Quick Start Tutorials & Webinars
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Signing up for a Free Trial
Signing up

The following section describes how to sign up for an ActivityInfo account.

Before using ActivityInfo, you must have an account.

ActivityInfo offers a Free Trial plan to users, with certain limitations. Please see our Pricing page for details on the limitations of the trial plan, as well as our Subscription plans for larger deployments. Learn more about User Accounts and Subscriptions.

⚠️ You must meet the minimum browser requirements to use ActivityInfo. Please see our Browser Requirements documentation to check you have a browser which meets the requirements.

How to Sign Up

1. Complete the Sign Up Form

   • Navigate to the Sign Up page on the ActivityInfo website.
   • Fill in your details on the Sign Up form, and select your preferred language.
   • Carefully review the Terms and Conditions and Privacy Policy and check the box if you agree to these terms.
Start your free trial

Fill out the form below to start your 30-day free trial and create your own database today.

Are you looking to report results to a cluster or donor? Request an invitation from your contact point instead!

Your full name (ex: John Doe)

E-mail address

Preferred language

English

By ticking this box you agree to ActivityInfo's:

- Terms and Conditions
- Privacy Policy

START YOUR TRIAL

- Click the "Start your Trial" button to complete your registration. You will be presented with a screen asking you to confirm your email address.

2. Confirm your Email address and create your Password

- Check your email inbox for the confirmation email from ActivityInfo.
- Click on the confirmation link, and you will be brought to the Password Creation page.
- Choose a strong and memorable password, and enter it into each field.
- Check the box if you would like to receive emails about the latest features, news and resources from ActivityInfo.
When you are ready, click "Continue" to set your password and complete the Account creation.

Don't worry! If you forget your password you can reset it at any point.
Logging in

The following section describes how to log in to your ActivityInfo account.

After signing up for an ActivityInfo account, you will need to log in to start using the application. You can log in using your password or using Humanitarian ID.

How to Log In to your Account

• Navigate to the Login page on the ActivityInfo website.
• Enter your email address and password into the Login form.
• Once you are ready, click the "Log In" button to log into ActivityInfo.

If you enter incorrect login credentials, you will receive an error message. Check your email address and password, and retry.

Have you forgotten your password? Please see our Resetting your Password documentation for further instructions.

How to Log In with your Humanitarian.ID

If you have a Humanitarian.ID account, you can log in directly to ActivityInfo without having to choose a new password.

Humanitarian ID is a contact information management system used by responders during crises or disasters. Being able to use your HID account to log into ActivityInfo not only means...
that you have one less account to remember, but it also allows you to move seamlessly across OCHA's range of humanitarian community websites, including ReliefWeb and HumanitarianResponse.info.

1. Select the Humanitarian.ID Login option

   • Navigate to the Login page on the ActivityInfo website.
   • Click on the "Log In with Humanitarian.ID" button. This will take you to the Humanitarian.ID login page.

2. Log In to Humanitarian.ID

   • On the Humanitarian.ID Login page, enter your email address and password into the Login form.
   • Once you are ready, click the the "Login" button.
   • If successful, you will be directed automatically to the ActivityInfo application.
Create a Simple Database with no Partners
How to create a Blank (simple) Database without partners

This article is a tutorial on creating a Simple Database to help you get quickly started with your first Database in ActivityInfo.

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

<table>
<thead>
<tr>
<th>Roles and Permissions in Blank Database Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
</tr>
<tr>
<td>--------------</td>
</tr>
<tr>
<td>• View all records</td>
</tr>
<tr>
<td>• Add any record</td>
</tr>
<tr>
<td>• Edit all records</td>
</tr>
<tr>
<td>• Delete any record</td>
</tr>
<tr>
<td>• Export records</td>
</tr>
<tr>
<td>• Manage users</td>
</tr>
<tr>
<td>• Manage record locks</td>
</tr>
</tbody>
</table>

Quick Start Tutorials & Webinars
Roles and Permissions in Blank Database Template

- Add forms and folders
- Edit forms and folders
- Delete forms and folders

💡 If you want to create a Database for many Partners, view the Tutorial "How to create a Database for Multi-Partner Reporting". If you want to create a Database with multiple teams and users such as Supervisors and Case Workers view the Tutorial "How to create a Database for Case Management".

