ORGANIZING DATA AND DESIGNING FORMS
# Table of Contents

Add a Database, Form or Folder ........................................................................................................... 4
  Adding a Database .............................................................................................................................. 5
  Viewing the Database ownership ...................................................................................................... 19
  Adding a Folder ................................................................................................................................. 21
  Adding a Form .................................................................................................................................... 25
  Moving a Form ................................................................................................................................... 28

Form Templates ...................................................................................................................................... 30
  COVID-19 - Testing - Tests performed and results ............................................................................. 31
  COVID-19 Test capacity ...................................................................................................................... 38
  COVID-19 - New and Total cases, deaths and recovered .................................................................... 47
  COVID-19 - ICUs availability remaining .............................................................................................. 54
  COVID-19 - Individual level tracking ................................................................................................ 61
  COVID-19 - Individual cases spread .................................................................................................. 67
  COVID-19: Global COVID-19 Clinical Platform - RAPID VERSION (Form by WHO and Isaric) ............................................................................................................................................ 75
  Cost measurement for programmes and activities .............................................................................. 88
  Simple identification Form ................................................................................................................... 99
  Vulnerability Assessment .................................................................................................................... 101

Design a Form ....................................................................................................................................... 104
  Designing a Form ................................................................................................................................. 105
  Designing a Form with a Subform ....................................................................................................... 115
  Referencing the Partner Form ........................................................................................................... 120
  Adding a Section header ..................................................................................................................... 124
  Adding an Attachment field ............................................................................................................... 127
  Adding a Calculated field .................................................................................................................... 130
  Adding a Date field .............................................................................................................................. 137
  Adding a Fortnight field ....................................................................................................................... 140
  Adding a Month field ........................................................................................................................... 143
  Adding Selection fields ....................................................................................................................... 146
  Adding Quantity fields ......................................................................................................................... 154
  Adding a Reference field ..................................................................................................................... 157
Add a Database, Form or Folder
Adding a Database

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

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

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

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

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

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

⚠️ You can add up to 500 Forms in a Database.
How to add a Database based on the Simple (Blank) template

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

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

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

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

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

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

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

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

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

The name of the database should correspond to information contained in the Database (program, country activities, etc.) and should be comprehensive for the users who will perform data entry.

• The Database has been added and you can find it in the. Database List page.
• Now you can start by adding some Partners to the Database. Click on "Database settings" to start setting up the Database.
• In the Database Design section you can start by adding your Partners in the "Reference Data" folder. Click on the arrow to reveal the contents of the folder.
• Click on the Partner Form to select it and click on "View and edit records" in the Resource side Panel.

• The Table View of this Form is empty because no Records have been added so far. Click on "Add record" to start adding Partners as Records.
• Type the name of the first Partner and click on "Save Record".
• The Partner has been added. Repeat the same process to add all of the Partners. You can also import a list of Partners instead. This is very useful if you have many Partners. In the Table View, click on "Import" and follow the steps in the article "Importing Records".
• When you have added all the Partners, navigate back to the Database by clicking on the name of the Database on the breadcrumb at the top of the Table View.

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

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

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

• Give a name to your Database.
• Select the "Case management database" from the available templates to get started with it.
• Click on "Add database".
We recommend choosing a short and self-descriptive name for the Database.

The name of the database should correspond to information contained in the Database (case, program, country activities, etc.) and should be comprehensive for the users who will perform data entry.

The Database has been added and you can find it in the Database List page.

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

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

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

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

Please note that:

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

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

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

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

⚠️ Please note that:

• When a user is invited to one or more Forms that exist within a Folder, the user will be able to see the Name of the Folder.
• When a user is invited to one or more Subforms that exist within a Form, the user will be able to see the Name of the Form.
You can override the Permissions of a Role for a specific user to better match the Permissions you want to assign. Click on "Database Design", select the Form or Folder for which you want to apply changes and click on the user on the Side Panel to reveal the assigned Permissions. Click on the Permissions you want to add or remove any unwanted Permission by unticking a ticked box. Click on "Save" to save the changes.

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

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

You can view the ownership of each Database in your Database list. This is useful if you have many Databases and if you work with many users.

A Database Owner Account allows users to perform a variety of actions such as:

- Add their own Databases
- View, Add and Edit Records
- Manage Users
- View and Add Reports
- View and Add Forms
- and more

A Database Owner Account **always** requires a paid subscription.

Read more about User Accounts.

How to view the Database ownership

- On the Database list page, click on the Database for which you want to view the owner.

- You can view the Database owner below the Database name.
- You can contact the Database owner via email by clicking on their name.
Organizing Data and Designing Forms
Adding a Folder

The following section describes how to add a Folder in ActivityInfo in order to organise the Forms you have added in a Database and create more advanced structures. Folders allow you to group Forms based on your preferences, assign more refined Permissions to users and make it easier for users to navigate and find what they need.

- You can create one or more Folders within a Folder.
- You can have a maximum Folder depth (Folder within Folder) of 10.
- Maximum length of a Folder Label: 1024 characters

Adding a Folder

- On the Database List page, click on the Database where you want to add a Folder.

- Click on "Add folder".
• Type the name you want to give to the Folder and click on "OK" to save it.

v4.activityinfo.org says
Enter the name of the folder
Case Tracking - Intake

• The Folder has been added. You can open it by clicking on it.
Adding a Folder within a Folder

- You can add one or more Folders within a Folder. Click on the Folder in which you want to add a Folder to open it.

- Click on "Add folder".

![Image of data organization interface]

Organizing Data and Designing Forms
• Type the name you want to give to the Folder and click on "OK" to save it.

• The Folder has been added in the Folder. You can open it by clicking on it.

Repeat the same process to add more Folders within Folders.

You can have a maximum Folder depth (Folder within Folder) of 10.
Adding a Form

The following section describes how Forms work and how to add a Form to start collecting data (Records) from users.

Every Form is created within a Database. You can design a Form according to your data collection needs.

You can organize and group Forms in Folders. Users when doing data entry they add Records to the Form. All Records are stored in the Database where the Form was added.

Forms can contain Subforms, can reference to other Forms and can be designed to be very flexible.

Instead of designing a Form from scratch you can copy a Form by exporting its fields and importing them to a new Form.

In order to add a new Form, you first need to add a Database.

• You can add up to 500 Forms in a Database.
• You can add up to 500 fields in a Form.
• You can add up to 30 Subforms in a Form.

Adding a new Form

• On the Database List page, click on the Database where you want to add the Form.
• On the Database Page click on "Add Form".

• Now you can start designing your Form.
You have not added any fields.

Add a field
Moving a Form

The following section describes how to move a Form into or out of a Folder using the Database Design settings.

You can easily move a Form using the Database Settings page to restructure your Database.

You might want to move one or more Forms to another Folder in order to organize your Database. You might also want to move a Form outside a Folder until you decide where you want it to be added.

⚠️ When moving a Form to a Folder, users that have access to the Folder will be able to access the Form according to their permissions.

How to move a Form

- In the Database Design section, find the Form you want to move and click on it to select it. If the Form is inside a Folder click on the arrow next to the Folder name to reveal its contents.
• Click on "Move" to reveal the available locations where the Form can be moved and select the location where you want to move the Form. 'Database root' means that the Form will be moved outside the Folder.

• The Form has been moved.
Form Templates
COVID-19 - Testing - Tests performed and results

This is a sample template of a Form that can be used to collect information about the numbers of tests performed per day in your country along with the number of tests with a positive result and the number of tests with a negative result for COVID-19.

You may need to collect high-level data about COVID-19.

In this example we will use a Reference Form to collect all the medical institutions and their geographical location in one place to make sure that all users reporting use the same names for the medical institutions participating in testing for COVID-19. Then we will add a Form with a Subform to collect data per institution. We will link the Form to the Reference Form.

You can use the Form and Subform Schema below to directly import the fields to a new Form and Subform and save time. You can also duplicate a Form to quickly create similar Forms if needed.

The example uses dummy data.
Add a Reference Form

To make sure that all users reporting use the same names for the medical institutions participating in testing for COVID-19, you can create a Reference Form with a Text field and add all the medical institutions of your country as Records.

By making that Text field a Key field you can then refer to it in your Form and users will be able to select from the list of available institutions the institutions for which they report. In the Reference Form you can also reference ActivityInfo’s built-in Geodatabase to link each institution to a geographical location.

• In the Database Design section, click on 'Add form' to add a Form.

• Give a name to your Form and add a Reference field to reference the Geodatabase of ActivityInfo and a Text field for the name of the institution.
• Make the Text field a Key field so as to link to it in the next Form.
• Save the Form.
• In the Table View page, click on 'Add record' and add the first institution of your country. Click on 'Save record' to save it.
• Repeat the same process to add all the medical institutions participating in the testing. If you have a list of institutions available you can import them as Records to this Form.
• On the URL of the Table View page you can view the Form Id of this Form. If you want to import a fields list instead of designing a Form using the Form Schemas at the end of the article, you will need to use this Id.
You can change the visibility settings of the Form to Reference data to make sure users doing data entry don’t get confused with it.

Add a Form

The Parent Form will link to the list of medical institutions. Users will be able to select the institution for which they are reporting from the list. We will add a Subform to the Parent Form to collect daily information about each institution.

- In the Database Design section, click on 'Add form' to add another Form.
- Give a name to the Form and add a Reference field. Select the Reference Form that you created in the previous step. Make that field a Key field. By making this field a Key field you prevent users from adding duplicate Records and ensure they will add all data related to the selected institution in the same place.
- Add a Subform field and give it a descriptive name.
Add a Subform

We will add a Subform to collect information about the daily numbers of tests performed and their results per institution.

- Click on the Subform to open it.
- Add a Date field and make it a Key field. By making this field a Key field you prevent users from adding duplicate Records for the added date.
- Then add 3 Quantity fields with Codes:
  - **Label:** Number of total tests performed - **Code:** TT - **Unit:** tests
  - **Label:** Number of tests with positive result - **Code:** PR - **Unit:** tests
  - **Label:** Number of tests with negative result - **Code:** NR - **Unit:** tests

We add Codes to be able to do automated calculations based on the numbers collected.

- Add 2 Calculated fields with Formulas:
  - **Label:** Positive results percentage - **Formula:** PR/TT
  - **Label:** Negative results percentage - **Formula:** NR/TT

This will give us the ratio of positive results to total results and of negative results to total results per day.
You can add additional Quantity fields with Codes to count the number of tests performed by gender, the number of positive test results by gender and the number of negative results by gender.

You can add Section headers to make the Subform easier to navigate.

Form Schemas

Instead of manually designing the Form and the Subform, you can directly import the fields list to your Form. The following files contain the fields list for the Form and the Subform. As this is a sample Form, you might need different fields so you can add new fields, edit fields or delete the fields that you don't need to customize the Form. The Form links to a Reference Form with a Reference field to include a list with all the medical institutions, so make sure you add a Reference Form first, as described in the first step.

The fields list of the Subform contains additional Quantity fields with Codes to count the number of tests performed by gender, the number of positive test results by gender and the number of negative results by gender.

• To import the fields list to the Form, add a new Form and give it a name.
• Then download and open the first file. You need to find the Reference Form id of the Reference Form from step one and add it the cell in the Row 'reference', Column
'Referenced Form'. You can find the Form Id in the URL of the Table View page of the Reference Form.

- Copy the cells along with their Headers.
- In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet". Paste the cells and click on "Add fields" to add them.

- To import the fields list to the Subform, click on the Subform to open it.
- Download the second file and copy all the cells along with their Headers.
- As before, open the fields palette of the Subform and click on "Paste field list from spreadsheet".
- Paste the cells and click on "Add fields" to add them.
- Save the Subform and the Form.

COVID-19_testsPerformedAndResults__Parent Form.csv

COVID-19_testsPerformedAndResults__Subform.csv
COVID-19 Test capacity

This is a sample template of a Form that can be used to collect information about the test capacity for COVID-19 for each medical institution in a country. The test capacity depends on people and material available in each medical institution. The Form can be used to collect daily data about the availability and shortages of such resources.

You may need to collect data related to the resources available in your country or in medical institutions to evaluate the test capacity they have. Test capacity does not only depend on the number of tests available. It depends on the materials used during the administration of the test (e.g. cotton swabs to collect samples, protective equipments for people who take the samples), the analysis of the test (e.g. laboratory equipment, liquids and filters for analysis) and also on the personnel available in each stage of the process (e.g. personnel to conduct the test, to analyze the results, to deliver the results, etc.)

In this example we will use a Reference Form to collect all the medical institutions and their geographical location in one place to make sure that all users reporting use the same names for the medical institutions participating in testing for COVID-19. Then we will add a Form with a Subform to collect daily data per institution. We will link the Form to the Reference Form.

You can use the Form and Subform Schema below to directly import the fields to a new Form and Subform and save time. You can also duplicate a Form to quickly create similar Forms if needed.

The example uses dummy data.
Add a Reference Form

To make sure that all users reporting use the same names for the medical institutions participating in testing for COVID-19, you can create a Reference Form with a Text field and add all the medical institutions of your country as Records.

By making that Text field a Key field you can then refer to it in your Form and users will be able to select from the list of available institutions the institutions for which they report. In the Reference Form you can also reference ActivityInfo's built-in Geodatabase to link each institution to a geographical location.

• In the Database Design section, click on 'Add form' to add a Form.

• Give a name to your Form and add a Reference field to reference the Geodatabase of ActivityInfo and a Text field for the name of the institution.
• Make the Text field a Key field so as to link to it in the next Form.
• Save the Form.

In the Table View page, click on 'Add record' and add the first institution of your country. Click on 'Save record' to save it.
• Repeat the same process to add all the medical institutions participating in the testing. If you have a list of institutions available you can import them as Records to this Form.
• On the URL of the Table View page you can view the Form Id of this Form. If you want to import a fields list instead of designing a Form using the Form Schemas at the end of the article, you will need to use this Id.
You can change the visibility settings of the Form to Reference data to make sure users doing data entry don’t get confused with it.

Add a Form

The Parent Form will link to the list of medical institutions. Users will be able to select the institution for which they are reporting from the list. We will add a Subform to the Parent Form to collect daily information about each institution.

- In the Database Design section, click on 'Add form' to add another Form.
- Give a name to the Form and add a Reference field. Select the Reference Form that you created in the previous step. Make that field a Key field. By making this field a Key field you prevent users from adding duplicate Records and ensure they will add all data related to the selected institution in the same place.
- Add a Subform field and give it a descriptive name.
Add a Subform

We will add a Subform to collect information about the daily numbers of material used and personnel occupied for the various stages of COVID-19 testing.

- Click on the Subform to open it.
- Add a Date field and make it a Key field. By making this field a Key field you prevent users from adding duplicate Records for the added date.
- Then add Quantity fields with Codes. We add Codes to be able to do automated calculations based on the numbers collected.
- In this example, we have added the following Quantity fields, you can adjust these to your needs.
  - **Label:** Cotton swabs used  **Code:** CU  **Unit:** Cotton swabs
  - **Label:** Packaging material used  **Code:** PU  **Unit:** packaging material
  - **Label:** Personal protective equipment for samplers used  **Code:** EU  **Unit:** personal protective equipment
  - **Label:** Liquid units used for analysis  **Code:** LU  **Unit:** liquid units
  - **Label:** Filters used for analysis  **Code:** FU  **Unit:** filters
  - **Label:** Analysis equipment units used  **Code:** AU  **Unit:** analysis equipment units
  - **Label:** Personnel doing tests  **Code:** PET  **Unit:** people
  - **Label:** Personnel transferring the tests  **Code:** PT  **Unit:** people
  - **Label:** Personnel analysing results  **Code:** PAT  **Unit:** people
  - **Label:** Personnel delivering results  **Code:** PDT  **Unit:** people

- Then, add a Single Selection field to check if there was capacity for more testing today or there were shortages. In this example we have added the following Single selection field:
  - **Label:** Was there capacity for more testing today?  **Options:** Yes, No

- Finally, add a Multiple Selection field to collect information about the shortages of the specific day. In this example, we have added the following Multiple selection field:
  - **Label:** If no, please select the shortages of this day:  **Options:** cotton swabs, packaging material, personal protective equipment for samplers, liquid units for analysis, filters for
analysis, analysis equipment, personnel doing tests, personnel transferring the tests, personnel analysing results, personnel delivering results

- Optionally, you can add a Multi-line Text field to ask for more information.

