GETTING STARTED WITH DATABASE DESIGN
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What do I need to start?
Requirements

Browser Requirements

ActivityInfo requires one of the following browsers:

- Google Chrome
- Internet Explorer (8+)
- Microsoft Edge
- Safari (5+)
- Firefox (30+)

Offline Mode Requirements

Using ActivityInfo in Offline Mode requires one of the aforementioned browsers. Please see the [Offline Mode documentation](#) for further instructions on enabling Offline Mode.

ODK Data Collection Requirements

ActivityInfo supports Open Data Kit (ODK) for mobile data collection.

ODK is only available on Android devices. Please see the [ODK website](#) for more information on device requirements.

Please see the [ODK Data Collection documentation](#) for further instructions on using ODK for data collection.
Sign Up for an Account
Signing Up

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

Before using ActivityInfo, you must have an account.

ActivityInfo offers a free trial plan to users, with certain limitations. Please see our Pricing page for details on the limitations of the trial plan, as well as our Subscription plans for larger deployments.

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

How to Sign Up

1. Complete the Sign Up Form

   - Navigate to the Sign Up page on the ActivityInfo website.
   - Fill in your details on the Sign Up form, and select your preferred language.
   - Carefully review the Terms and Conditions, and check the box if you agree to these terms.
• Click the "Get Free Account" button to complete your registration. You will be presented with a screen asking you to confirm your email address.

2. Confirm your Email Address and Create your Password

• Check your email inbox for the confirmation email from ActivityInfo.
Access to ActivityInfo

Hi ActivityInfo User,

Thank you for signing up to ActivityInfo!

To complete your user registration, click on the following link:

https://www.activityinfo.org/signUpConfirmation?

Best regards,

The ActivityInfo Team

- Click on the confirmation link, and you will be brought to the Password Creation page.
- Choose a strong and memorable password, and enter it into each field. You can find tips for creating a strong password here.
- Check the box if you would like to receive emails about the latest features, news and resources from ActivityInfo.

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

ActivityInfo user registration

Thank you for signing up to ActivityInfo! To complete the process, please fill in the following fields.

Choose a password:

Password:

Confirm your password:

Password:

Send me news and updates about ActivityInfo

CONTINUE »

- When you are ready, click "Continue" to set your password and start using ActivityInfo.
Log In
Logging In

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

After setting up your ActivityInfo account, you will need to log in to start using the application.

How to Log In to your Account

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

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

Have you forgotten your password? Please see our Resetting your Password documentation for further instructions.
Logging In with Humanitarian.ID

The following section describes how to log in to your ActivityInfo account with your Humanitarian ID credentials.

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

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

How to Log In with your Humanitarian.ID

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

- On the Humanitarian.ID Login page, enter your email address and password into the Login form.
- Once you are ready, click the "Login" button.
- If successful, you will be directed automatically to the ActivityInfo application.
Basic Concepts
The following section describes the difference between the Classic Interface and New Interface portions of ActivityInfo.

As ActivityInfo has grown and evolved over time, we have introduced new features to make the platform more powerful and flexible for our users.

In order to introduce these new features and to improve how our users interact with ActivityInfo, we are in the process of moving to a new interface for the entire application. This is a gradual process however, so you will find that there are currently two distinct flavors of interface as you move around the application:

**Classic Interface**

This is the traditional interface for ActivityInfo, primarily designed for the more structured data of Activities, Attributes and Indicators.

The Classic Interface deals with functions related to:

- Databases
- Users
- Projects
- Partners
- Targets
- Locks
- Activity Design
- Sites
- Reports
New Interface

This is the modern interface being introduced into ActivityInfo. It is primarily designed for the more flexible data of Forms, Sub-Forms and Fields, but also accommodates the legacy data of Activities.

The New Interface deals with functions related to:

- Form Design
- Form Records
- Reports
In order to help you differentiate between these two interfaces, we have added a tag to each article in our documentation. Beneath the title of each article you will see a **Classic Interface** or **New Interface** subtitle, letting you know which interface we are discussing.
The following section defines what a Database is in ActivityInfo.

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

New Data Model

The New Data Model is designed to be more flexible, empowering you to create a data structure which meets your information needs.
The Classic Data Model is designed to give you a predefined framework, so you can set up quickly and easily for rapid deployments.

Your Database is also used to manage Users and Partners. On your Database, you can invite Users and organize them into Partners for your projects and activities. You can grant Users the rights to view and edit entries, manage other User Permissions, or to edit your Data Structure.