How to create a Simple Database

Add a Database using a template

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

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

Add a Form

Now you can add your first Form. Click on "Add form" to get started. If you want to organize your Forms in Folders, you can add a Folder first by clicking on "Add folder".
• Give a name to your Form and start designing it by adding fields. Click on "Add fields" to get started.

Take a look at all the available Fields and their Common or Individual Properties before you design your Form. You can also read the articles on Designing a Form to make sure you know all you need to design a powerful Form.

• In this example, we designed a simple Form to gather the Type of NFI distributions that took place per Governorate. You can add, edit and remove fields from your Form depending on your needs. When you finish designing the Form click on "Save" to save it.
• The Form has been added to the Database and you can view the Table View for that Form. Users will add their Records using the Table View. Navigate back to the Database by clicking on the name of the Database on the breadcrumb at the top of the Table View.
Add Users

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

- You can define the Permissions that each user will have by assigning a Role to them. You can view an overview of the Permissions of each Role in the Roles section. Just click on a Role from the list and view the Permissions in the Side panel.
- In the Database Settings page, click on "User management" to start adding users and click on "Add user".

- In the Side panel, type the email of the user you want to add and click on "Continue".
• If the user doesn't have an ActivityInfo account, you will invite them to ActivityInfo. ActivityInfo sends an email to the user you invite to a Database, if the user doesn't have an ActivityInfo account.

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

### Roles and Permissions in Blank Database Template

<table>
<thead>
<tr>
<th>Role</th>
<th>Administrator</th>
<th>Data Entry</th>
<th>Read Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permissions</td>
<td>View all records</td>
<td>Add any record</td>
<td></td>
</tr>
<tr>
<td>View all records</td>
<td>Edit all records</td>
<td>Delete any record</td>
<td>View all records</td>
</tr>
<tr>
<td>Edit all records</td>
<td>Delete any record</td>
<td>Export records</td>
<td>Export records</td>
</tr>
<tr>
<td>Delete any record</td>
<td>Add forms and folders</td>
<td>Manage users</td>
<td>Manage record locks</td>
</tr>
<tr>
<td>Add forms and folders</td>
<td>Manage record locks</td>
<td>Edit forms and folders</td>
<td></td>
</tr>
<tr>
<td>Edit forms and folders</td>
<td>Delete forms and folders</td>
<td>Export records</td>
<td></td>
</tr>
<tr>
<td>Delete forms and folders</td>
<td>Export records</td>
<td></td>
<td>You can view an overview of the Permissions of each Role in the Roles tab. Just click on a Role from the list and view the Permissions in the Side panel.</td>
</tr>
</tbody>
</table>

Select the Role you want to assign to the user you are inviting.
Finally select the Forms and Folders to which you want this user to be added and click on "Send invite".
Please note that:

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

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

• If you start adding a user that has already been added to this Database, an alert will warn you about it and you won't be able to click on "Continue". Instead you can edit the user.

• If you start adding a user that already has an account in ActivityInfo, you will be notified about it.
• You can select the Role for this user and select the Forms and Folders to which you want this user to be added but you cannot change their name.
• Click on "Send invite" to add this user to this Database.

You can **override the Permissions of a Role** for a specific user to better match the Permissions you want to assign. Click on "Database Design", select the Form or Folder for which you want to apply changes and click on the user on the Side Panel to reveal the assigned Permissions. Click on the Permissions you want to add or remove any unwanted Permission by unticking a ticked box. Click on "Save" to save the changes.

