APPENDIX
# Table of Contents

Glossary .............................................................................................................................................. 4

<table>
<thead>
<tr>
<th>Category definition</th>
<th>Database definition</th>
<th>Dimension definition</th>
<th>Field definition</th>
<th>Folder definition</th>
<th>Form definition</th>
<th>Lock definition</th>
<th>Measure definition</th>
<th>Partner definition</th>
<th>Permission definition</th>
<th>Pivot Table definition</th>
<th>Record definition</th>
<th>Report definition</th>
<th>Statistic definition</th>
<th>Subform definition</th>
<th>User definition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Roles & Database Templates............................................................................................................. 23

<table>
<thead>
<tr>
<th>Roles and Database templates</th>
<th>Forms and Fields</th>
<th>Form</th>
<th>Subform</th>
<th>Attachment field</th>
<th>Calculated field</th>
<th>Date field</th>
<th>Fortnight field</th>
<th>Geographic Point field</th>
<th>Month field</th>
<th>Multi-Line Text field</th>
<th>Multiple Selection field</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<p>| Form definition | Subform definition | Attachment field definition | Calculated field definition | Date field definition | Fortnight field definition | Geographic Point field definition | Month field definition | Multi-Line Text field definition | Multiple Selection field definition |</p>
<table>
<thead>
<tr>
<th>Field properties</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>71</td>
</tr>
<tr>
<td>Description</td>
<td>72</td>
</tr>
<tr>
<td>Code</td>
<td>73</td>
</tr>
<tr>
<td>Key</td>
<td>75</td>
</tr>
<tr>
<td>Required</td>
<td>79</td>
</tr>
<tr>
<td>Hide from Entry</td>
<td>80</td>
</tr>
<tr>
<td>Relevance rules</td>
<td>81</td>
</tr>
<tr>
<td>Input Mask</td>
<td>82</td>
</tr>
<tr>
<td>Units</td>
<td>84</td>
</tr>
<tr>
<td>Options</td>
<td>85</td>
</tr>
<tr>
<td>Prefix Formula</td>
<td>87</td>
</tr>
<tr>
<td>Formula</td>
<td>90</td>
</tr>
<tr>
<td>Validation Rules</td>
<td>92</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>User Interface Overview</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database List page</td>
<td>95</td>
</tr>
<tr>
<td>Database page</td>
<td>96</td>
</tr>
<tr>
<td>Database Settings page</td>
<td>97</td>
</tr>
<tr>
<td>Search Bar</td>
<td>102</td>
</tr>
<tr>
<td>Form Design page</td>
<td>103</td>
</tr>
<tr>
<td>Table View page</td>
<td>105</td>
</tr>
<tr>
<td>Report List page</td>
<td>107</td>
</tr>
</tbody>
</table>
Glossary
Category definition

In ActivityInfo, Categories allow you to 'slice' your data based on a selected Dimension. This way you can customize what you view in a Pivot Table and focus on a selected group of data.

For example, if you have a Dimension "Partners" or "Provinces", you can select to view only the data related to one of the "Partners" or the "Provinces".

![Pivot Table Example](image-url)
Database definition

In ActivityInfo, a Database is where you store your data. Your Database serves as the central source of information for all your related projects and activities. All data are added, maintained and reported on from here.

Data Model

You can design Forms and Subforms to collect information (Records) from other users and you can add Folders to group your Forms. Your Database is also used to manage users and their permissions as well as Locks added for specific time periods to Forms and Subforms.
In ActivityInfo, a Dimension groups Measured values into one or more categories. In other words, Dimensions are groups of Indicators.

Dimensions can be shown in a Report in Rows and Columns and can be added in the using the Report Design side panel.
Field definition

A Field represents a specific type of data to be collected in a Form. Fields can be combined in any way you choose to collect the information you need. Fields can be used in Forms and Subforms and have a variety of Properties.

Field Data Model

A Field can represent:

- Text
- Check-boxes
- Quantities
- Calculations
- Geographic Coordinates
- and more

Please see our the Field Types reference manual for a full list of supported types.

Fields can also have user-defined settings, which allow you to set a field as:

- **Required** for Users to fill out
- **Hidden** from Users adding Records
• Relevant, or not, for the current Record

You can also set rules as to when a Record is Valid or not.

And you can define one or more fields as Key fields for the Form.

💡 Need a specific Field Type that is not currently present? Don't hesitate to get in touch, and we can explore the possibility of including it in a future release.
Folder definition

In ActivityInfo, a Folder is a grouping of Forms. You can also add Folders within Folders to created more advanced structures in your Databases.

Folder Data Model

Folders have two primary purposes:

- They allow you to organize your Database.
- They can be used to restrict User access to groups of Forms by assigning the appropriate Roles and Permissions.
Form definition

In ActivityInfo, Forms are the main components of your Database. A Form defines the various data to be collected, and how they link together. Usually, a Form will represent part of the information you wish to gather. A Form is composed of one or more Fields. Each Field represents a type of data to be collected, and can be combined in any way you choose. This gives you flexibility in creating Forms which match your information requirements.

Form Data Model

For instance, a Form could represent:

- Tasks
- Programs
- Projects
- Beneficiaries
- Surveys
- Interventions in a specific country
- etc.
Forms are the primary way Users will interact with your data. During data collection, a User will fill out the various fields defined on your Form, and save them in your Database. These saved entries are referred to as Records.

You can add a special type of Form, referred to as a Subform, to allow you to add additional information to a Form or to report over a time range for the same Record or to report multiple occurrences for the same Record.

Forms can also be linked together using special Reference fields. This will allow you to reduce duplication of data, and to report on connected data.
Lock definition

A Lock is a restriction which prevents Users from adding or editing data for a particular time period. Locks allow you to prevent users from adding data to a Form for a time period when reporting has ended for example. They also allow you to preserve versions of your data after they have been validated by your information management processes.

Depending on your needs, a Lock can be set on any Form or Subform that has a Date/Month/Week field added as a Key field. Users will get an error message when they try to add a Record for the locked period and they won't be able to save the Record.
Measure definition

A Measure is a value that a function works on. With a Measure you define the types of values you will analyse in a Pivot Table.