💡 You can add Section headers to make the Subform easier to navigate.

![Image of a form]

### Add Calculated fields in the Parent Form

In the Parent Form, we can make some calculations based on the numbers added in the Subform. We can add Calculated fields to automatically sum up the daily numbers of material used. This can be useful for resources used once and then discarded (e.g. cotton swabs, packaging, protective material).

For the personnel we can use a Formula to get the average amount of personnel occupied in that medical institution for each position. We can use another Formula to calculate the maximum number of people occupied in each position.

- In this example we used the following Calculated fields and Formulas. You can adjust these to your own Quantity fields and needs.
  - **Label:** Total cotton swab kits used - **Formula:** sum(CU)
  - **Label:** Total packaging materials used - **Formula:** sum(PU)
  - **Label:** Total personal protective equipment for samplers used - **Formula:** sum(EU)
  - **Label:** Total liquid units for analysis used - **Formula:** sum(LU)
  - **Label:** Total filters for analysis used - **Formula:** sum(FU)
• **Label**: Total analysis equipment used - **Formula**: sum(AU)
• **Label**: Average number of personnel making tests - **Formula**: average(PET)
• **Label**: Average number of personnel transferring tests - **Formula**: average(PT)
• **Label**: Average number of personnel analysing tests - **Formula**: average(PAT)
• **Label**: Average number of personnel delivering results - **Formula**: average(PDT)
• **Label**: Maximum number of personnel making tests - **Formula**: max(PET)
• **Label**: Maximum number of personnel transferring tests - **Formula**: max(PT)
• **Label**: Maximum number of personnel analysing tests - **Formula**: max(PAT)
• **Label**: Maximum number of personnel delivering results - **Formula**: max(PDT)

• Save the Form.

💡 You can add Section headers to make the Form easier to navigate.

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**Form Schemas**

Instead of manually designing the Form and the Subform, you can directly import the fields list to your Form and Subform. The following files contain the fields list for the Form and the Subform. As this is a sample Form, you might need different fields so can add new fields, edit fields or delete the fields that you don't need to customize the Form. The Form links to a Reference Form with a Reference field to include a list with all the medical institutions, so make sure you [add a Reference Form](#) first, as described in the first step.
As the Form includes Calculated fields based on fields of the Subform, you will need to import the fields in three steps.

- To import the first fields list to the Form, add a new Form and give it a name.
- Then, download and open the first file which includes the first part of the Parent Form. You need to find the Reference Form Id of the Reference Form from step one and add it the cell in the Row 'reference', Column 'Referenced Form'. You can find the Form Id in the URL of the Table View page of the Reference Form.
- Copy the cells along with their Headers.
- In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet". Paste the cells and click on "Add fields" to add them.

Continue with the Subform. To import the fields list to the Subform, click on the Subform to open it.
- Download the second file and copy all the cells along with their Headers.
- As before, open the fields palette of the Subform and click on "Paste field list from spreadsheet".
- Paste the cells and click on "Add fields" to add them.
- Save the Subform to go back to the Parent Form.
- Finally, in the Parent Form, we will add the Calculated field.
- Download the third file which contains the second part of the Parent Form with the Calculated field, open it and copy all the cells along with their Headers.
- As before, open the fields palette of the Parent Form and click on "Paste field list from spreadsheet".
- Paste the cells and click on "Add fields" to add them.
- Save the Form.
Test_capacity___Parent_Form_part_1.csv

Test_Administration_daily___Subform.csv

Test_capacity___Parent_Form_part_2.csv
COVID-19 - New and Total cases, deaths and recovered

This is a sample template of a Form that can be used to collect information about the numbers of new COVID-19 cases, new deaths and new recovered cases per day and at the same time calculate the total numbers for these per day. This especially applies if multiple users from different institutions report at different times of the day for the same day.

In this example, we will use a Reference Form to collect all the medical institutions and their geographical location in one place to make sure that all users reporting use the same names for the medical institutions. Then, we will add a Form with a Subform to collect data per institution. We will link the Form to the Reference Form.

With the Subform we will collect daily numbers of new cases, new deaths and recovered cases. Then, in the Parent Form we will sum up the numbers reported in the Subform per day and per institution using Calculated fields.

You can use the Form and Subform Schema below to directly import the fields to a new Form and Subform and save time. You can also duplicate a Form to quickly create similar Forms if needed.

The example uses dummy data.
Add a Reference Form

To make sure that all users reporting use the same names for the medical institutions, you can create a Reference Form with a Text field and add all the medical institutions of your country as Records.

By making that Text field a Key field you can then refer to it in your Form and users will be able to select from the list of available institutions the institutions for which they report. In the Reference Form you can also reference ActivityInfo’s built-in Geodatabase to link each institution to a geographical location.

- In the Database Design section, click on 'Add form' to add a Form.

- Give a name to your Form and add a Reference field to reference the Geodatabase of ActivityInfo and a Text field for the name of the institution.
- Make the Text field a Key field so as to link to it in the next Form.
- Save the Form.

- In the Table View page, click on 'Add record' and add the first institution of your country. Click on 'Save record' to save it.
- Repeat the same process to add all the medical institutions. If you have a list of institutions available you can import them as Records to this Form.
- On the URL of the Table View page you can view the Form Id of this Form. If you want to import a fields list instead of designing a Form using the Form Schemas in the end of the article, you will need to use this Id.
You can change the visibility settings of the Form to Reference data to make sure users doing data entry don't get confused with it.

Add a Form

The Parent Form will link to the list of medical institutions. Users will be able to select the institution for which they are reporting from the list. It will also use a Date field to collect daily information.
The Subform will include Quantity fields with Codes for the numbers of new cases, new deaths and recovered cases.

Codes will allow us to go back to the Parent Form and add Calculated fields with Formulas which will calculate totals based on the numbers added to the Subform.

- In the Database Design section, click on 'Add form' to add another Form.
- Give a name to the Form and add a Reference field. Select the Reference Form that you created in the previous step. Make that field a Key field. By making this field a Key field you prevent users from adding duplicate Records and ensure they will add all data related to the selected institution in the same place.
- Add a Date field and make it a Key field. By making this field a Key field you prevent users from adding duplicate Records for the added date and you can also add a Lock for a reporting period that includes this date.
- Add a Subform field and give it a descriptive name.

Add a Subform

We will add a Subform to collect information about the numbers of new cases, new deaths and recovered cases.

- Click on the Subform to open it.
- Add 3 Quantity fields with Codes:
  - **Label:** Number of new infected - **Code:** NI - **Unit:** persons
  - **Label:** Number of new deaths - **Code:** ND - **Unit:** persons
  - **Label:** Number of new recovered - **Code:** NR - **Unit:** persons

- Save the Subform. We will continue adding fields in the Parent Form.
You can add additional Quantity fields with Codes to count the number of tests performed by gender, the number of positive test results by gender and the number of negative results by gender.

You can add Section headers to make the Subform easier to navigate.

Add Calculated fields in the Parent Form

In the Parent Form, add 3 Calculated fields with Formulas:

- **Label**: Total new infected today - **Formula**: sum(NI)
- **Label**: Total new deaths today - **Formula**: sum(ND)
- **Label**: Total new recovered today - **Formula**: sum(NR)

These Calculated fields will sum up the numbers of the Subform to give as a result:

- the total number of new infected people for that day for that institution
- the total number of new deceased people for that day for that institution
- the total number of new recovered people for that day for that institution
- Save the Form.
Form Schemas

Instead of manually designing the Form and the Subform, you can directly import the fields list to your Form. The following files contain the fields list for the Form and the Subform. As this is a sample Form, you might need different fields so can add new fields, edit fields or delete the fields that you don’t need to customize the Form. The Form links to a Reference Form with a Reference field to include a list with all the medical institutions, so make sure you [add a Reference Form] first, as described in the first step.

As the Form includes Calculated fields based on fields of the Subform, you will need to import the fields in three steps.

- To import the first fields list to the Form, add a new Form and give it a name.
- Then, download and open the first file which includes the first part of the Parent Form. You need to find the Reference Form Id of the Reference Form from step one and add it the cell in the Row 'reference', Column 'Referenced Form'. You can find the Form Id in the URL of the Table View page of the Reference Form.
- Copy the cells along with their Headers.
- In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet". Paste the cells and click on "Add fields" to add them.
• Continue with the Subform. To import the fields list to the Subform, click on the Subform to open it.
• Download the second file and copy all the cells along with their Headers.
• As before, open the fields palette of the Subform and click on "Paste field list from spreadsheet".
• Paste the cells and click on "Add fields" to add them.
• Save the Subform to go back to the Parent Form.
• Finally, in the Parent Form, we will add the rest of the fields.
• Download the third file which contains the second part of the Parent Form with the Calculated fields, open it and copy all the cells along with their Headers.
• As before, open the fields palette of the Parent Form and click on "Paste field list from spreadsheet".
• Paste the cells and click on "Add fields" to add them.
• Save the Form.

COVID-19 New Cases, Deaths, Recovered - Parent Form first part.csv

Daily numbers - Subform.csv

COVID-19 New Cases, Deaths, Recovered - Parent Form second part.csv
COVID-19 - ICUs availability remaining

This is a sample template of a Form that can be used to track the remaining ICUs per medical institution. To be able to track the remaining units you need to know the initial total ICUs for each medical institution. Then, for each day you need to collect the number of ICUs that become available and the number of ICUs that are newly occupied on that day.

In this example, we will use a Reference Form to collect all the medical institutions and their geographical location in one place to make sure that all users reporting use the same names for the medical institutions. Then we will add a Form with a Subform to collect data per institution. We will link the Form to the Reference Form.

The Parent Form will link to the Reference Form with a Reference field and will use a Quantity field with a Code to capture the initial amount of available ICUs per institution.

In the Subform we will collect daily numbers of ICUs that become newly occupied and the number of ICUs that become newly available, on that day using Quantity fields with Codes. We can also collect the number of cases hospitalised to do further calculations.

Then, in the Parent Form we will use a Calculated field to calculate the remaining ICUs. To do this we will use a Formula which will subtract the sum of ICUs newly occupied from the initial amount of ICUs and then we will add the sum of all ICUs that become available.

You can use the Form and Subform fields lists below to directly import the fields to a new Form and Subform and save time. You can also duplicate a Form to quickly create similar Forms if needed.

The example uses dummy data.
Add a Reference Form

To make sure that all users reporting use the same names for the medical institutions, you can create a Reference Form with a Text field and add all the medical institutions of your country as Records.

By making that Text field a Key field you can then refer to it in your Form and users will be able to select from the list of available institutions the institutions for which they report. In the Reference Form you can also reference ActivityInfo's built-in Geodatabase to link each institution to a geographical location.

• In the Database Design section, click on 'Add form' to add a Form.

![Database Design](image)

• Give a name to your Form and add a Reference field to reference the Geodatabase of ActivityInfo and a Text field for the name of the institution.
• Make the Text field a Key field so as to link to it in the next Form.
• Save the Form.

![Edit Form](image)

• In the Table View page, click on 'Add record' and add the first institution of your country. Click on 'Save record' to save it.
• Repeat the same process to add all the medical institutions participating in the testing. If you have a list of institutions available you can import them as Records to this Form.
• On the URL of the Table View page you can view the Form Id of this Form. If you want to import a fields list instead of designing a Form using the Form Schemas in the end of the article, you will need to use this Id.
You can change the visibility settings of the Form to Reference data to make sure users doing data entry don't get confused with it.

Add a Form

The Parent Form will link to the list of medical institutions. Users will be able to select the institution for which they are reporting from the list.
• In the Database Design section, click on 'Add form' to add another Form.
• Give a name to the Form and add a Reference field. Select the Reference Form that you created in the previous step. Make that field a Key field. By making this field a Key field you prevent users from adding duplicate Records and ensure they will add all data related to the selected institution in the same place.
• Add a Quantity field for the initial ICUs and give it a Code. We gave it the Label 'ICUs - initial' and the Code ICUI.
• Add a Subform field and give it a descriptive name.

In some cases, the number of ICUs change very rapidly from one day to another because of the efforts of the medical institutions to adjust to the amount of new cases. In that case, adding Quantity fields to capture the amount of ICUs available and the amount of ICUs occupied on each day could be a better structure to reflect the given situation.

Add a Subform

We will add a Subform to collect daily information about the number of ICUs that become newly occupied and the number of ICUs that become newly available, on that day using Quantity fields with Codes. We can also collect the number of cases hospitalised.

• Click on the Subform to open it.
• Add a Date field and make it a Key field. By making this field a Key field you prevent users from adding duplicate Records for the added date and you can also add a Lock for a reporting period that includes this date.
• Add 3 Quantity fields with Codes:
  • Label: New cases hospitalized - Code: NH - Unit: cases
- **Label**: Newly occupied ICUs today - **Code**: ICUNO- **Unit**: ICUs
- **Label**: ICUs that became available today - **Code**: ICUA- **Unit**: ICUs

- Save the Subform. We will continue by adding a Calculated field in the Parent Form.

### Add Calculated field in Parent Form

In the Parent Form, add one Calculated field with Formula:

- **Label**: ICUs remaining - **Formula**: ICUI-sum(ICUNO)+sum(ICUA)

This Calculated field will give as a result the number of remaining ICU units for that institution based on all the Records added in the Subform of this Form.

- Save the Form.
Form Schemas

Instead of manually designing the Form and the Subform, you can directly import the fields list to your Form and Subform. The following files contain the fields list for the Form and the Subform. As this is a sample Form, you might need different fields so can add new fields, edit fields or delete the fields that you don't need to customize the Form. The Form links to a Reference Form with a Reference field to include a list with all the medical institutions, so make sure you add a Reference Form first, as described in the first step.

As the Form includes Calculated fields based on fields of the Subform, you will need to import the fields in three steps.

- To import the first fields list to the Form, add a new Form and give it a name.
- Then, download and open the first file which includes the first part of the Parent Form. You need to find the Reference Form Id of the Reference Form from step one and add it the cell in the Row 'reference', Column 'Referenced Form'. You can find the Form Id in the URL of the Table View page of the Reference Form.
- Copy the cells along with their Headers.
- In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet". Paste the cells and click on "Add fields" to add them.
• Continue with the Subform. To import the fields list to the Subform, click on the Subform to open it.
• Download the second file and copy the cells along with their Headers.
• As before, open the fields palette of the Subform and click on "Paste field list from spreadsheet".
• Paste the cells and click on "Add fields" to add them.
• Save the Subform to go back to the Parent Form.
• Finally, in the Parent Form, we will add the Calculated field.
• Download the third file which contains the second part of the Parent Form with the Calculated field, open it and copy the cells along with their Headers.
• As before, open the fields palette of the Parent Form and click on "Paste field list from spreadsheet".
• Paste the cells and click on "Add fields" to add them.
• Save the Form.

COVID-19_-_New_cases_and_ICUs_availability_-_Parent_Form_first_part.csv

Daily_Report_-_Subform.csv

COVID-19_-_New_cases_and_ICUs_availability_-_Parent_Form_second_part.csv
COVID-19 - Individual level tracking

This is a sample template of a Form that can be used to collect information at individual level. You may want to track the progress of the health of an individual patient affected by COVID-19. In that case, you may want to collect information regarding the medical institution where they have been hospitalized or tested, the dates when they were tested for the COVID-19 and the results of the tests as well as the isolation period they had to go through. At the same time, you may need to keep the individual anonymous.

In this example, we will use a Reference Form to collect all the medical institutions and their geographical location in one place to make sure that all users reporting use the same names for the medical institutions. Then, we will add a Form with a Subform to collect data for individuals. We will link the Form to the Reference Form and we will use a Serial Number to anonymize the individual.

You can create a third Form with information about this individual and link to this one using a Reference field so that only selected users can access the details of the individual.

The Form will collect the date of hospitalization and the minimum required period of isolation using a Date field and a Calculated field. We added 16 days as the minimum number of isolation days and you can change that according to the guidelines you have from your institution.

