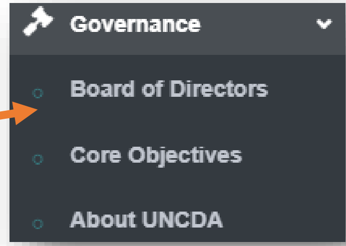
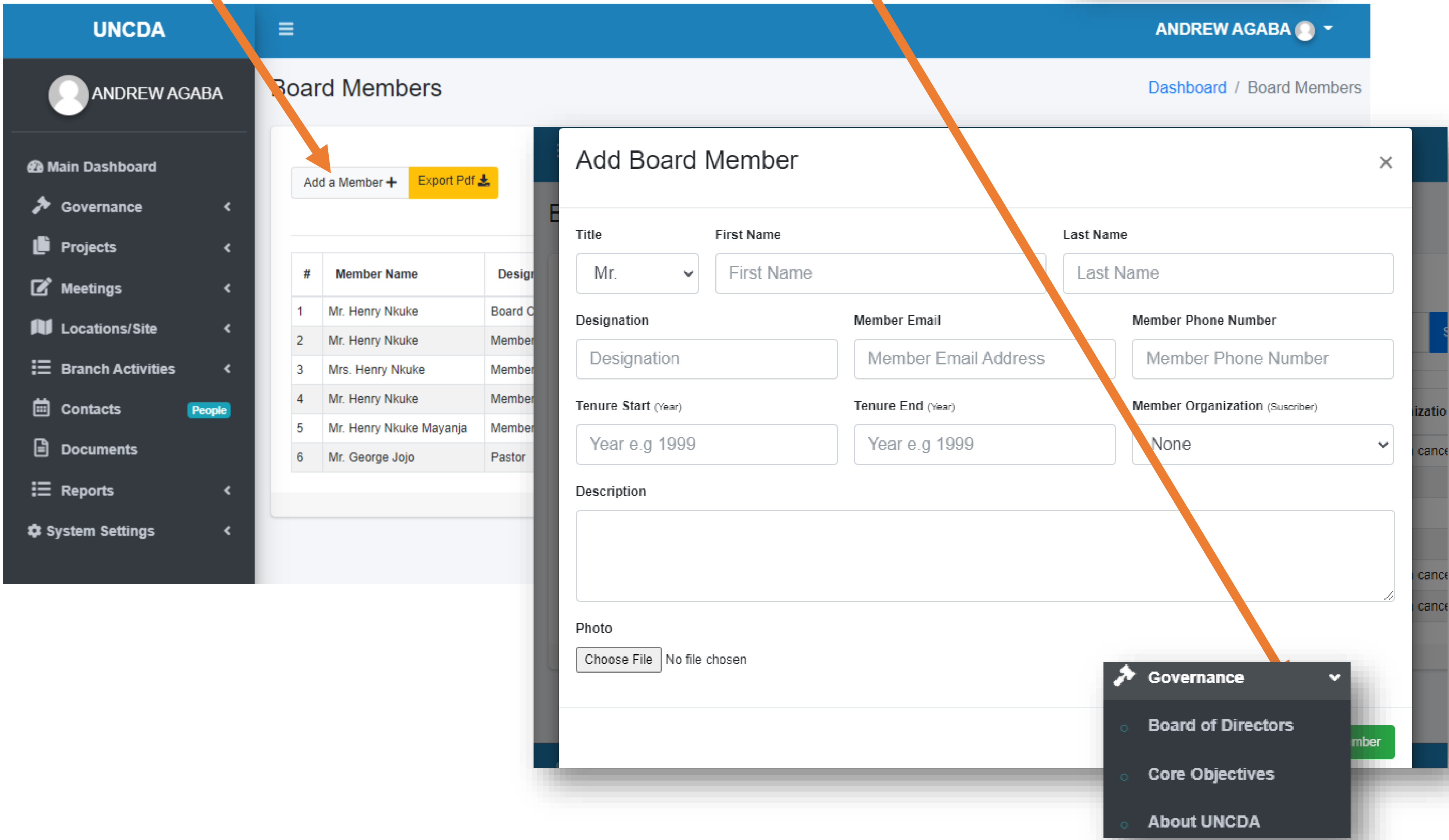
UNCDA internal system user guide



1. Adding Board Members

To add/register board members,

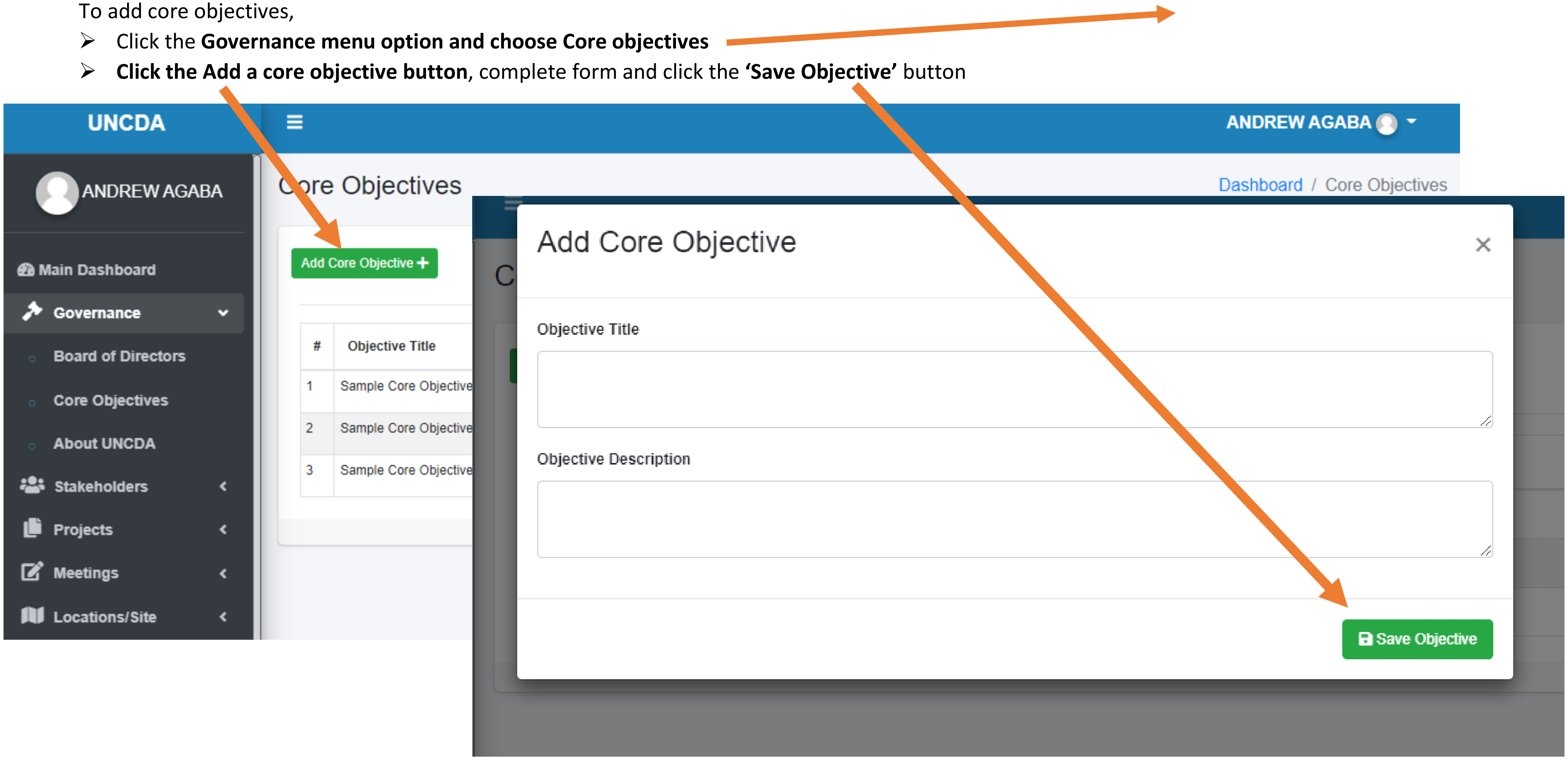
- Click the **Governance menu option and choose Board members**
- **Click the Add a member button** and complete the members' form and click the **'Save Member'** button



2. Adding Core Objectives

To add core objectives,

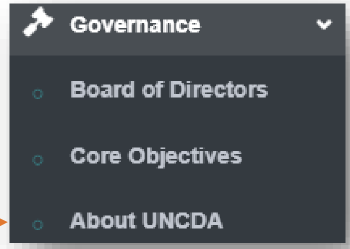
- Click the **Governance menu option and choose Core objectives**
- **Click the Add a core objective button**, complete form and click the **'Save Objective'** button

