MANAGING USERS, ROLES, PERMISSIONS AND LOCKS
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Managing Users, Roles, Partners & Permissions
Adding Partners to the multi-partner reporting Database

This article describes how to add Partners to the Partner Form of the multi-partner reporting Database to be able to use the Reporting partner Role of the Database and assign individual users to Partners.

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

Some of the templates can be used to allow you to create Databases where multiple Partners and their users can cooperate.

For example, the "Multi-partner reporting database" template is ideal if you want to create a Database where multiple Partners will collaborate on reporting for specific activities of programmes.

Not all templates are optimized for adding Partners. Make sure you are using a template that allows partner reporting such as the "Multi-partner reporting database".

How to add Partners

• Navigate to the Database Design section of your Database.
• You can start 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 Resource side panel.

• The Table View page 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 page, click on "Import" and follow the steps in the article "Importing Records".
• When you have added all the Partners, you can navigate back to the Database by clicking on the name of the Database on the breadcrumb at the top of the Table View page.

Now, you can add a Reference field in your Form to refer to this Partner Form.
Also, when assigning the Role of Reporting partner to a user you can define the user’s Partner to refine the Permissions assigned to the user.
Adding a user

The following section describes how to add (invite) a user to a Database using one of the available Database templates. It explains how to assign Roles to the added users, how to select the language of the invitation and how to define the resources which they can access.

ActivityInfo can be used to coordinate many users. Users can be added to one or more Databases, Forms and Folders by the owner of the Database and they can have different Permission levels based on predefined Roles.

- If the users added have an ActivityInfo account, the new Database will appear in their Database list page when they are added and they will receive an email to notify them about the invitation to join the Database.
- If the users added don't have an ActivityInfo account, an email will be sent by ActivityInfo to the email address you provided to inform them about the invitation to the Database. Once they create an account and sign in ActivityInfo they will be able to access the Database in which they have been added.

💡 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.
Depending on the template you choose for your Database, you can have different Roles available.

The Simple (Blank) Database template is 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).

In this case, you can:

• assign a Role to each user
• define the Folder(s) and Form(s) which they can access.

If you want to create a Database where multiple Partners will collaborate, the Multi-partner reporting database template is ideal as it allows you to:

• assign a Role to each user
• define the Folder(s) and Form(s) which they can access
• and refine permissions further based on their Partner.

The Case Management template is ideal if there are teams of users (e.g. Case Workers) that work on a Case under Supervisors and it allows you to:

• assign a Role to each user
• define the Folder(s) and Form(s) which they can access
• define the Records they can access
• and assign Case Workers to Supervisors

You can edit a Role to customize it to your needs or override the permissions for an individual user.

As a Database owner, you are not listed as a User because you have all Permissions by default and these cannot be changed. This also holds for Databases where you have the permission to Manage Users.

Maximum number of users that can have access to a Database: 10,000 users.

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 Parent Form but not to the Parent Form itself, the user will be able to view the Name of the Parent Form and the Parent Records but won't be able to Add, Edit and Delete Records related to the Parent Form.
• You can only grant permissions to users for a Resource if you have the "Manage users" permission for that Resource.
How to add a User to a Blank Database (without Partners)

• On the Database List page, click on the Database that you want to add a user to.

• Click on "Database settings" to open the Database Settings page.

• Click on "User management" to open the User management section and click on "Add user" to add a new 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 when the user doesn't have an ActivityInfo account.

• 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 too. You will be able to 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.

• If the user doesn't have an account in ActivityInfo, 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, there are some available Roles with default permissions. You can use these or create new Roles.
• View all the Roles and their permissions for this template.

• Then, select the Forms and Folders this user is added to. Click on the arrows to reveal more resources such as Forms or Folders within Folders.

• Click on "Send invite" to invite the user you want to add.

• An invitation will be sent to the email you provided. Once the user accepts their invitation they will be able to access the Forms and Folders to which s/he was invited.

• If you want to change some of the Permissions that come with a predefined Role for a specific user, 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.

How to add a User to a Multi-partner reporting database
• On the Database List page, click on the Database that you want to add a user to.
• Click on "Database settings" to open the Database Settings page.

• Click on "User management" to open the User management section and click on "Add user" to add a new 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 when the user doesn't have an ActivityInfo account.
• 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 too. You will be able to 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.

• If the user doesn't have an account in ActivityInfo, 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, there are some available Roles with default permissions. You can use these or create new Roles.
View all the Roles and their permissions for this template.

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.

If you choose Reporting Partner, choose the Partner for the user. Make sure to add Partners in the reference Form of the Database.

- Then select the Forms and Folders this User is added to.
- Click on the arrows to reveal more resources such as Forms or Folders within Folders.