With the Subform we will collect information regarding the Dates when the individual was tested and the results of the test. For every new test, the user needs to add a new Record to the Subform.

You can use the Form and Subform Schema below to directly import the fields to a new Form and Subform and save time. You can also duplicate a Form to quickly create similar Forms if needed.

The example uses dummy data.
Add a Reference Form

To make sure that all users reporting use the same names for the medical institutions, you can create a Reference Form with a Text field and add all the medical institutions of your country as Records.

By making that Text field a Key field you can then refer to it in your Form and users will be able to select from the list of available institutions the institutions for which they report. In the Reference Form you can also reference ActivityInfo's built-in Geodatabase to link each institution to a geographical location.

- In the Database Design section, click on 'Add form' to add a Form.

![Database Design](image)

- Give a name to your Form and add a Reference field to reference the Geodatabase of ActivityInfo and a Text field for the name of the institution.
- Make the Text field a Key field so as to link to it in the next Form.
- Save the Form.

![Edit Form](image)

- In the Table View page, click on 'Add record' and add the first institution of your country. Click on 'Save record' to save it.
- Repeat the same process to add all the medical institutions. If you have a list of institutions available you can import them as Records to this Form.
- On the URL of the Table View page you can view the Form Id of this Form. If you want to import a fields list instead of designing a Form using the Form Schemas in the end of the article, you will need to use this Id.
You can change the visibility settings of the Form to Reference data to make sure users doing data entry don’t get confused with it.

Add a Form

The Parent Form will link to the list of medical institutions and will use a Serial Number to anonymize the individual. Users will be able to select the institution for which they are reporting from the list. It will also use a Date field with a Code to collect the date of hospitalization and it
will calculate the minimum required time for isolation of the individual on the basis of 16 days. You can change this number in the Formula, to meet your needs.

- In the Database Design section, click on 'Add form' to add another Form.
- Give a name to the Form and add a Reference field. Select the Reference Form that you created in the previous step.
- Add a Serial Number. This is the Key of your Form.
- Add a Date field and give it a Code, we gave it the Label "Date of hospitalization" and the Code "DH".
- Add a Calculated field and use the Formula below to calculate the minimum required date for isolation on the basis of 16 days. We use the Code "DH". If you used another code in your Date field use that Code in its place.

\[ \text{adddate(DH,16)} \]

- Add a Subform field and give it a descriptive name.

Add a Subform

We will add a Subform to collect the date when the individual was tested and the result of the test. The Subform will include a Date field and a Single Selection field.

- Click on the Subform to open it.
- Add a Date field.
- Add a Single Selection field with Options: Positive, Negative, Not valid
- Save the Subform and then the Form.
Form Schemas

Instead of manually designing the Form and the Subform, you can directly import the fields list to your Form. The following files contain the fields list for the Form and the Subform. As this is a sample Form, you might need different fields so can add new fields, edit fields or delete the fields that you don't need to customize the Form. The Form links to a Reference Form with a Reference field to include a list with all the medical institutions, so make sure you add a Reference Form first, as described in the first step.

- To import the fields list to the Form, add a new Form and give it a name.
- Then, download and open the first file which includes the fields list for the Parent Form. You need to find the Reference Form Id of the Reference Form from step one and add it the cell in the Row 'reference', Column 'Referenced Form'. You can find the Form Id in the URL of the Table View page of the Reference Form.
- Copy the cells along with their Headers.
- In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet". Paste the cells and click on "Add fields" to add them.
• Continue with the Subform. To import the fields list to the Subform, click on the Subform to open it.
• Download the second file and copy the cells along with their Headers.
• As before, open the fields palette of the Subform and click on "Paste field list from spreadsheet".
• Paste the cells and click on "Add fields" to add them.
• Save the Subform to go back to the Parent Form.
• Save the Form.

COVID-19_-_Individual_level_tracking__testing_and_isolation-_Parent_Form.csv

Testing_-_Subform.csv
COVID-19 - Individual cases spread

This is a sample template of a Form that can be used to collect information at individual level. You may need to collect data to track an individual patient along with the people they came in contact with while they were infected with COVID-19 in order to contact them. You may also need to collect data regarding the places they have travelled to. At the same time you may need to keep the individual anonymous.

In this example, we will use a Reference Form to collect all the medical institutions and their geographical location in one place to make sure that all users reporting use the same names for the medical institutions. Then, we will add a Form with two Subforms to collect data for individuals. We will link the Form to the Reference Form and we will use a Serial Number to anonymize the individual.

You can create a third Form with information about this individual and link to this one using a Reference field so that only selected users can access the details of the individual.

The Form will collect information about the individual such as the day the individual was tested and the institutions where they were tested. It will also collect information as to whether the individual was in contact with other people or travelled 15 days before or after the testing. The number of days can be changed according to your needs.

With the first Subform we will collect information regarding the travels the individual has made. Users will add one Record to the Subform for each travel.

With the second Subform we will collect information regarding the people the individual was in contact with during the defined period. Users will add one Record to the Subform for each contact.

You can use the Form and Subform Schemas at the end of the article to directly import the fields to a new Form and Subform and save time. You can also duplicate a Form to quickly create similar Forms if needed.

The example uses dummy data.
Add a Reference Form

To make sure that all users reporting use the same names for the medical institutions, you can create a Reference Form with a Text field and add all the medical institutions of your country as Records.

By making that Text field a Key field you can then refer to it in your Form and users will be able to select from the list of available institutions the institutions for which they report. In the Reference Form you can also reference ActivityInfo's built-in Geodatabase to link each institution to a geographical location.

- In the Database Design section, click on 'Add form' to add a Form.

- Give a name to your Form and add a Reference field to reference the Geodatabase of ActivityInfo and a Text field for the name of the institution.
- Make the Text field a Key field so as to link to it in the next Form.
- Save the Form.

In the Table View page, click on 'Add record' and add the first institution of your country. Click on 'Save record' to save it.
- Repeat the same process to add all the medical institutions. If you have a list of institutions available you can import them as Records to this Form.
- On the URL of the Table View page you can view the Form Id of this Form. If you want to import a fields list instead of designing a Form using the Form Schemas in the end of the article, you will need to use this Id.
You can change the visibility settings of the Form to Reference data to make sure users doing data entry don’t get confused with it.

Add a Form

The Parent Form will link to the list of medical institutions and will use a Serial Number to anonymize the individual. Users will be able to select the institution for which they are reporting from the list. It will also use a Date field with a Code to collect the date the individual was tested and it will collect information regarding the contacts and travels of the individual for a period of 15 days before and after the Date of testing. You can change this number to meet your needs.

- In the Database Design section, click on 'Add form' to add another Form.
- Give a name to the Form and add a Reference field. Select the Reference Form that you created in the previous step.
- Add a Serial Number. This is the Key of your Form.
- Add a Date field and give it a Code, we gave it the Label "Date of testing".
- Add two Single Selection fields. We gave them the Labels and Options below. You can change these to meet your needs:
  - **Label**: Individual has travelled 15 days before or after the date of testing - **Options**: Yes, No
  - **Label**: Individual has been in contact with other people 15 days before or after date of testing - **Options**: Yes, No
• Add a Subform field for the first Subform and give it a descriptive name.
• Add another Subform field for the second Subform and give it a descriptive name.

Add the first Subform

We will add a Subform to collect the date when the individual has travelled and the countries of departure and destination. We can add a Single Selection field to define the current location of the individual.

• Click on the Subform to open it.
• Add a Date field to collect the Date of travel and two Text fields to collect the Country of departure and the Country of destination.
• Add a Single Selection field to define the current location of the individual.
• Save the Subform and open the next Subform.
Add the second Subform

With the second Subform we will collect the date when the individual came in contact with another individual and some contact details for that individual.

- Click on the Subform to open it.
- Add a Date field to collect the Date of contact.
- Add a Text field and a Multi-line text field to collect information about the contacted individual.
- Save the Subform and the Form.
Form Schemas

Instead of manually designing the Form and the Subform, you can directly import the fields list to your Form. The following files contain the fields list for the Form and the Subform. As this is a sample Form, you might need different fields so you can add new fields, edit fields or delete the fields that you don't need to customize the Form. The Form links to a Reference Form with a Reference field, (so as to include a list with all the medical institutions), so make sure you [add a Reference Form](#) first, as described in the first step.

- To import the fields list to the Form, add a new Form and give it a name.
- Then, download and open the first file which includes the fields list for the Parent Form. You need to find the Reference Form Id of the Reference Form from step one and add it the cell in the Row 'reference', Column 'Referenced Form'. You can find the Form Id in the URL of the Table View page of the Reference Form.
- Copy the cells along with their Headers.
- In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet". Paste the cells and click on "Add fields" to add them.
• Continue with the first Subform. To import the fields list to the Subform, click on the Subform to open it.
• Download the second file and copy the cells along with their Headers.
• As before, open the fields palette of the Subform and click on "Paste field list from spreadsheet".
• Paste the cells and click on "Add fields" to add them.
• Save the Subform to go back to the Parent Form.
• Continue with the second Subform. To import the fields list to the Subform, click on the Subform to open it.
• Download the third file and copy the cells along with their Headers.
• As before, open the fields palette of the Subform and click on "Paste field list from spreadsheet".
• Paste the cells and click on "Add fields" to add them.
• Save the Subform to go back to the Parent Form.
• Save the Form.

COVID-19_-_Individual_level_spread_-_Parent_Form.csv

Travels_-_First_Subform.csv

Contacts_-_Second_Subform.csv
COVID-19: Global COVID-19 Clinical Platform - RAPID VERSION (Form by WHO and Isaric)

These are sample templates for Forms for collecting clinical data for COVID-19 based on the Rapid case record form provided by WHO and Isaric.

To anonymize the individual data, a separate Form to collect the individual's personal information can be created. Using a customized Serial Number the individual is anonymized. The customized Serial Number is used in the Forms collecting clinical data to link to the individual via a Reference field.

Another Reference Form can be created to collect all the medical institutions and their geographical location in one place to make sure that all users reporting use the same names for the medical institutions.

Then, four Forms are created to collect clinical data following the suggested structure provided by WHO and Isaric:

1. MODULE 1_ complete on admission/enrolment
2. MODULE 1_ complete on admission/enrolment (continued)
3. MODULE 2_ follow-up
4. MODULE 3_ complete at discharge/death

As the Form for Module 1 is very long we divided it in two sections.

For Module 2 we designed a Form with a Subform. The Subform allows us to add data for the same individual on different dates.

All Forms use Relevance rules to show several answers only when necessary to the person filling in the Forms. If you use the Form Schemas you will need to manually add validation rules, if necessary after importing the fields.

These Forms are adapted from the Form found on the WHO website which are adapted from SPRINT SARI CRF by ISARIC. Licensed under a Creative Commons Attribution-ShareAlike 4.0 International License by ISARIC on behalf of Oxford University.

Individual Form

The Individual Form collects information about the individual.

- Make sure you add a Serial Number to anonymize the individual. You can customize the Serial Number using a Text field. This will be the patient's identification.
- If you use the Form Schema below you need to manually add the Prefix Formula to the Serial Number and make it a hidden field as well as add the Relevance rules.
• On the URL of the Table View page of this Form you can view the Form Id of this Form. If you use the Form Schemas for the Modules you will need to use this Id before importing those schemas.

Form Schema - Individual Form

• To import the first fields list to the Form, add a new Form and give it a name. Then, download and open the file below which include the fields list for the Form above.
• Copy the cells along with their Headers.
• In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet". Paste the cells and click on "Add fields" to add them.
• If needed apply additional changes manually. For example, add the Prefix Formula to the Serial Number and make it a hidden field, add more Relevance rules or Validation rules.
• Save the Form.

![1-Patient's_Demographics.csv](attachment:1-Patient's_Demographics.csv)

Reference Form

To make sure that all users reporting use the same names for the medical institutions, you can create a Reference Form with a Text field and add all the medical institutions as Records. If you have a list of institutions available you can import them as Records to the Form.
• You can add a Reference field to reference the Geodatabase to bring in all the countries or a Text field to simply collect the name of the country and then a Text field to collect the name of the institution.
• Make both fields Key fields.
• On the URL of the Table View page of this Form you can view the Form Id of this Form. If you use the Form Schemas for the Modules you will need to use this Id, before importing those schemas.

You can change the visibility settings of the Form to Reference data to make sure users doing data entry don't get confused with it.

Form schema

• To import the first fields list to the Form, add a new Form and give it a name. Then, download and open the file below which include the fields list for the Form above.
• Copy the cells along with their Headers.
• In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet". Paste the cells and click on "Add fields" to add them.
• This Form Schema uses two Text fields to collect the name of the country and the name of the medical institution. You can customize this to the geographic boundaries on which you are working. You can also reference the ActivityInfo built-in geodatabase and bring in a list of countries or administrative units instead of using a Text field.
• Save the Form and optionally start adding Records.
MODULE 1 _ complete on admission/enrolment

We divided Module 1 into two Forms as it was a very long module. This is the Form for the first part of MODULE 1.

- Note that the Form uses Reference fields to link to the Individual Form and the Reference Form we created above. You can repeat these Reference fields in the second part too.
- The Form also uses Section headers to make it easier to navigate in data entry.
Form schema

- To import the first fields list to the Form, add a new Form and give it a name. Then, download and open the file below which include the fields list for the Form above.
- The Form links to the two Forms we designed above. To correctly link to them, in the file you just opened you need to add the Form Id of the first form and the Form Id of the second Form in the cells of the Rows 'reference', under the Column 'Referenced Form' (field names: 'Select patient's ID', 'Select your medical center'). You can find the Form Id in the URL of the Table View page of these two Forms as described in the previous steps.
- Copy the cells along with their Headers.
- In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet". Paste the cells and click on "Add fields" to add them.
- If needed apply additional changes manually. For example add Relevance rules or Validation rules if needed.
- Save the Form.

2.1_-MODULE_1__complete_on_admission_enrolment.csv

MODULE 1_ complete on admission/enrolment (continued)

We divided Module 1 into two Forms as it was a very long module. This is the Form for the second part of MODULE 1.
Form schema

• To import the first fields list to the Form, add a new Form and give it a name. Then, download and open the file below which include the fields list for the Form above.
• The Form links to the two Forms we designed above. To correctly link to them, in the file you just opened you need to add the Form Id of the first form and the Form Id of the second Form in the cells of the Rows 'reference', under the Column 'Referenced Form' (field names: 'Select patient's ID', 'Select your medical center'). You can find the Form Id in the URL of the Table View page of these two Forms as described in the previous steps.
• Copy the cells along with their Headers.
• In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet". Paste the cells and click on "Add fields" to add them.
• If needed apply additional changes manually. For example add Relevance rules or Validation rules if needed.
• Save the Form.

MODULE 2_ follow-up

• As before, the Form will use a Reference field to refer to the Individual Form to allow people adding data to select the patient's id.
It will also use a Subform to collect follow-up data on various points in time, as needed.

If you use the Form Schema below, you need to **add manually to the spreadsheet the Form Id of the first Form** in the cell in the Row 'reference', under the Column 'Referenced Form'. You can find the Form Id in the URL of the Table View page of the Form. After importing the fields, you need to also **add Relevance rules manually** whenever needed.

The Subform needs a Date field as Key field to make sure there are no duplicates for each day.

You can use Section Headers to make the navigation to the Subform easier.
<table>
<thead>
<tr>
<th>Data Source</th>
<th>Data Context Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>Life sciences</td>
<td>- Age</td>
</tr>
<tr>
<td>- Income</td>
<td>- Education</td>
</tr>
<tr>
<td>- Employment status</td>
<td>- Marital status</td>
</tr>
<tr>
<td>- Health status</td>
<td>- Family history</td>
</tr>
</tbody>
</table>
Form Schemas

• To import the first fields list to the Form and the Subform, first add a new Form and give it a name. Then, download and open the file below which include the fields list for the Parent Form.
• The Form links to the Individual Form we designed above. To correctly link to it, in the file you just opened you need to add the Form Id of the first form in the cell of the Row 'reference', under the Column 'Referenced Form' (field names: ‘Select patient's ID’). You can find the Form Id in the URL of the Table View page of this Form as described in the previous steps.
• Copy the cells along with their Headers.
• In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet". Paste the cells and click on "Add fields" to add them.
• Save the Form.