Measures can be:

- Quantity fields of Forms or Subforms aggregated by a function (e.g. sum, average, count etc.).
- Calculated fields using Records of Forms and Subforms.
- You can only use Aggregate Functions with Records of Subforms.

Values related to a Measure can be displayed in various ways in the Reports.
Partner definition

In ActivityInfo, a Partner is an organization who will interact with your Database. Usually, a Partner will be an organization such as an NGO, private company or government organization. Partners are used in the template of the Multi-partner reporting database.

By using Partners, you can link the users you add with the organizations they belong to. This will allow you greater control over what data a user can view or edit for example.

Using Partners gives you an extra layer of detail when you report on your data, allowing you to filter and group entries performed by users of a specific Partner.
Permission definition

In ActivityInfo, a Permission is a right given to a user to allow them to perform a specific task. Without the required Permission, a user will be prevented from performing that task. Permissions are part of Roles.

Permissions are the primary mechanism for controlling what a user can do in a Database, Folder, Form or Subform. Permissions are linked to Roles which are specific to each type of Database template. So depending on the Role you choose, a different set of Permissions will be available.

Permissions available

- View records
- Add records
- Edit records
- Delete records
- Export records
- Manage reference data
- Manage users
- Manage record locks
- Add forms and folders
- Edit forms and folders
- Delete forms and folders
- Share reports
- Publish reports

Some Roles combine Permissions with other Parameters so you can further refine the Permissions. For example, the Role of Reporting Partner in the Multi-partner reporting Database template is combined with the Parameter 'Partner'. So after adding the Partner organizations in the Reference Form, using this combination in this Role gives the following result of Permissions:

- View where partner is user's partner
- 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

This way you can restrict users' permissions to Records related only to their organization.
Pivot Table definition

A Pivot Table is a table of statistics that summarizes the data collected and allows data processing. In ActivityInfo users can use the data collected (Records) to create Pivot Tables.

Using Measures you define the types of values you will analyse in a Pivot Table.

Using Dimensions you group Measures into one or more categories. These can appear as Rows or Columns in the Pivot Table.

Using a Statistic for a Measure, you define the way in which the values related to this Measure will be summarised (e.g. Count, Count distinct, Sum, Average, Media, Min, Max)

Using Categories you 'slice' your data based on a selected Dimension and customise what you view in a Pivot Table.
Record definition

In ActivityInfo, a Form Record is a specific data entry on any Form or Subform.

When a user opens a Form, fills out the required fields and adds their entry, they create a Record. This Form Record is then saved in your Database.

If a Form contains a Subform, each entry the User makes on the Subform creates an individual Record in the Subform.
Report definition

In ActivityInfo, a Report is a presentation of data stored in the Databases you have access to. This presentation can take the form of a visualization or tabulation, depending on your reporting requirements.

A visualization in ActivityInfo is a graphic presentation of data. These can be Charts (for instance, a Bar Chart).

A tabulation in ActivityInfo is a tabular presentation of data, similar to an Excel table. ActivityInfo gives you a flexible way to construct a table with many data points via Pivot Tables.

You are free to choose from all of the data you have access to when constructing a Report in ActivityInfo. These data can then be filtered, grouped and sorted to meet your reporting needs.
Statistic definition

Statistics are used when adding a Pivot Table in Reports.

There are different Statistic types in ActivityInfo. By defining the type of Statistic for a Measure, you define the way in which the values related to this Measure will be summarised in the Pivot Table of a Report.

The Statistic can be:

- Count
- Count Distinct
- Sum
- Average
- Median
- Min
- Max
Subform definition

A Subform allows you to collect data which needs to monitored over a period of time, or will occur multiple times. Subforms allow to enter data for any reporting frequency you need while still giving you the flexibility of a Form. Subforms can also be used to collect additional information for the same Record.

Subform Data Model

Subforms are included within a parent Form.

When designing Subforms for recurring reporting, you can define the frequency by using a Date field, a Week field, a Fortnight field, or a Month field.
**User definition**

In ActivityInfo, a User is any individual who interacts with the system. A User is uniquely identified by their email address.

Users can be invited to contribute to Databases and view Reports. You have full control over the access of Users invited to your Database(s) by assigning Roles to them or defining their Permissions.

Users can also be assigned to the organizations they belong to using Partners. This will help you manage Databases where many organizations will contribute. This can happen when the Multi-partner reporting database template is used.

Users can also be assigned to Supervisors in the Case management database template.

Each *unique* User invited to your Database(s) will count towards your total User Count on your ActivityInfo Subscription Plan. However, each User exists independently of any individual Database, organization, or subscription. Users can create their own Databases and invite others to contribute, in line with ActivityInfo Subscription Plans.
Roles & Database Templates
Roles and Database templates

In ActivityInfo you can use the readily available templates to get quickly started with your programme.

The available Database templates come with predefined Roles which allow you to quickly define the Permission levels of the users participating in the Database.

You can browse the available templates along with the Roles included in them.

Make sure you are familiar with the different Roles before you invite your users. You will be able to define the exact Folders, Forms and Subforms to which the Permissions of the selected Role apply when you will be adding the users.

⚠️ Note that only you can Delete a Database you own, but a User with the "Administrator Role" can delete all Folders, Forms and data contained in the Database. Also Roles that have the Edit Forms permissions also allow users to delete the fields of a Form.
Simple database template

This template is ideal if you are not working with Partners and you want to create a Database to use with your team or internally.

### Data Entry

Assigning this Role to a user means that the user will be able to:

- View all records
- Add any record
- Edit all records
- Delete any record
- Export records

### Read only

Assigning this Role to a user means that the user will be able to:

- View all records

### Administrator

Assigning this Role to a user means that the user will be able to:

- View all records
- Add any record
- Edit all records
- Delete any record
• Export records
• Manage users
• Manage record locks
• Add forms and folders
• Edit forms and folders
• Delete forms and folders
• **Share reports**
• **Publish reports**

⚠️ For Databases added **before August 3, 2020** the 'Share reports' and the 'Publish reports' permission must be manually assigned to Roles via the Roles section.

### Multi-partner reporting database template

This template is ideal if you are working with many Partners.