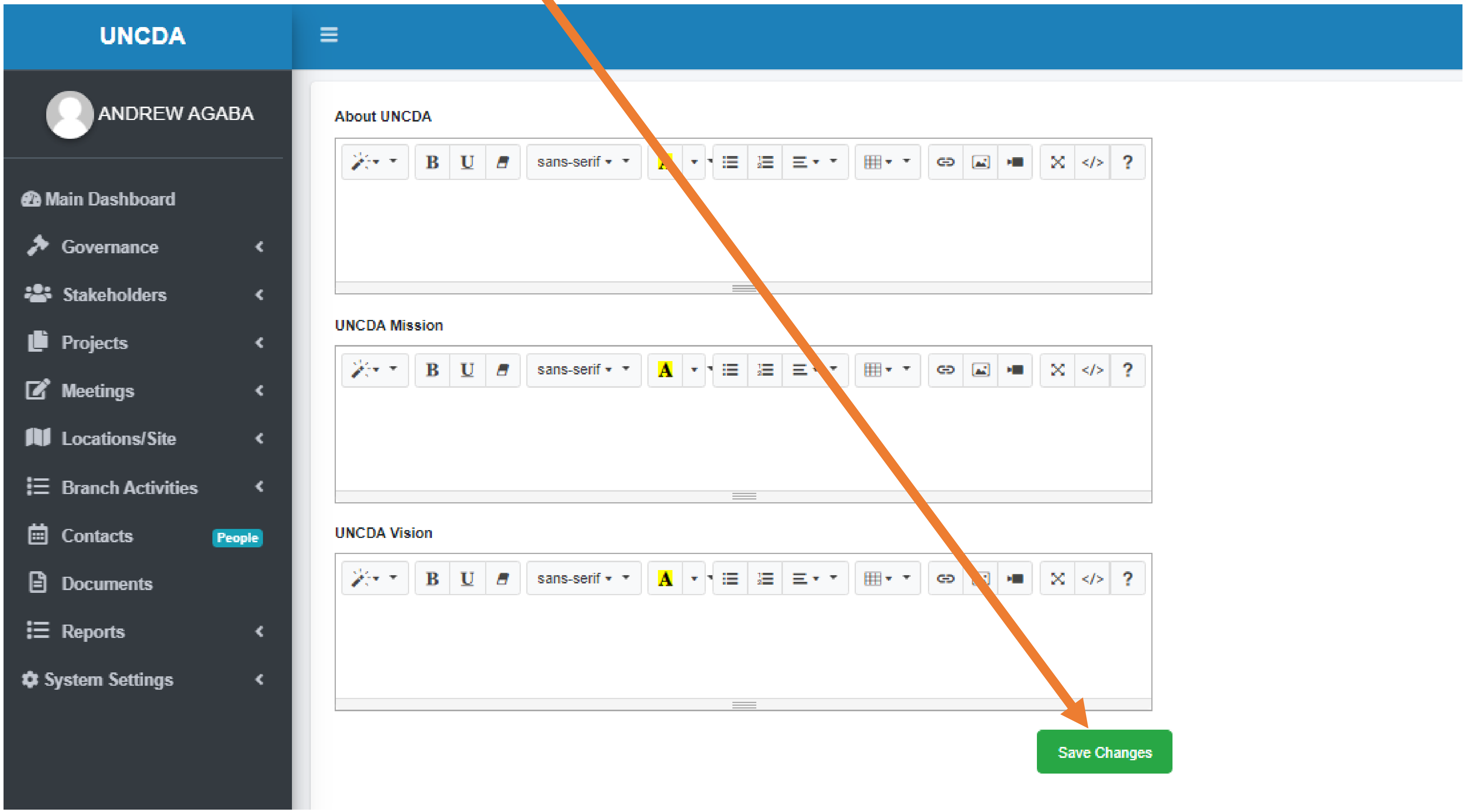


3. Edit UNCDA about Info

To add information about UNCDA like mission and vision,

- Click the **Governance menu option and About NCDA**
- Complete the form and click the **'Save Changes'** button

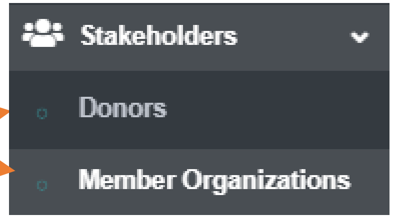


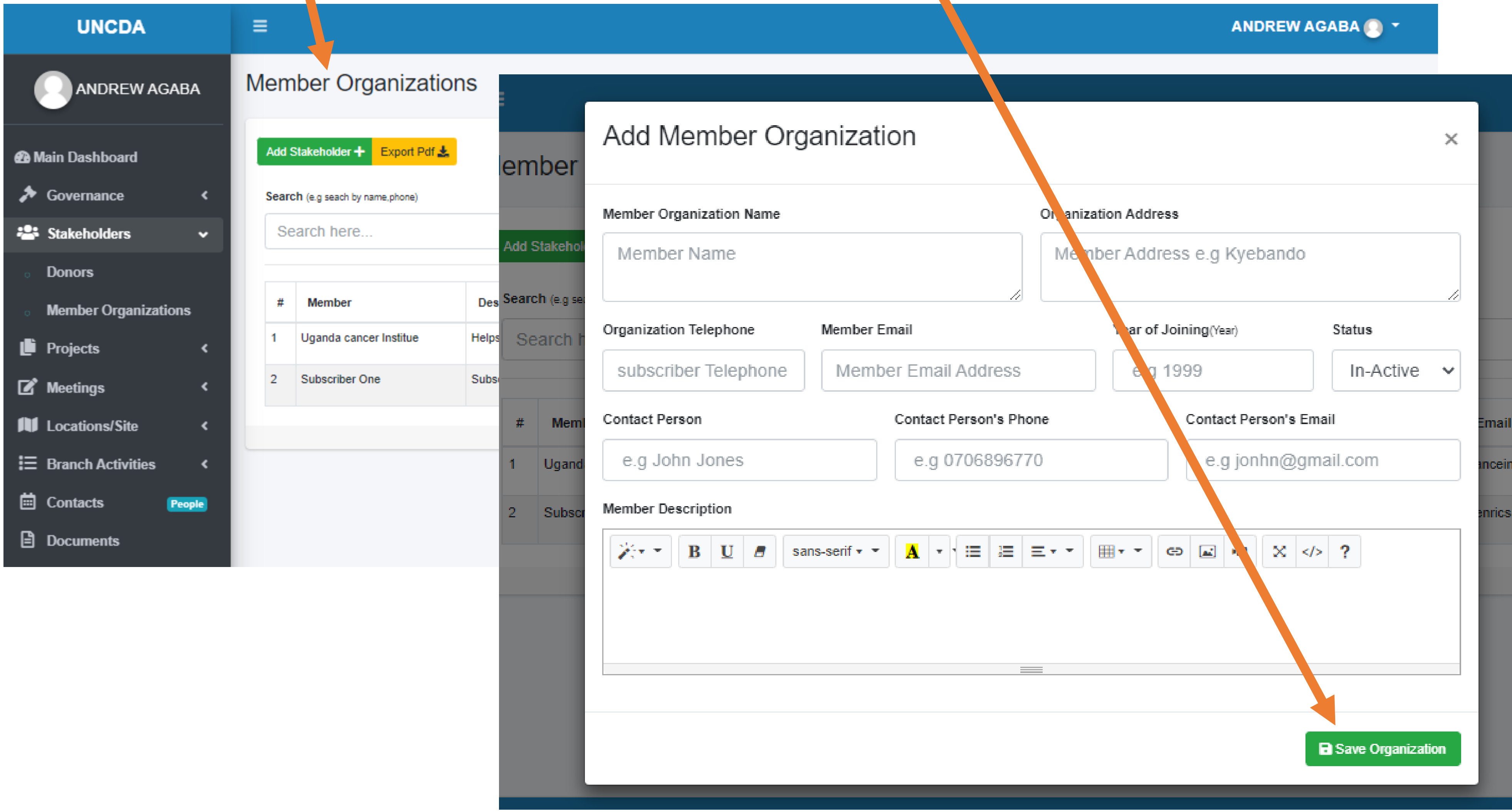


4. Stakeholders

To add a member organization or Donor,

- Click the **Stakeholders' menu option and choose Donors or Member Organization as required**
- Click the **Add Donor / Add Stakeholder button** , Complete the form and click the **'Save Organization'** button.