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

---

Help the invited Users get started with Data Entry

• Take a look at the available articles and videos on [Entering Data](#) and make sure you share them with your team to help them get started with adding their first Records.
• They can [Add records to a Form](#) or a Subform or they can [Import Records to a Form](#) or a Subform.
• They can also [make a Database available offline](#) and add Records when there is no internet connection or use ActivityInfo on a Tablet.
• The added Records appear in Table View. You can view the History and the Details of every Record in the Side panel and Filter and Sort the Records according to your needs.
Create a Database for Multi-Partner Reporting
How to create a Database for multi-partner reporting

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

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

<table>
<thead>
<tr>
<th>Roles and Permissions in Multi-partner reporting Database Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
</tr>
<tr>
<td>• View all records</td>
</tr>
<tr>
<td>• Add any record</td>
</tr>
<tr>
<td>• Edit all records</td>
</tr>
</tbody>
</table>
## Roles and Permissions in Multi-partner reporting Database Template

<table>
<thead>
<tr>
<th>permissions</th>
<th>permissions</th>
<th>permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Manage reference data</td>
<td>• Delete any record</td>
<td>• Add records where partner is user's partner</td>
</tr>
<tr>
<td>• Delete any record</td>
<td>• Export records</td>
<td>• Edit records where partner is user's partner</td>
</tr>
<tr>
<td>• Export records</td>
<td>• Manage users</td>
<td>• Delete records where partner is user's partner</td>
</tr>
<tr>
<td>• Manage users</td>
<td>• Manage record locks</td>
<td>• Export records</td>
</tr>
<tr>
<td>• Manage record locks</td>
<td>• Edit forms and folders</td>
<td>• Export records</td>
</tr>
<tr>
<td>• Add forms and folders</td>
<td>• Edit forms and folders</td>
<td>• Export records</td>
</tr>
<tr>
<td>• Edit forms and folders</td>
<td>• Delete forms and folders</td>
<td>• Export records</td>
</tr>
<tr>
<td>• Delete forms and folders</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## How to create a Database for multi-partner Reporting

### Add a Database using a template

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

Add a Database using a template

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

Add the Partners

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

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

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

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

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

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

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

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>Roles and Permissions in Multi-partner reporting Database Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
</tr>
<tr>
<td>• View all records</td>
</tr>
<tr>
<td>• Add any record</td>
</tr>
<tr>
<td>• Edit all records</td>
</tr>
<tr>
<td>• Manage reference data</td>
</tr>
<tr>
<td>• Delete any record</td>
</tr>
<tr>
<td>• Export records</td>
</tr>
<tr>
<td>• Manage users</td>
</tr>
<tr>
<td>• Manage record locks</td>
</tr>
<tr>
<td>• Add forms and folders</td>
</tr>
<tr>
<td>• Edit forms and folders</td>
</tr>
<tr>
<td>• Delete forms and folders</td>
</tr>
</tbody>
</table>

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

⚠️ Please note that:
• When a user is invited to one or more Forms that exist within a Folder, the user will be able to see the Name of the Folder.
• When a user is invited to one or more Subforms that exist within a Form, the user will be able to see the Name of the Form.
• The user has been invited. Repeat the same steps to invite more users.
In the User management section, "Invalid email" means that the email of the user is not valid and "Invite pending" means that the user hasn't accepted the invitation to ActivityInfo yet.

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

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

---

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

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

- The added Records appear in Table View. You can view the History and the Details of every Record in the Side panel and [Filter](#) and [Sort](#) the Records according to your needs.
<table>
<thead>
<tr>
<th>Select your Partner Name</th>
<th>Date of Reporting</th>
<th>Type of NFI distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>BeDataDriven</td>
<td>2019-11-01</td>
<td>Standard, Supplementary</td>
</tr>
<tr>
<td>Happy Day NGO</td>
<td>2019-11-01</td>
<td>Standard, Supplementary</td>
</tr>
<tr>
<td>Sun and Jay NGO</td>
<td>2019-11-01</td>
<td>Standard, Supplementary, Winterization</td>
</tr>
</tbody>
</table>
Create a Database for Case Management
How to create a Database for case management

This article is a tutorial on creating a Database for Case Management to help you get quickly started with your Database in ActivityInfo.

