



ActivityInfo

Data protection in practice - Office hours: Designing Roles in ActivityInfo

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Meet your instructor



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Data Security Webinar Series

Cybersecurity Awareness Month

OCT 5

SESSION 1

Top 5 data security risks for M&E professionals and what you can do about them

OCT 12

SESSION 2

Data protection in practice - Best practices for designing Roles in ActivityInfo

OCT 19

SESSION 3

Office Hours - Designing Roles in ActivityInfo

Outline

- 1 What are Parameters in ActivityInfo?
- 2 How to Migrate from Legacy Roles in ActivityInfo?
- 3 How does inheritance work in ActivityInfo?
- 4 How can you Override Grants in ActivityInfo?
- 5 More Q&A

1

What are Parameters in ActivityInfo?

What are Parameters in ActivityInfo?

Overview of Key Concepts

- Resources: Forms, Folders, Reports, and Databases.
- Operations: Actions performed on resources and users.
- Grants: Identify resource-specific operations.
 - Grants are inherited and can be overridden.
- Optional Grants: Enable flexibility in permission assignment.
- Conditions: Define rules for user operations.
- Parameters: Assign attributes to users for conditions.
- Roles: Combinations of Grants and Parameters.

What are Parameters in ActivityInfo

Key Concepts-Parameters

- **Parameters** are attributes that are assigned to a user which can be used in conditions to control the record-level operations they are allowed to perform.
- **Parameters** are linked to a reference form, such as "Regions", which provides the possible values that can be assigned to a user.
 - Use **parameters** to differentiate which records a user can work with.
- Roles can have multiple parameters defined, which can then be applied in conditions across grants as required.

Add parameter

Parameter ID
Provide an id for this parameter. This id can be used in formulas to reference the user's assigned parameter value (e.g. @user.partner).

Parameter Label
Provide a user-readable label for this parameter.

Possible Values
Select a form which provides the possible values for this parameter when a user is assigned to this role (e.g. Partner form).

DATABASE 2023 Wash Activities	▶	FORM Distribution of Soap and detergents
DATABASE 2023-08-15 Permission Demo (MPR)	▶	FORM Users

Adding Roles before Parameters in ActivityInfo

Overview of Steps involved in adding a Role

Before you start

- Make sure you have already added a database and
- You have been assigned to a role with the “Manage roles” and “Manage users” operation permitted.
- If not, for practice purposes, you can use the training and monitoring template to add a new database.

1. Add the role
2. Add resources to the role
3. Grant a resource
4. Assign operations
5. Save and invite a user

How to Design Roles with Parameters in ActivityInfo

Example 1: Limiting access to records based on a Parameter

- Scenario: Program staff serving beneficiaries by region.
 - Ensure staff can only access records in their assigned region.
- Create a Role for "Programme Officer" with parameters and conditions.
 - Create a single role
 - create a parameter
 - Assign Grants

How to Design Roles with Parameters in ActivityInfo

Quick notes

Grants, operations and reference forms.

To ensure that the visibility of reference forms is restricted, you must go to your database design, select the reference form and untick the box below in your list of operations



Permitted operations

BASIC

- View where conditions are met
- Display in the list of forms
- Add records where conditions are met
- Edit records where conditions are met
- Edit 'Reviewer only' fields
- Delete records where conditions are met
- Bulk record delete



Demo

How to Design Roles with Parameters in ActivityInfo

Example 2: Limiting access to records based on multiple conditions

- Scenario: Database management for humanitarian response
 - Managing a coordinated humanitarian response database.
 - Multiple partner organizations contributing records.
 - Need to control access and actions based on user's partner organization and region.
- Goal: Ensure data integrity and facilitate sector-wide visibility.
 - Create a Role for "Reporting Partner" with parameters and conditions.
 - Create a parameter
 - Assign Grants
 - Conditions within Grant



Demo

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How to Migrate from Legacy Roles in ActivityInfo

How to Migrate from Legacy Roles in ActivityInfo

Migrating from Legacy Roles in ActivityInfo

Step 1 =Go to roles

Step 2 =click on the legacy role

Step 3= Duplicate and migrate as updated role

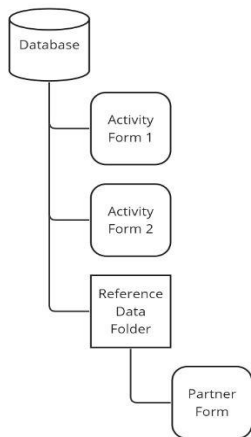
The screenshot displays the 'Roles' management page in ActivityInfo. The left sidebar contains navigation options: Database design, User management, Roles (highlighted with a red '1'), Problems, Audit log, and Translations Beta. The main content area shows a list of roles: Field office staff (marked with a red '2' and 'legacy' tag), Country team, Field team leader, View only, Administrator, and Surveyor. A right-hand panel for the 'Field office staff' role is open, showing options: Rename role, Duplicate as legacy role (marked with a red '3'), Duplicate and migrate as updated role, and Delete role. Below these are tabs for Permissions and Parameters, with a list of permissions including 'View where partner is user's partner', 'Add records where partner is user's partner', 'Edit records where partner is user's partner', 'Delete records where partner is user's partner', and 'Export records'.