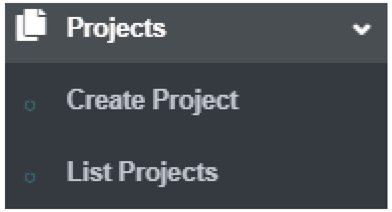


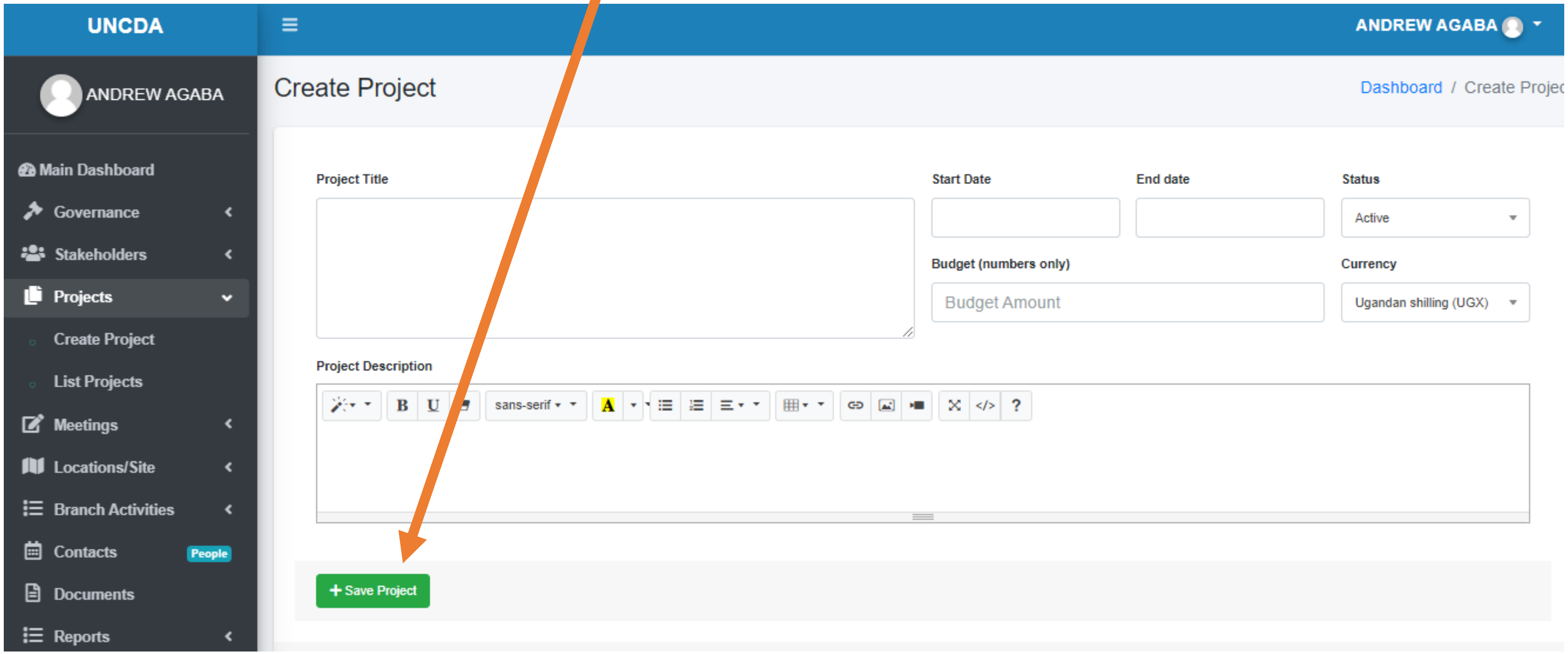


5. Create a Project

To create a project,

- Click the **Projects Menu option and choose Create Project**
- Complete the form and click the **‘Save Project’** button.

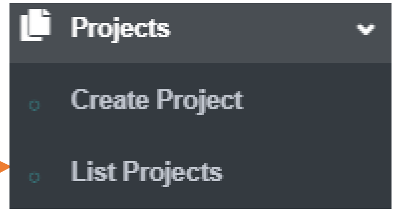


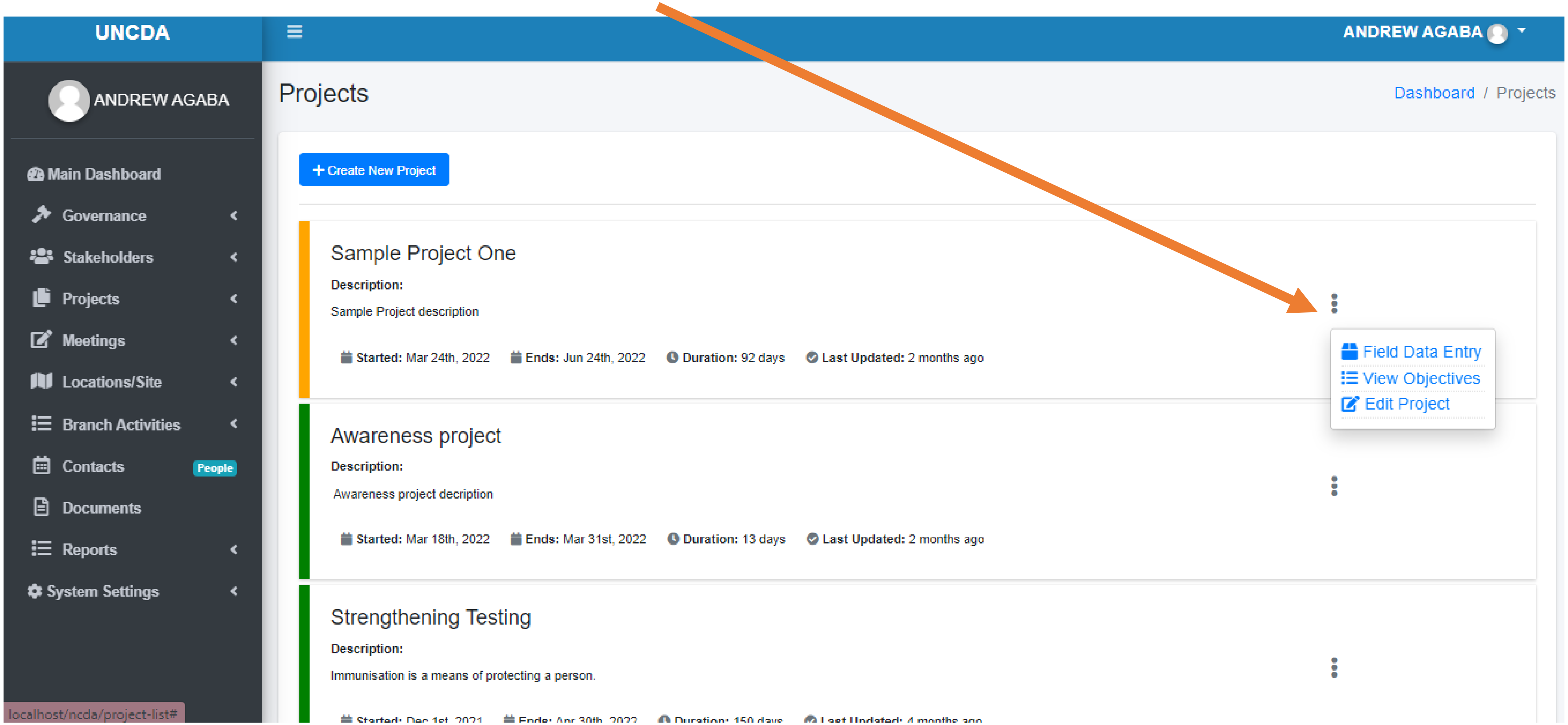


6. View Projects

To create a project,

- Click the **Projects Menu option and choose List Projects**
- To view project Objectives , **click the three dotts at the right** of each project and choose **View Objectives**.