3_MODULE_2___follow-up_-_Parent_Form.csv

• Continue with the Subform. To import the fields list to the Subform, click on the Subform to open it.
• Download the file and copy the cells along with their Headers.
• As before, open the fields palette of the Subform and click on "Paste field list from spreadsheet".
• If needed apply additional changes manually. For example add Relevance rules or Validation rules.
• Paste the cells and click on "Add fields" to add them.
• Save the Subform to go back to the Parent Form and save the Parent Form as well.

**Patient's_follow-up__-Subform.csv**

**MODULE 3_ complete at discharge/death**

• As before, the Form will use a Reference field to refer to the Individual Form to allow people adding data to select the patient's id.
• If you use the Form Schema below, you need to add manually to the spreadsheet the Form Id of the first Form in the cell in the Row 'reference', under the Column 'Referenced Form'. You can find the Form Id in the URL of the Table View page of the Form. After importing the fields, you need to also add Relevance rules manually whenever needed.
• We also use Section headers to make the Form easier to navigate.
Form Schema

- To import the first fields list to the Form, first add a new Form and give it a name. Then, download and open the file below which include the fields list for the Form.
The Form links to the Individual Form we designed above. To correctly link to it, in the file you just opened you need to add the Form Id of the first form in the cell of the Row 'reference', under the Column 'Referenced Form' (field names: 'Select patient's ID'). You can find the Form Id in the URL of the Table View page of this Form as described in the previous steps.

- Copy the cells along with their Headers.
- In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet". Paste the cells and click on "Add fields" to add them.
- If needed apply additional changes manually. For example add Relevance rules or Validation rules.
- Save the Form.

4_MODULE_3__complete_at_discharge_death.csv
Cost measurement for programmes and activities

This article includes some sample Form templates which can be used to help you track the costs of your programmes and activities at high-level based on the expenditures made by each field office.

You can copy the sample Forms, use the Form Schemas at the end of the article or get some inspiration for your own Forms. You can also design similar Forms to collect more detailed data about the expenditures made.

In this example, we use two Reference Forms to create two lists. One list is for the country offices and the other list is for the Programmes and Activities which you want to monitor. Then, we add a Form with a Subform.

The Parent Form links to the two Reference Forms so that users can select their country office and the Programme and Activity for which they are reporting. It also uses Calculated fields to sum up the amounts reported in the Subform. The Subform is used to collect monthly data (e.g. monthly expenditures).

You can customize these Forms to your needs. For example you can narrow down each category of expenditure and collect the amount spent for subcategories under each category. You can also combine this information with other Forms collecting information about the objectives of the activities (e.g. number of beneficiaries or people reached) to see the impact of your activities and the cost effectiveness of your programmes.

The example uses dummy data.
Add a Reference Form for the field offices

If you are working with many country offices, you can create a list of these offices and link each office to the built-in Geodatabase of ActivityInfo to connect them to a specific country.

- In the Database Design section, click on 'Add form' to add a Form.

  ![Database design settings](image)

  - Give a name to your Form and add a Reference field to reference the Geodatabase of ActivityInfo. Select 'Global' to add a list of all the available countries. Make the field a Key field.
  - Add Text field for the name of the field office and make it a Key field.
  - Save the Form.

  ![Edit form](image)

- In the Table View page, click on 'Add record' and add the first country office. Click on 'Save record' to save it.
- Repeat the same process to add all the country offices. If you have a list ready you can import them as Records to this Form.
- On the URL of the Table View page you can view the Form Id of this Form. If you want to import a fields list instead of designing a Form using the Form Schemas at the end of the article, you will need to use this Id.
You can change the visibility settings of the Form to Reference data to make sure users doing data entry don't get confused with it.

Add a Reference Form for your Programmes

Next, you can add another Reference Form to list your Programmes and all their Activities. You can also add the budget available for each Activity as well as their Starting Date and Ending Date.

- As before, in the Database Design section, click on 'Add form' to add a Form and give a name to your Form.
- Add two Text fields for the Programme name and the Activity name which falls under the Programme. Make the Text fields Key fields.
- You can add a Quantity field for the Budget available and two Date fields to capture the Start Date and End Date.
- Save the Form.
• In the Table View page, click on 'Add record' and add as a Record the first Programme and Activity. Click on 'Save record' to save it.
• Repeat the same process to add all the Activities and Programmes. If you have a list ready you can import them as Records to this Form.
• On the URL of the Table View page you can view the Form Id of this Form. If you want to import a fields list instead of designing a Form using the Form Schemas at the end of the article, you will need to use this Id.
You can change the visibility settings of the Form to Reference data to make sure users doing data entry don't get confused with it.

### Add a Form

The Parent Form will link to the list of field offices and to the list of Programmes and Activities using Reference fields. Users will be able to select the country office for which they are reporting from the list as well as the Programme and Activities for which they are reporting. We will also add a Subform to the Parent Form to collect the monthly expenditures.

- In the Database Design section, click on 'Add form' to add a Form and give a name to it.
- Add a Reference field and link to the first Reference Form you created. This will bring in the list of field offices and their country.
- Add another Reference field and link to the second Reference Form you created. This will bring in the Programmes and their Activities.
- You can also add a User field so that users select their name from a list and so that you know who reported the data.
- Add a Subform field and give it a descriptive name.
Add a Subform

The Subform will be used to collect the monthly expenditures.

- Click on the Subform to open it and add a Month field and make it a Key field to prevent duplicates and to be able to lock reporting for this Subform if needed.
- Add a Multiple Selection field and add all the cost categories for your Programmes. Users will be able to select the categories for which they will be reporting expenditures for every month.
- You can also add a User field so that users select their name from a list and so that you know who reported the data.
- Then add Quantity fields with Codes for each category. We will use the Codes in Formulas to automatically calculate spending in the Parent Form.
You can add Relevance Rules to the Quantity fields to make them appear to users only when they select the respective category in the Multiple Selection field.

- In the end, you can add a Calculated field and in the Formula add up all the Quantity fields using their Codes. This will give you the total amount spent by month.
- Save the Subform to go back to the Parent Form.

Add Calculated fields to the Parent Form

In the Parent Form, we can make some calculations based on the numbers added in the Subform. We can add Calculated fields to automatically sum up the monthly expenditures reported based on each different category. We can use the 'sum()' Formula, along with the Codes we gave to each Quantity field in the Subform.
Finally, we can add up these sums to see the total expenditure of the specific field office for the specific Activity so far.

Analyze the data further with a Pivot Table

Finally, after some data has been collected, if you want to see more information about the data, add a Pivot Table.

- Click on "Reports" and click on "Add pivot table".
- Use all the Forms you created as Resources.
Now you can use Measures and Dimensions to design the Pivot Table in a way that will show the information you need.

For example, you can use as Measures the field showing the total expenditures per activity per field office and the field of the second Reference Form showing the budget available for each activity.

Then you can add more Dimensions to the Pivot Table to show more details. You can show for example the budget available per Activity and the amount spent per field office and see where you Programmes stand.

Click on "Save report" to save the Pivot Table.
Form Schemas

Instead of manually designing the Reference Forms, the Form and the Subform, you can directly import the fields list to your Reference Forms and Form and Subform. The following files contain the fields lists for the two Reference Forms, the Form and the Subform. As these are a sample Forms, you might need different fields so can add new fields, edit fields or delete the fields that you don't need to customize the Forms.

The Parent Form links to the two Reference Forms using Reference fields. So after adding the two Reference Forms you will need to find their IDs and add them to the Parent Form template below.

Also, as the Form includes Calculated fields based on fields of the Subform, you will need to import the fields in three steps.

- To import the first fields list to the first Reference Form, add a new Form and give it a name.
- Download and open the file below which includes the fields for the first Reference Form.
- Copy the cells along with their Headers.
- In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet".
- Paste the cells and click on "Add fields" to add them.
- In the Table view of this Form, you can find the Form Id in the URL of the Table View page of the Reference Form. You will need in the following steps.

• To create the second Reference Form, add a new Form and give it a name.
• Download and open the file below which includes the fields for the second Reference Form.
• Copy the cells along with their Headers.
• In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet".
• Paste the cells and click on "Add fields" to add them.
• In the Table view of this Form, you can find the Form Id in the URL of the Table View page of the Reference Form. You will need in the following steps.
Now we will add the first part of the Parent Form.

- Add a new Form and give it a name.
- Download and open the file below which includes the first part of the Parent Form. You need to find the Reference Form Ids of the Reference Forms above as mentioned, and add each one in the cell in the Rows of 'reference', under the Column 'Referenced Form'.
- Copy the cells along with their Headers.
- In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet". Paste the cells and click on "Add fields" to add them.

Cost_efficiency_of_programmes_-_Parent_Form_part_1.csv

- Continue with the Subform. To import the fields list to the Subform, click on the Subform to open it.
- Download the file below and copy the cells along with their Headers.
- As before, open the fields palette of the Subform and click on "Paste field list from spreadsheet".
- Paste the cells and click on "Add fields" to add them.
- Save the Subform to go back to the Parent Form.

Monthly_spending_-_Subform.csv

- Finally, in the Parent Form, we will add the Calculated fields.
- Download the final file below which contains the second part of the Parent Form with the Calculated fields, open it and copy the cells along with their Headers.
- As before, open the fields palette of the Parent Form and click on "Paste field list from spreadsheet".
- Paste the cells and click on "Add fields" to add them.
- Save the Form.

Cost_efficiency_of_programmes_-_Parent_Form_part_2.csv
Simple identification Form

This article includes a sample Form template which can be used to help you collect some information about a beneficiary. This Form can be linked to other Forms that collect information about individuals by using its Serial Number.

With this Form you can collect information that identify an individual. As these information can be confidential there might be the need for only specific people to have access to it. In that case you can use a Serial Number to identify this individual. The Serial Number can be then used in other Forms referring to the identification Form. So you will able to connect various types of Forms to this particular Form without revealing more information about the individual.

You can copy the sample Form, use the Form Schema at the end of the article or get some inspiration for your own Forms. You can also design similar Forms to collect more detailed data about your programmes and the beneficiaries.

Add a Form

- In the Database Design section, click on 'Add form' to add a Form and give a name to it.
- Add a Serial Number and give it a descriptive name (e.g. 'Administrative ID'). This will be the Key field of this Form and can be used when you reference this Form in other Forms.
- You can add a Date fields to collect the date of the interview/intake and the date of birth of the individual. You can add a Code to the Date of Birth to automatically calculate the age of the individual.
- Then you can add various Text fields to collect the First and Last name of the individual, Contact people for the individual and Multi-line Text fields for more detailed information such as the Address of the individual, the city of origin etc.
- You can also add Single Selection fields to define the type of identification id the individual has, the gender, the marital status, the employment status, the education level, etc.
- With a Calculated field you can round up the age of the individual based on the birth date. The Formula would be CEIL(YEARFRAC(\text{CODEOFDATEFIELD}, \text{TODAY}()))
- Finally, you can add attachment fields to collect a photograph of the individual or any other document needed.
- You can also add Relevance rules and Validation rules to further define the type of answers accepted.
Form schema

Instead of manually designing the Form, you can directly import the fields list to your Form. The following file contains the fields lists for the Form. As this is a sample Form, you might need different fields so can add new fields, edit fields or delete the fields that you don't need to customize the Form.

You can also add Relevance rules or Validation rules after you import the fields to the Form.

- To import the first fields list to Form, add a new Form and give it a name.
- Download and open the file below which includes the fields for the Form.
- Copy the cells along with their Headers.
- In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet".
- Paste the cells and click on "Add fields" to add them.

Simple_Identification_Form_.csv
Vulnerability Assessment

This article includes a Form and a Subform template which can be used to help you do vulnerability assessments for households based on some criteria. The template uses a lot of formulas to help you automate calculations and assign the vulnerability score automatically.

You can copy the sample Form and Subform, use the files with the fields lists at the end of the article or get some inspiration for your own Forms.

As these are sample Forms, you might need different fields so you can add new fields, edit fields or delete the fields that you don't need to customize the Form.

The Parent Form collects information about the household and the head of the household and gives a score to the household based on the answers provided to the fields. The Subform collects information about the rest of the members of the household. Form doesn't collect data regarding geographic locations. You can customize it to your needs and connect it to other Forms which collect locations such as villages with reference fields or reference the built-in geodatabase.

The example uses dummy data.
Add a Form

• In the Database Design section, click on 'Add form' to add another Form.
• Give a name to the Form.
• Then download and open the file below.
• Copy the cells along with their Headers.
• In the Form Design page, open the fields palette of the Form and click on "Paste field list from spreadsheet". Paste the cells and click on "Add fields" to add them.
• Save the Form.

Add the Subform

• To import the fields list to the Subform, click on the Subform to open it.
• Download the second file and copy all the cells along with their Headers.
• As before, open the fields palette of the Subform and click on "Paste field list from spreadsheet".
• Paste the cells and click on "Add fields" to add them.
• Save the Subform and the Form.
Design a Form
Designing a Form

The following section describes how to design a Form to start collecting data (Records) from your users. It presents the available Field types and the common and individual properties. It also shows how to add, edit, delete and move fields in the Form.

In order to gather the information you need, you must design a Form that collects the correct data. Your data is collected using various types of fields. A user then fills in a Form, entering data into the defined fields. This is then stored in your Database as a Record.

Forms are very flexible, and allow you to mix-and-match fields to capture a variety of data types. For instance:

- A unique identifier for a beneficiary can be generated using a Serial Number field.
- The amount of a specific type of good delivered to a beneficiary can be captured using a Quantity field.
- The total of amount of goods delivered to an individual beneficiary can be captured using a Calculated field.

You can also link your Form to another Form or to the Geodatabase of ActivityInfo. This can be done with Reference fields.

Instead of designing a Form from scratch you can copy a Form by exporting its fields and importing them to a new Form, or you can duplicate a Form.

You can also make sure that users won’t add duplicate Records to a Form by using a combination of Key fields.
Working with Partners?

If you are working with a Database that includes Partners make sure to:

- Add all Partners in the Partner Form.
- Add a Reference field in your Form to refer to the "Partner" Form in the "Reference Data" Folder.

This allows:

- Users to select a Partner from the list when adding Records.
- You to assign Permissions based on the users' Partner.

Working with Case Management?

If you are working with a Database that includes Supervisors and Case workers make sure to:

- Assign the correct Role to each User when adding them.
- Add a User field in your Form.

This 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.

Collecting data over a period of time?

If you want to collect data on a repetitive basis, you can design a Form with a Subform.

Subforms can make your Form very flexible.

For example, you can create them to collect data on a regular basis (e.g. a monthly delivery), or on an irregular basis (e.g. every time a beneficiary receives goods).

You can add up to 500 Forms in a Database.
• You can add up to 500 fields in a Form.
• You can add up to 30 Subforms in a Form.
• The maximum number of Records that can be added in a Form is 200,000.

Name your Form

• In the Form Design page give a name to your Form.

⚠️ Maximum length of a Form label: **1024 characters**

Add Fields

• Click on "Add a field" to start adding fields.
You can:

- Add a Serial Number
- Add a Quantity field
- Add a Text field or multi-line Text field
- Add a Date field
- Add a Month field
- Add a Week field or add a Fortnight field
- Add a Single or Multiple Selection field
- Add an Attachments field
- Add a Calculated field
- Add a Geographic point field
- Add a Reference field to reference another Form
- Add a User field

⚠️
- Maximum length of a Text field record value: 1024 characters
- Maximum length of a Multi-line Text field record value: 65536 characters
- Maximum length of a Calculated field formula: 1024 characters
- Maximum Attachment size: 10 MB
- Maximum number of Attachments per field: 20 attachments

💡 If you want to collect data on a repetitive basis, you can design a Form with Subform using the Subform field and define the frequency using the Month or Week field.

- From the Fields palette, click on a field to add it.
You can also add one or more Section headers to create sections in your Form.

Define the Fields' properties

When you add a field you can define some of its Properties to make your Form even more flexible.

