Adding a Database

The following section describes what a Database is and how to add a Database in ActivityInfo to get started. It presents the available Database templates and the Roles that come with them and it walks you through the necessary steps to start working with each template.

A Database is the place where you store data related to a particular organisation, project or activity. In every Database you can design Forms and Subforms to collect information for your programmes and activities. You can organize the Forms using Folders. You can invite Users to work together on the design of the Forms, to do data entry or to view the information collected.

The data collected using the Forms and Subforms are called Records. All Records added by users will be kept in the Database.

A Database allows you to control user access and their rights to view, add, edit and delete data and many more.

You can select a template for your Database and start working with that. Every template comes with some predefined Roles that you can give to the users. Each Role comes with some predefined Permissions. If the Permissions that come with a Role don't match you needs, you can edit a Role. You can also override the Permissions of a Role for individual users.

<table>
<thead>
<tr>
<th>Template</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple (Blank) database</td>
<td>Ideal if you want to create a Database for your organization and you don't need to add any Partners (e.g. for internal reporting, Monitoring and Evaluation etc.)</td>
</tr>
<tr>
<td>Multi-partner reporting database</td>
<td>Ideal if you want to create a Database where multiple Partners will collaborate. You will be able to assign individuals users to their Partner.</td>
</tr>
<tr>
<td>Case management database</td>
<td>Ideal if you want to create a Database where teams of people (such as Case Workers) work under a Supervisor. You will be able to assign teams of Case Workers to a Supervisor and to specific Cases.</td>
</tr>
</tbody>
</table>

⚠️ You can add up to 500 Forms in a Database.
To get quickly started with all the components of one of these templates take a look at our Tutorials!

How to add a Database based on the Simple (Blank) template

• On the Database List page click on "Add database".

To be able to view the button "Add database" you currently need to be a Database Owner and a Technical Contact for the ActivityInfo subscription of your organization. You can also start a Free Trial to create your own databases.

• Give a name to your Database.
• Select "Blank database" from the list to get started with a blank database.
• Click on "Add database".

Adding a Database
We recommend choosing a short and self-descriptive name for the Database.

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.

- The Database has been added and you can find it in the Database List page
- Now you can start designing your Forms and Subforms.
- You can also add Folders to group your Forms or add Locks to prevent users from adding Records.
- You can also create copies of your Forms to work faster by exporting the fields of a Form and importing them to a new Form.

- You can invite other users to this Database and assign Roles to them.
• Once you have Records in this Database, you can also export all quantities of all Forms in one spreadsheet, or all Records of all Forms on multiple spreadsheets.

How to add a Database based on the Multi-Partner Reporting template

• On the Database List page click on "Add database".
To be able to view the button "Add database" you currently need to be a Database Owner and a Technical Contact for the ActivityInfo subscription of your organization. You can also start a Free Trial to create your own databases.

- Give a name to your Database.
- Select the "Multi-partner reporting database" from the available templates to get started with it.
- Click on "Add database".

We recommend choosing a short and self-descriptive name for the Database. 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.

- The Database has been added and you can find it in the Database List page.
- Now you can start by adding some Partners to the Database. Click on "Database settings" to start setting up the Database.
• In the Database Design section you can start by adding your Partners 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 Resource 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.

- Once you have added the Partners, you can start designing your Forms and Subforms.
- You can also add Folders to group your Forms or add Locks to prevent users from adding Records.
- You can also create copies of your Forms to work faster by exporting the fields of a Form and importing them to a new Form.
• Once you have added Partners, Forms and Folders, you can invite other users to this Database and assign predefined Roles to them to manage their Permission levels.
How to add a Database based on the Case management template

• On the Database List page click on "Add database".

To be able to view the button "Add database" you currently need to be a Database Owner and a Technical Contact for the ActivityInfo subscription of your organization. You can also start a Free Trial to create your own databases.

• Give a name to your Database.
• Select the "Case management database" from the available templates to get started with it.
• Click on "Add database".
We recommend choosing a short and self-descriptive name for the Database. The name of the database should correspond to information contained in the Database (case, program, country activities, etc.) and should be comprehensive for the users who will perform data entry.

- The Database has been added and you can find it in the Database List page.
- Now you can start by adding some Users such as Supervisors and Case Workers to the Database. The template contains a 'Case' Form template, so you can get quickly started with Form design. Click on "Database settings" to start setting up the Database.
In the Database Design section you can start by adding users and assigning Roles to them. The Roles and the Permissions define the level of access each user will have to the Database.

- First, add the Supervisors so as to assign Case Workers to them. This way you can create teams of users under one supervisor for example. Click on "User management" to add the first Supervisor.
- Click on "Add User".

![User management interface](image)

- Click on Roles to get an overview of the Permissions available for every Role before you start adding users.

- Type the email of the user you want to add and click on "Continue".
- Select the language of the invitation and enter the name of the user. ActivityInfo sends an email to the user you invite to a Database, if the user doesn't have an ActivityInfo account.
- In the Role section, select 'Supervisor' to assign to this user the Role of Supervisor.
- Finally select the Forms and Folders to which you want this user to be added and click on "Send invite".
- The user has been invited and has been assigned the Role of Supervisor.
- You can repeat the same process to add more Supervisors.
In this example, there is only one Form in our Database, the 'Case' Form. If you add more Folders and Forms in the Database you will be able to select the ones you prefer.

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.

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.

Next, add some Case Workers and assign them to the Supervisor you just added.
• Click on "Add user".
• Type the email of the user you want to add and click on "Continue".
• Select the language of the invitation and enter a name for the user. ActivityInfo sends an email to the user you invite to a Database if the user doesn't have an ActivityInfo account.
• In the Role section, select 'Case Worker' to assign to this user the Role of Case Worker.
• Next, we will assign the Case Worker to a Supervisor. Click on the arrow to reveal the available Supervisors and click on the Supervisor you want to select it.
• Finally select the Forms and Folders to which you want this user to be added and click on "Send invite".
• The user has been invited and has been assigned the Role of Case Worker.
• You can repeat the same process to add more Case Workers and to assign them to the same or other Supervisors added to the Database.

In this example, there is only one Form in our Database, the 'Case' Form. If you add more Folders and Forms in the Database you will be able to select the ones you prefer.

⚠️ 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.
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• Now you can start designing your first Form or add a Form with Subforms. You can use the existing 'Case' Form template or you can add a new Form by clicking on "Add form".
• You can also add Folders to group your Forms or add Locks to prevent users from adding Records.
• If you add a Form make sure you add a User field to the Form so that you can assign Records (in this example, Cases) to Case Workers, or allow Case Workers to select their Name in the Form.
• Case Workers's permissions (such as view, add, edit Records etc.) will be related only to the Records assigned to them or added by them.
• Supervisors's permissions (such as view, add, edit Records etc.) will be related to the Records added by them or any Case Worker assigned to them.
• You can also create copies of your Forms to work faster by exporting the fields of a Form and importing them to a new Form.

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.