How to create a Database for case management

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

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

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

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

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## Roles and Permissions in Case Management Database Template

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

### How to create a Database for Case Management

#### Add a Database using a template

1. Log in your ActivityInfo account and make sure your system meets the ActivityInfo Requirements.
2. Click on "Add database" to add a new Database.
3. Give a short and self-descriptive name name to your Database and select "Case management database" from the list of templates to get started with it. The name of the database should correspond to information contained in the Database (program, country activities, etc.) and should be comprehensive for the users who will perform data entry.

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

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**How to create a Database for Case Management**

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• Click on "Add database".

![Database setup screen](image)

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

![Database settings](image)

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

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

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

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

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

- View where case is owned or supervised by them
- Add records where case is owned or supervised by them
- Edit records where case is owned or supervised by them
- Delete records where case is owned or supervised by them
- Export records
- Finally select the Forms and Folders to which you want this user to be added and click on "Send invite".
In this example, there is only one Form in our Database, the 'Case' Form. If you add more Folders and Forms in the Database you will be able to select the ones you prefer.

⚠️ Please note that:

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

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

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

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

### Add the Case Workers

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

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

- As with the Supervisors, if the user doesn't have an ActivityInfo account, you will invite them to ActivityInfo. ActivityInfo sends an email to the user you invite to a Database, if the user doesn't have an ActivityInfo account.
- Give a name to the user by entering a name in the "Name" field and select the language of the invitation they will receive. The user will be able to change that name when they accept their invitation to ActivityInfo and they sign up.
- In the Role section, select 'Case Worker' to assign to this user the Role of Case Worker. The default Permissions for Case Workers are:
  - View where case is assigned to them
  - Add records where case is assigned to them
  - Edit records where case is assigned to them
  - Delete records where case is assigned to them
  - Export records
Next, we will assign the Case Worker to a Supervisor. Click on the arrow to reveal the available Supervisors and click on the Supervisor you want to select it.

Finally select the Forms and Folders to which you want this user to be added and click on "Send invite".
In this example, we have added more Forms in our Database, apart from the 'Case' Form. If you add more Folders and Forms in the Database you will be able to select the ones you prefer.

Please note that:

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

• The user has been invited and has been assigned the Role of Case Worker.
• You can repeat the same process to add more Case Workers and to assign them to the same or other Supervisors added to the Database.

In the User management section, "Invalid email" means that the email of the user is not valid and "Invite pending" means that the user hasn't accepted the invitation to ActivityInfo yet.
You can override the Permissions of a Role for a specific user to better match the Permissions you want to assign. Click on "Database Design", select the Form or Folder for which you want to apply changes and click on the user on the Side Panel to reveal the assigned Permissions. Click on the Permissions you want to add or remove any unwanted Permission by unticking a ticked box. Click on "Save" to save the changes.

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

Design the Form

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

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

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

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

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

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

Help your team get started with Data Entry

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