- Click on the Field you want to work with, to open the Field Card editor.

Here you can:

- Add a Label for the field
- Add a Description
- Add a Code
- Add a Prefix Formula (only for Serial Numbers)
- Add the Options for Single and Multiple Selection Fields
- Add a Formula (only for Calculated Fields)
- Add an Input Mask (only for Text fields)

You can also manage the Settings for the field.

You can:

- Define a field as a Key field
- Make a field Required
- Hide a field from data entry
- Set relevance rules for a field
- Set validation rules for some specific types of fields
- Maximum number of options per Single/Multiple Selection field: **100 options**
- Maximum number of options in total for all Single/Multiple Selection field in a Form: **1000 options**
- Maximum number of Relevance rules per field: **10 relevance rules**
- Maximum length of a field Label: **1024 characters**
- Maximum length of a field Description: **2048 characters**
- Maximum length of a field Code: **20 characters**

- Click on "Done" to add the field to the Form.
Add, move, edit and delete fields

- Click on "x" to close the fields tab and click on "+" to reveal it again.

- To add a new field click on "+" to reveal the Fields 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.
• To edit a field's Properties click on it to open the Field Card editor, apply the edits and click on "Done".
• To delete a field click on it to open the Field Card editor and click on "Delete field".

Save the Form

• When the Form is ready, click on "Save" to save your Form.
Click on "Cancel" to go back without saving the Form.

- The Form is added in the Database.
Designing a Form with a Subform

The following section describes how to design a Form with a Subform which allows you to add more flexibility to your Form. **Subforms** are included in a parent Form so in order to design a Form with a Subform you follow the steps of designing a Form.

⚠️ For users to be able to import Records to a Subform, the **Form** must have a **Serial Number** or a **Key** field. Users will use that to define to which Parent Record they are adding (Subform) Records when importing to the Subform.

You can have a maximum Subform depth (Subform within Subform) of 5 and up to 30 Subforms within a Form.
If you want to collect data on a repetitive basis, you can add a Subform field and define the frequency using a Date, Month or Week field. You can make that field a Key field for the Subform so as to alert users for duplicate entries for that specific time period for example.

By making that field a Key field you can also add a Lock to the Subform.

How to design a Form with a Subform

• To start designing your Form you first need to add a Database.
• Click on "Add Form" to open the Form Design page.

• In the Form Design page give a name to your Form and click on "Add a field" to view the Field palette.

Read more about Designing a Form, adding fields and defining Field's properties.
• Click on "Add field" and click on "Subform" to add a Subform to the Form.

Fill in the Properties of the Subform field by providing:

• **Label**: type the name for the Subform
• **Description**: optionally provide a description
• **Code**: optionally provide a code

In the Settings check the boxes you want to apply for the field.

• Click on "Done" to add the Subform.
• The Subform has been added. Click on it to open the Properties tab and click on "Open Subform" to start adding fields to the Subform.
• You can design the Subform in the same way you would design a Form. Click on "Add a field" to start adding fields define the fields properties to make the Subform even more flexible.
• Click on "Save" on the Form Design page to save the changes.

If you want to collect data on a repetitive basis, you can add a Subform field and define the frequency using a Date, Week, Fortnight, or Month field as a Key in the Subform. You can make that field a Key field for the Subform so as to alert users of duplicate entries for that specific time period or to be able to add a Lock to the Subform.

• Users will be able to add Records to the Subform.
Organizing Data and Designing Forms
Referencing the Partner Form

The following section describes how to reference the Partner Form in your Form to allow your users to select their Partner when they add Records and to assign Permissions to them based on their Partner. The Partner Form exists in Database templates that include Partners such as the "Multi-partner reporting database" template and is located in the "Reference Data" folder which you can access in the Database Design tab of this template.

By referencing this Form you:

- Allow users to select a Partner from the list when adding Records
- Can assign Permissions based on the Users' Partner (in User management)

Before referencing the Form, make sure you have added your Partners in the Partner Form:

How to reference the Partner Form

- In the Form Design page, on the Fields palette, click on "Reference" to select the field.
• Search for your Database and the Folder "Reference Data". Click on the arrows to reveal the contents of each Database or Folder. Click on the "Partner" to select it and click on "Continue".

Fill in the properties of the Reference field by providing:

• Label: type the question for which the User will select an option or give a descriptive name
• Description: optionally provide a description
• Code: optionally provide a code
• In the Settings check the boxes you want to apply for the field.
• Click on "Done" to add the field.

• The Reference field has been added to the Form.
• When you finish adding fields, click on "Save" to save the Form.
• While adding Records, users will be able to select a Partner out of the list of Partners you added in the Partner Form.
Adding a Section header

Section headers organize Forms or Subforms into various sections and make navigation in the Data Entry page easier. Note that Section headers don't appear in Table View.

How to add a Section header

- In the Form Design page, click on "Section header" to select it from the Fields palette.

![Select field type]

Fill in the Properties of the field by providing:

- Label: a descriptive title of what the section is about
- Description: optionally provide a description
- Click on "Done" to add it.
• The Section header has been added to the Form.
• When you finish adding fields, click on "Save" to save the Form.

• Users will see the Section you created when they are adding Records in the Data Entry page.
### Program name and details
This section collects information about the program

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program name</td>
<td></td>
</tr>
<tr>
<td>Details of the program</td>
<td></td>
</tr>
</tbody>
</table>

### Starting Month and Year
Select a month (YYYY-MM)

---

**Organizing Data and Designing Forms**

Page 126
Adding an Attachment field

The following section describes how to add an Attachment field when designing a Form. The Attachment field allows users to add any type of file or multiple files when they are adding Records to a Form or Subform.

• Maximum attachment size: 10 MB
• Maximum number of attachments per field: 20 attachments
• Supported Image Types are: Portable Network Graphics (PNG), JPEG (JPG)
• Attachments can't be Key fields.
• Users are allowed to add one image per field.

You cannot upload attachments to a Database when you have taken that Database offline.

How to add an Attachment field

• In the Form Design page, click on "Attachments" to select the field from the Fields palette.

Fill in the Properties of the Attachment field by providing:
• Label: type the question or the label for which the user needs to provide an attachment
• Description: optionally provide a description
• Code: optionally provide a code

In the Settings check the boxes you want to apply for the field.
• Click on "Done" to add the field.

• The Attachment field has been added to the Form.
• When you finish adding fields, click on "Save" to save the Form.

• Users will be able to add an attachment to the Attachment field when they are adding Records.
Adding a Calculated field

Adding a Calculated field automates calculations and allows you to get direct results out of other fields. You can write Formulas for your Calculated fields using Codes of other fields in the Formula editor.

You can use such Calculated fields in a variety of ways, such as:

• 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 and read more on Writing an Expression.

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.

⚠️ Maximum length of a calculated field formula: **1024 characters**

**How to add a Calculated field**

**Adding Codes to fields**

• In the Form Design page, find the fields that you want to use in your calculations and add a Code to them to make them more readable in the Formula editor.
Maximum length of a field Code: **20 characters**

Adding the Calculated field

- Click on "Calculated" to select the field from the Fields palette.

Fill in the Properties of the Calculated field by providing:
• Label: give a descriptive label to the field
• Description: optionally provide a description
• Code: optionally provide a code

In the Settings check the boxes you want to apply for the field.

The Calculated field will not appear in the Data Entry page to avoid confusing users adding Records. It will appear however in the Table View. To hide it from Table View make sure you tick the 'Hide from entry' property.

If you set Relevance rules to the field, then it will appear in Table View only if the conditions of the Relevance rules are met.

Using the Formula section

• In the Formula section add the expression for your Formula. Use the codes you assigned to the fields you need.
• Make sure your Formula is verified. A verified Formula will be marked with green. A Formula that is not correct will be marked with red.
• Click on "Done" to add the field to the Form.
Take a look at all the available Formulas in the Formulas Manual and learn more about Writing an Expression.

- When you finish adding fields, click on "Save" to save the Form.
Using the Formula editor

- Alternatively click on "Formula editor" in the Formula section to navigate to the Formula editor.

- The Formula editor provides you with a list of all available Functions and all available fields.
- Enter your Formula in the Formula editor. Click on a field to directly select it. If you haven't assigned a code to it, it will appear as a number.

💡 Take a look at all the available Formulas in the Formulas Manual and learn more about Writing an Expression.
• If you enter an invalid Formula you will get a warning.

• When you Formula is ready, click on "Done" to add it.
• Click on "Done" to add the field to the Form.
• When you finish adding fields, click on "Save" to save the Form.
Adding a Date field

The following section describes how to add a Date field when designing a Form. This allows you to add Locks to a Form or simply keep track of specific dates. Users can select a Date from a Calendar when adding Records or type a Date in the field. 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.

How to add a Date field

• In the Form Design page, click on "Date" to select the field from the Fields palette.

Fill in the Properties of the Date field by providing:

• Label: type the question or the label for which the user needs to provide information
• Description: optionally provide a description
• Code: optionally provide a code

In the Settings check the boxes you want to apply for the field.

If you make a Date field a Key field, you can use it to add a Lock for a specific date period for the Form.

• Click on "Done" to add the field.
• The Date field has been added to the Form.
• When you finish adding fields, click on "Save" to save the Form.

• Users will be able to provide a date for the Date field when they are adding Records.
Date of Visit*
Please provide the date of your visit to the school

Select a date (YYYY-MM-DD)

Aug 2019

The condition of the school on the day of the visit was
shortages - facilities need repair -

Organizing Data and Designing Forms
Adding a Fortnight field

The following section describes how to add a Fortnight field when designing a Form. This field is useful if you want to add a Lock to your Form or you want to create a Form/Subform for fortnightly reporting. Users can select a week or a day from the Calendar when adding Records or type the Fortnightly period using the suggested format. The Fortnight field format is YYYYWW-WW (e.g. 2020W3-W4).

How to add a Fortnight field

• In the Form Design page, click on "Fortnight" to select the field from the fields palette.

Fill in the Properties of the field by providing:

• Label: type the question or the label for which the user needs to provide information
• Description: optionally provide a description
• Code: optionally provide a code

In the Settings check the boxes you want to apply for the field.

If you make a Fortnight field a Key field, you will be able to add Locks to the Form based on a specific period of time.

• Click on "Done" to add the field.
• The Fortnight field has been added to the Form.
• When you finish adding fields, click on "Save" to save the Form.

• Users will be able to provide a Fortnightly period when they are adding Records.
Edit record

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

2019W51 W52

How many kits did you distribute during this period?

130 kits

via the AP

Cancel Save record

Organizing Data and Designing Forms
Adding a Month field

The following section describes how to add a Month field when designing a Form. This field is useful if you want to add a Lock to your Form or you want to create a Form/Subform for monthly reporting. Users can select a Month from a Calendar when adding Records or type the month using the suggested format. The Month format in ActivityInfo is YYYY-MM.

How to add a Month field

• In the Form Design page, click on "Month" to select the field from the fields palette.

Fill in the Properties of the Month field by providing:

• Label: type the question or the label for which the user needs to provide information
• Description: optionally provide a description
• Code: optionally provide a code

In the Settings check the boxes you want to apply for the field.

If you make a Month field a Key field, you will be able to add Locks to the Form based on a specific period of time.

• Click on "Done" to add the field.
• The Month field has been added to the Form.
• When you finish adding fields, click on “Save” to save the Form.

• Users will be able to provide a month for the Month field when they are adding Records.
Add record

Month of visit
Please provide the month you visited the school

Select a month (YYYY-MM)

Year
2022 2023 2024 2025 2026 2027
This year

Month
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
This month

Please select the province the school belongs to.
Adding Selection fields

The following section describes how to add Single Selection and Multiple Selection fields when designing a Form. Selection fields allow users to select one or more options as an answer.

**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.

**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.

- Maximum number of options per Single/Multiple Selection field: **100 options**
- Maximum number of options in total for all Single/Multiple Selection field in a Form: **1000 options**

How to add a Single Selection field

- In the Form Design page, click on "Single selection" to select the field from the Fields palette.
Fill in the Properties of the Single Selection field by providing:

- Label: type the question for which the user will select an option
- Description: optionally provide a description
- Code: optionally provide a code

In the Settings check the boxes you want to apply for the field.

- In the Options section, type in the first option.
• Click on "Add option" to add more options and repeat to add as many options as needed. To delete an option, click on "Delete" next to its name.
• Click on "Done" to add the field.

• The Single Selection field has been added to the Form.
• When you finish adding fields, click on "Save" to save the Form.
Users will be able to provide one answer to the Single Selection field when they are adding Records.

How to add a Multiple Selection field

• In the Form Design page, click on "Multiple selection" to select the field from the Fields palette.
Fill in the Properties of the Multiple Selection field by providing:

- Label: type the question for which the User will select one or more options
- Description: optionally provide a description
- Code: optionally provide a code

In the Settings check the boxes you want to apply for the field.

- In the Options section, type in the first option.
- Click on "Add option" to add more options and repeat to add as many options as needed. To delete an option, click on "Delete" next to its name.
• If you are using Relevance rules make sure you set the correct Relevance rules.

![Relevance rules interface](image)

- When the field is ready, click on "Done" to add it.
In this example we are using relevance rules but this is optional for your Form. Learn more about Adding Relevance rules.

- The Multiple Selection field has been added to the Form.
- When you finish adding fields, click on "Save" to save the Form.
• Users will be able to provide one or more answers to the Multiple Selection field when they are adding Records (if the Relevance rule is met).
Adding Quantity fields

The following section describes how to add a Quantity field when designing a Form. You can add a Quantity field to your Form to allow users to enter a numerical value. This can be for example any numerical indicator that you want to track. Quantity fields can also be used as the components to make calculations using Calculated fields.

How to add a Quantity field

• In the Form Design page, click on "Quantity" to select the field from the Fields palette.

Fill in the Properties of the Quantity field by providing:

• Label: type a question or give a label for which the user needs to provide a number
• Description: optionally provide a description
• Code: optionally provide a code
• Units: the units for the quantity

In the Settings check the boxes you want to apply for the field.

💡 if you plan to use Calculated fields to automate calculations for your Reports, make sure to add a Code to this field.
If you are using Relevance rules make sure you set the correct Relevance rules.

- Click on "Done" to add the field.

In this example we are using relevance rules but this is optional for your Form. Learn more about [Setting Relevance rules](#).

- The Quantity field has been added to the Form.
- When you finish adding fields, click on "Save" to save the Form.
• Users will be able to fill in the Quantity field when they are adding Records - if the Relevance rule is met.
Adding a Reference field

The following section describes how to add a Reference field when designing a Form. Reference fields are very powerful fields which make it possible to connect Forms to other Forms or to the built-in Geographic database of ActivityInfo. Users can link their Records 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:

- Key fields
- Serial Number field

Using a Reference field and multiple Keys in the referenced Form, you can also create a 'cascading' effect to allow users to select from a series of options.

💡 You can add a prefix to the Serial Number to customize it and make it more readable for your users. This allow you to show - without revealing much information- what the Record is about, if you choose to use the Serial Number as the common reference.

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

How to add a Reference field to reference one field of another Form

- Before adding a Reference field, make sure you have defined as Key field the field you want your Form to refer to.
• Navigate to your Form, and in the Form Design page, click on "Reference" to select it from the Fields palette.

Make sure you have defined as Key the field you want your Form to refer to.

• Search for the Database and the Form that contains the Form and the Records you want to link to. Click on the arrows to reveal the contents of each Database.
• Select the Form and click on "Continue".
Fill in the Properties of the Reference field by providing:

- **Label**: type the question for which the user will select an option
- **Description**: optionally provide a description
- **Code**: optionally provide a code

In the Settings check the boxes you want to apply for the field.
• Click on "Done" to add the field.
• The Reference field has been added to the Form.
• When you finish adding fields, click on "Save" to save the Form.

• While adding Records, users will be able to select a Record out of the list of Records of the referenced Form.
Note that in this example, the referenced field was a Single Selection field, defined as a Key field. That is why users were able to see the specific options in the dropdown list.

How to add a Reference field to reference many fields of another Form (cascading effect)

• Before adding a Reference field, make sure you have defined as Key fields the fields you want your Form to refer to.