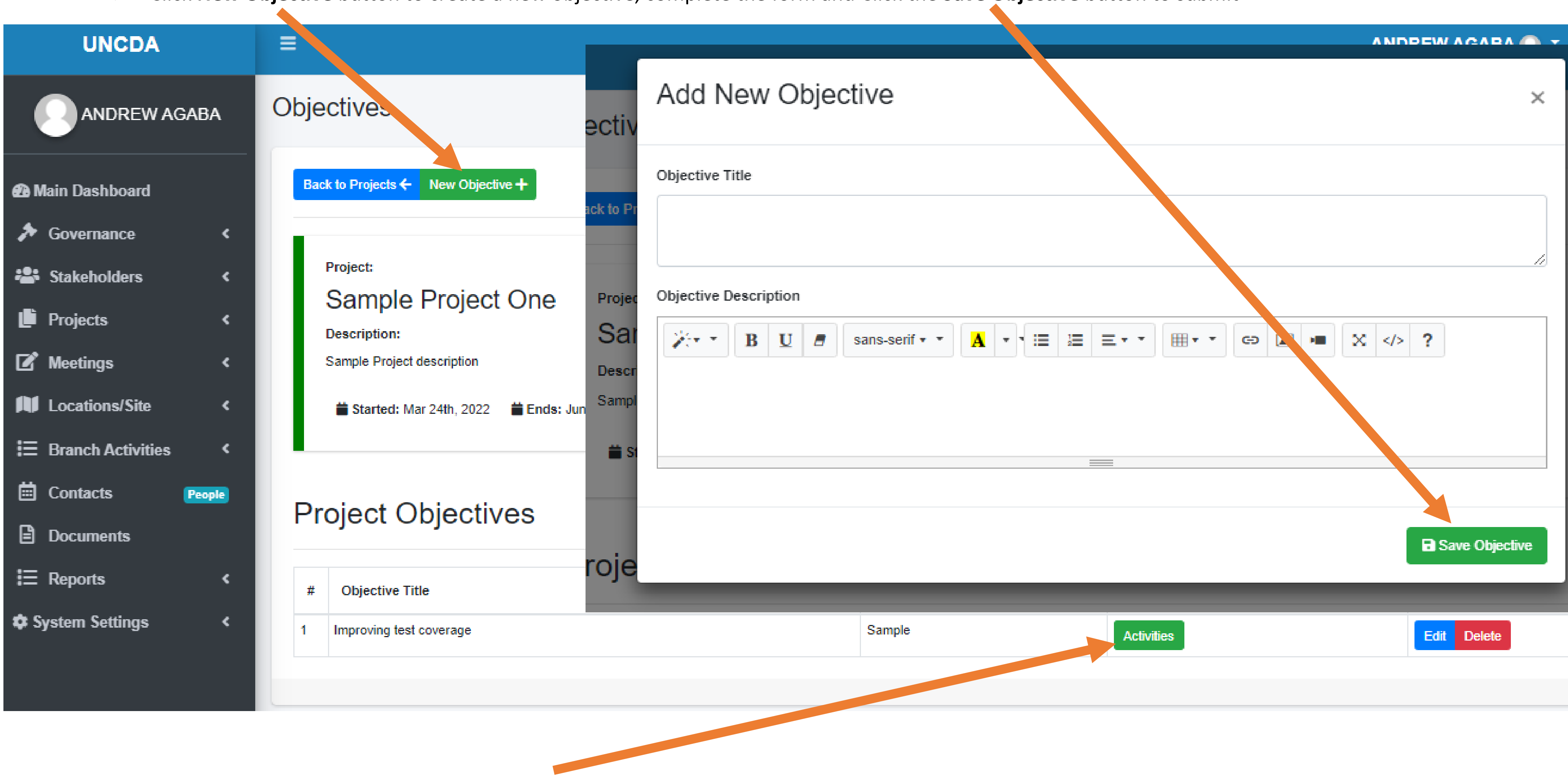




7. Add / Configure Project Objectives

To create a project objective,

- From the **List of Projects as shown above**
- Click **the three dotts at the right** as shown above and choose **View Objectives** to go to the details page
- Click **New Objective** button to create a new objective, complete the form and Click the **Save Objective** button to submit

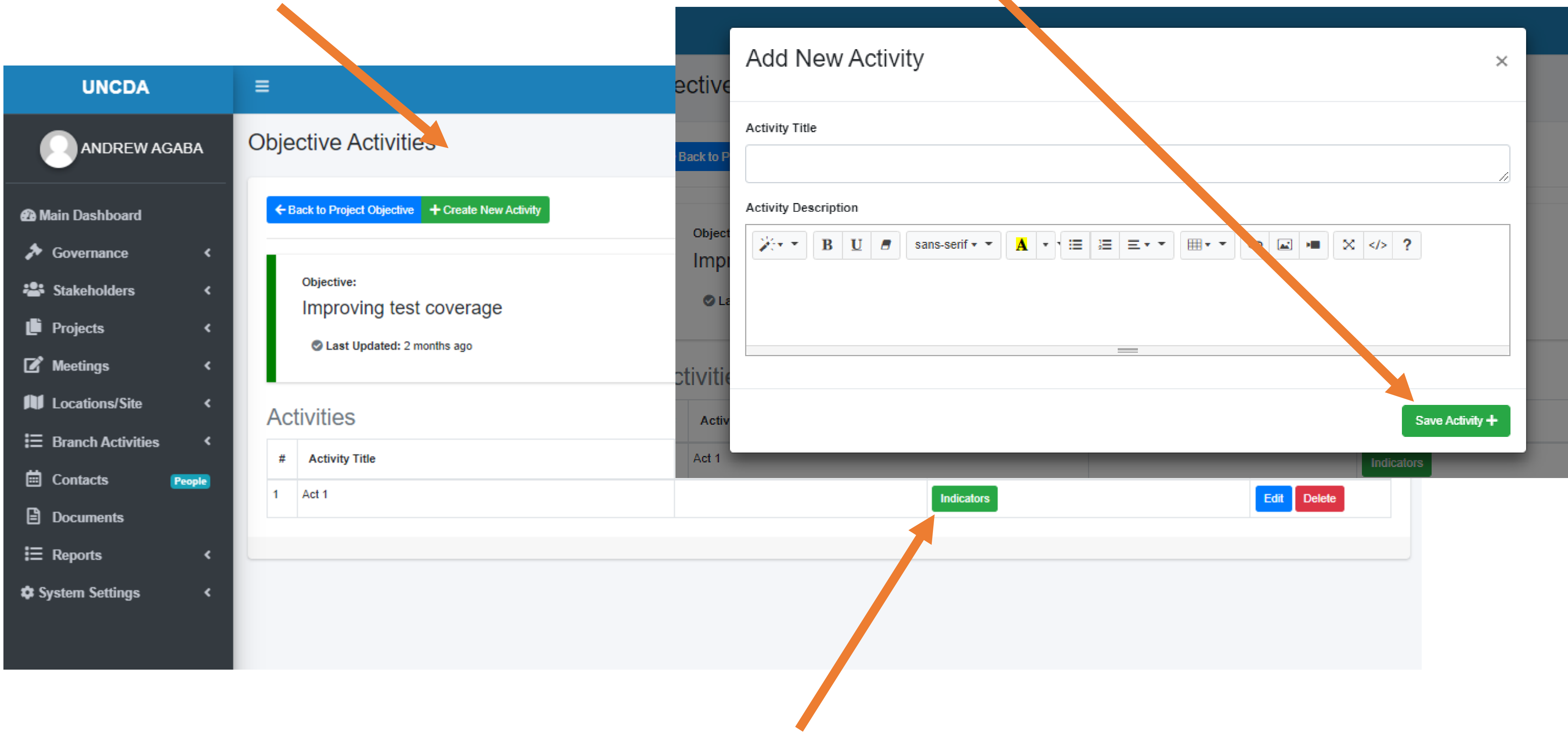


Each Objective has **Activities** and it, to view them **Click Activities button** on the Objective row.

8. Add / Configure Objective Activities

To create a Objective activities,

- From the **Projects Objectives as shown above**, Click **the Activities button** (as shown above) to go to the Activities page
- Click **Create New Activity** button to create a new activity, complete the form and Click the **Save Activity** button to submit.

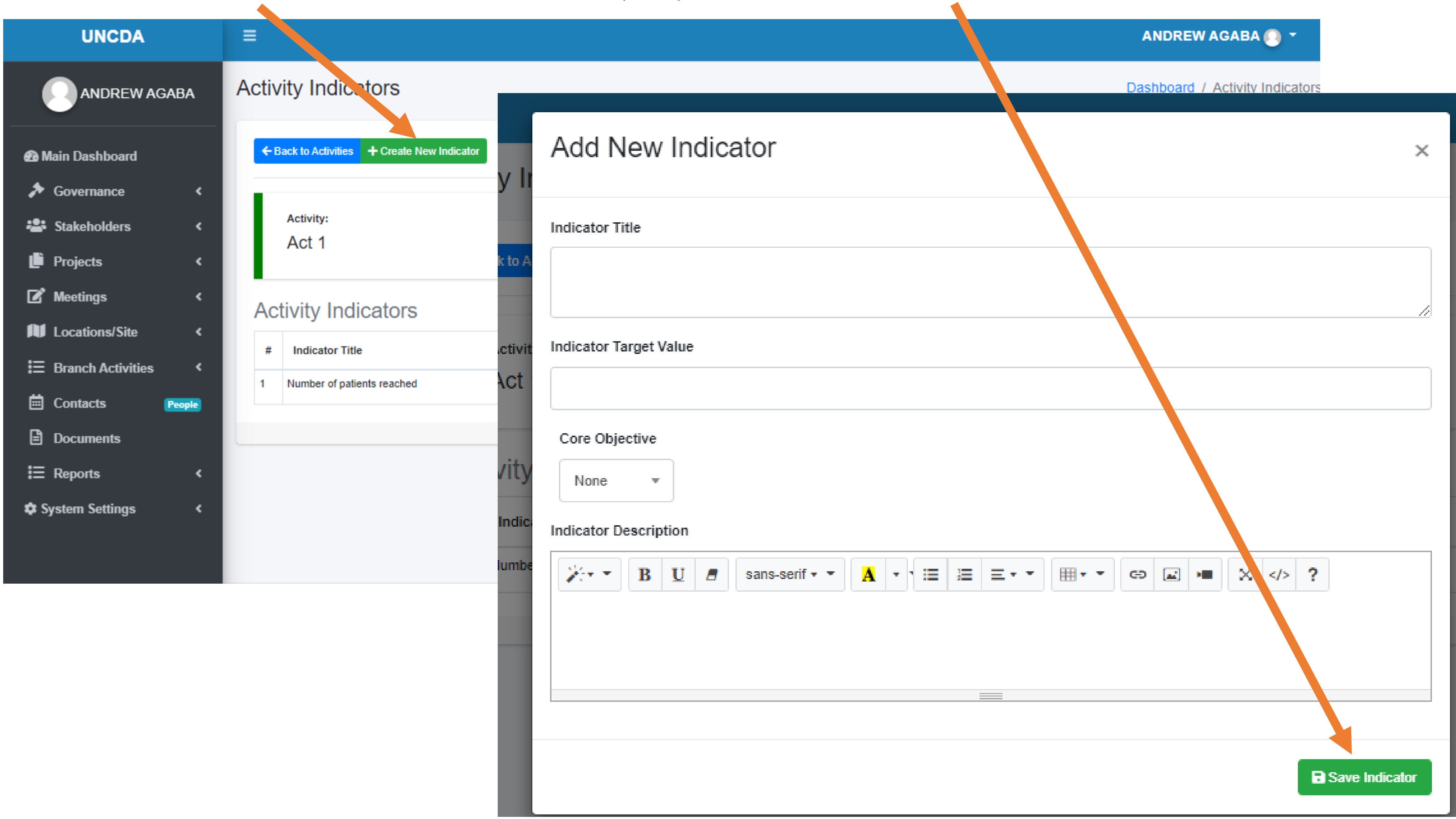


Each **activity has/should have indicators** configured under it, to configure them **click the Indicators** button on the activity row.