If you wish to restrict data entry once a report has been published, Databases also allow you to set Locks to prevent users from creating new entries or editing existing ones.

All Databases can be tied to a specific country, giving you access to a set of Administrative Levels to use (e.g. Province, Territory, etc.)
The following section introduces and contrasts Activities and Forms, so you can decide how to build your Data Structure.

In ActivityInfo, Activities and Forms define the data you wish to collect. They are the primary way your Users will interact with your data.

Activities

Activities have a defined structure, and are composed of one or more Indicators and Attributes. Typically, Indicators represent a value, state or condition you wish to measure. Attributes represent a characteristic, quality or feature you wish to capture.

Activities are tied to a specific Location Type. The list of possible Locations and Administrative Levels is inherited from the Database’s defined country.

Activities can have one of two reporting frequencies:

- A single, one-off basis
- A recurring, monthly basis
Forms

Forms have a flexible structure, and are composed of one or more Fields. Each Field represents a type of data to be collected, and can be combined in any way you choose. This gives you flexibility in creating Forms which match your information requirements.

You can add a special type of Form, referred to as a Sub-Form, to allow you to report over multiple time periods.

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

Which should I choose?

Depending on your information requirements, either an Activity or Form may best suit your needs. By default, we strongly recommend you use Forms.

- If you need to create Map-based reports, only Activities currently support mapping. This functionality will be added to Forms in the coming year.
- If you need to track Barcodes or Serial Numbers, Forms include these Fields with input validation.
- If you need a flexible structure which may need additional Fields in future, Forms can be extended easily.
- If you need to reference data among different Databases, Forms include powerful Reference Fields.
• If you need to input data on a more regular (or irregular) basis than Monthly, Sub-Forms allow you to enter data for whatever reporting frequency is required.
• If you need to add relevancy or "skip" logic, Forms include Relevance logic for each Field.
The following section defines what a Folder is in ActivityInfo.

In ActivityInfo, a Folder is a grouping of Forms and/or Activities.

Folders have two primary purposes:

- They allow you to organize your Database, and make it easier to find Forms/Activities when performing data entry
- They can be used to restrict User access to groups of Forms/Activities by setting the appropriate Permissions

Folder New Data Model
Folder Classic Data Model
The following section defines what a User is in ActivityInfo.

In ActivityInfo, a User is any individual who interacts with the system. A User is uniquely identified by their email address. A User may choose to include further identifying information on their profile (e.g. their full name).

Users can be invited to contribute to Databases and view Reports. You have full control over the rights and access of Users invited to your Database(s).

Users can also be assigned to the organizations they belong to using Partners. This will help you manage Databases where many organizations will contribute.

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

The following section defines what a Partner is in ActivityInfo.

In ActivityInfo, a Partner is an organization or distinct individual who will interact with your Database. Usually, a Partner will be an organization such as an NGO, private company or government organization.

By using Partners, you can divide your Users into the organizations they belong to. This will allow you greater control over what data a User can view or edit. It will also give you an extra layer of detail when you report on your data, allowing you to filter and group entries performed by Users of a specific Partner.

By default, ActivityInfo provides a "Default" Partner for all databases.
Permissions

The following section defines what a Permission is in ActivityInfo.

In ActivityInfo, a Permission is a right given to a User to allow them to perform a specific task. Without the required Permission, a User will be prevented from performing that task.

Permissions are the primary mechanism for controlling what a User can see and edit in your Database. You can grant Users the rights to:

• View data entered by others
• Add and edit data
• Manage the Permissions of others
• Edit the structure of your Database and Forms

In combination with Partners, you can restrict Users to viewing and editing data entered by Users of the same organization.

If required, you can add even more granular Permissions by only allowing Users access to a specific set of Folders.
Set Up your First Database
Creating your First Database

The following section describes how to create your first **Database** in ActivityInfo.

How to Create your First Database

1. Navigating to the Database Creation Tab
   - When you first start in ActivityInfo, you will first see the **Dashboard** Tab.
   - From the Dashboard, navigate to the Design Tab by selecting "Design" on the **Navigation Bar**.

2. Creating your Database
   - You will now be presented with the **Database Creation Tab**.
   - On the **Database Toolbar**, select "New Database".
     - The Database Creation Dialog will open in a pop-up.
     - Select the "Create a new empty database" option, and press "Next".
• Enter a name for your Database in the "Database Name" field.
• Select the Country your Database is related to from the drop-down menu. If your Database monitors data from various countries, select the "Global" option.

