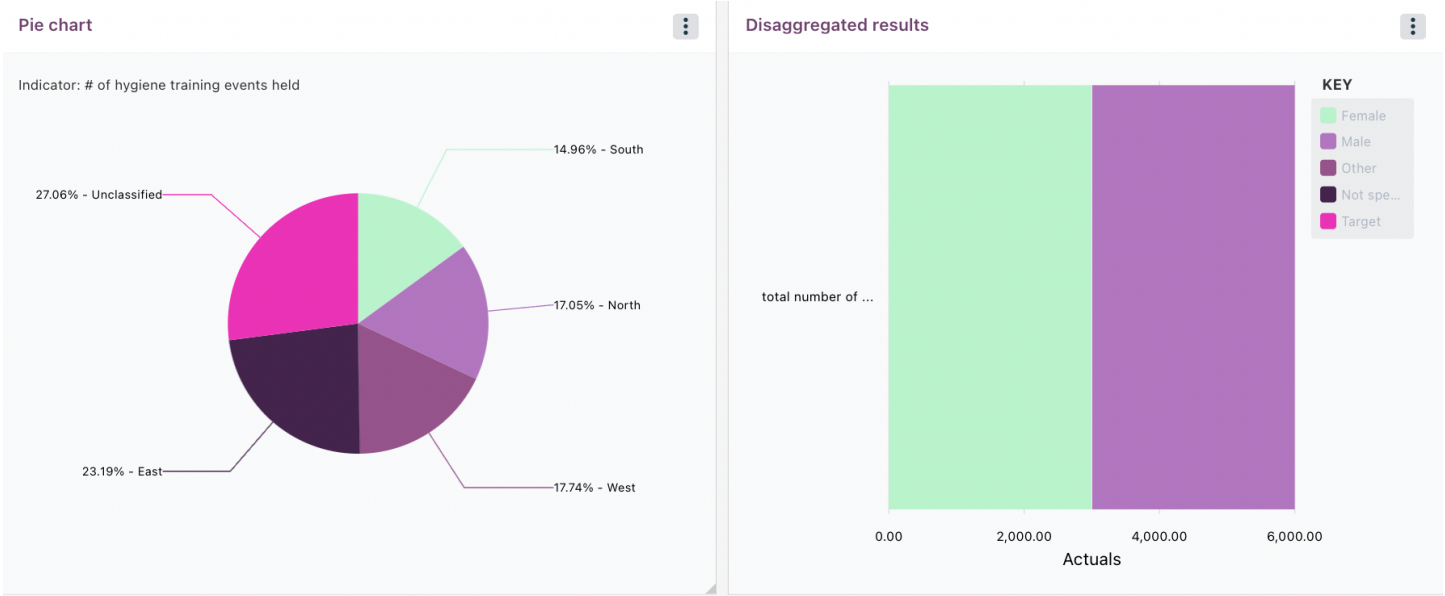
6. Changing the Colour of your Dashboard

- 6.1. Custom colour styles must first be created through the Admin console by an Org Admin. To create the custom colour style check the Org Admin guide.
- 6.2. 'Dashboard Admins' and 'Edit Access' users can apply these to individual dashboards. To do this click on the Styles tab within your dashboard, selecting your desired style and clicking save.

The screenshot shows the TolaData interface. On the left is a dark blue sidebar with navigation options: Project, Details, Activity, Indicators, Forms, Data tables, and Dashboards (highlighted with a red box). The main content area is titled 'Dashboards' and shows a configuration for 'My new dashboard'. At the top right of this section is a 'Close' button. Below the title is a navigation bar with tabs: Dashboard, Details, Settings, Styles (highlighted with a red box), and Team. Under the 'Styles' tab, there is a dropdown menu labeled 'Name of custom colour scheme' with the selected value 'My New Colour Package'. Below this is a table of color settings:

Name	Colour
Widget title colour	#764172
Actuals main colour	#f07fd2
Targets main colour	#f399ff
For multi-colour graphs	
Colour 1	#a8f5c9
Colour 2	#bb73c4
Colour 3	#9f508e

- 6.3. Once applied, the dashboard will update with the newly configured custom colours.



