How to create a Database for multi-partner reporting

This article is a tutorial on creating a Database for multi-partner Reporting to help you get quickly started with your first Database in ActivityInfo.

In ActivityInfo you can use the readily available templates to get quickly started with your programme. The "Multi-partner reporting database" template is ideal if you want to create a Database where multiple Partners will collaborate. If you want to create a Database where no Partners need to be added, view the Tutorial "How to create a simple Database without Partners". If you want to create a Database where you want to add users (e.g. case workers) under a manager (e.g. a supervisor) view the Tutorial "How to create a Database for case management".

<table>
<thead>
<tr>
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<td>Administrator</td>
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<td>• View all records</td>
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Roles and Permissions in Multi-partner reporting Database Template

- Manage reference data
- Delete any record
- Export records
- Manage users
- Manage record locks
- Add forms and folders
- Edit forms and folders
- Delete forms and folders

- Delete any record
- Export records
- Manage users
- Manage record locks
- Edit forms and folders

- Add records where partner is user's partner
- Edit records where partner is user's partner
- Delete records where partner is user's partner
- Export records

How to create a Database for multi-partner Reporting

Add a Database using a template

- Log in your ActivityInfo account and make sure your system meets the ActivityInfo Requirements.
- Click on "Add database" to add a new Database.

- Give a short and self-descriptive name name to your Database and select "Multi-partner reporting database" from the list of templates to get started with it. The name of the database should correspond to information contained in the Database (program, country activities, etc.) and should be comprehensive for the users who will perform data entry.
- Click on "Add database".
In the next page you can start designing the Database and the Forms in the way you need. Click on "Database settings" to start setting up the Database.

Add the Partners

In the Database Design section you can start by adding your Partners in the "Partner" Form located in the "Reference Data" folder. Click on the arrow to reveal the contents of the folder.
• Click on the Partner Form to select it and click on "View and edit records" in the Side Panel.

• The Table View of this Form is empty because no Records have been added so far. Click on "Add record" to start adding Partners as Records.
• Type the name of the first Partner and click on "Save record".

• The Partner has been added. Repeat the same process to add all of the Partners. You can also import a list of Partners instead. This is very useful if you have many Partners. In the Table View, click on "Import" and follow the steps in the article "Importing Records".

• When you have added all the Partners, navigate back to the Database by clicking on the name of the Database on the breadcrumb at the top of the Table View.
Add a Form

- Now you can add your first Form. Click on "Add form" to get started. If you want to organize your Forms in Folders, you can add a Folder first by clicking on "Add folder".

- Give a name to your Form and start designing it by adding fields. Click on "Add fields" to get started.
Take a look at all the available **Fields** and their **Common or Individual Properties** before you design your Form. You can also read the articles on **Designing a Form** to make sure you know all you need to design a powerful Form.

- In this example, we designed a simple Form to gather the Type of NFI distributions that took place per Partner. You can add, edit and remove fields from your Form depending on your needs. When you finish designing the Form click on "Save" to save it.

![Add form](image)

- The Form has been added to the Database and you can view the Table View for that Form. Users will add their Records using the Data Entry page. Navigate back to the Database by clicking on the name of the Database on the breadcrumb at the top of the Table View.
Add Users

• Now it's time to add some users to the Database so they can start adding Records to your Form. Click on "Database settings" to navigate to the Database Settings page.

• You can define the Permissions that each user will have by assigning a Role to them. You can view an overview of the Permissions of each Role in the Roles section. Just click on a Role from the list and view the Permissions in the Side panel.

• In the Database Settings page, click on "User management" to start adding users and click on "Add user".
• In the Side panel, type the email of the user you want to add and click on "Continue".

• If the user doesn't have an ActivityInfo account, you will invite them to ActivityInfo. ActivityInfo sends an email to the user you invite to a Database, if the user doesn't have an ActivityInfo account.

• Give a name to the user by entering a name in the "Name" field and select the language of the invitation they will receive. The user will be able to change that name when they accept their invitation to ActivityInfo and they sign up.
In the next steps you will define the Permission levels for this user.
First you need to define a Role for the user. In this template, the available Roles and the default permission for these Roles are the following:

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⚠️ For Databases created before February 2020 you need to edit the Role of Administrator to add the "Manage record locks" and "Manage reference data" permissions to include them in the available Permissions.
• Select the Role you want to assign to the user you are inviting. In the case of Reporting partner you need to specify the Partner for which the Permissions apply.
• Finally, select the Forms and Folders to which you want this user to be added and click on "Send invite".

⚠️ Please note that:
• When a user is invited to one or more Forms that exist within a Folder, the user will be able to see the Name of the Folder.
• When a user is invited to one or more Subforms that exist within a Form, the user will be able to see the Name of the Form.

• The user has been invited. Repeat the same steps to invite more users.
In the User management section, "Invalid email" means that the email of the user is not valid and "Invite pending" means that the user hasn't accepted the invitation to ActivityInfo yet.

- If you start adding a user that has already been added to this Database, an alert will warn you about it and you won't be able to click on "Continue". Instead you can edit the user.
• If you start adding a user that already has an account in ActivityInfo, you will be notified about it.
• You can select the Role for this user and select the Forms and Folders to which you want this user to be added but you cannot change their name.
• Click on "Send invite" to add this user to this Database.
You can **override the Permissions of a Role** for a specific user to better match the Permissions you want to assign. Click on "Database Design", select the Form or Folder for which you want to apply changes and click on the user on the Side Panel to reveal the assigned Permissions. Click on the Permissions you want to add or remove any unwanted Permission by unticking a ticked box. Click on "Save" to save the changes.

If the Permissions that come with a Role don't match your needs, you can also **edit a Role**.

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**Help your Partners get started with Data Entry**

- Take a look at the available articles and videos on [Entering Data](#) and make sure you share them with your team and Partners to help them get started with adding their first Records.
- They can [Add records to a Form](#) or a Subform or they can [Import Records to a Form](#) or a Subform.
- They can also [make a Database available offline](#) and add Records when there is no internet connection or use ActivityInfo on a Tablet.

- The added Records appear in Table View. You can view the History and the Details of every Record in the Side panel and **Filter** and **Sort** the Records according to your needs.
### How to create a Database for multi-partner reporting

**Select your Partner Name** | **Date of Reporting** | **Type of NFI distribution**
--- | --- | ---
BeDataDriven | 2019-11-01 | Standard, Supplementary
Happy Day NGO | 2019-11-01 | Standard, Supplementary
Sun and Jay NGO | 2019-11-01 | Standard, Supplementary, Winterization

**Tools and Filters**
- Sort ascending
- Sort descending
- Filter by choice
- Filter by text
- Filter by blank

**Export Options**
- Print record
- Edit record

**Delete record**