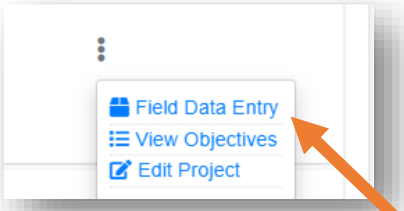
9. Add / Configure Activity Indicators

To create activity Indicators,

- From the **Objective activities page as shown above**, Click **the Indcators button** (on the activity row as shown above) to go to the indicators page
- Click **Create New Indicator** button to create a new activity, complete the form and Click the **Save Indicator** button to submit.

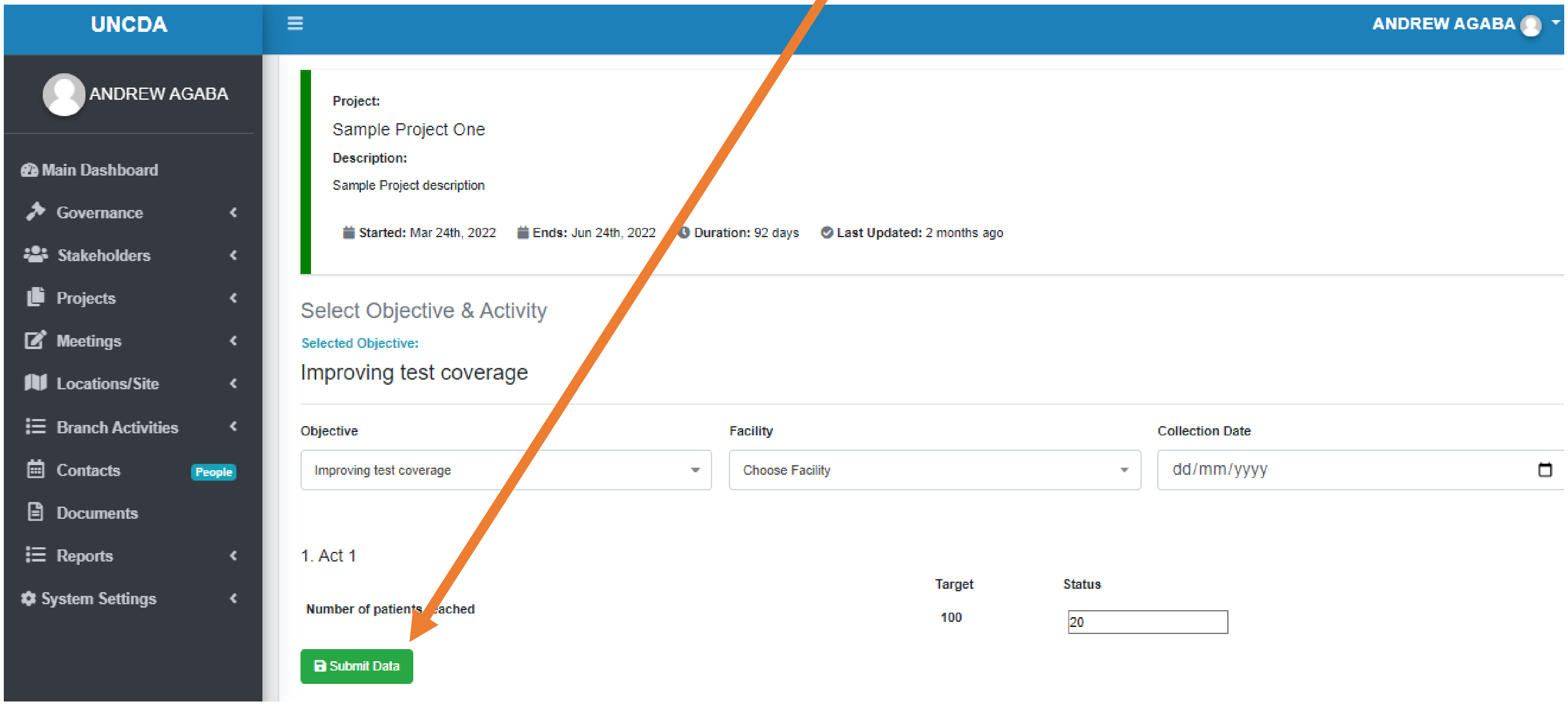


10. Project Data Entry



To capture project data

- From the **list of projects shown in 6**, Click **the dotts on the right of the desired project and choose 'Field Data Entry' to go to the data entry form**
- Choose a project Object, the system will re-render the form with the corresponding activities and their indicators for you to start data entry.
- Enter the different values for the different indicators and press **'Submit Data'** button

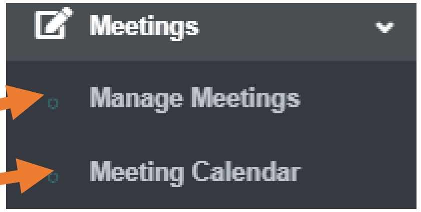


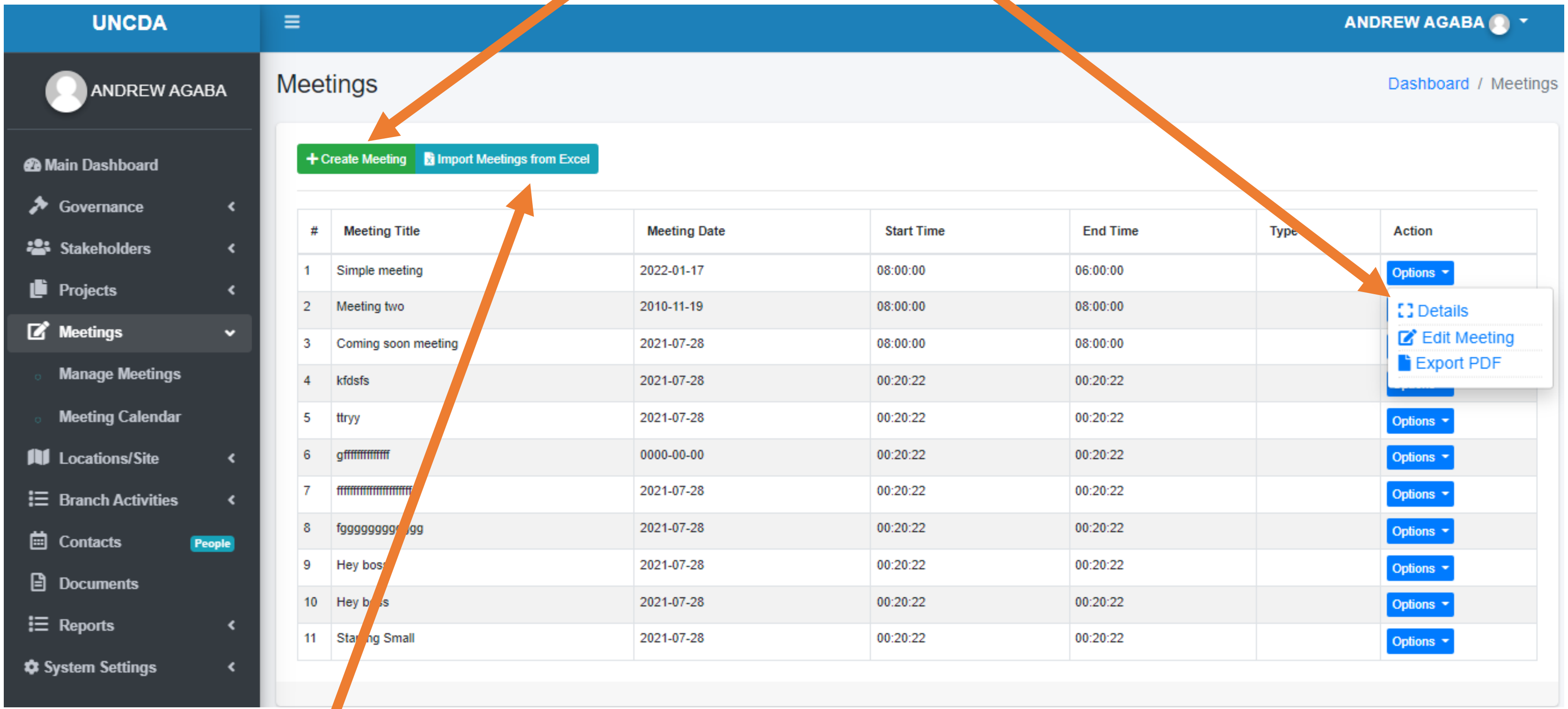
Note: Choose a facility and enter a date if applicable to the data you are entering

