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

Starting shortly, Please wait!
Meet your instructor

Victoria Manya
Customer Education Specialist
BeDataDriven
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
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.
Adding Roles before Parameters in ActivityInfo

Overview of Steps involved in adding a Role

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

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.
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
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.
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
2
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
3

How does Inheritance work in ActivityInfo
Understanding Roles in ActivityInfo

Key Concepts-Inheriting grants

Say you have a database setup like so:

- Database
  - Activity Form 1
  - Activity Form 2
  - Reference Data Folder
  - Partner Form

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 these 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 forms. Note that the other resources in the database do not receive permissions as a result, as there are no other grants.
Demo
4

How do you Override inheritance in ActivityInfo
Understanding Roles in ActivityInfo

Key Concepts - Overriding grants

Say you have a database setup like so

On my role, I apply an explicit grant to the database to allow the role to view records.
In doing so, the inherited resources (roles, forms) are not applied to throw resources as well. The combination of this as an explicit grant.

In addition to the database grant, I also apply an explicit grant to the forms to view, edit, and delete records.

The inherited grant from the database is overridden on the forms, and the forms (and the contained resources) have the explicit grant applied instead.

We can also use overrides to restrict permission in a subset of the database.
In addition to the database grant, I also apply an explicit grant to the forms with no permissions permitted - i.e., I am restricting access.
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.