![Database design diagram]

<table>
<thead>
<tr>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>SL</td>
</tr>
<tr>
<td>A</td>
</tr>
<tr>
<td>RP</td>
</tr>
</tbody>
</table>

### Sector Lead

Assigning this Role to a user means that the user will be able to:

• View all records
• Add any record
• Edit all records
• Delete any record
• Export records
• Manage users
• Manage record locks
• Edit forms and folders
Administrator

Assigning this Role to a user means that the user will be able to:

- View all records
- Add any record
- Edit all records
- 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
- **Share reports**
- **Publish reports**

⚠️ For Databases added **before August 3, 2020** the 'Share reports' and the 'Publish reports' permission must be manually assigned to Roles via the Roles section.

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.

Reporting partner

When you assign this role to a user you need to define the Partner of the user in the User Management tab. To do so you need to first [add the Partners of your programme to the Partner Form](#).

Assigning this Role to a user means that the user will be able to:

- View records where partner is user's partner
- 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 (which are visible)
Case management database template

This template is ideal if you are working with case management where teams of Case Workers work with Cases under Supervisors. It contains the Form template ‘Case’ and it uses the User field to refine Permissions.

Administrator

Assigning this Role to a user means that the user will be able to:

- View all records
- Add any record
- Edit all records
- Delete any record
- Export records
- Manage users
- Manage record locks
- Add forms and folders
- Edit forms and folders
- Delete forms and folders
- Share reports

⚠️ For Databases added before August 3, 2020 the ‘Share reports’ permission must be manually assigned to Roles via the Roles section.
Case worker

Assigning this Role to a user means that the user will be able to:

- View where case is assigned to them
- Add records where case is assigned to them
- Edit records where case is assigned to them
- Delete records where case is assigned to them
- Export records

Supervisor

Assigning this Role to a user means that the user will be able to:

- View where case is owned or supervised by them
- Add records where case is owned or supervised by them
- Edit records where case is owned or supervised by them
- Delete records where case is owned or supervised by them
- Export records
Forms and Fields
**Form**

In ActivityInfo, Forms are the main components of a Database. A Form defines the various data to be collected, and how they link together. Usually, a Form will represent part of the information you wish to gather.

A Form could represent:

- Tasks
- Programs
- Projects
- Beneficiaries
- Surveys
- Interventions in a specific country
- etc.

A Form is composed of one or more fields. Each field represents a type of data to be collected, and can be combined in any way you choose. This gives you flexibility in creating Forms which match your information requirements.

Forms can be grouped using Folders.
Forms are the primary way users will interact with your data. During Data Entry, a user will fill out the various fields defined on your Form, and save them in your Database. These saved entries are referred to as Records.

You can add one or more Forms within a Form, these are called Subforms.

Forms can also be linked together using special Reference fields. This will allow you to reduce duplication of data, and to report on connected data.
Subform

The following section defines what a Subform is in ActivityInfo.

ActivityInfo has a very flexible Form Designer which allows you to create a variety of structures to fit the reporting needs of your organization. The way you design this structure depends on what the objectives are.

In ActivityInfo, a Subform is a Form within a Form.

Subforms are included within a parent Form.

You can also add a Subform within a Subform.

You can add up to 30 Subforms in a Form. The maximum Subform depth level is 10.

Subform Data Model

A Subform can be used for example to allow you to collect data which needs to monitored over a period of time, or will occur multiple times.

It can also be used to group different types of information that you need to collect.
Attachment field

The Attachment field can be used to allow users to add any type of file or multiple files. This field is well-suited to add extra documents such as PDF documents to Records.

- The maximum attachment size is **10 MB**.
- The maximum number of attachments per field is **20 attachments**.

You cannot upload attachments to a Database when you work with that Database while offline.

You can find all attached documents in the Details tab on the Record side panel of the Table View page.

You can download attachments but you cannot export them when you export Records.

You cannot import Attachments.

 иногда лучше избегать деления поля Attachment на обязательное (например, пользователи могут не иметь файл при добавлении Records).
Attachment field in Data Entry

Delivery signed
Please attach the signed delivery doc.

- Delivery doc_signed.pdf

Attachment field in Table View - Details Panel

Record

Details History

Go to subform:

- Subform

NAME OF SCHOOL
Rosewood

DELIVERY SIGNED
Delivery doc_signed.pdf

DID YOU DO A DELIVERY?
No
Calculated field

Calculated fields are powerful fields. With Calculated fields you can automate calculations in your Form. This way when users fill in the Quantity fields for example you will automatically get the results of the calculations you have defined via the Calculated fields.

You can also use a variety of other Formulas with other types of fields in the Formula Editor of the Calculated field. You can for example:

- add, subtract, multiply and divide indicators
- find the count, count distinct, average, median, max, min of indicators
- search in text values
- concatenate (merge) text values
- use date functions
- use logical functions
- use geographic functions
- and many more

Take a look at all the available Formulas in the Formulas Manual.

The maximum length of a calculated field formula is 1024 characters.

To make the Formula more readable and easy to use, make sure to add Codes to the fields you want to use.

Calculated fields don't appear in the Data Entry page to avoid confusing users adding Records. You can view the results of the calculated fields directly on the Table View of the Form or Subform.
<table>
<thead>
<tr>
<th>Name of School</th>
<th>Number of Dacks da...</th>
<th>Number of Chairs da...</th>
<th>Number of Chemistry...</th>
<th>Number of Blackbo...</th>
<th>Total Units Distributed</th>
</tr>
</thead>
<tbody>
<tr>
<td>40th</td>
<td>23</td>
<td>46</td>
<td></td>
<td></td>
<td>69</td>
</tr>
<tr>
<td>Riverwood Primer</td>
<td>10</td>
<td>40</td>
<td>0</td>
<td>2</td>
<td>52</td>
</tr>
<tr>
<td>Rosenver</td>
<td>10</td>
<td>20</td>
<td>2</td>
<td>10</td>
<td>42</td>
</tr>
<tr>
<td>Illinois</td>
<td>30</td>
<td></td>
<td></td>
<td></td>
<td>30</td>
</tr>
<tr>
<td>12th</td>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td>12</td>
</tr>
</tbody>
</table>
Date field

Users can select a Date from a calendar when adding Records or type a Date in the field. You can add one or more Date fields in your Form.