In ActivityInfo you can use the readily available templates to get quickly started with your programme. The "Case management database" template is ideal if you want to create a Database where a team of people such as Case Workers and Supervisors will collaborate on case tracking.

You can assign different Roles to the users that you add in this Database to create groups of users.

<table>
<thead>
<tr>
<th>Roles and Permissions in Case Management Database Template</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Administrator</strong></td>
</tr>
<tr>
<td>• View all records</td>
</tr>
<tr>
<td>• Add any record</td>
</tr>
<tr>
<td>• Edit all records</td>
</tr>
</tbody>
</table>
Roles and Permissions in Case Management Database Template

<table>
<thead>
<tr>
<th>Role</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete any record</td>
<td>Delete any record</td>
</tr>
<tr>
<td>Export records</td>
<td>Export records</td>
</tr>
<tr>
<td>Manage users</td>
<td>Manage users</td>
</tr>
<tr>
<td>Manage record locks</td>
<td>Manage record locks</td>
</tr>
<tr>
<td>Add forms and folders</td>
<td>Add forms and folders</td>
</tr>
<tr>
<td>Edit forms and folders</td>
<td>Edit forms and folders</td>
</tr>
<tr>
<td>Delete forms and folders</td>
<td>Delete forms and folders</td>
</tr>
<tr>
<td>Add records where case is owned or supervised by them</td>
<td>Add records where case is owned or supervised by them</td>
</tr>
<tr>
<td>Edit records where case is owned or supervised by them</td>
<td>Edit records where case is owned or supervised by them</td>
</tr>
<tr>
<td>Delete records where case is owned or supervised by them</td>
<td>Delete records where case is owned or supervised by them</td>
</tr>
<tr>
<td>Export records</td>
<td>Export records</td>
</tr>
</tbody>
</table>

If you want to create a Database for multi-partner reporting, view the Tutorial "How to create a Database for multi-partner Reporting". If you want to create a Database where no Partners are needed, view the Tutorial "How to create a simple Database without Partners".

How to create a Database for Case Management

Add a Database using a template

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

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

• In the next page you can start designing the Database and the Forms in the way you need.
• The template contains a 'Case' Form template, so you can get quickly started.
• Click on "Database settings" to start setting up the Database, first.

📍 If you want to organize your Forms in Folders, you can add a Folder, by clicking on "Add folder".
Add the Supervisors

- In the Database Settings page 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.
- Click on Roles to get an overview of the Permissions available for every Role before you start adding users.
- First, we will add the Supervisors and then we will assign Case Workers to them. This way we can create teams of users under one supervisor for example.

![Database Settings](image)

- Click on User Management to add the first Supervisor.
- Click on "Add User"
• In the Side panel, type the email of the user you want to add and click on "Continue".

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

• Give a name to the user by entering a name in the "Name" field and select the language of the invitation they will receive. The user will be able to change that name when they accept their invitation to ActivityInfo and they sign up.
In the Role section, select 'Supervisor' to assign to this user the Role of Supervisor. The default Permissions for Supervisors are:

- 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
- Finally select the Forms and Folders to which you want this user to be added and click on "Send invite".
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.

- The user has been invited and has been assigned the Role of Supervisor.
- You can repeat the same process to add more Supervisors.
In the User management section, "Invalid email" means that the email of the user is not valid and "Invite pending" means that the user hasn't accepted the invitation to ActivityInfo yet.

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

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

Add the Case Workers

Now we will add some Case Workers and we will assign them to the Supervisor we just added.

- Click on "Add user" and type the email of the user you want to add as Case Worker and click on "Continue".