11. Meetings

To view a list of meetings

- From the **menu, Select Meetings and then 'Manage meetings'**
- To view the meetings on a calendar view, choose **'Meeting Calendar'**
- To view or add the meetings details, click '**Options' and choose 'Details'**
- To create a new Meeting, use the **'Create meeting button'**



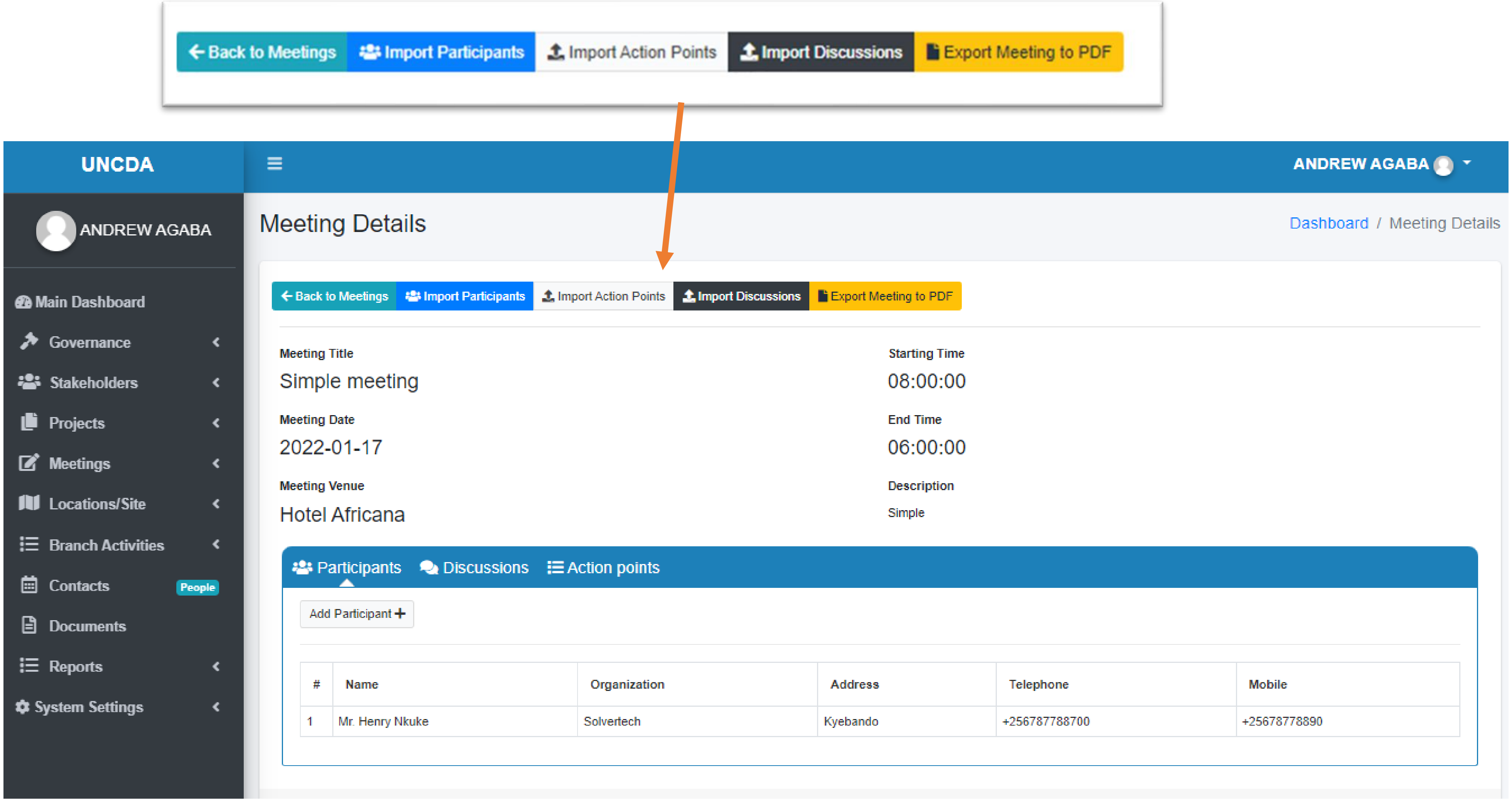


You can use the **Import Meetings Option** to add a list of meetings as entered in an excel file, an excel template is accessible through the same button

12. Meeting Details Page

The meeting details page allows you to view add meeting details i.e Participants, Discussions and action points

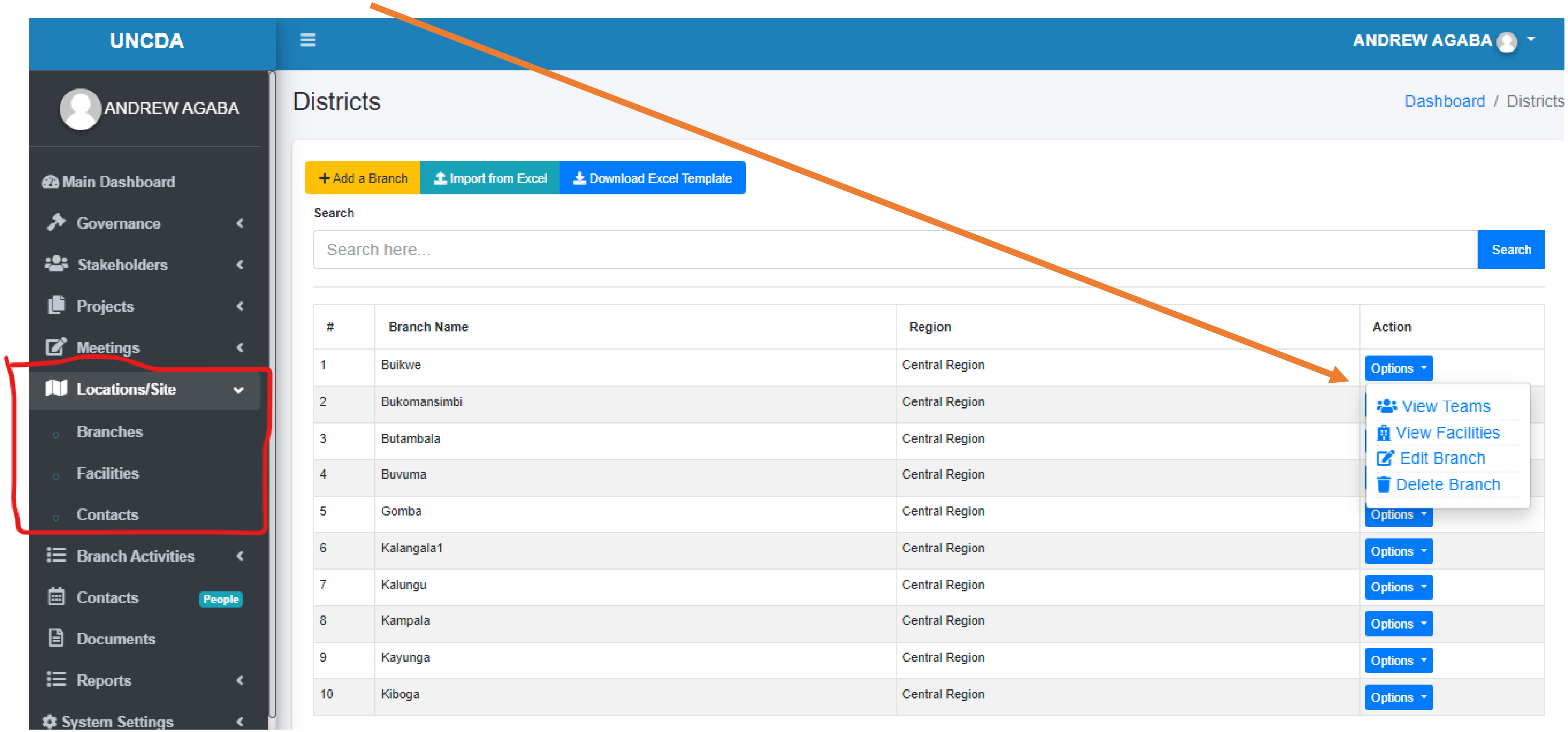
- To add participants, **click the participants tab or use the import button at the top**
- **To add meeting discussions, you can also use the discussion tab or import form excel and the same applies for meeting actions**
- **Meeting details can also be exported to PDF using the yellow button at the top**