• Navigate to your Form, and in the Form Design page, click on "Reference" to select it from the Fields palette.
Make sure you have defined as Keys the fields you want your Form to refer to.

- Search for the Database and the Form that contains the Form and the Records you want to link to. Click on the arrows to reveal the contents of each Database.
- Select the Form and click on "Continue".
Fill in the Properties of the Reference field by providing:

- Label: type the question for which the user will select an option
- Description: optionally provide a description
- Code: optionally provide a code

In the Settings check the boxes you want to apply for the field.

- Click on "Done" to add the field.
- The Reference field has been added to the Form.
- When you finish adding fields, click on "Save" to save the Form.

- While adding Records, users will be able to select a Record out of the list of Records of the referenced Form.
Note that in this example, the referenced fields were:

- a Reference field (referencing the Provinces available in the Geodatabase)
- a Text field
- a Single Selection field

and were **ALL defined as Key fields** in the referenced Form.

That is why users were able to see the specific options in the dropdown list.
Adding a Serial Number

The following section explains how the Serial Number works and describes how to add a Serial Number when designing a Form. It also presents ways to customize the Serial Number to make it easier to remember.

Every Record stored in ActivityInfo is automatically assigned a unique, randomly-generated ID when it is created. By using a Serial Number field in your Form, you can identify more easily each Record thanks to an easier-to-remember format that consists of sequential numbers such as "0023", "0024".

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.

**Only one Serial Number field can be added per Form.**

To make it easier to trace or remember a Record, instead of just having a number you can add a prefix to it that will give more traceability to it, without revealing sensitive information. To do this you can you add a Prefix Formula.

This is useful because it allows you to identify any specific Record in the Table View quickly.

Also it allows users to easily refer to such a Record if you are using multiple Forms that link to each other with Reference fields.

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 editing a Record that is not yet saved, the Form field will be displayed as "(Pending)".

You can use Serial Numbers in Subforms too. In Subforms, the Prefix Formula can also derive from the Parent Form.

⚠️ Once a Serial Number is assigned to a Record, it cannot change.

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.

⚠️ If you save a Record while using a Database made available offline, a Serial Number will not be assigned to it until you have fully synchronized the Form to ActivityInfo.
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.

How to add a Serial Number

Adding the Serial Number field

- In the Form Design page, click on "Serial Number" to select it from the Fields palette.

Fill in the Properties of the Serial Number by providing:

- Label: give a descriptive name for the Serial Number
- Description: optionally provide a description for the Serial Number
- Code: optionally provide a code for the Serial Number
- Prefix Formula: you can customize the Serial Number using another field; read the following examples for more information

In the Settings check the boxes you want to apply for the Serial Number.
Customizing the Serial Number field with a Single Selection field

- You can customize a Serial Number using a Single Selection field. In this case users will be able to select the prefix from a list of options that you will provide them with.
- Add a Single Selection field and add as options all the possible prefixes.
- Click on "Done" to add the field.
In the Prefix section of the Serial Number field, click the arrow to reveal a list of options that can work as prefixes and select the Single Selection field.

Click on "Done" to add the field.

Click on "Save" to save the Form.
• When a user adds a Record they won't be able to fill in the Serial Number Field as this is automatically filled by ActivityInfo. Instead they will see the word "Pending" in that field.
• If you have used a Single Selection field to define the Prefix, the user will be able to select it when adding a new Record and this will be automatically added as a Prefix to the Serial Number that will be assigned to the Record.

![Add record screenshot](image)

• This will appear in the Table View in front of the Serial Number.

![Distribution in Primary Schools](image)

**Customizing the Serial Number field with a Text field**

• You can customize a Serial Number using a Text field. In this case users will be able to provide a short text which will be then used as the prefix of the Serial Number. You can also add an Input Mask to the Text field, to constrain what the users can type in the Text field.
  • Add a Text field.
  • Click on "Done" to add the field.
In the Prefix section of the Serial Number field, click the arrow to reveal a list of options that can work as prefixes and select the Text field.

- Click on "Done" to add the field.
- Click on "Save" to save the Form.
• When a user adds a Record they won't be able to fill in the Serial Number field as this is automatically filled by ActivityInfo. Instead they will see the word "Pending" in that field.
• If you have used a Text field to define the Prefix, the user will be able to type in the Text field that will be then automatically added to the Prefix.

• This will appear in the Table View in front of the Serial Number.

Customizing the Serial Number field with a Text Formula
• You can customize a Serial Number using more than one Text fields and Text Formulas.
• Add the Text fields that you want to use and give them a Code.
• Add a Serial Number field, give it a name and in the Prefix section of the Serial Number field type the Text formula. Use the Codes you assigned to the Text fields in the Formula.
• Click on "Done" to add the field.
• Click on "Save" to save the Form.

Take a look at the available Text formulas!

• When a user adds a Record they won't be able to fill in the Serial Number field as this is automatically filled by ActivityInfo. Instead they will see the word "Pending" in that field.
• If you have used Text fields to define the Prefix, the user will be able to type in the Text fields and the prefix will be automatically applied to the Serial Number.

```
<table>
<thead>
<tr>
<th>Serial Number</th>
<th>Name of institution</th>
<th>Select entity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public_Saint Nicolas-00001</td>
<td>Saint Nicolas</td>
<td>Public</td>
</tr>
</tbody>
</table>
```

Customizing the Serial Number with a field from a Referenced Form

• You can customize a Serial Number using a Text field, a Single Selection field or a Serial Number of another Form. To do that you need to add a Reference field in your Form and reference the Form that contains the field that you want to use.
• Then in the Prefix formula of the Serial Number field click on the arrow and select the field from the list or type in the Formula.

When a user adds a Record they won't be able to fill in the Serial Number field as this is automatically filled by ActivityInfo. Instead they will see the word "Pending" in that field.
• If you have used a Reference field to define the Prefix, the user will be able to select their answer in the Reference field (which would be the Serial Number or any other Key field(s) of the referenced Form) and the Prefix will be automatically applied to the Serial Number.
Adding Text fields

The following section describes how to add short Text and Multi-line Text fields when designing a Form. **Text fields** can be used to collect short answers to open-ended questions or to ask for very specific information (e.g. a name). They can also be used to help customise a Serial Number field when selected a Prefix Formula in the properties of the Serial Number. **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.

- Maximum length of a Text field record value: **1024 characters**
- Maximum length of a Multi-line Text field record value: **65536 characters**
- Multi-line text fields can't be Key fields.

How to add a Text field

- In the Form Design page, click on "Text" to select the field from the Fields palette.

Fill in the properties of the Text field by providing:

- Label: type the question or the label for which the user needs to provide information
• Description: optionally provide a description
• Code: optionally provide a code
• Input Mask: add an input mask to constrain what users type in to a field

In the Settings check the boxes you want to apply for the field.

• Click on "Done" to add the field.

Read more about adding an Input Mask.

• The Text field has been added to the Form.
• When you finish adding fields, click on "Save" to save the Form.

• Users will be able to provide a short answer to the Text field when they are adding Records.
How to add a Multi-line Text field

- In the Form Design page, click on "Multi-line text" to select the field from the Fields palette.

Fill in the Properties of the Text field by providing:

- Label: type the question or the label for which the user needs to provide information
- Description: optionally provide a description
- Code: optionally provide a code

In the Settings check the boxes you want to apply for the field.

- Click on "Done" to add the field.
• The Multi-line Text field has been added to the Form.
• When you finish adding fields, click on "Save" to save the Form.

• Users will be able to provide a long answer to the Multi-line Text field when they are adding Records.
Multi-Line Text fields can be expanded to facilitate users adding Records by dragging the two lines in the corner of the box.
Adding a User field

The following section describes how to add a User field when designing a Form in the Case management database template. User fields are related to the Roles of the Case management database template and allow users with the Role of Supervisor to assign Records (as Cases for example) to specific users.

⚠️ You need to have added users to the Database for which you are designing the Form.

How to add a User field

• In the Form Design page, click on "User" to select the field from the Fields palette.

Select field type

- Serial Number
- Quantity
- Text
- Multi-line text
- Date
- Week
- Fortnight
- Month
- Single selection
- Multiple selection
- Attachments
- Calculated
- Subform
- Reference
- Geographic point
- User
- Section header

Paste field list from spreadsheet

Fill in the Properties of the User field by providing:

• Label: type the label for which the user needs to provide information
• Description: optionally provide a description
• Code: optionally provide a code

In the Settings check the boxes you want to apply for the field.

• Click on "Done" to add the field.
• The User field has been added to the Form.
• When you finish adding fields, click on "Save" to save the Form.

• Users with the Role of Supervisor will be able to select the user to which they want to assign a Record in the Data Entry Form.
• Users with the Role of Case worker will be able to select their name from the user list.
Adding a Week field

The following section describes how to add a Week field when designing a Form. This field is useful if you want to add a Lock to your Form or you want to create a Form/Subform for weekly reporting. Users can select a Week from a Calendar when adding Records or type the Week using the suggested format. The Week format in ActivityInfo is YYYY-WW.

💡 Please note that the Week field uses the EPI week convention.

How to add a Week field

- In the Form Design page, click on "Week" to select the field from the Fields palette.

Fill in the Properties of the Week field by providing:

- Label: type the question or the label for which the user needs to provide information
- Description: optionally provide a description
- Code: optionally provide a code

In the Settings check the boxes you want to apply for the field.

If you make a Week field a Key field, you will be able to add Locks to the Form based on a specific period of time.
• Click on "Done" to add the field.

• The Week field has been added to the Form.
• When you finish adding fields, click on "Save" to save the Form.

• Users will be able to provide a week for the Week field when they are adding Records.
### Add record

**Week of visit**
Please provide the week of the visit to the school

![Calendar](calendar-image)

**Select a week (YYYY WW)**

<table>
<thead>
<tr>
<th>Sun</th>
<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
<th>Thu</th>
<th>Fri</th>
<th>Sat</th>
</tr>
</thead>
<tbody>
<tr>
<td>29</td>
<td>30</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>10</td>
<td>11</td>
<td>12</td>
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<td>27</td>
<td>28</td>
<td>29</td>
<td>30</td>
<td>31</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
</tr>
</tbody>
</table>
Defining Key fields

The following section describes how the Key property works and presents how to define one or more fields as Key fields when designing a Form. It also describes how you can prevent users from adding duplicate Records by defining Key fields (i.e. key points of information that should not be repeated).

Keys are very important properties in ActivityInfo and they help you build flexible Forms. The Key property is used to uniquely identify a Record.

This is very useful for a variety of cases as a Key allows you to easily reference a specific field in a Form.

Examples of Cases where Key fields are used:

- A Key field is necessary to allow users to import Records to a Subform. A Key field needs to be identified in the Parent Form to allow you to link the Records you plan to import to a Subform to the correct Record of the Parent Form.
- A Key field allows you to easily Reference the Record of another Form. This can be the Serial Number of a Record or a specific field which has been defined as a Key field.
- 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 more easily.
- A combination of Key fields can be used to prevent users from adding more than one Record for that combination.
- 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.

If you add a Serial Number in your Form, then this becomes the Key of the Form automatically. To use the Serial Number and make it easier to recognise, you can customize it using a Text field or a Single Selection field. 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.

Key points about Keys:

- 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.
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**, **Multi-line Text** & **Attachments** fields cannot be Key fields.
- You can add up to 10 Keys in a Form.

### How to define a Key field

- In the Form Design page, click on the field you want to make Key.
- In the Field Card editor, check the box next to "Key".

- Click on "Done" to save the field.
- When you finish adding fields, click on "Save" to save the Form.
How to use a combination of Key fields to prevent users from adding duplicate Records

- In the Form Design page select the fields which will act as Key fields by checking the Key property to make them keys.
- Users will get an error if they add a Record with information that has been already added for these fields.
How to use a Single Selection field as a Key to prevent users from adding duplicate Records

- In the Form Design page select the Single Selection field which will act as a Key by checking the Key property.
• Users will get an error if they select the same option.

In this example we set as Key field the "Select city" Single Selection field.

Then, we add one Record and select the first option of the Single Selection field "Athens".

Name of student
Lucy
When we try to add another Record for the same option in the Single Selection field ("Athens") we get an error.
Hiding a field from data entry

The following section describes how to hide a field from data entry when designing a Form. You can hide a field if it is no longer relevant, but you do not want to lose any data entered in this field in the past. 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. Data in hidden fields can still be included in reports, which makes hiding a field different from Deleting a Field.

How to hide a field from data entry

• In the Form Design page, click on the field you want to hide.
• In the Field Card editor, check the box next to "Hide from entry".
• Click on "Done" to save the field.
• The property has been added and the field is marked with the "HIDDEN" tag in the Form Design page. When you finish adding fields, click on "Save" to save the Form.
<table>
<thead>
<tr>
<th><strong>CALCULATED:</strong> Cost of chairs in Euros</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatically calculates the cost of total chairs delivered.</td>
</tr>
<tr>
<td>FORMULA: C = $</td>
</tr>
</tbody>
</table>

**Save**

**Cancel**
Making a field Required

The following section describes how to make any field Required when designing a Form. By assigning this property to a field you make it Required 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 "Required" and "Hide from entry" at the same time.

How to make a field Required

- In the Form Design page, click on the field you want to make Required to select it.

• In the Field Card editor, check the box next to "Required".
• Click on "Done" to save the change.
• The field has become Required and it is marked in the Form Design page with the REQUIRED label.
• When you finish adding fields, click on "Save" to save the Form.

• Users will need to fill in the field marked as Required when adding Record in order to be able to save the Form.
Add record

Partner
Please select your Partner from the list.

Children NGO

Date of Visit*
Please provide the date of your visit to the school

Select a date (YYYY-MM-DD)
Setting Relevance rules

The following section describes how to set relevance rules for fields when designing a Form so that a field appears to users only when some conditions are met.

Buy using relevance rules 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 based on the fields of your Form or based on the fields of a referenced Form.

You can also write a Formula for more advanced rules. View all the available Formulas or read more about writing an expression for a Formula.

⚠️ Maximum number of Relevance rules per field: 10 relevance rules

⚠️ Please note when writing Formulas that the Formula editor is case sensitive.

💡 List of fields and conditions which can be used in relevance rules:

- Attachment (empty / not empty)
- Reference (only one level)
- Multi-line Text
- Quantity
- Geographic Point (empty / not empty)
- Single Selection
- Multiple Selection
- Date/Month / Fortnight / Week
- Text

and 'Formula is true'.

How to set relevance rules based on the fields of a Form

- In the Form Design page, click on the field you want to apply relevance rules to.
- In the Field Card editor, check the box next to "Set relevance rules".
• In the relevance rules section that appears at the bottom of the card you can start defining
the rules.

• You can select to show the selected field if all or any of the conditions are met. Click on the
arrow next to "any" if you want to change it to "all".

• Set the first relevance rule by selecting the condition that applies to:
  • the field
• the state of the condition

• the condition
To show the list of 'Options' the two Forms need to be in the same Folder. Otherwise you can type the selected 'Option'.

- To add another relevance rule, click on "Add".

- Set the rule by selecting what you want to apply.
Depending on the field type you select, you might get different types of rules to select from.

- Click on "Done" to save the field.
- When you finish adding fields, click on "Save" to save the Form.

A field that has relevance rules, appears with the label "RELEVANCE RULE SET" in the Form Design page.

- Users will view the specific field when they are adding Records, only if the relevance rule is met.
How to set relevance rules based on the fields of a referenced Form

- Before setting relevance rules based on the fields of a referenced Form, you need to add a Reference field in your Form to refer the fields of the Form needed.

- After referencing the Form, add the field that needs to use relevance rules based on the fields of the referenced Form and select the box “Set relevance rules”.

Form A has 3 key fields. These fields will be used in Form B. When you design it, you add a Reference field and select Form A.

This is how the Reference field looks like in Form B. Form B references Form A.

This is what users will see when they do data entry for Form B.
• In the rules editor that appears at the bottom of the Field Card editor you can start defining the rules.
• You can select to show the selected field if all or any of the conditions are met. Click on the arrow next to "any" if you want to change it to "all".