The Date format in ActivityInfo is YYYY-MM-DD so no matter the way the Date is typed by a user it will always appear in this format.
Date field in Data Entry

Date field in Table View

<table>
<thead>
<tr>
<th>Name of School</th>
<th>Date of Visit</th>
<th>School Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rosewood</td>
<td>2019-08-02</td>
<td>-</td>
</tr>
<tr>
<td>Roserver</td>
<td>2019-08-30</td>
<td>All was good.</td>
</tr>
<tr>
<td>Riverwood primar...</td>
<td>2019-08-01</td>
<td>School was in a g...</td>
</tr>
<tr>
<td>Riverwood B</td>
<td>2019-08-08</td>
<td>All was good.</td>
</tr>
<tr>
<td>Riverdell</td>
<td>2019-08-28</td>
<td>All good</td>
</tr>
<tr>
<td>Hillside</td>
<td>2019-09-03</td>
<td></td>
</tr>
</tbody>
</table>
Fortnight field

Fortnight fields allow users to select a specific two-week period for their Record. This is useful if you are using a Form or a Subform to collect information on a two-week basis or if you are only interested in the two-week period of a specific action.

No matter which week or which day a user will choose for a fortnightly Record (even or odd week), the final fortnightly Record will be automatically converted to the specified format and will always start with an odd week.

The Fortnight field format in ActivityInfo is YYYYWW-WW (e.g. 2020W3-W4). Users can directly type using this format or use the calendar to select a week.

In Pivot Tables, the Fortnight field can be added to rows or columns as dimension. It can be added as a measure using only the count and count unique Statistic.
Add record

Select the 2 week period of the distribution:
Select the 2-week period in which the distribution took place.

Jan 2020

Save record

Fortnight field in Table View

<table>
<thead>
<tr>
<th>Parent Date of distribution</th>
<th>Select the 2 week period of the distribution</th>
<th>How many kits did you distribute during this period</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020-02-01</td>
<td>2019W31-W52</td>
<td>130</td>
</tr>
</tbody>
</table>
With the Geographic Point field you can ask from users to fill in the Form the Latitude and the Longitude of a Geographic Point. Users can use their current GPS location too.

Coordinates of latitude must specify a hemisphere (+/-N/S).

Coordinates of longitude must specify a hemisphere (+/-E/W).
## Geographic Point field in Table View

<table>
<thead>
<tr>
<th>Name of School</th>
<th>LATITUDE Geographic field</th>
<th>LONGITUDE Geographic field</th>
<th>Did you do a del...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rosewood</td>
<td>56.138367</td>
<td>-106.346771</td>
<td>No</td>
</tr>
<tr>
<td>Roseniver</td>
<td>56.138367</td>
<td>-106.646771</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Month field

Month fields allow users to select a specific month of a year. This is useful if you are using a Form or a Subform to collect information on a monthly basis or if you are only interested in the month of a specific action.

The Month format in ActivityInfo is YYYY-MM.

Users can directly type using this format or use the calendar to select a year and a month.
Multi-Line Text field

Multi-Line Text fields can be used to collect long answers to open-ended questions. They could be used for example to collect Comments about a specific Form or an Extended Narrative.

Multi-Line Text fields can be expanded in Data Entry to facilitate the User when entering data by dragging the two lines in the corner of the box.
<table>
<thead>
<tr>
<th>Name of School</th>
<th>School Condition</th>
<th>Did the ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Riverwood Primary</td>
<td>School was in a g...</td>
<td>Yes</td>
</tr>
<tr>
<td>Riverwood B</td>
<td>All was good.</td>
<td>No</td>
</tr>
<tr>
<td>Roseriver</td>
<td>All was good.</td>
<td>Yes</td>
</tr>
<tr>
<td>Riverdell</td>
<td>All good</td>
<td>No</td>
</tr>
<tr>
<td>Evergreen Primary</td>
<td>-</td>
<td>No</td>
</tr>
</tbody>
</table>
Multiple Selection fields can be used to allow users to select more than one option as an answer.

Make sure you create a different option for every individual potential answer.

Multiple Selection fields appear as Checkboxes by default.
<table>
<thead>
<tr>
<th>Name of School</th>
<th>Did you do a del...</th>
<th>What kind of equipment did you distribute?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rosewood</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Roseriver</td>
<td>Yes</td>
<td>Desks, Chairs, Blackboards, Chemistry lab equipment</td>
</tr>
<tr>
<td>Riverwood primar...</td>
<td>Yes</td>
<td>Desks, Chairs, Blackboards, Chemistry lab equipment</td>
</tr>
</tbody>
</table>
Reference field

Reference fields are very powerful fields which make it possible to connect Forms to other Forms or to the Geodatabase. Users can link the Records they add to a Form to the Records of another Form.

To link a Record of one Form to a Record of another Form you need to use as common reference:

- a Key field or
- a Serial Number field

The maximum length of the characters of a Key field to appear in a dropdown result of a Reference field is 128 characters.
Quantity field

You can add a Quantity field to a Form to allow users to enter a numerical value.

You can define the units (Units property) and the type of value by adding a name in the "Label" property.

Quantity Fields can also be used to make calculations using Calculated fields by using the Code property.

![Quantity field in the Form designer](image_url)

![Quantity field in Data Entry](image_url)
<table>
<thead>
<tr>
<th>Did the...</th>
<th>Number of Desks delivered:</th>
<th>Number of Chairs...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>10</td>
<td>40</td>
</tr>
<tr>
<td>Yes</td>
<td>10</td>
<td>20</td>
</tr>
<tr>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Serial Number field

Every Record that is added in ActivityInfo is automatically assigned a unique, randomly-generated ID (e.g. "c23cwexxsf") when it is created. However, in many situations, it can be useful to identify Records by easier-to-remember sequential numbers such as "0023", "0024". So this is the format that a Serial Number will have in Data Entry if you add a Serial Number field in your Form.

Instead of just having a number, which is not very easy to trace or remember, you can add a Prefix Formula to the Serial Number. This will give more traceability to it without revealing sensitive information.

In order to ensure that Serial Numbers are unique, they are only assigned once the Record is actually saved on the server. When you are adding a Record, the Serial Number will be displayed as "(Pending)".