7. Sharing Dashboard

- 7.1.** To share your dashboard click the tab 'Settings' tab located in the top bar of your dashboards.

TolaData
AD

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

Dashboards

My New Dashboard Close

Dashboard
Details
Settings
Styles
Team

My Text & Image Widget

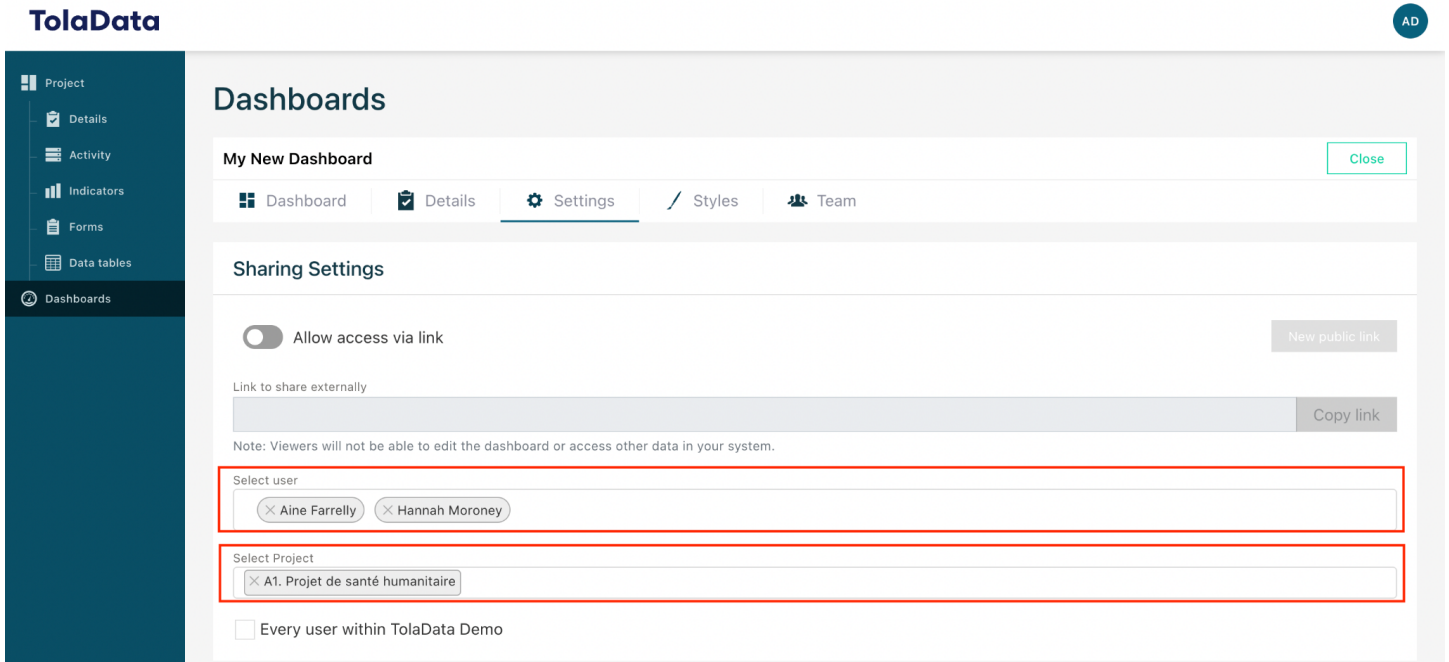
This is my description

Indicator status

Humanitarian Health Project

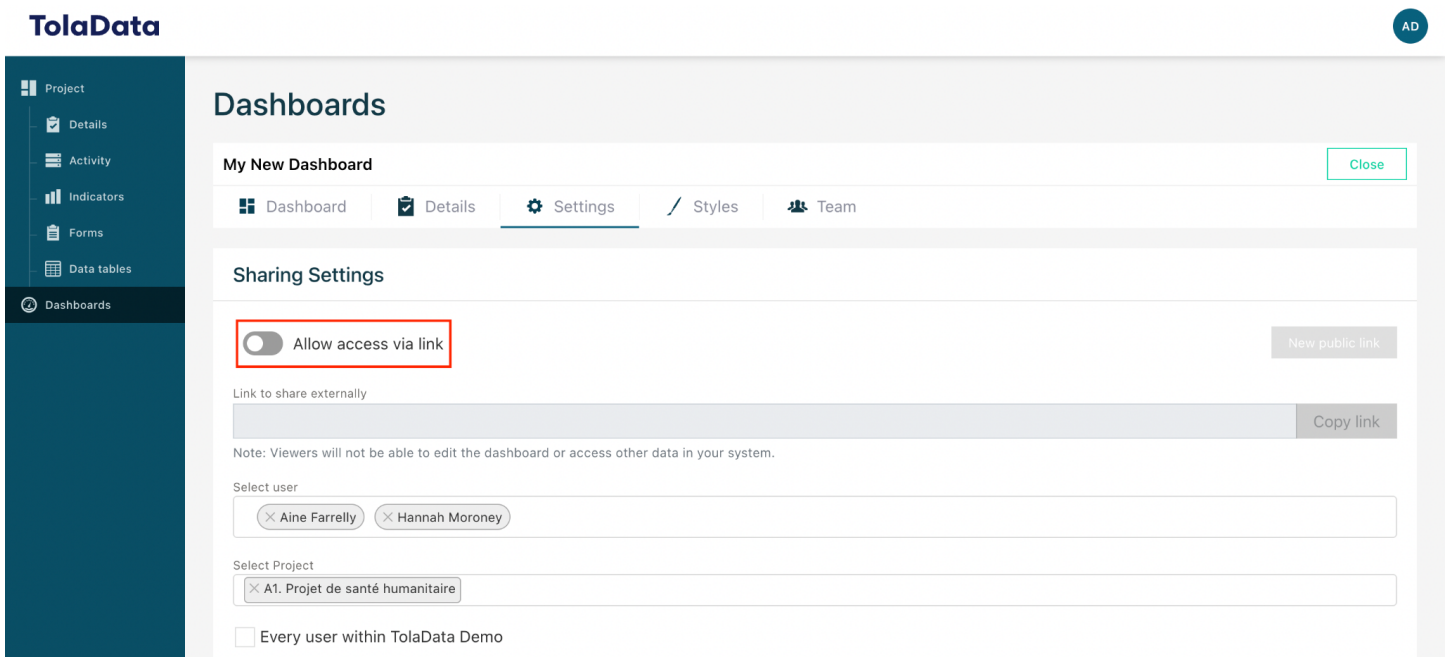
INDICATOR NAME	INDICATOR STATUS	PROJECT
% of injured community members who make full recovery	On track	Humanitarian Health Project

- 7.1.1. Internal sharing:** To share a Dashboard with other TolaData users, or with entire project teams, select the individual users or the project name from the dropdown menu.



The screenshot shows the 'Dashboards' settings page for 'My New Dashboard'. The 'Sharing Settings' section is active, and the 'Allow access via link' toggle is turned off. Below this, there are two dropdown menus: 'Select user' with 'Aine Farrelly' and 'Hannah Moroney' selected, and 'Select Project' with 'A1. Projet de santé humanitaire' selected. A 'New public link' button is visible to the right. The interface includes a sidebar with navigation options like Project, Details, Activity, Indicators, Forms, Data tables, and Dashboards. A 'Close' button is in the top right corner.

- 7.1.2. External sharing:** The dashboards can be shared externally by sending a public URL link. This link can be accessed by the recipient without a TolaData user account. To share a Dashboard via URL first turn on allow link sharing by selecting the toggle.



This screenshot is identical to the previous one, but the 'Allow access via link' toggle is now turned on, highlighted with a red box. The 'New public link' button is now active and greyed out. The rest of the interface, including the sidebar and dropdown menus, remains the same.

- 7.1.3. Once switched on, you will see an unique unguessable URL. You can easily share the link by clicking 'Copy link' and then emailing it to stakeholders or embedding it in another website to make the dashboard visible publicly.

- 7.1.4. People who have the public URL can see the latest results and all data on the dashboard but cannot edit it or access any other parts of TolaData.