• Set the first relevance rule by selecting the condition that applies to:
  • the field
Note that here you will see all the available fields from which you can select including the ones that appear in the current Form and the referenced Form.

- the state of the condition

- the condition
• To add another relevance rule, click on "Add" and repeat the same process.

💡 Depending on the field type you select, you might get different types of rules to select from.

• To delete a Relevance rule, click on 'Delete'.
• When you are ready, click on "Done" to save the field.
• When you finish adding fields, click on "Save" to save the Form.
A field that has relevance rules, appears with the label "RELEVANCE RULE SET" in the Form Design page.

- Users will view the specific field when they are adding Records, only if the relevance rule is met.
How to set relevance rules using a Formula

- In the Form Design page, click on the field you want to apply relevance rules to.
- In the Field Card editor, check the box next to "Set relevance rules".
- In the relevance rules section that appears at the bottom of the card you can start defining the rules.

- To start writing a Formula, select the 'Formula is true' option.
• Next, you can either right your Formula on the rules editor or open the Formula editor to write a longer Formula and get more help.

⚠ Please note that the Formula editor is case sensitive.

• Start writing your Formula and click on "Done" when you are ready to save it.
- You can see the relevance rules added in the editor.
- Click on 'Done' to save the field.

- When you finish adding fields, click on "Save" to save the Form.
A field that has relevance rules, appears with the label "RELEVANCE RULE SET" in the Form Design page.

- Users will view the specific field when they are adding Records, only if the relevance rules of the Formula are true.
Select Entity and Situation

- Province Name: Fluvoland
- School, Classes and Shortages School Name: College A
- School, Classes and Shortages Classroom Type: Chemistry Lab

How many Blackboards are needed?

Enter a number: [Input field]

Details
Adding a record to a subform takes you to a new form. All your data you've filled in on this form remains saved until you return to it.

- Add record in details
Setting Validation rules

This section describes the steps for setting validation rules to a field when designing a Form. You can define one or more rules for some specific types of fields to define when an added Record is valid. Adding validation rules to one or more fields prevents users from saving 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.

List of field types and conditions which can be used:

<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>Field Type</td>
<td>Condition</td>
</tr>
<tr>
<td>------------</td>
<td>-----------</td>
</tr>
</tbody>
</table>
|            | • Ends with  
|            | • Contains |

- 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.

View [all the available Formulas](#) or read more about [writing an expression for a Formula](#).

Please note when writing Formulas that the Formula editor is case sensitive.

How to set validation rules based on the fields of a Form

- In the Form Design page click on the field to which you want to apply validation rules.
- In the Field Card editor check the box next to "Set validation rules".
- In the validation rules section that appears at the bottom of the tab you can start defining the rules.
You can select to use the validation rule if all or any of the conditions are met. Click on the arrow next to "any" if you want to change it to "all".

Set the first validation rule by selecting:

- the state of the condition
- the condition
To add another validation rule, click on "Add" and set the rule by selecting what you want to apply.
Click on "Delete" to delete a validation rule.
Once you have added all the validation rules you need, click on "Done" to save the field.

You can add validation rules to more fields.
A field that has validation rules, appears with the label "VALIDATION RULE SET" in the Form Design page.

- When you finish adding fields, click on "Save" to save the Form.
Users will get an error message with a description of the validation rule when they try to add a Record that doesn't meet the validation rule(s).
How to set validation rules using a Formula

- In the Form Design page, click on the field you want to apply validation rules to.
- In the Field Card editor, check the box next to "Set validation rules".
- In the validation rules section that appears at the bottom of the card you can start defining the rules.

- You can select to show the selected field if all or any of the conditions are met. Click on the arrow next to "any" if you want to change it to "all".
- To start writing a Formula, select the 'Formula is true' option.
- Next, you can either right your Formula on the rules editor or open the Formula editor to write a longer Formula and get more help.

- Start writing your Formula and click on "Done" when you are ready to save it.

⚠️ Please note that the Formula editor is case sensitive.
• You can see the validation rules added in the editor.
• Click on 'Done' to save the field.

View all the available Formulas or read more about writing an expression for a Formula.
• When you finish adding fields, click on "Save" to save the Form.
A field that has validation rules, appears with the label "VALIDATION RULE SET" in the Form Design page.

- Users will get an error message with a description of the validation rule when they try to add a Record that doesn't meet the validation rule(s).
Adding an Input Mask

The following section describes how to add an Input Mask to a Text field 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. This can be useful if you have a field with administrative codes, for example. 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 when they do.

💡 Take a look at the available characters and their explanations before creating an Input Mask.

How to add an Input Mask

• In the Form Design page, click on the Text field to which you want to add the Input Mask.

• In the Field Card editor enter the Input Mask

• Click on "Done" to save the change.
• The Input Mask has been added and you can view it in the Form Design page.
• When you finish adding fields, click on "Save" to save the Form.

• In Data Entry page, a greyed out placeholder will indicate the type of text users need to type.
Writing a Formula

This section explains how to write a Formula for a Calculated Field or for a validation or relevance rule when designing a Form in ActivityInfo. Calculated Fields can calculate a value based on a Formula and the value of other fields. Depending on your needs you can write a Formula to automate the calculations and save time. To write a Formula you need to add a Calculated field to your Form and open the Field card editor of the field. Relevance and validation rules can be further defined thanks to Formulas.

A list of all available Functions can be found in the Formulas Reference Manual.

How to write a Formula

• To write a Formula, you need to add a Calculated field. You can either use the Formula section on the Field Card editor (e.g. for a short Formula) or open the Formula editor (e.g. for a longer Formula or for a full list of your options) by clicking on "Formula editor".

Understanding the components

A Formula consists of:

Symbols
Symbols are references to other fields which we will use in our calculations. Symbols can be field **Labels** or **Codes**. Every calculation will use the value of the field on that Record to produce a result.

**Formula**

\[ D + C + Bl + Ch \]

**Constants**

Constants are constant values which do not change. Every calculation will use the same value to produce a result.

Constants can be for example a text string, numbers, logical or boolean value (e.g. TRUE/FALSE).

**Functions**

Functions are instructions to perform a specific task. These tasks can be mathematical operations (e.g. addition + or subtraction -), finding a word within a piece of text, or checking a value is greater than another.

The values which a function operates on are called **arguments**. These arguments can be Symbols or Constants.

Once the function has performed its task using the provided arguments, it returns a **result**. This result can then be used as an argument to another function, or returned as the Calculated Value.
In our example the Calculated field will add up - using the addition function ("+") - the amount Desks, Chairs, Blackboards and Chemistry lab equipment delivered using the codes "D", "C", "Bl" and "Ch" respectively. This will happen after the user adds a Record and enters the Quantity fields.

Using a field of a Form as a Symbol

Apart from assigning a Code to a field, there are other ways to use a field as a Symbol. When writing a Formula use one of the following ways to add as many symbols as needed in it.

**Use the field Label**

- If a Label is a single word (e.g. "Desks"), then we can use the Label directly in the Formula.

```
Formula

Desks
```

- If a Label contains one or more spaces (e.g. "Number of Desks delivered"), then we can use the Label by surrounding it with square brackets - i.e. [Number of Desks delivered].
- If a Label includes special characters (that is characters that are not alphanumeric, such as ?,!, etc.) then it should be within square brackets [ ]
- If a Label consists of 20 or more characters, it will be converted into a field Id.

```
Formula

[Number of Desks delivered:]
```

**Use the field Code**

- If a field has a defined Code (e.g. "Number of Desks delivered" has Code "D"), then we can include the Code directly in the Formula.

```
Formula

D
```
Using a Constant

To use a Constant in our Formula, we can:

- Include text strings by surrounding them with double-quotes (e.g. "Your Text Here")

- Include numbers by including them directly (e.g. 10)
• Include Logical or Boolean values (e.g. TRUE/FALSE) by including them directly, fully capitalized.

Using a Function

To use a Function in our Formula, we must:

1. Include the Function name (e.g. IF)
2. Include all of the Function Arguments within parentheses - e.g. IF(arg1, "yes", "no"). Function Arguments can be Symbols or Constants.
Using a function with a Single Selection field.

A list of all available Functions can be found in the [Formulas Reference Manual](#).

Using the Subform fields in a Formula

You can write a Formula in your Parent Form to make calculations based on the Records added in the Subform of the Parent Form. You can only use Aggregate Functions with Records of Subforms.

Add a Calculated field in the Parent Form and in the Formula editor use functions (such SUM, AVERAGE etc.) along with the Code or Label of the Records of the Subform you want to use.
You can currently use the Records of a first level Subform. If a Subform is within a Subform you will not be able to use the Records of the second level Subform.

How to verify a Formula

• Once you have created your Formula, the system will inform you whether there are any issues with the syntax of your Formula. If there are no issues with the syntax of your Formula, it will appear with a green glow.
• If there are syntax issues with the Formula the system will not allow you to save the field.

 Logical inaccuracies or incorrect references are not checked by the system. Therefore, you may find that after creating your Calculated Field, it will only return "#VALUE!" values.

 If this occurs, return to the Form Design page and check your Calculated field Formula:

• Ensure you are using the correct Symbols
• Ensure your Function Arguments are of the correct type
Referencing the Geodatabase

The following section describes how reference the Geodatabase of ActivityInfo, using a Reference Field in your Form, to allow Users to select a location from the built-in locations. This way you can reach a list of available locations (e.g. Provinces, Governorates etc.), let your users select from this list and maintain consistency in your data.

How to reference the Geodatabase

• In the Form Design page, click on "Reference" to select it from the Fields tab.

• Search for the Geodatabase and click on it to reveal the list of countries.
• Click on the country you want, to reveal the locations and select the location you want to use.
• Click on "Continue".

Organizing Data and Designing Forms
If you want to use a list of countries click on "Global" instead.

Fill in the Properties of the Reference field by providing:

• Label: type the question for which the user will select an option
• Description: optionally provide a description
• Code: optionally provide a code

In the Settings check the boxes you want to apply for the field.

• Click on "Done" to add the field.
• The Reference field has been added to the Form.
• When you finish adding fields, click on "Save" to save the Form.
While adding Records, users will be able to select a location from the Geodatabase.
Copy a Form
Duplicating a Form

Instead of designing a Form, you can create a copy of another Form by duplicating that Form. You might want to do that if for example you need to create a duplicate Form or you need to do slight changes to its copy. This can save you time.

When duplicating a Form with one or more Subforms, the Subforms are also duplicated as they are part of the Form. The Records added to the Form are not copied.

How to duplicate a Form

• In the Database Settings page find the Form you want to duplicate in the Database Design section and click on it.

• Click on "Duplicate form" to duplicate it.
• The Form is duplicated and you can see the copy in the Database Design section.
Copying a Form by exporting and importing fields

The following section describes how to create a copy of a Form by exporting a Form's fields and importing them to another Form.

Instead of designing a Form you can create a copy of another Form. You might want to do that if for example you need to create a duplicate Form or you need to do slight changes to its copy. This can save you time.

To do that you need to export the fields of the Form and then import them to a new Form. You might also want to import only some selected fields in order to create a shorter Form for example.

⚠️ To import a reference field make sure you use the Form id of the Form you are referencing.

How to copy a Form by exporting and importing fields

Export the fields of the Form you want to copy

Navigate to the Form Design

- On the Database List page, click on the Database that contains the Form you want to copy to open it.
• Click on "Database settings" to open the Database Settings page.

• On the Database Design section, click on the Form you want to copy to select it.
• Click on "Edit form" on the right side panel to navigate to the Form Design page.
If the Form is in a Folder click the arrow next to the Folder's name to expand it in order to find the Form and click on the Form.

Export the fields

• In the Form Design page click on "Export fields" to export the fields of the Form.

  ![Form Design Page]

  Click on the export file to open it.
Import the exported fields in a new Form

Prepare the fields to import

- In the exported file you can see all the fields of the Form along with their properties. You can apply any changes you want at this step.
- Select the fields and copy them (Control + C or Command + C). Make sure you selected the Headers of the columns too.
- The FormId and the FieldId are not necessary as these are related to the Form and fields you have exported.

Add a Form and import the fields

- In the Database Design section, select the location where you want the new Form to be added and click on "Add form".
• In the Form Design page, give a Name to your Form and click on "Add a field" to reveal the Field palette.

• On the Field palette, click on "Paste field list from spreadsheet".
• Paste the fields (Control + V or Command + V) and click on "Add fields".

• The fields have been added to your Form.
• Click on "Save" to save the Form.
Correcting errors, adding reference fields (optional)

- In case of an error you will be notified and you won't be able to add the fields.
- If you didn't add all the necessary information for the fields you will be notified in the Form Design page.
Please make sure you included the Headers of the columns of the spreadsheet and that you included options for the Selection fields and the Form Id of the referenced Form for a Reference field.

- To make changes click on a field to open its properties.

- Click on "Done" to save any changes to the fields and click on "Save" to save the Form.
Copying a Form with a Subform by exporting and importing fields

The following section describes how to create a copy of a Form with a Subform by exporting a Form's fields and a Subform's fields and importing them to another Form.

Instead of designing a Form with a Subform you can create a copy of another Form and a copy of its Subform. You might want to do that if for example you need to create a duplicate Form with a Subform or you need to do slight changes to its copy.

To do that you need to export the fields of the Form and then import them to a new Form. Then you need to export the fields of the Subform and import them to the Subform of the new Form. You might also want to import only some selected fields in order to create a shorter Form/Subform for example.

⚠️ To import a reference field make sure you use the Form id of the Form you are referencing.

How to copy a Form with a Subform by exporting and importing fields

Export the fields of the Form you want to copy

Navigate to the Form Design page

• On the Database List page, click on the Database that contains the Form with the Subform that you want to copy to open it.
• Click on "Database settings" to open the Database Settings page.

• Click on the Form you want to copy to select it.
• Click on "Edit form" on the Resource side panel to navigate to the Form Design page.
If the Form is in a Folder click the arrow next to the Folder's name to expand it in order to find the Form and click on the Form.

Export the fields of the Form and the Subform

- In the Form Design page, click on "Export fields" to export the fields of the Form.
• Click on the Subform to open it and on the Form Designer of the Subform, click on "Export fields" to export the fields of the Subform too.

• Click on the exported files to open them.
Import the exported fields in a new Form

Prepare the fields to import

- In the exported file you can see all the fields of the Form along with their properties. You can apply any changes you want at this step.
- Select the fields and copy them (Control + C or Command + C). Make sure you selected the Headers of the columns too.
- The FormId and the FieldId are not necessary as these are related to the Form and fields you have exported.

Add a Form and import the fields of the Form

- In the Database Design section, select the location where you want the new Form with the Subform to be added and click on "Add form".

- In the Form Design page, give a Name to your Form and click on "Add a field" to reveal the Fields palette.
• On the fields palette click on "Paste field list from spreadsheet".

• Paste the fields (Control + V or Command + V) to the fields box and click on "Add fields".
• The fields have been added to your Form, click on "Save" to save it.

Import the fields of the Subform

• In the exported file of the Subform you can see all the fields of the Subform along with their properties. You can apply any changes you want at this step.
• Select the fields and copy them (Control + C or Command + C). Make sure you selected the Headers of the columns too.
• The FormId and the FieldId are not necessary as these are related to the Subform and fields you have exported.
• In your Form click on the Subform field and click on "Open subform" to open it.

• In the Form Designer of the Subform click on "Add a field" to reveal the fields panel and click on "Paste field list from spreadsheet".
• Paste the fields of the spreadsheet of the Subform (Control + V or Command + V) to the fields box and click on "Add fields".

• The fields have been added to the Subform, click on "Save" to save it.
• On the Form Designer of the Form, click on "Save" to save the Form with the Subform.

Correcting errors, making changes

• In case of an error you will be notified and you won’t be able to add the fields.
• If you didn't add all the necessary information for the fields you will be notified in the Form Designer.
Please make sure you included the Headers of the columns of the spreadsheet and that you included options for the Selection fields and the Form Id of the referenced Form for a Reference field.

- To make changes click on a field to open its properties.
• Click on "Done" to save any changes to the fields and click on "Save" to save the Form.
Copying a Subform by exporting and importing fields

The following section describes how to create a copy of a Subform by exporting a Subform's fields and importing them to a new Subform.