13. Locations / Site

The Locations/Site menu avails access to lists of Branches/districts, their teams and facilities

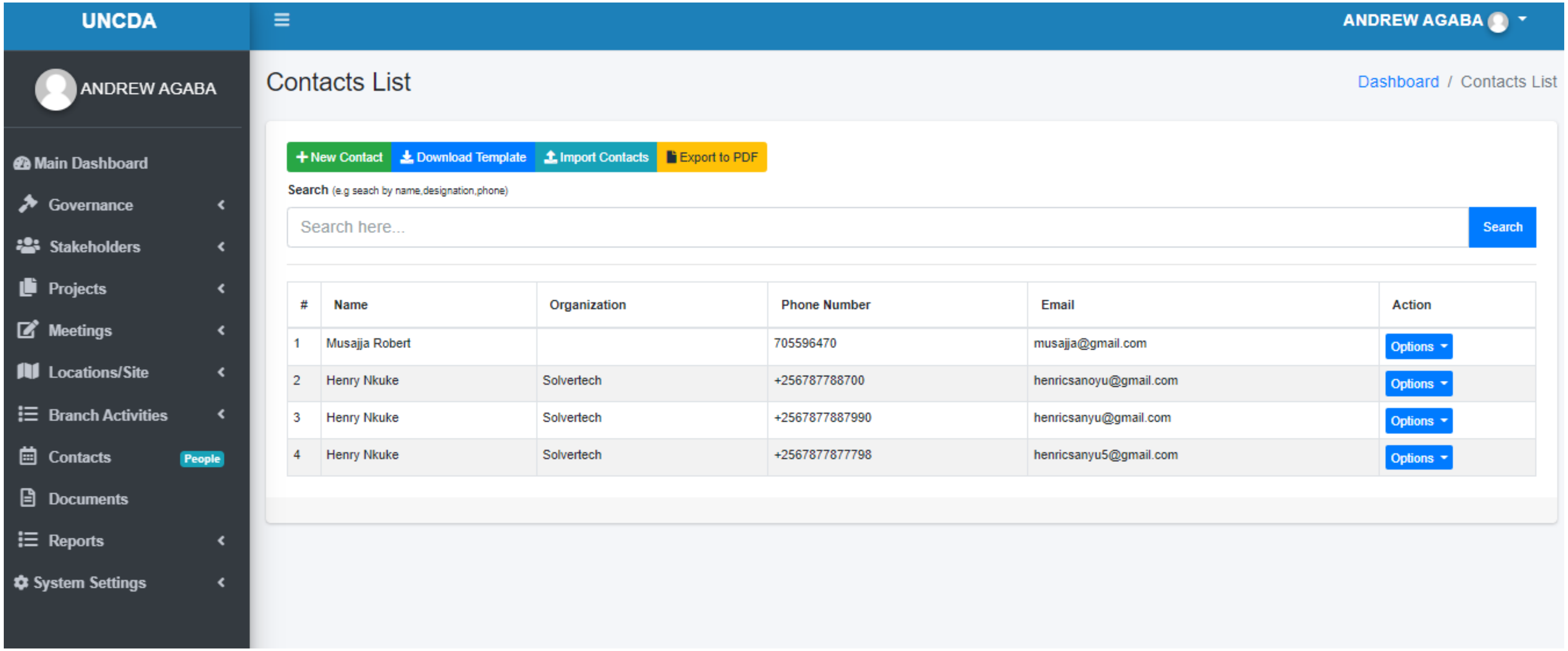
- Use the **Options button** on each Branch/district row to add facilities and teams under them



14. Contacts

The Contacts list is made up of all meeting participants and other contacts added manually.

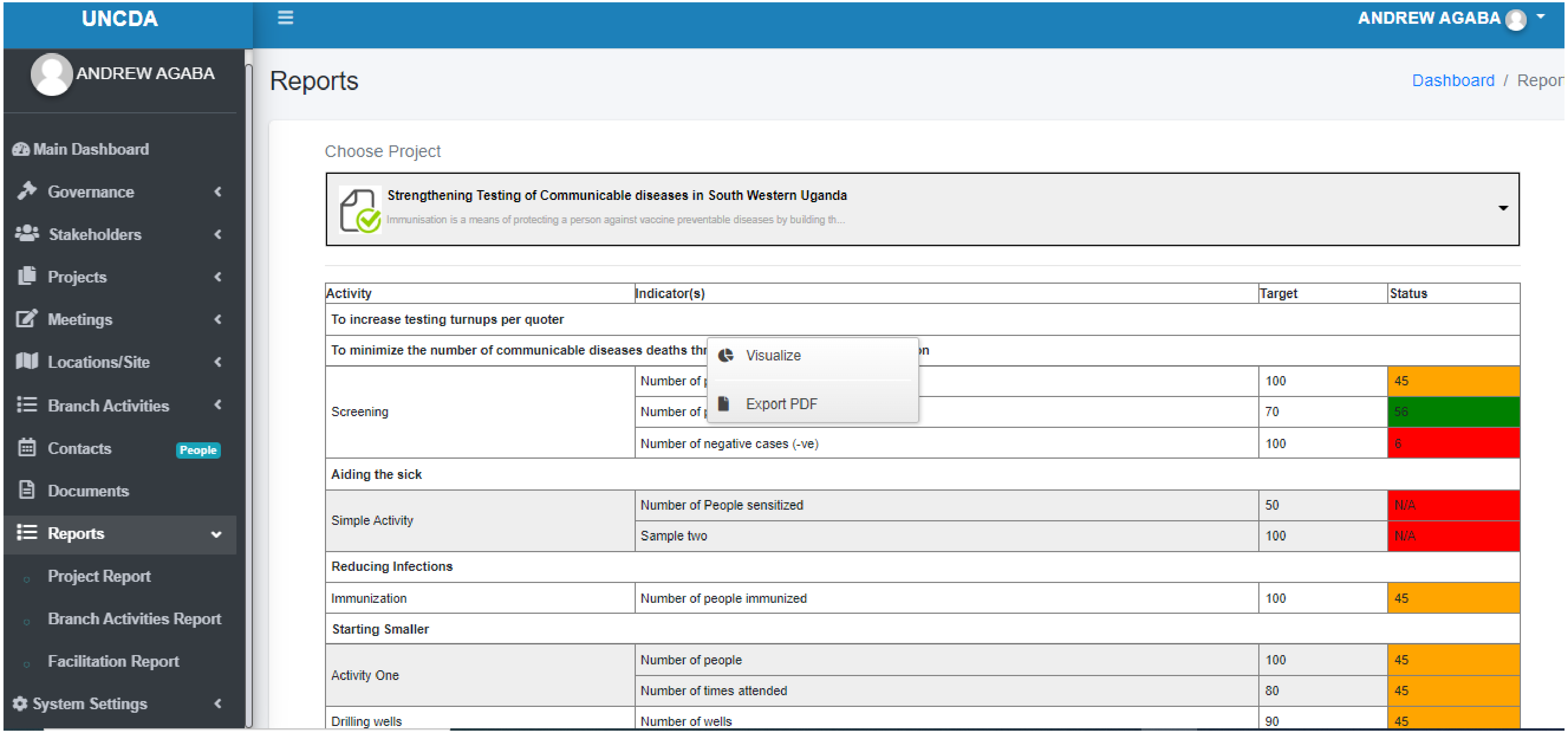
- Use the **Download template button** to obtain the format required for bulk contact importing
- Use the export to PDF option to download a list of contacts