- As with the Supervisors, if the user doesn't have an ActivityInfo account, you will invite them to ActivityInfo. ActivityInfo sends an email to the user you invite to a Database, if the user doesn't have an ActivityInfo account.
- Give a name to the user by entering a name in the "Name" field and select the language of the invitation they will receive. The user will be able to change that name when they accept their invitation to ActivityInfo and they sign up.
- In the Role section, select 'Case Worker' to assign to this user the Role of Case Worker. The default Permissions for Case Workers are:
  - 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
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".
In this example, we have added more Forms in our Database, apart from 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.

- 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 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.
You can **override the Permissions of a Role** for a specific user to better match the Permissions you want to assign. Click on "Database Design", select the Form or Folder for which you want to apply changes and click on the user on the Side Panel to reveal the assigned Permissions. Click on the Permissions you want to add or remove any unwanted Permission by unticking a ticked box. Click on "Save" to save the changes.

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

**Design the Form**

- Now you can start designing your first Form. You can use the existing 'Case' Form template or you can add a new Form by clicking on "Add form".
- In this example, we will design a Form using the existing 'Case' Form template.
- Click on Database Design, select the 'Case' Form and click on "Edit form".
• The template provides you with a **Serial Number** field and a User field.
• Give a name to your Form and start designing it by adding fields. Click on "Add fields" or "+" to get started.

💡 Take a look at all the available **Fields** and their **Common or Individual Properties** before you design your Form. You can also read the articles on **Designing a Form** to make sure you know all you need to design a powerful Form.
• In this example, we designed a Form with Subforms for Case Tracking. You can add, edit and remove fields from your Form and Subform, depending on your needs. When you finish designing the Form click on "Save" to save it.

![Edit form](image)

• When you save the Form, it will be added to the Database and you can view the Table View for that Form.
• Users will be able to add their Records according to their Role and Permissions.
• Case Workers's permissions will be related only to the Records assigned to them or added by them.
• Supervisors's permissions will be related to the Records added by them or any Case Worker assigned to them.
• Navigate back to the Database by clicking on the name of the Database on the breadcrumb at the top of the Table View and on "Database Settings".
Assign Cases to Case Workers (optional)

As an Administrator or Supervisor you can assign a specific Case to a user who has been assigned the Role of Case Worker.

- In the Table View of the Form you designed, click on "Add record".
• Find the User field, select the name of the Case Worker from the list and click on "Save record".

• When the Case Worker logs in ActivityInfo they will be able to view and edit the Record assigned to them.

Help your team get started with Data Entry

• Take a look at the available articles and videos on Entering Data and make sure you share them with your team to help them get started with adding their first Records.
• They can Add records to a Form or a Subform or they can Import Records to a Form or a Subform.
• They can also make a Database available offline and add Records when there is no internet connection or use ActivityInfo on a Tablet.
• The added Records appear in Table View. Users can view the History and the Details of every Record in the Side panel according to their Role and Permissions.
• Users can also Filter and Sort the Records according to their needs.
## Case Tracking - Education

### Table

<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>
</tr>
</thead>
<tbody>
<tr>
<td>00001</td>
<td>Fay 1</td>
<td></td>
<td></td>
<td>2010-10-20</td>
<td>0 records</td>
</tr>
<tr>
<td>00002</td>
<td>Fay 1</td>
<td></td>
<td></td>
<td>2005-01-30</td>
<td>0 records</td>
</tr>
</tbody>
</table>

### Filter by choice
- Education Primary Schools
- Education Secondary Schools

### Go to form:
- Family Members
- Service Provided
- Assessment
- Case Plan
- Case Closure
Get started with Data Entry
Accepting your invitation to ActivityInfo

The following section describes how to accept your invitation to ActivityInfo.

When a Database owner would like you to add Records to one or more Forms, they will invite you to contribute to their Database. To do so, you will require an ActivityInfo account.

If you do not already have an ActivityInfo account, then you will receive an email requesting you to create one.

⚠️ You must meet some Requirements to use ActivityInfo. Please make sure you are aware and meet these Requirements in order to use ActivityInfo.