  ![Diagram showing the process of selecting forms and folders and sending invites]

  - Click on "Send invite" to invite the user you want to add.
  - An invitation will be sent to the email you provided. Once the user accepts their invitation they will be able to access the Forms and Folders to which they were invited.
  - If you want to change some of the Permissions that come with a predefined Role for a specific user, 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.

How to add a User to a Case management database

• On the Database List page click on the Database that you want to add a user to.
• Click on "Database settings" to open the Database Settings page.

• Click on "User management" to open the User management tab and click on "Add user" to add a new 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 when the user doesn't have an ActivityInfo account.

• 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 too. You will be able to 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.

In the next steps you will define the Permission levels for this user.

• If the user doesn't have an account in ActivityInfo, 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, there are some available Roles with default permissions. You can use these or create new Roles.
View all the **Roles and their permissions for this template**.

**User fields** allow you to assign Cases (Records) to Case Workers.

If you choose Case Worker, choose the Supervisor for that Case Worker. To be able to do that you need to first add the users that will have the role of Supervisor.

- Then select the Forms and Folders this User is added to. Click on the arrows to reveal. Click on the arrows to reveal more resources, such as Forms or Folders within Folders.

- Click on "Send invite" to invite the user you want to add.
- An invitation will be sent to the email you provided. Once the user accepts their invitation they will be able to access the Forms and Folders to which s/he was invited.

- If you want to change some of the Permissions that come with a predefined Role for a specific user, 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.
Changing a user's Role

The following section describes how to change the Role that has been given to a user. By changing a user's Role you change the Permissions for that users.

Users can be invited to one or more Databases, Forms and Folders by the owner of the Database and they can have different Permission levels based on predefined Roles.

After inviting a user to a Database, you might want to change the Role you assigned to that user.

💡 Instead of changing a user's Role you might want to grant permissions to the user for a specific resource.

How to change a user's Role

• Navigate to the User management section of the Database in which the user has been invited.
• Click on the user to select them and on the User side panel click on the Card to change the Role.

• Select the new Role that you want to assign to this user.
• Optionally select or change the Forms and Folders for which the permissions of this Role will apply.
• Click on 'Save' to save the changes.
The Role of the selected user has been changed and you can view the new Role assigned to the user in the User list of the User management section.
Overriding a Role's permissions for an individual user (granting permissions)

The following sections describes how to override the Permissions of a Role assigned to a User for a specific resource such as a Folder or a Form. This helps you customize further the access the invited users have by granting them specific Permissions.

You might want to change some of the Permissions that come with a predefined Role of a Database template or the Permissions of a Role you have created and do this for an individual user. This way you can customize even further the access that User has to a specific Database, Folder, Form or Subform.

💡 You might want to edit a Role instead.

💡 To view the granted permissions of a user, navigate to the User management section and select the user. The granted permissions, if any, will appear in the User side panel. Click on the Card to view the exact permissions.

How to override a Role's permissions

• On the Database List page, click on the Database that you want to apply the change to.

<table>
<thead>
<tr>
<th>Databases</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Database 1</td>
<td></td>
</tr>
<tr>
<td>NFI Distribution Activities - 2020 Indicators</td>
<td></td>
</tr>
<tr>
<td>Database 2</td>
<td></td>
</tr>
</tbody>
</table>
• Click on "Database settings" to open the Database Settings page.

• Click on "Database Design" and select the Form or Folder for which you want to apply changes.
• On the Resource side panel, click on the User for which you want to change the Permissions, to reveal the assigned Permissions.

• Click on the Permissions you want to add or remove any unwanted Permission by unchecking a checked box.
• Click on "Save" to save the changes.
The predefined Permissions that come with the Role of this User for this specific Resource have been edited.

To view, edit or delete these granted permissions navigate to the User Management section and click on the user to select them from the list.

In the User side panel click on the card that shows the granted permissions for the selected resource.

Here you can view and edit the granted permissions. To remove the granted permissions completely click on "Delete this extra grant".
Click on "Save" to save any changes or on "OK" to the confirmation message if you select to delete the granted permissions.
Granting permissions to a user for a new Folder or Form (via Database Design)

The article presents how to grant permissions to a user for a Folder or Form.

You can grant permissions to a user that has been already added to a Database for a Form or Folder. Sometimes, a user is added to a Database but is not added to all the Forms or Folders needed or there is the need to grant specific permissions to the user.

This could happen because the resource was not there at the time the user was invited, because the user’s permissions need to be changed due to a change in your programme or due to a mistake for example.

⚠️ You can only grant permissions to users for a Resource if you have the "Manage users" permission for that Resource.

How to grant permissions to a user for a new Folder or Form (via Database design)

• On the Database List page, click on the Database that you want to apply the change to.
Click on "Database settings" to open the Database Setting page.