If you save a Record while you are working offline, a Serial Number will not be assigned until you have fully synchronised the Form to ActivityInfo.

You can only have one Serial Number field in a Form. If you have a Serial Number field in your Form, this is automatically the Key of your Form.

יאה Serial numbers can be particularly useful in setting up Case Tracking Systems, where case workers need an easy-to-remember identifier for each case that doesn't include personally-identifying information.
Customizing a Serial Number using a Text field

Customizing a Serial Number using a Single Selection field
Single Selection field

Single Selection fields can be used to ask from users to select one out of two or more options as an answer. This can be a "Yes" or "No" question for example or any other type of question that can be answered with one option.

Single Selection fields can be used in Prefix Formulas to customize Serial Numbers too.

The options will appear as radio buttons when:

- the field is Required and
- has up to 10 options as possible answers

The options will appear as a drop-down menu when:

- the field is not Required

or

- when the field is Required and
- has more than 10 options.
Single Selection field in Data Entry (not Required and less than 10 options)

How did you make the delivery?
Please select one option.

Private car
Organization car
Public transport - bus
Public transport - tram
Public transport - other
Private Van
Organization Van
Other

Distributed kits per household.

All day school N for night school

Single Selection fields in Table View

<table>
<thead>
<tr>
<th>Name of School</th>
<th>How did you make the delivery</th>
<th>Did the School</th>
<th>Did you do a delivery?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rosewood</td>
<td>Other</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Reserver</td>
<td>Organization car</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Riverwood primar...</td>
<td>Organization Van</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Riverwood B</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Text field

Text Fields can be used to collect short answers to open-ended questions (e.g. a Name, an address etc. or other specific information).

They can also be used as a Prefix Formula in a Serial Number.

You can define the format of the text that the users should type in a Text field using an Input Mask.
<table>
<thead>
<tr>
<th>Name of School</th>
<th>Did the...</th>
<th>Number of Desks delivered</th>
</tr>
</thead>
<tbody>
<tr>
<td>01st</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>12th</td>
<td>Yes</td>
<td>12</td>
</tr>
<tr>
<td>13th</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>32th</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>40th</td>
<td>Yes</td>
<td>23</td>
</tr>
</tbody>
</table>
Week field

Week fields allow users to select a specific week of a month. This is useful if you are using a Form or a Subform to collect information on a weekly basis or if you are only interested in the week of a specific action.

The Week format in ActivityInfo is YYYY-WW. Users can directly type using this format or use the calendar to select a week.

Please note that the Week field uses the EPI week convention.
<table>
<thead>
<tr>
<th>Week of distrib...</th>
<th>Name of School</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019W10</td>
<td>Rosewood</td>
</tr>
<tr>
<td>2019W38</td>
<td>Roseriver</td>
</tr>
</tbody>
</table>
User field

User fields allow you to select a specific user from a list. It is a field useful for the Case Management Database template with which you can assign Cases to specific users.

This field allows:

- Users with the Role of Supervisor:
  - to assign Records to users with the Role of Case worker.
  - to access the Records of their assigned Case workers.
- Case workers to access only their own Records.

![User field in the Form Designer](image)

![User field in Data Entry - Supervisor View](image)

![User field in Data Entry - Case worker View](image)
### Case Tracking - Education

#### User field and Records in Data Entry - Supervisor View

<table>
<thead>
<tr>
<th>Case Number</th>
<th>Case Worker Name</th>
<th>Programme Name</th>
<th>Name</th>
<th>Date of Birth</th>
<th>Family Members</th>
<th>Service Provided</th>
</tr>
</thead>
<tbody>
<tr>
<td>00001</td>
<td>Fay</td>
<td>Education Primary</td>
<td>Tom</td>
<td>2010-10-20</td>
<td>0 records</td>
<td>0 records</td>
</tr>
<tr>
<td>00002</td>
<td>Fay</td>
<td>Education Secondary</td>
<td>Ellen</td>
<td>2005-01-30</td>
<td>0 records</td>
<td>0 records</td>
</tr>
<tr>
<td>00010</td>
<td>Fa</td>
<td>Education Secondary</td>
<td>Edit</td>
<td>1999-10-02</td>
<td>0 records</td>
<td>0 records</td>
</tr>
</tbody>
</table>

#### User field and Records in Data Entry - Case Worker View

<table>
<thead>
<tr>
<th>Case Number</th>
<th>Case Worker Name</th>
<th>Programme Name</th>
<th>Name</th>
<th>Date of Birth</th>
<th>Family Members</th>
<th>Service Provided</th>
</tr>
</thead>
<tbody>
<tr>
<td>00001</td>
<td>Fay</td>
<td>Education Primary</td>
<td>Tom</td>
<td>2010-10-20</td>
<td>0 records</td>
<td>0 records</td>
</tr>
<tr>
<td>00002</td>
<td>Fay</td>
<td>Education Secondary</td>
<td>Ellen</td>
<td>2005-01-30</td>
<td>0 records</td>
<td>0 records</td>
</tr>
</tbody>
</table>
Section header

The Section header allows you to create sections in your Forms and Subforms. This is useful in the case of a long Form or Subform and it helps users navigate more easily in the Data Entry page.

Section headers are not visible in Table View.

You can add many Section headers in your Form.
Field properties
Label

By defining the Label property you give a Name to the field. This allows users adding Records to know what kind of information they need to fill in.

You can provide more information using the Description property.

The maximum length of a field Label is **1024 characters.**
After defining the Label property you can give more information about what kind of data the field collects. This allows users adding Records to know what kind of information they need to fill in in detail.

The maximum length of a field Description is **2048 characters**.
You can assign a Code to a field if you want to re-use it in your Form. For example, Codes are added to Quantity fields to make them more readable in the Formula editor.

Valid codes

A field Code must meet the following conditions to be a valid code:

1. its length may not exceed 20 characters,
2. it must start with a letter, and
3. it may only consist of letters, numbers, and the underscore symbol.