💡 You can also add a description of your Database in the "Description" field. This will be visible to Users invited to your Database, and will help to explain the contents of your Database.

• Once you are ready, select "Create" to create your first Database.
• Your Database will now appear in the Database List, and the Database Grid!
Creating your First Form

The following section describe how to create your first Form within your Database on ActivityInfo.

How to Create your First Form

1. Navigating to the Design Page

   • After creating your Database, you will be presented with the Database Creation Tab.
   • Double-click on your Database in the Database Grid.

   ![Database Design Tab](image)

   • You will now be presented with the Database Design Tab for your Database.
   • Click on the "Design" page.
2. Creating a new Form

- You will now be presented with the Design Page for your Database.
- On the Design Toolbar, select "New ?".

- On the drop-down menu, select "New Form".

- The New Form Dialog will appear in a pop-up.
• Enter a name for your Form in the "Name" field.
• On the "Published" drop-down menu, select the "Not published" option.

⚠️ Selecting the "All are Published" option will make all data on that Form publicly available.

You can make a Form's data private by ensuring the Published setting is set to "Not published" on the Details Side Panel.

• Once you are ready, select the "Save" button to create your first Form.

• Your first Form will now appear in the Form and Activity Grid!
3. Navigating to the Form Designer

- Select your Form on the Form and Activity Grid, and select "Open Form Designer" from the Design Toolbar.

- You will now be presented with the Form Designer.
4. Designing your Form

When you first open your Form, the Form Design Panel will be populated with a few commonly-used Fields:

- A Start and End Date Field
- A Partner Field (this cannot be removed)
- A Project Field
- A Comments Text Field

You are free to remove these Fields and add other Fields and Sub-Forms to meet your reporting requirements.

Add Fields to your Form

- You can add Fields and Sub-Forms to your Form by dragging them from the Fields Panel and dropping them into the Form Design Panel.
Rename your Field and Edit its Properties

- You can edit the properties of each Field in the Properties Panel. Select a Field in the Form Design Panel, and its properties will appear. Here, you can:
  - Rename a Field
  - Give it a unique Code
  - Give the Field a description
  - Set the Field as required for every entry
  - Set the Field as visible or invisible when the User fills in a Form during Data Entry
  - Set the Field to only appear if it is relevant for the current data entry, depending on the data entered for other fields
Rearrange your Fields

• You can rearrange the order of Fields in your Form by clicking, holding and dragging the "|||" symbol in the top-right corner.

Delete a Field

• You can delete a Field from your Form by clicking the "X" symbol in the top-right corner.
Save your Form

- Once you are happy with your Form structure, select the "Save" button in the top-right corner to save your Form in your Database.
Inviting Users to Contribute

The following section describes how to invite a User to contribute to your Database in ActivityInfo.

ActivityInfo can be used to coordinate many Users which belong to different Partners. Users can be invited to a Database by the owner of the Database and they can have different Permission levels.

If the Users invited have an ActivityInfo account, the new Database will appear in their Databases List.

If the Users invited don't have an ActivityInfo account, an email will be sent by ActivityInfo to the email address you provided to inform them about the invitation. Once they create an account and sign in ActivityInfo they will be able to access the Database in which they have been invited.

💡 Before inviting Users to a Database it is advisable to add Partners so that you can assign the invited Users to them.

How to Invite a User

Navigate to the "Users" Page

• On the Design Tab, click on your Database in the Database List.
• On the **Database Design Tab** click on the "**Users**" Page.

[Image of Database Design Tab with options: Data Entry, Reports, Design, Users]

**Tracking**

- **Design**: Create or change the activities and their indicators which are part of this database.
- **Partner**: Define the partner organisations who participate in this database.
- **Target**: Define targets to be reached by your project.

**Project**

- View, add, change and remove projects

**Users**

- Add users or control their access level

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**Invite a User**

- Click on the "**Add User**" button on the **Users Toolbar**.

[Image of Users Toolbar with options: Add User, Edit, Delete, Export, Copy to clipboard]

- Enter the Name and the Email Address of the User.
- Select the **Partner** you want to assign this User to from the Partner dropdown list.
- **Set the User Permissions** and the **Folder Permissions** for the User.
- Click on the "Save" button.
• The User has been invited to the Database.