Instead of designing a Subform in a Form you can create a copy of an existing Subform to use. You might want to do that if for example you need to create a duplicate Subform in your Form with slight changes or if you want to use the same Subform in a different Form.

To do that you need to export the fields of the Subform and import them to a new Subform. You might also want to import only some selected fields in order to create a shorter Subform for example. To do that make sure you have added a Subform field in your Form.

⚠️ To import a reference field make sure you use the Form id of the Form you are referencing.

How to copy a Subform by exporting and importing fields

Navigate to the Form Design page

- On the Database List page, click on the Database that contains the Form with the Subform that you want to copy to open it.
• Click on "Database settings" to open the Database Setting page.

• Click on the Subform you want to copy to select it.
• Click on "Edit subform" on the Resource side panel to navigate to the Form Design page.
If the Subform is in a Folder click the arrow next to the Folder's name to expand it in order to find the Form that contains it and click on the Form to reveal it.

Export the fields of the Subform

- On the Form Design page of the Subform, click on "Export fields" to export the fields of the Subform.
- Click on the exported file to open it.

<table>
<thead>
<tr>
<th><strong>Column</strong></th>
<th><strong>Options</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td>Male, Female, Null</td>
</tr>
</tbody>
</table>

**Quantity**

- **Age**
  - Optionally provide the age of the household member

**Select**

- **Household member**
  - Father
  - Mother
  - Child
Import the exported fields in a new Subform

- In the exported file of the Subform you can see all the fields of the Subform along with their properties. You can apply any changes you want at this step.
- Select the fields and copy them (Control + C or Command + C). Make sure you selected the Headers of the columns too.
- The FormId and the FieldId are not necessary as these are related to the Form and fields you have exported.

- Navigate to the Form Design page of the Form where you want to add the copied Subform and add a Subform field.
- Click on "Open subform" to open the Subform.

<table>
<thead>
<tr>
<th>FormId</th>
<th>FieldId</th>
<th>FieldType</th>
<th>FieldName</th>
<th>FieldDescription</th>
<th>Required</th>
<th>Key</th>
<th>Units</th>
<th>Formula</th>
<th>Prefix Formula</th>
<th>Referred Form</th>
<th>Relevance Condition</th>
<th>Validation Condition</th>
<th>Choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>ck3poxxx30</td>
<td>1144000000</td>
<td>text</td>
<td>Name</td>
<td></td>
<td>false</td>
<td>true</td>
<td>false</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ck3poxxx30</td>
<td>6600000000</td>
<td>single select</td>
<td>Gender</td>
<td></td>
<td>false</td>
<td>false</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ck3poxxx30</td>
<td>6600000000</td>
<td>single select</td>
<td>Gender</td>
<td></td>
<td>false</td>
<td>false</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ck3poxxx30</td>
<td>1170776666</td>
<td>quantity</td>
<td>Age</td>
<td>Optionally provide the age of the household member</td>
<td>false</td>
<td>false</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ck3poxxx30</td>
<td>6600000000</td>
<td>single select</td>
<td>Household member</td>
<td></td>
<td>false</td>
<td>false</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ck3poxxx30</td>
<td>6600000000</td>
<td>single select</td>
<td>Household member</td>
<td></td>
<td>false</td>
<td>false</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
• In the Form Design page of the Subform click on "Add a field" to reveal the Fields palette and click on "Paste field list from spreadsheet".

• Paste the fields of the spreadsheet of the Subform (Control + V or Command + V) and click on "Add fields".
• The fields have been added to the Subform, click on "Save" to save it.

• On the Form Design page of the Form, click on "Save" to save the Form with the Subform.
Correcting errors, making changes

- In case of an error you will be notified and you won’t be able to add the fields.
- If you didn’t add all the necessary information for the fields you will be notified in the Form Design page.
Please make sure you included the Headers of the columns of the spreadsheet and that you included options for the Selection fields and the Form Id of the referenced Form for a Reference field.

- To make changes click on a field to open its properties.

- Click on "Done" to save any changes to the fields and click on "Save" to save the Form.
Edit a Database, Form or Folder
Editing a Database

You can edit many aspects of a Database in ActivityInfo.

You can:

- Rename the Database
- Edit the Database Design including:
  - the Folders  
  - the Forms and Subforms
- Edit the Users invited, their Roles and Permissions
- Edit the Locks added to the Database, Forms and Folders of the Database

How to edit a Database

Renaming a Database

- On the Database settings page of your Database, click on "Rename database" on the Resource side panel.
  
  ![Database settings screen](image)

  - Type in the new name for the Database and click "OK" to save it.
• The Database is renamed and you can find it in the Database List page.

Editing the Database Design

Follow the steps for:

• Editing a Folder to edit a Folder.
• Editing a Form to edit a Form.

Editing the Users invited and their Permissions

• On the Database settings page of your Database, on the Resources side panel you can view the Permissions and the Locks added to this Database.

• Click on the User for which you want to change (override) the Permissions. Or click on "Grant permissions".
• Tick or untick the boxes to apply the permissions and click on "Save" to save your changes.
• To delete a user, click on "User management" to navigate to the list of users.
• Click on a user to select it.
• Click on "Delete user" to delete the user.
Editing the Lock added to a Database

- On the Database Design section you can view the Locks added to this Database.
- Click on a Lock to edit it and click on "Save" to save the edits.

Tips

Locks are applied to Forms and Subforms that contain a Date/Month/Week field which has been added as a Key field. Read more about adding Locks.
Editing a Folder

The following section describes how to edit a Folder.

Once you have created a Folder, you can edit it.

More specifically you can:

- Rename the Folder
- Edit Users' Permissions to the Folder
- Edit the Locks added to the Folder

You can also change the visibility of the Folder.

💡 You can add another Folder in the Folder or add a Form.

How to edit a Folder

Renaming a Folder

- On the Database settings page of your Database, click on the Folder you want to edit to select it and click on "Rename folder" on the Resource side panel.

  ![Database settings screen](image)

  - Type in the new name for the Folder and click "OK" to save it.
The Folder is renamed.

Editing Users' Permissions to a Folder

- On the Database settings page of your Database, click on the Folder you want to edit to select it.
- On the Resource side panel you can view the Permissions and the Locks added to this Folder.
• Click on the Permissions tab to view all users that have been granted Permissions for the Folder.
• Click on "Grant permissions" to grant new permissions for this Folder or click on a user from the list.

• Select the user for which you want to grant permissions by clicking on it.
• You will view the preselected Permissions for this User. Check or uncheck the boxes to change the Permissions.
• Click on "Done" to save the changes.
Editing Locks added to Folder

- In the Database Design section, click on the Folder for which you want to edit the Lock.
- On the Resource side panel you can view the Permissions and the Locks added to this Folder.
- Click on Locks to reveal the available Locks.
- Apply the changes and click on "Save" to save them.
If you add a Lock to a Folder this Lock will be inherited by the Forms and Subforms in this Folder as long as they have a Date/Month/Week field made as a Key field. Learn more about adding Locks.
Editing a Form

The following section describes how to edit a Form.

Once you have created a Form, you can edit it. You can edit many aspects of the Form.

You can:

• Rename the Form
• Edit Users' Permissions to the Form
• Edit the Locks added to the Form
• Edit the Design of the Form

⚠ Since a Form is the main tool you will use to collect data from users it is important to edit its Design as much as needed before users start adding Records to it.

How to edit a Form

Renaming the Form

• On the Database settings page of your Database, click on the Form you want to edit to select it.
• If the Form is in a Folder click the arrow next to the Folder's name to expand it in order to find the Form and click on the Form.
Click on "Edit form" on the Resource side panel to navigate to the Form Design page.

Rename the Form on the Form Design page and click on "Save" to save the changes.

The Form is renamed.

Alternatively, you can reach the Form Design page from the Table View page of the Form. Navigate to the Table View page of the Form and click on "Form Settings" to open the Form Design page.

Editing Users' Permission to the Form

On the Database settings page of your Database, click on the Form you want to edit to select it.

If the Form is in a Folder click the arrow next to the Folder's name to expand it in order to find the Form and click on the Form.
On the right side panel you can view the Permissions and the Locks added to this Form.

Click on the Permissions tab to view all users that have been granted Permissions for the Form.

Click on a user to change (override) the Permissions of their Role or click on "Grant permissions" to grant new permissions for this Form.

Click on "Save" to save the changes.
Editing Locks added to the Form

- On the Database Design section, click on the Form for which you want to edit a Lock to select it.
- If the Form is in a Folder click the arrow next to the Folder’s name to expand it in order to find the Form and click on the Form.
- On the right side panel you can view the Permissions and the Locks added to this Form.
- Click on the Locks tab to view all Locks that have been applied to the Form.

![Database design screenshot]

- Click on the Lock to edit it.
- Apply the changes and click on "Save" to save them.

![Edit Lock form screenshot]
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.

A Lock on a Form might be inherited from a Lock on a Folder that contains that Form. In that case the Lock can't be changed.

Editing the Design of the Form

- On the Database settings page of your Database, click on the Form you want to edit to select it.
- If the Form is in a Folder click the arrow next to the Folder's name to expand it in order to find the Form and click on the Form.

- Click on "Edit form" on the right side panel to navigate to the Form Design page.

- In the Form Design page, start editing the fields.
- Click on a field to view and edit its properties.
• Click on "Done" to save the changes on a field.

• Click on "+" to add a new field.

• When you finish editing the Design of the Form click on "Save" to save it.

Alternatively, you can reach the Form Design from the Table View page of the Form. Navigate to the Table View page of the Form and click on "Form Settings" to open the Form Design page.
Delete from a Database, Form or Folder
Deleting a Database

The following section describes how to delete a Database in ActivityInfo in the Database Design section. By deleting a Database ALL Records, Forms, Subforms and Folders stored in the Database are deleted too.

⚠️ Once you delete a Database everything associated to it is permanently deleted from the Database. All the information collected will be deleted too!

You can edit a Database instead of deleting it.

How to delete a Database

• On the Database settings page of your Database, on the Resource side panel click on "Delete database".

![Database settings page](image-url)
To go back to the Database Design section without deleting it, click on "Back to database".
Deleting a Folder

The following section describes how to delete a Folder.

You can delete a Folder in ActivityInfo. By deleting a Folder all Forms and **ALL Records collected for this Forms will be deleted too.**

⚠️ ATTENTION!

Once you delete a Folder, the Forms and all information associated to them is permanently deleted from the Database!

💡 You can edit a Folder instead of deleting it.

How to delete a Folder

- On the Database settings page of your Database, on the Database Design section, click on the Folder you want to delete or click on the Folder that contains it to reveal its contents.
- On the Resource side panel click on "Delete folder".
Deleting a Form

The following section describes how to delete a Form.

You can delete a Form in ActivityInfo. By deleting a Form **ALL Records collected for this Form will be deleted too.**

⚠️ **ATTENTION!**

Once you delete a Form, the Form and all information associated to it is permanently deleted from the Database!

💡 You can [edit a Form] instead of deleting it.

How to delete a Form

- On the Database settings page of your Database, on the Database Design section, click on the Form you want to delete or click on the Folder that contains it to reveal its contents.
- On the Resource side panel click on "Delete form".
Deleting a Subform

The following section describes how to delete a Subform.

You can delete a Subform that belongs to a Form.

By deleting a Subform **ALL Records collected for this Subform will be deleted too.**

**ATTENTION!**

Once you delete a Subform, the Subform and all information associated to it is permanently deleted from the Database!

💡 You can edit a Subform instead of deleting it.

How to delete a Subform

Deleting a Subform using the Database Design tab

- On the Database settings page of your Database, on the Database Design section, click on the Form that contains the Subform you want to delete or click on the Folder that contains it to reveal its contents.
- Click on the Subform.
• On the Resource side panel click on "Delete form".

Once you delete a Subform, the Subform and all information associated to it is permanently deleted from the Database!

Deleting a Subform using the Form Design page

• On the Table View page of your Form, click on Form Settings to open the Form Design page.

• In the Form Design page, find the Subform field and click on it to open the card editor.
Click on "Delete field" to delete the field and the whole Subform and click on "Save" to save the change.

Once you delete a Subform, the Subform and all information associated to it is permanently deleted from the Database!
Deleting a Field

The following section describes how to delete a field from a Form.

You can delete a field from a Form.

By deleting a field **ALL information related to this field will be deleted too.**

⚠️ ATTENTION!

Once you delete a field, the field and all information associated to it is permanently deleted from the Database!

💡 You can edit a field instead of deleting it. Alternatively, Hiding a field from data entry will allow you to 'remove' a field from data entry without loosing any data entered previously.

How to delete a field

- On the Database settings page of your Database, click on your Form to select it.
- If the Form is in a Folder click the arrow next to the Folder's name to expand it in order to find the Form and click on the Form.

- Click on "Edit form" on the Resource side panel to navigate to the Form Design page.
In the Form Design page, find the field and click on it to open the card editor.

Click on "Delete field" to delete the field and click on "Save" to save the change.
Once you delete a field, the field and all information associated to it is permanently deleted from the Database!

- If the field belongs to a Subform, in the Form Design page click on the Subform to open the card editor and click on "Open subform" to open it and find the field.
View a Database Audit Log
Viewing a Database Audit Log

The following articles describes the steps for viewing and filtering a Database Audit Log. In the Database Audit Log you can review changes made in a Database, Form or Folder as well as the user(s) who applied these changes.

A Database Audit Log provides you with a list of events that have taken place in a Database. You might want to have access to these events in order to review which users updated a Form, a Record or a Lock for example.

The events that you can review in the Database Audit Log include:

- Adding, updating or deleting Records
- Adding, updating, or deleting Folders, Locks, Roles
- Deleting or moving Forms or updating Form's visibility
- Adding or deleting users, or changing their permissions

In some cases you can revert an action, you can for example recover a deleted Record.

💡 Please note the Database Audit Log is available only to Database owners.

How to view a Database Audit Log

- Select the Database for which you want to view the Audit Log in the Database List page.
Click on "Database settings" to open the Database Settings page.

Click on "Audit log" to navigate to the Audit log section.
• You can view the Database Audit Log in this section.

• If you recover a deleted Record the label 'Reverted' will appear.
• 'Updated database' signifies a change to a Folder, Form, Lock or Role.

• To view the details of the log click on it.
• In the Audit Log side panel you can view more details about the selected log.
• You can directly email the user that did the change. Click on their name in the Audit Log side panel to open your email service provider or hover your mouse above the user's name to view their email.
• You can navigate to the Table View of the Form by clicking on the name of the Form in the Audit Log side panel.

How to filter a Database Audit Log

• You can select a Date and show events that happened before that date by clicking on "Events before ..." and selecting a date.
To filter by event type click on "Filter by event type" and select the filter(s) you want to use by checking the boxes.

To filter by Form or Folder click on "Filter by form or folder" and select the Folder or Form for which you want to view the events.
You will only view the top level Forms in this list, that is Forms that don't belong in any Folder. If the Form belongs in a Folder you should select the Folder instead.

- To remove a filter click on the 'x' next to the filter name.
- To remove all filters click on "Clear all filters".
Recover data
Recovering a deleted Record

The following article describes the steps for recovering a deleted Record via the Database Audit Log section.

You can recover a Record that has been deleted using the Audit Log section of the Database where this Record belonged. You might want to recover a Record because it was deleted by accident for example.

💡 Please note the Database Audit Log is available only to Database owners.

How to recover a deleted Record

• In the Database List page, select the Database where the deleted Record belongs.

• Click on "Database settings" to open the Database Settings page.
Click on "Audit log" to navigate to the Audit log section.

- You can view the Database Audit Log in this section. You can filter the Audit Log to find the deleted Record or select the event log directly from the list. For example, if you know the Form or Folder in which the deleted Record belonged you can click on "Filter by form or folder" to find the Form.
Please note that you will only view the top level Forms in this list, i.e. Forms that don't belong to any Folder. If the Form belongs to a Folder you should select the Folder instead.

- Once you find the deleted Record, click on "Recover record" under the event's name.

- The Record has been recovered and the label 'Reverted' will appear next to its name. You can view more details about this event in the Audit Log side panel.