Letters can be lower case (a-z) and upper case (A-Z) letters, but not accented (i.e. ë is not accepted). Here are some examples of valid and invalid codes:

<table>
<thead>
<tr>
<th>Valid</th>
<th>Invalid</th>
</tr>
</thead>
<tbody>
<tr>
<td>MALE_TOTAL</td>
<td>MALE TOTAL</td>
</tr>
<tr>
<td>x1</td>
<td>1x</td>
</tr>
<tr>
<td>A_PLUS_B</td>
<td>A+B</td>
</tr>
<tr>
<td>hopital</td>
<td>hôpital</td>
</tr>
</tbody>
</table>
Key

Keys are very important properties in ActivityInfo and they help you build flexible Forms. A Key helps you uniquely identify a Record. When you assign the Key property to a field you identify a Record, you individualize it. This is very useful when you want to reference a specific field in a Form.

When a Form has a Serial Number field, it automatically becomes the Key field of the Form and no more Keys can be added. This is useful and preferable in Protection cases when you don't want to reveal information when you refer to a Record of a Form.

If you haven't added a Serial Number in your Form then it is advised that you select another field to define as the Key to your Form.

Examples of Key uses

- Keys are necessary to allow users to import Records to a Subform or to Reference another Form. This is because users need to link Records by using a common field (i.e. the Key or the Serial Number).
- When you make a Date/Week/Month or any other time-related field a Key field you can use it to add Locks on Records. This is useful for Monthly or Weekly Reporting Subforms for example.
- A combination of Key fields can be used to prevent users from adding more than one Record for that combination (e.g. a Name and a Surname).
- A Single Selection field which is the unique Key in a Form will prevent users from adding a Record where the same option is selected more than once.
- A Reference field which is the unique Key in a Form will prevent users from adding a Record where the same referenced Record is selected more than once.

Attention!

- If you add a Serial Number field in your Form, this field automatically becomes the Key field for your Form and you cannot add other Keys.
- You can add up to 10 Keys in a Form (or only one Serial Number).
- A Key Field is Required and cannot be hidden from data entry.
- You cannot set Relevance rules to a Key field.
- Quantity, Calculated, Geographic Points, Multiple selection & Attachments fields cannot be Key fields.

Examples

In this example, we make a Single Selection field a Key field for our Form. Then we create another Form which refers to it to allow users to select one of the cities for which there are available Records and link their Records to it.
A Key can be also used to inform users that there is a duplicate for a specific combination of fields and prevent them from adding the same Record.

In the example below, the "Date of distribution" and the "School Name" are Key fields. When users try to add a Record and add the same Date and School Name as in another Record, they get an error.
A Key can prevent users from adding a duplicate Record for the same option in a Single Selection field.

In the example below, the "Select city" Single Selection field is a Key field. When users try to add a Record for an option that has already been used in another Record, they get an error.
A Key can be used to allow you to add a Lock to a Form or Subform to prevent users from adding Records for a specific period.

In the example below, the "Date of reporting" Date field is a Key field. There is a Lock that prevents users from adding Records for January 2020. When users try to add a Record for a Date in January they get an error.
Required

With the Required property you make it obligatory for a field to be filled in when users add Records. Users won't be able to save their Record unless they fill in the field(s) marked as Required.

Make sure you assign this property only to fields that the users can definitely fill in.

You cannot check the property "Required" and "Hide from entry" at the same time.
Hide from Entry

With this property you can choose to hide a field from users. You might want to do that, if for example the field has a functional role which does not make sense to be shared with the users adding Records and you plan to use it when you add a new Report.

When you hide a field from data entry it is hidden both from the Form in which users add Records and from the Table View page.
Relevance rules

Sometimes when users add Records they might not need to reply to all the questions of the Form. With this property you can customise when a field will appear in the Data Entry page. You can define under which conditions (rules) the field should appear to the user. This way you can save time and avoid confusion for users adding Records who don't need to fill in specific fields.

You can define various Relevance rules to customise when a field will appear. You can also write a Formula to define a more advanced rule.

The maximum number of Relevance rules that can be added to a field is 10.
Input Mask

The Input Mask property is available for Text fields and can be used to constrain what users type in a Field when adding records. It can be used to make sure that users enter certain digits or letters.

When adding Records, as users type in the field that has an Input Mask, the data entered will automatically get validated and the field will turn red if the data entered do not match the Input Mask and green if they do.

Input Masks can be useful if you have a field with administrative codes, for example or if you want to customise a Serial Number field using a Text field and you want the text to have a specific format.

The following table shows the characters that can be used to create an Input Mask and their explanation.

<table>
<thead>
<tr>
<th>Character</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>User must enter one digit (0 to 9)</td>
</tr>
<tr>
<td>00</td>
<td>User must enter two digits (0 to 9)</td>
</tr>
<tr>
<td>L</td>
<td>User must enter a letter</td>
</tr>
<tr>
<td>LL</td>
<td>User must enter two letters</td>
</tr>
<tr>
<td>A</td>
<td>User must enter a letter or a digit</td>
</tr>
<tr>
<td>\</td>
<td>Character immediately following will be displayed literally</td>
</tr>
</tbody>
</table>

The following table shows examples using an Input Mask and their explanation.

<table>
<thead>
<tr>
<th>Example</th>
<th>Input mask</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family Registration Number</td>
<td>1-00000000</td>
<td>The ‘1-’ is always fixed the rest of the digits can be different</td>
</tr>
<tr>
<td>Case worker Initials</td>
<td>AAA</td>
<td>Initials have to be 3 letters long</td>
</tr>
<tr>
<td>Case worker ID</td>
<td>000</td>
<td>ID has to be 3 digits</td>
</tr>
<tr>
<td>Administrative number</td>
<td>2\02\0-00-000</td>
<td>The ‘2020-’ and the other dashes are fixed; the rest of the numbers can be changed.</td>
</tr>
<tr>
<td><strong>Example</strong></td>
<td><strong>Input mask</strong></td>
<td><strong>Explanation</strong></td>
</tr>
<tr>
<td>------------------</td>
<td>----------------</td>
<td>--------------------------------------</td>
</tr>
<tr>
<td>US phone number</td>
<td>(000) 000-0000</td>
<td>The brackets, space, and dash are fixed</td>
</tr>
</tbody>
</table>
Units

This property is available for Quantity fields and it is where you define what is being counted by the specific field.