INDICATOR NAME	INDICATOR STATUS
SDG 11.2.1-Proportion of population that has convenient access to public transport, by sex, age and persons with disabilities	On track



Exercise E.

- Share your dashboard with a project team.
- Create a public URL for your dashboard and open it in a new tab.

8. Adding Team Members to a Dashboard

8.1. Dashboard Admins have the ability to add users to the dashboard and set their permissions to allow them to edit and contribute to the dashboard. This is done in the 'Team' tab.

The screenshot shows the TolaData dashboard interface. On the left is a dark blue sidebar with navigation options: Project, Details, Activity, Indicators, Forms, Data tables, and Dashboards. The main content area is titled 'Dashboards' and shows a dashboard named 'My New Dashboard'. At the top of this dashboard are tabs for 'Dashboard', 'Details', 'Settings', 'Styles', and 'Team'. The 'Team' tab is highlighted with a red box. Below the tabs, there are two widget areas. The left one is titled 'My Text & Image Widget' and contains a description and a placeholder image. The right one is titled 'Indicator status' and contains a table for 'Humanitarian Health Project'.

INDICATOR NAME	INDICATOR STATUS	PROJECT
% of injured community members who make full recovery	On track	Humanitarian Health Project

8.2. Once in the Teams tab, the Dashboard Admin can add other team members from their TolaData account to their dashboard and grant them either 'Dashboard Admin' or 'Edit Access'. Users with 'Dashboard Admin' status can add and change permissions of other users by clicking into the 'Team' tab within the Dashboard. The admin can also change their own permission, limiting their own powers. 'Edit Access' users can edit the dashboard but cannot change the permissions

Dashboards

My New Dashboard Close

Dashboard Details Settings Styles **1. Team**

Team members (3)

2. MEMBER NAME ~ ROLE ~

2. + Add existing team member

MEMBER NAME ~	ROLE ~
Aoife Ann Doran	Dashboard Admin
Aine Farrelly	Edit Access
Hannah Moroney	Edit Access

3. Edit Access
Dashboard Admin
Edit Access



Exercise F.

- Add a team member to your dashboard
- Grant them 'Dashboard Admin' access.

9. Deleting a Dashboard

9.1. A dashboard can only be deleted by a member of an organisation who is a 'Dashboard Admin'. To delete a dashboard, select the trashcan icon.

Dashboards

+ Add new dashboard

NAME ~	CREATED BY ~	LAST EDITED ~	
Example Dashboard	Aine Farrelly	Mar 20, 2023	Delete
My New Dashboard	Aoife Doran	Mar 17, 2023	Delete

- 9.2. If no trash can icon is available, it is because you do not have permission to delete the dashboard and must ask the 'Dashboard Admin' to delete it.

The screenshot shows the TolaData interface with a sidebar on the left containing 'Project', 'Details', 'Activity', 'Indicators', 'Forms', 'Data tables', and 'Dashboards'. The main area is titled 'Dashboards' and features a '+ Add new dashboard' button. Below is a table with columns for NAME, CREATED BY, and LAST EDITED. The table contains two rows: 'Example Dashboard' created by Aine Farrelly on Mar 20, 2023, and 'A1. The Path to Healthy M&E: SDG 3 Good Health and Well-being (Vaccinations)' created by Sadhbh Nutty on Mar 16, 2023. The trash can icon in the second row is highlighted with a red box.

NAME	CREATED BY	LAST EDITED	
Example Dashboard	Aine Farrelly	Mar 20, 2023	
A1. The Path to Healthy M&E: SDG 3 Good Health and Well-being (Vaccinations)	Sadhbh Nutty	Mar 16, 2023	

- 9.3. A pop up will appear asking you to confirm the deletion

The screenshot shows the same TolaData interface as before, but with a confirmation dialog box overlaid in the center. The dialog box is titled 'Delete dashboard' and contains the text 'Are you sure you want to delete Example Dashboard?'. At the bottom of the dialog box are two buttons: 'Close' and 'Confirm'.

- 9.4. Once confirmed the dashboard will be deleted.