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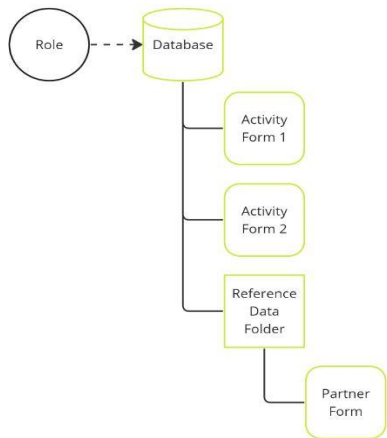
How does Inheritance work in ActivityInfo

Understanding Roles in ActivityInfo

Key Concepts-Inheriting grants

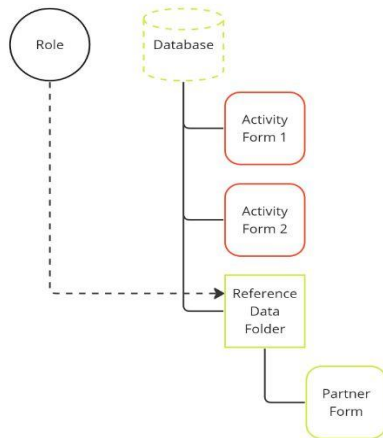


Say you have a database setup like so

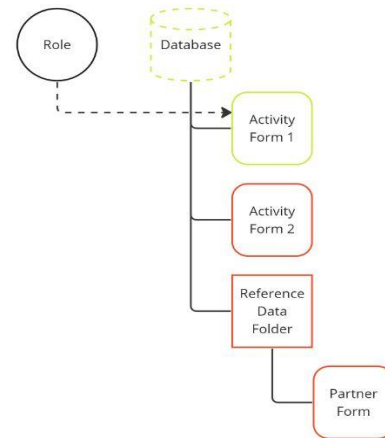


On my role, I apply an **explicit** grant to the database.

In doing so, the contained resources (folder, forms) also inherit this grant and the operations are applied to those resources as well. We can think of this as an **implicit** grant.



If I apply my explicit grant to the folder instead, then the contained resources inherit the grant in the same way. Note that I do not receive permissions on the root level forms as a result, as there is no grant on the database.



If I apply my explicit grant directly to a form instead, then the grant is only applied to the form. Note that the other resources in the database do not receive permissions as a result, as there are no other grants.



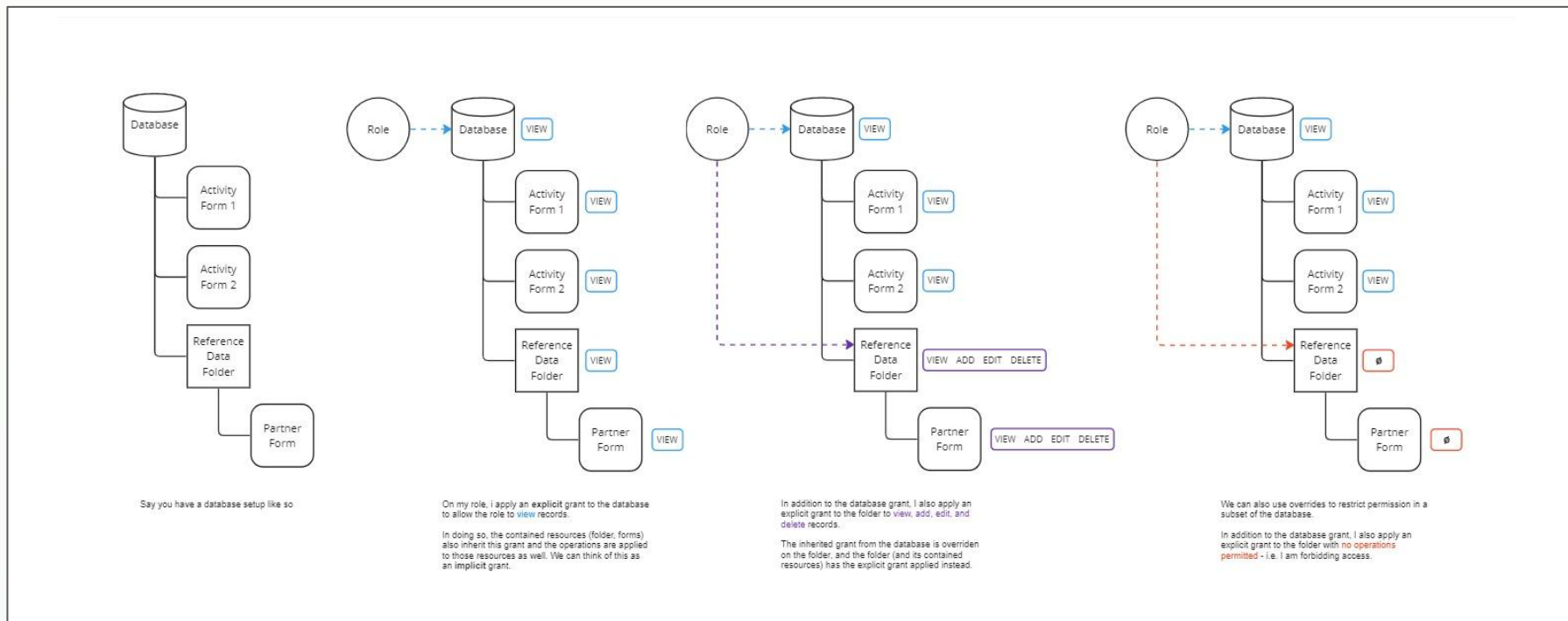
Demo

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How do you Override inheritance in
ActivityInfo

Understanding Roles in ActivityInfo

Key Concepts-Overriding grants





Demo

R Package implications

Legacy & New Role Support

- Development focus for new roles was to ensure full user interface support
- Many actions which could only be performed via R script can now be fully completed within the ActivityInfo app
- For databases using legacy roles:
 - There is no change to R package support and the current functions remain compatible with legacy roles
 - Support will remain until the end of support for legacy roles in Dec 2024
- For databases using new roles:
 - The R package cannot be used to define or manage new roles for the time being
 - Planned upgrade of the R package in **Nov 2023** to include full support for new role management and support for batch user management



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Q&A