You can leave 'Units' blank if you don't want to define the type of unit.
Options

The Options property is used with Single and Multiple Selection fields to provide users with the available options they can choose from.

The maximum number of options per Single/Multiple Selection field is **100 options**.

The maximum number of options in total for all Single/Multiple Selection field in a Form is **1000 options**.

Multiple selection fields appear as checkboxes in the Data Entry page.
What kind of equipment did you distribute?*
Please select all that apply.

- Desks
- Chairs
- Blackboards
- Chemistry lab equipment
The Prefix Formula is available for Serial Number fields and can be used to customise how the Serial Number will appear.

The Prefix Formula can be either a Text field, a Single Selection field or a Reference field that references a Text field made Key, a Single Selection field made Key or a Serial Number field of another Form. The Prefix Formula can be selected from the drop down menu.

You can also add a CONCAT formula to combine Text fields by typing the Formula on the Prefix Formula section or other Text formulas.

In Subforms, the Prefix Formula can also derive from the Parent Form.

If Records were added to a Form before changes were applied to a Prefix Formula, the previous Serial Number will remain the same and the change will only be applicable to new Records.
In the Subform you can select a field from the Parent Form and use it as a Prefix. The first part shows the name of the Parent Form, the second part shows the name of the field.

Prefix Formula

Case Details — Name of Institution
The Formula property is available for Calculated fields. It is used to define the Formula to automate a calculation in your Form.

Take a look at all the available Formulas in the Formulas Manual.

To make the Formula more readable and easy to use, make sure to add Codes to the fields you want to use.

When the Formula is valid, the field will be marked in green.

You can also write a Formula using the Formula editor.

Formulas can also be used to define advanced validation and relevance rules when designing a Form.
Validation Rules

You can define rules for the validity of Records. Users won't be able to save a Record that does not follow the validation rules. You can base the validation rules on the fields of your Form or on a specific Formula. Writing a Formula for a validation rule allows you to set more advanced validation rules.

- A field with validation rules can be a Key field.
- A field with validation rules can be hidden.
- A field with validation rules can also have relevance rules.

<table>
<thead>
<tr>
<th>Field Type</th>
<th>Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>• Is</td>
</tr>
<tr>
<td></td>
<td>• Is not</td>
</tr>
<tr>
<td></td>
<td>• Starts with</td>
</tr>
<tr>
<td></td>
<td>• Ends with</td>
</tr>
<tr>
<td></td>
<td>• Contains</td>
</tr>
<tr>
<td>Quantity</td>
<td>• Greater than</td>
</tr>
<tr>
<td></td>
<td>• Less than</td>
</tr>
<tr>
<td></td>
<td>• Greater or equal to</td>
</tr>
<tr>
<td></td>
<td>• Less or equal to</td>
</tr>
<tr>
<td></td>
<td>• Is</td>
</tr>
<tr>
<td></td>
<td>• Is not</td>
</tr>
<tr>
<td>Date</td>
<td>• Before</td>
</tr>
<tr>
<td></td>
<td>• After</td>
</tr>
<tr>
<td></td>
<td>• Is</td>
</tr>
<tr>
<td></td>
<td>• Is not</td>
</tr>
<tr>
<td>Week/Fortnight/Month</td>
<td>• Before</td>
</tr>
<tr>
<td></td>
<td>• After</td>
</tr>
<tr>
<td></td>
<td>• Is</td>
</tr>
<tr>
<td></td>
<td>• Is not</td>
</tr>
<tr>
<td>Multi-line Text</td>
<td>• Is</td>
</tr>
<tr>
<td></td>
<td>• Is not</td>
</tr>
<tr>
<td></td>
<td>• Starts with</td>
</tr>
<tr>
<td></td>
<td>• Ends with</td>
</tr>
<tr>
<td></td>
<td>• Contains</td>
</tr>
<tr>
<td>Date</td>
<td>Code</td>
</tr>
<tr>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>Label</td>
<td>Code</td>
</tr>
<tr>
<td>Date of distribution</td>
<td>Distribute</td>
</tr>
</tbody>
</table>

**Description**

Please add the date of the distribution

**Settings**

- Key
- Required
- Hide from entry
- Set relevance rules
- Set validation rules

**Validation rules**

Count as valid if all of the following conditions are met:

- **Date**: after **2020-02-18**
- **Formula & true**: [date of visit] < [distribute]

Appendix
User Interface Overview
Database List page

The Databases List page is the first page you view when you log in to ActivityInfo. From here you can select a Database to navigate to a Form or a Subform in order to add Records. On the Databases List page you can view all the Databases that you have added or have been invited to.
Database page

On the Database page you can view the contents of a Database. There might be Folders within other Folders or Forms with Subforms.

Depending on your assigned Permissions here you can:

• Add a Form.
• Add a Folder.
• Navigate to the Database Settings page.
• Make the Database available offline.
• Export the Database.
• Navigate to the Table View of Forms and Subforms.
• View the content of a Folder in the Folder page.
• View the Database owner.
• View your Role in the Database.

![Database page screenshot](image-url)
Database Settings page

The Database Settings page is where you can manage a Database and its settings. It includes the Database design section, the User management section and the Roles section.

The Database Design section

The Database Settings page includes the Database Design section which is where you can manage the design of the Database and its contents.

On this section you can:

- Rename a Database
- Rename a Folder
- Rename a Form
- Delete a Database
- Delete a Folder
- Delete a Form
- Add a Form
- Add a Folder
- Grant Permissions or override Permissions of Roles for the whole Database or for specific Forms and Folders
- Add Locks for the whole Database or for specific Forms and Folders

Appendix
The User Management section

The User Management section is part of the Database Settings page. It is where you can manage the Users that have access to the Database and their Permissions.

In this section you can also:

- **Add users**
- **View users and their Role**
- **View the status of an invite**
- **Edit the Role of a user**
- **View the Permissions granted to a user.**
- **Edit or delete granted permissions of a user**
- **Delete users**
- **Export users**
The Roles section

The Roles section is part of the Database Settings page. It is where you can view the Roles that come with the Database template you selected.

You can also:

• Rename a Role
• **Duplicate a Role**
• **Delete a Role**
• **View and edit the Permission that come with a Role**
• **View the Parameters that come with a Role**

---

### The Audit Log section

The Audit Log section is part of the Database Settings page. It is where you can review an Audit log of the events that took place in your Database. The Database Audit Log is available only to [Database owners](#).