How to Accept your Invitation

1. Check your Email
   - Check your email inbox for an email from ActivityInfo.
   - Click on "Sign up now" to set up your ActivityInfo account. If you have a Humanitarian.ID, click on "Log in with Humanitarian ID" to log in with your Humanitarian ID to ActivityInfo. This way you don't need to set up an account.

2. Set Up your Account
   - Fill in your name in the form, and select your preferred language.
   - Choose a strong and memorable password, and enter it into each field.
   - Carefully review the Terms and Conditions, and check the box if you agree to these terms.
   - Check the box "Yes, I would like to receive this emails", if you would like to receive emails about the latest features, training materials, webinars, news and resources from ActivityInfo.
   - When you are ready, click "Continue" to create your account and start using ActivityInfo.
Welcome to ActivityInfo

Before we get started, let's set up your account.

Enter your name:

Select your preferred language:

Choose a password:

Confirm your password:

☐ Check this box to agree to:
  - Terms and conditions
  - Privacy Policy

Would you like to receive emails with training materials, invitations to webinars, and news and updates about ActivityInfo?

☐ Yes, I would like to receive these emails
☐ No, I do not want to receive these emails

CONTINUE

Don't worry! If you forget your password you can reset it at any point.
Logging in ActivityInfo

The following section describes how to log in to your ActivityInfo account using Version 4.0.

After signing up for an ActivityInfo account, you will need to log in to start using the application.

How to Log In to your Account

• Navigate to the Login page on the ActivityInfo website.
• Enter your email address and password into the Login form.
• Once you are ready, click the "Log In" button to log into ActivityInfo.

If you enter incorrect login credentials, you will receive an error message. Check your email address and password, and retry.

Have you forgotten you password? Please see our Resetting your Password documentation for further instructions.
The following section describes how to log in to your ActivityInfo account with your Humanitarian ID credentials.

If you have a Humanitarian.ID account, you can log in directly to ActivityInfo without having to choose a new password.

Humanitarian ID is a contact information management system used by responders during crises or disasters. Being able to use your HID account to log into ActivityInfo not only means that you have one less account to remember, but it also allows you to move seamlessly across OCHA's range of humanitarian community websites, including ReliefWeb and HumanitarianResponse.info.

**How to Log In with your Humanitarian.ID**

1. Select the Humanitarian.ID Login option
   - Navigate to the [Login page](#) on the ActivityInfo website.
   - Click on the "Log In with Humanitarian.ID" button. This will take you to the Humanitarian.ID login page.
2. Log In to Humanitarian.ID

- On the Humanitarian.ID Login page, enter your email address and password into the Login form.
- Once you are ready, click the "Login" button.
- If successful, you will be directed automatically to the ActivityInfo application.
Navigating to your Form

The following section describes how to navigate to a Form in ActivityInfo.

How to Navigate to your Form using the Search Bar

• To navigate to your Form using the Search Bar, you need to know the name of the Form or a part of its name.
• If you know the name of your Form, type it on the Search Bar and click on it to select it from the drop-down list.

How to Navigate to your Form from the Database List page

• On the Database List page, click on the Database that contains your Form.
• On the Database page, click on the Folder that contains the Form you want to add Records to.

• If the Form is not in a Folder, you will see it in the list of Forms and Folders. You can click on the Form instead.

• Click on the Form to open the Table View page.
Northern Greece Schools N.I.

- Primary schools
- Secondary schools
Adding your first Record

The following section describes how to add your first Record in ActivityInfo.

How to add your first Record to a Form

Navigate to Table View page

- After navigating to your Form, click on it to open the Table View page.

- Click on "Add Record" to add your first Record.

Add a Record to a Form

- Start filling in the fields.
- If the Form contains a Serial Number Field you don't need to fill it in. It is automatically assigned by ActivityInfo.
• When entering the date in the Date Field keep in mind that the date format used across the ActivityInfo platform is the International date format YYYY-MM-DD. This means that no matter which locale or browser you are using and regardless the way you insert a date, ActivityInfo will always provide this date format. You can also click on the Calendar icon to select a Date.