Click on "Database design" and select the Form or Folder for which you want to apply changes. In the Resource side panel you can see the users that have permissions for this resource but you will not see the users that haven't.

Click on 'Grant permissions' to reveal the list of all the users that have been added to the Database.
Select the user you want to add from the list of users and select the permissions you want to assign to them by checking the box next to them.  
Click on "Done" to save the changes.

The user has been added to the list of users for that resource.
- You can view the granted permissions of users in User management.
- Click on 'User management' and click on the user from the User list.
- In the User side panel, in the User side panel you can view, edit or delete the granted permissions.
Adding an existing user to a new resource (via User Management)

This article presents how to add a user, who has already been added to a Database, to a new resource (Folder or Form).

Sometimes, a user is added to a Database but is not added to all the Forms or Folders needed. This could happen because the resource was not there at the time the user was invited or because the user’s permissions need to be changed due to a change in your programme for example.

You can either select the new Form or Folder from the Database Design section and then grant permissions to a user or find the user in the User Management section and edit the user’s access from the User side panel.

Changes to granted permissions made in User Management section will be reflected in Database Design section and vice-versa.

Please note that you need to have the permission "Manage users" for the Folder or the Form in which you want to add the user. If the user has been assigned Forms or Folders for which you are not authorized to manage permissions, you will be limited in the changes that you can make.

For example, if you have the "Manage user" permission for only one specific Folder and not for the entire Database where a user has been added you can only add the user to the resources in which you have the "Manage user" permission.

How to add an existing user to a new resource

• On the Database List page, click on the Database that you want to apply the change to.
• Click on "Database settings" to open the Database Setting page.

• Click on "User management" to see the list of users.
• Click on the user you want to add to a new Folder or Form.
In the User side panel you can view a summary of the permissions a user has. You can view the Role of the user, any additional grants as well as the resources which the user can access. Click on the Card.

Check the boxes of the resources in which you want to add the user and click on "Save".
• The user has been added to the selected resources.
• Navigate to the Database design page to view the users that have been added in the selected resources.
Editing a Role

The following section describes how to change the predefined permissions of a Role to customize it further. It also explains how to duplicate a Role to create a new Role and how to delete it.

The database templates in ActivityInfo come with some predefined Roles. The predefined Roles define the type of Permissions a user will have to the Database/Folder/Form they have been added to.

You can:

• Rename a Role
• Duplicate a Role
• Delete a Role
• Change the Permissions of a Role

You might want to change the Permissions that come with a Role to better meet your needs.

Please keep in mind that when you change the Permissions that correspond to a Role then this will apply to all the users that have been assigned with that Role.

Take a look at the available Templates and Roles.

You need to be the Database owner to be able to edit a Role.
You will not be able to delete a Role if it has already been assigned to a user.

How to rename a Role

• Select the Database for which you want to change the Permissions of a Role or add a Database using a template.
• Click on "Database settings" to navigate to the Database Settings page.

• Click on "Roles" to reveal the available Roles for this database.
• Click on the Role you want to rename and click on "Rename role".
• Give a new name to the Role and click on "OK" to save it.

• The Role has been renamed.
How to duplicate a Role

- Select the Database for which you want to change the Permissions of a Role or add a Database using a template.

- Click on "Database settings" to navigate to the Database Settings page.
- Click on "Roles" to reveal the available Roles for this database.

- Click on the Role you want to duplicate and click on "Duplicate role".
The Role has been duplicated. You can rename it to make it distinct or edit its Permissions to customize it further.
How to delete a Role

- Select the Database for which you want to change the Permissions of a Role or [add a Database using a template](#).

- Click on "Database settings" to navigate to the Database Settings page.

- Click on "Roles" to reveal the available Roles for this Database.
• Click on the Role you want to delete to select it and click on "Delete role".
• On the pop message click on "OK" to confirm the deletion.

⚠ You will not be able to delete a Role if it has already been assigned to a user.

• The Role has been deleted.
How to change the Permissions of a Role

- Select the Database for which you want to change the Permissions of a Role or [add a Database using a template](#).

- Click on "Database settings" to navigate to the Database Settings page.
• Click on "Roles" to reveal the available Roles for this database.

Please note that the Roles may vary depending on the template you use.

• Click on the Role for which you want to change the available Permissions. In the side panel you can view the Permissions that apply to the Role currently and any related Parameters.
• Click on "Edit permissions".
• Check or uncheck the boxes to define the new Permissions that you want to apply for this Role.
• Click on "Save" to save the changes.

• The Permissions for that Role have been changed.
Exporting users

You can export a list for all users listed in the User Management section in the Database Settings page. The export includes information about all the users added in the Database. To be able to export a list of users, a user must have been granted the 'Manage users' permission or assigned with a Role that comes with this permission.