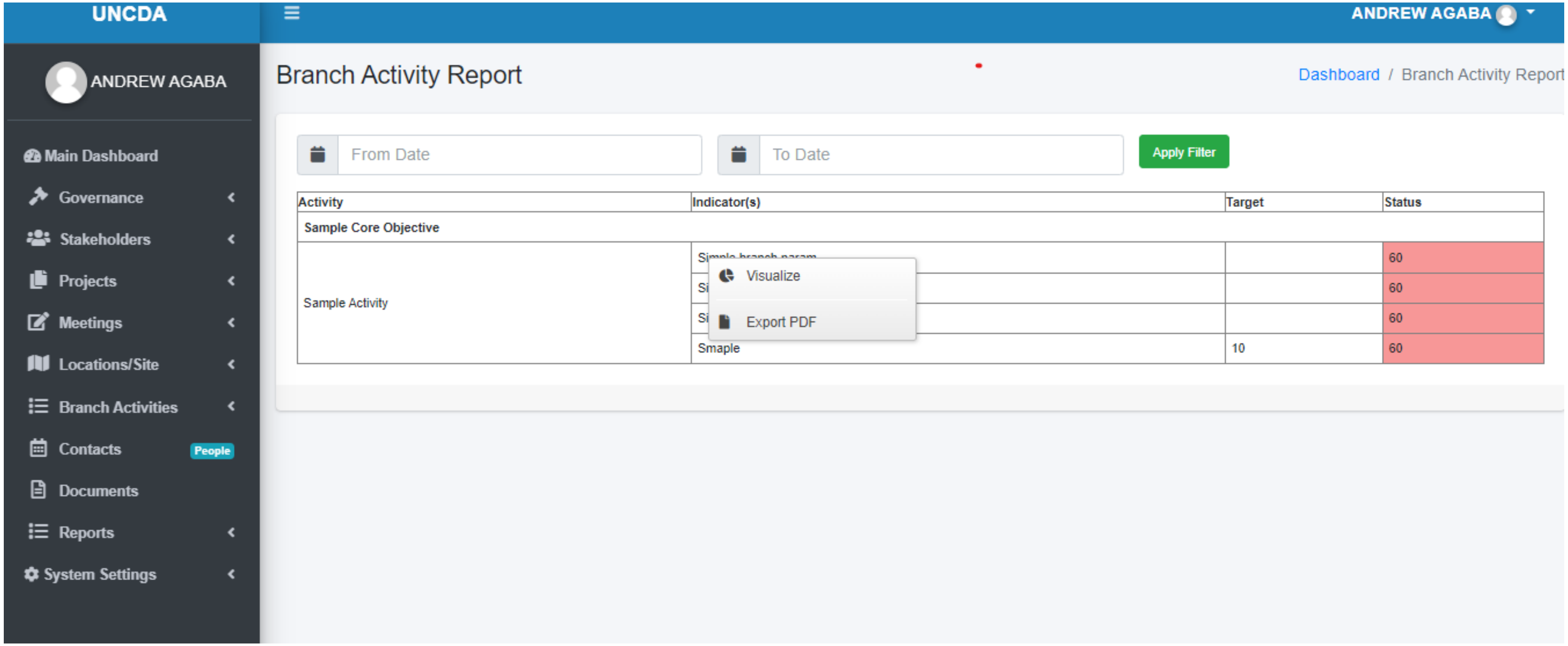
15. Reports

The Project Report helps you visualize the performance of different projects, you simply select a project to render its report

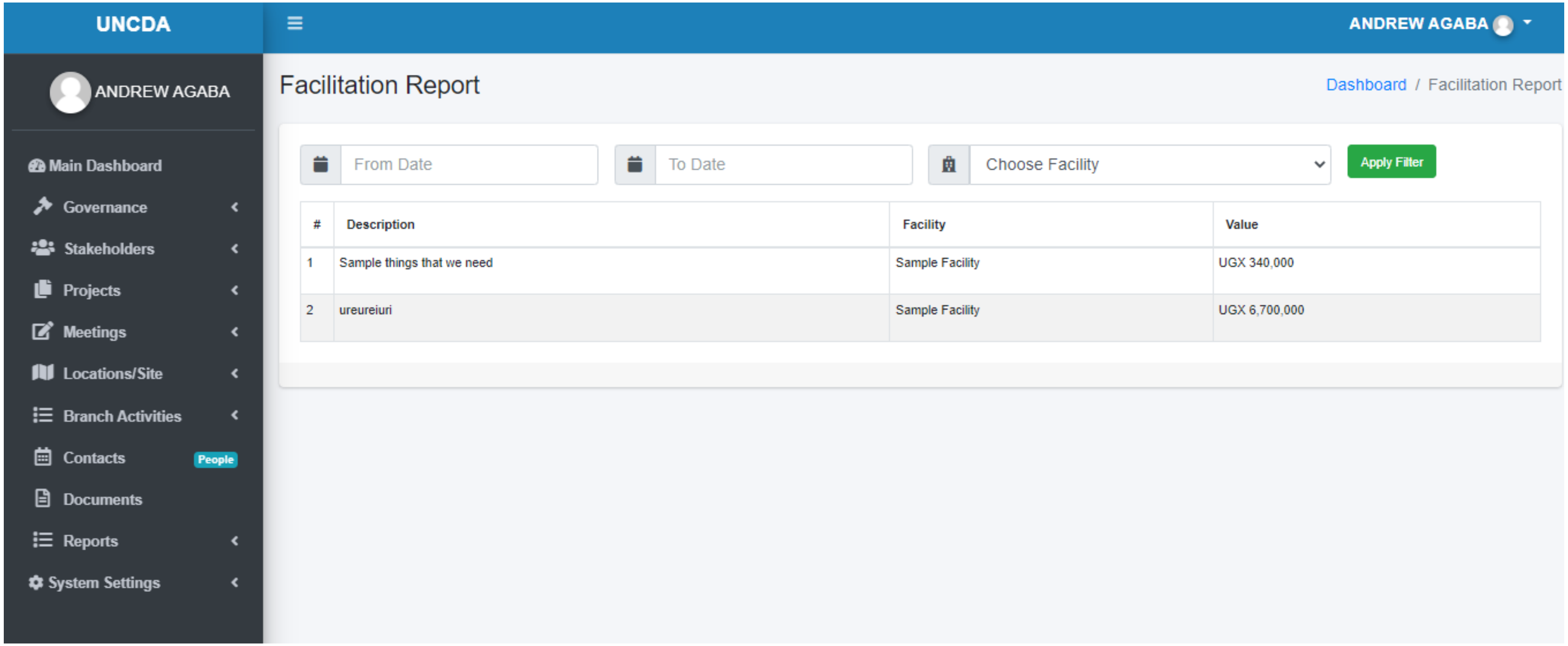
- Right click in the report and choose visualize to render a graphical representation of the same data



The Branch Activities report shows the performance on branch activity indicators over the selected period



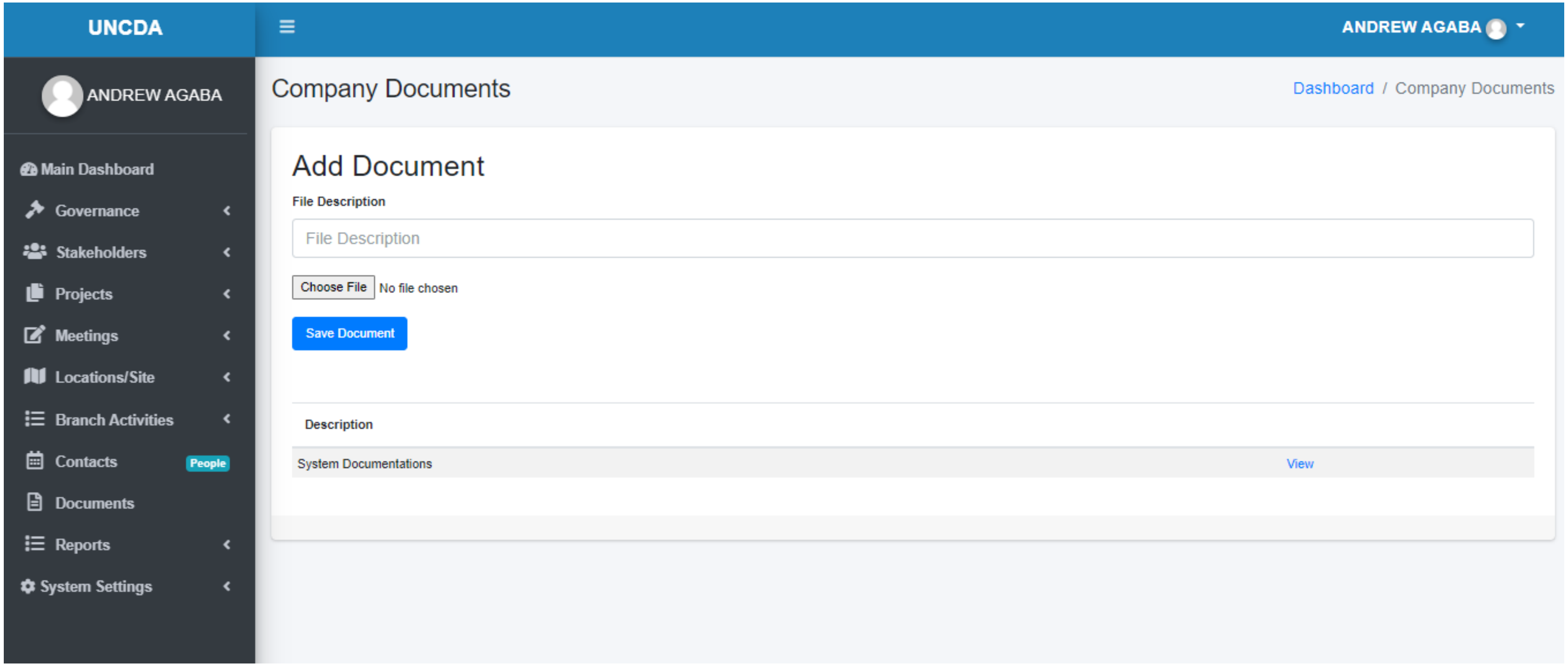
The Facilitation report shows the distribution of different items to branches/facilities over the selected period



1. Documents

The documents section is a storage area for company documents.

Documents can be uploaded with a meaningful description, and these will be accessible by all users with the due permissions



General Note:

Any section that is not covered in this document can be elaborated by contacting the system developers through the contacts below

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