In the Audit Log section you can:

- **View and filter the Audit Log of your Database**
- **Recover a deleted Record**
- **Find and contact via email a user that made a change to the Database**
The following section presents the Search Bar.

The Search Bar allows you to navigate quickly to a Database, Folder or Form under the condition that you know part of or its complete name.

The available results will appear as a drop-down list and will include Databases names, Folder names and Form names, if there is match. Click on a result to select it and navigate to it.
The Form Design page is the interface where you can start designing your Forms and the Subforms in order to start collecting data.

A Form is composed of multiple fields, allowing you to tailor your Form to match your requirements.

Take a look at all the available fields before you start designing your Form.

On the Form Design page you can:

- **Design your Form**
- **Design a Form with a Subform**
- **Copy a Form by exporting its fields and importing them to a new Form**

Click on "x" to close the field palette and click on "+" to reveal it again.

To add a new field click on "+" to reveal the field palette and click on the field to add it.

To move a field click on it to select it and drag it to the place you want to place it.
To add a field between two existing fields, hover your mouse between the two fields to reveal the "x" button and click on it.

You can define the properties of each field to customise your Form even further. Some properties are common for all the fields and some properties are unique to each type of field.

Take a look at all the available field properties before you start designing your Form and read more about Designing a Form.
The Table View is where you or your team can view the data collected by user who added Records to a Form or to a Subform.

From the Table View you can:

- Add records
- Import records
- Export records
- Select columns to view in the Table View
- Add a temporary Calculated field to the Table View
- Filter and Sort Records
- View the Details and the History of a Record
- Navigate to the Table View page of a Subform

In the Record side panel you view the Details and the History tab for a selected Record.

Using the Details panel you can:

- Print the Record
- Edit the Record
- Delete the Record
<table>
<thead>
<tr>
<th>Month</th>
<th>Grade books, Phys...</th>
<th>New delivery of...</th>
<th>Amount of...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb 19</td>
<td>Maths books, Phys...</td>
<td>Yes</td>
<td>100</td>
</tr>
<tr>
<td>Mar 19</td>
<td>Maths books, Phys...</td>
<td>Yes</td>
<td>150</td>
</tr>
<tr>
<td>Apr 19</td>
<td>Maths books, Phys...</td>
<td>Yes</td>
<td>200</td>
</tr>
<tr>
<td>May 19</td>
<td>Maths books, Phys...</td>
<td>Yes</td>
<td>400</td>
</tr>
<tr>
<td>Jun 19</td>
<td>Maths books</td>
<td>Yes</td>
<td>320</td>
</tr>
<tr>
<td>Jul 19</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aug 19</td>
<td>Physics books, Ch...</td>
<td>Yes</td>
<td>150</td>
</tr>
<tr>
<td>Sep 19</td>
<td>Physics books, Ch...</td>
<td>Yes</td>
<td>200</td>
</tr>
<tr>
<td>Oct 19</td>
<td>Maths books, Phys...</td>
<td>Yes</td>
<td>320</td>
</tr>
<tr>
<td>Nov 19</td>
<td>Maths books, Phys...</td>
<td>Yes</td>
<td>10</td>
</tr>
<tr>
<td>Dec 19</td>
<td>Maths books, Phys...</td>
<td>Yes</td>
<td>310</td>
</tr>
<tr>
<td>Jan 20</td>
<td>Maths books, Phys...</td>
<td>Yes</td>
<td>310</td>
</tr>
<tr>
<td>Feb 20</td>
<td>Maths books, Phys...</td>
<td>Yes</td>
<td>320</td>
</tr>
<tr>
<td>Mar 20</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apr 20</td>
<td>Maths books</td>
<td>Yes</td>
<td>250</td>
</tr>
</tbody>
</table>

Click on a record to view the record inside panel.
The Report List page is where you can find all the Reports and add Reports. You can visualize your data using a Pivot Table and a Bar Chart.

In the Pivot Report page you can start design your Report and decide on how to visualise it. Currently you can visualise the analysis of the data as:

- A Pivot Table
- A Bar Chart

Using the Report Design side panel you can select the Resources you will use in the Report.
In the Report page you can also:

- Save a Report
- Rename a Report
- Delete a Report
- Change the way the report is visualised
- Share a Report
- Publish a Report as a standalone webpage
- Publish a Report as an embeddable HTML snippet
### Kits distribution by date and partner

#### Pivot Table

<table>
<thead>
<tr>
<th>Municipality</th>
<th>BeDataDriven</th>
<th>Ministry of Devlop...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aa en Hunze</td>
<td>250</td>
<td>100</td>
</tr>
<tr>
<td>Aalten</td>
<td>210</td>
<td></td>
</tr>
<tr>
<td>Almere</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td>Apeldoorn</td>
<td>120</td>
<td>80</td>
</tr>
<tr>
<td>Assen</td>
<td>250</td>
<td></td>
</tr>
<tr>
<td>Dantumadie</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Goes</td>
<td>230</td>
<td></td>
</tr>
<tr>
<td>Weert</td>
<td>60</td>
<td></td>
</tr>
</tbody>
</table>
Measures Card

- Define the Measure(s) you want to base you Report on by dragging and dropping the respective Field(s) to the Measures.

Using the Measures Card you can:

- Rename a Measure.
- Delete a Measure.
- Select the type of Statistic you want to use in the Pivot Table for this Measure.
Rows Card

- Define the Field(s) to be used in the Rows of the Pivot Table by dragging and dropping the respective Fields to Rows.

Using the Rows Card you can:

- Edit the Label.
- Delete the Dimension.
- Select what to display in the Pivot Table.
Columns Card

Define the Field(s) to be used in the Columns of the Pivot Table by dragging and dropping the respective Field(s) to the Columns.

Using the Columns Card you can:

• Edit the Label.
• Delete the Dimension.
• Select what to display in the Pivot Table.
Columns

Dimension name

Date

Edit Label

Delete

Delete Dimension

Also display

- [ ] Totals
- [x] Missing Values
- [ ] Percentages

Select other metrics to be included