The export list includes each user's:

- id in ActivityInfo
- name
- email address
- assigned Role
- assigned resources

It also shows information regarding:

- time of invitation sent to user
- the status of the account
- the email deliverability status
- time of the last login of the user

The dates and times will be in the same timezone your device is set to.

How to export users

- In the Database Settings page of your Database, click on "User management".
• In the User management section click on "Export".

• Once downloaded, click on the file on the Download Bar of your browser to open it.
Activity_4_Win....xlsx
Editing the visibility of a Folder or Form

The following section describes how to edit the visibility of a Folder or Form in your Database so that you can create public, private and reference Forms and Folders.

The visibility of all the Forms you design is by default 'private'. This means that they will be visible only to the users that have been granted access when you added them to the Database.

You can change the visibility of a Form to:

• **Public**: The Form becomes public. Users in and outside the Database can view the Form and all of its Records and the form can be queried using the API without the need to authenticate.
• **Reference**: The Form and its Records is turned to reference data and can used as a reference. Any user with access to the Database can view the Form and all of its Records, but it will not appear in the list of Forms.
• **Private**: The Form is private. Only the users added to it will be able to access it.

You can change the visibility of a Folder to:

• Reference: The Folder can be used for reference. Any user with access to the Database can view the Folder, but it will not appear in the list of Folders. Be careful because users might not be able to access Forms in this Folder.
• Private: The Folder is private. Only the users added to it will be able to access it.

⚠️ If you change the visibility status of a Subform (e.g. from Private to Public) then the visibility status of the Parent Form will change too.

💡 The "Manage reference data" permission found in the Administrator Role of the database templates, allows users to add, edit, import and delete records in the Forms inside the Reference data Folder.

How to edit the visibility of a Folder or a Form

• In the Database Design section, click on the resource for which you want to change the visibility.
• In the Resource side panel, in the Permissions tab, you can read about its current visibility status. Click on "Edit" to change it.
• Click on the visibility option you prefer from the list to select it.

• The visibility status has changed.
Database design

- Reference Data
- Winter Activities
- Distribution Activities Q2
- Distribution by Partner
- Form with Lock

Distribution Activities Q2
- View and edit records
- Edit form
- Delete form

Permissions

This form is reference data. Any user with access to this database can view the form and all of its records, but it will not appear in the list of forms.

Grant permissions
Manage Locks
Adding a Lock

This article explains how to add a Lock to a Form or Subform to prevent users from adding or editing Records that belong to a particular time period. It presents the prerequisites for your Form or Subform and it showcases how Locks work in the Data Entry page.

By adding a Lock you can preserve versions of the Records after they have been validated by your information management processes for example and make sure that no user can edit them.

You can add a Lock to a Folder or a Subform. You need to add a Date/Month/Week field to your Form or Subform and make it a Key field in order to add the Lock.

How to add a Lock

• Before adding a Lock to your Form make sure that it contains a Date/Month/Week which is a Key field.

• On the Database List page, click on the Database that contains the Form you want to add a Lock to.
Click on "Database settings" to open the Database Settings page.

Navigate to the Form to which you want to add the Lock. Click on the arrows to reveal the contents of Folders.

In the Resource side panel of the Database Design section, click on "Locks" to open the Locks tab.
• Click on "Add Lock" and give a name to the Lock.
• Select the starting date and the ending date for your Lock. Click on the Calendar icon to reveal a Calendar or type the date following the format "YYYY-MM-DD".
• Click on "Save" to save the Lock.

• When users try to add a Record for that period or edit a Record for that period they will get a warning and won't be able to save the Record.
Editing a Lock

This article explains how to edit a Lock added to a Form or Subform.

You can edit a Lock added to a Form or Subform.

You can edit:

- The name of the Lock.
- The time period of the Lock.

How to edit a Lock

- Navigate to the Database Design section of the Database that contains the Form or Subform with the Lock that you want to edit.

- Select your Form or Subform from the list and click on "Locks" on the Resource side panel to reveal the available Locks for it.
• Click on the Lock you want to edit. Apply the edits you want to the Lock and click on "Save".
Deleting a Lock

This article explains how to delete a Lock added to a Form or Subform.

You can delete a Lock added to a Form or Subform. If you delete a Lock added to a Form or Subform, users will be able to add and edit Records on that Form or Subform again.

How to Delete a Lock

• Navigate to the Database Design List page of the Database that contains the Form or Subform with the Lock that you want to delete.

  ![Database Design List](image)

  - Select your Form or Subform from the list and click on "Locks" on the Resource side panel to reveal the available Locks for it.
Click on the Lock you want to delete and click on "Delete".