• Fill in all the Required Fields. In case you miss a required field you will not be able to save the data you entered. The Required Fields will be highlighted with red.
If the Form includes a Multi-line field, you can expand the block where you are entering the text information so that you can view all the text. To do this drag the two lines in the corner of the box.

When you are adding Records, you will only see the fields that are related to the answers you provide. Fields that have been added with a Relevance rule will only appear if you fulfil the rules. In the example below, the Quantity field "Number of upgrades" appeared because the answer in the previous question was "Yes".
If a field includes an Input Mask you will be asked to provide your answer in a specific format. Take a look at the Input Mask characters to make yourself familiar with the various types.

- Click on "Save Record" to save your first record.
Add a Record to a Subform (optional)

- If there is a Subform in the Form you will find it inline. You can add Records to the Subform too.
- Click on it to add your Records.

• Start filling in the fields of the Subform. The same rules as before apply.
• Click on "Save record" when you are ready.
- You can view the Record in the parent Form.
- Click on "Save record" to save the Record.
View the added Record

- In the Table View page you can view the added Record.
- Click on it to open the Record side panel.
- View the Details of the Record in the Details tab and the History of the Record in the History tab.

- To view the Record of the Subform, click on the Subform name on the Details tab.
• Click on the Record to open the Record side panel.
• View the Details of the Record of the Subform in the Details tab and the History of the Record in the History tab.
Webinars
Description

Get started with Database setup in ActivityInfo 4.0. Learn how to use the database templates, add users and assign Roles to them. The Webinar also covers the basic aspects of designing a Form and a Subform and adding Locks.

Agenda

- Templates & Database Creation
- Folders & Navigation
- Form Design & Data Entry
- Roles & User Management
- Locks
- Q/A
Adding and Importing Data in ActivityInfo 4.0 - Webinar

Broadcast 16 April 2019

Description

This Webinar presents ActivityInfo Version 4.0. It is focused on how users can add Records to Forms and Subforms as well as on how to import Records to Forms and Subforms. It contains a lot of examples and live Q&A sessions during the presentation.

Agenda

- Introduction to Version 4.0
- Navigation
- Adding Records to Forms and Subforms
- Preparing Data to Import
- Importing Records
- Table View
- Q/A
Broadcast 16 October 2018

Description

This Webinar shares important information about the precautions and actions we take to ensure that your data is always safe in ActivityInfo. It also analyses what a threat can be and explains the difference between a hosting a software in the cloud and hosting it on-premises.

Agenda

- What is Data Security
- How your data is secured on ActivityInfo
- Threat Analysis
- Cloud vs On-Premises
- Questions
The secret power of ActivityInfo Formulas - Webinar

Broadcast 13 August 2020

Description

This is a Webinar on using Formulas in ActivityInfo. Formulas allow you to automate calculations in your Forms and do further analysis on Pivot Tables and on Table View. They can also be used in Validation and Relevance rules.

💡 View all available Formulas.

You can download the file below and recreate the Forms with the Formulas. Browse through the different tabs to view the various Forms or Subforms.

💾 Formula_Examples.xlsx
## Agenda

<table>
<thead>
<tr>
<th>SETUP</th>
<th>COLLECT ANALYZE</th>
</tr>
</thead>
<tbody>
<tr>
<td>BASIC</td>
<td>Using simple formulas for validation and relevance conditions.</td>
</tr>
<tr>
<td>FUNCTIONS</td>
<td>Use functions to work with dates, scoring, and other calculations.</td>
</tr>
<tr>
<td>SUBFORMS</td>
<td>Include subforms in formulas for relevance rules</td>
</tr>
<tr>
<td>REFERENCE</td>
<td>Include referenced forms in relevance and validation rules</td>
</tr>
</tbody>
</table>