



ActivityInfo

MCP server

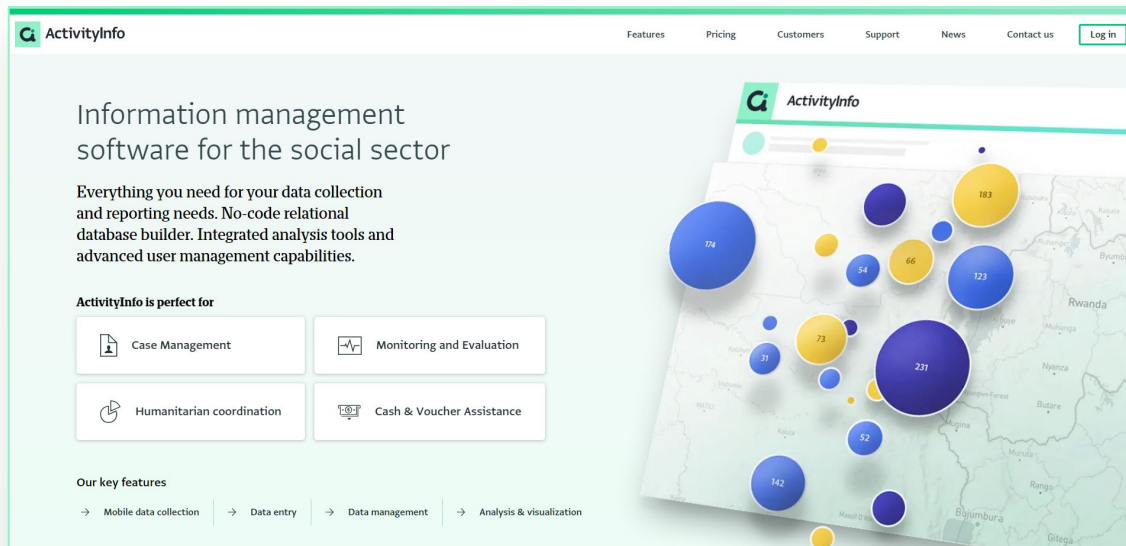
Working with AI assistants in ActivityInfo

Starting shortly, please wait!

Presented by the ActivityInfo Team

All in one information management software for humanitarian and development operations.

- Track activities, outcomes
- Beneficiary management
- Surveys
- Work offline/online



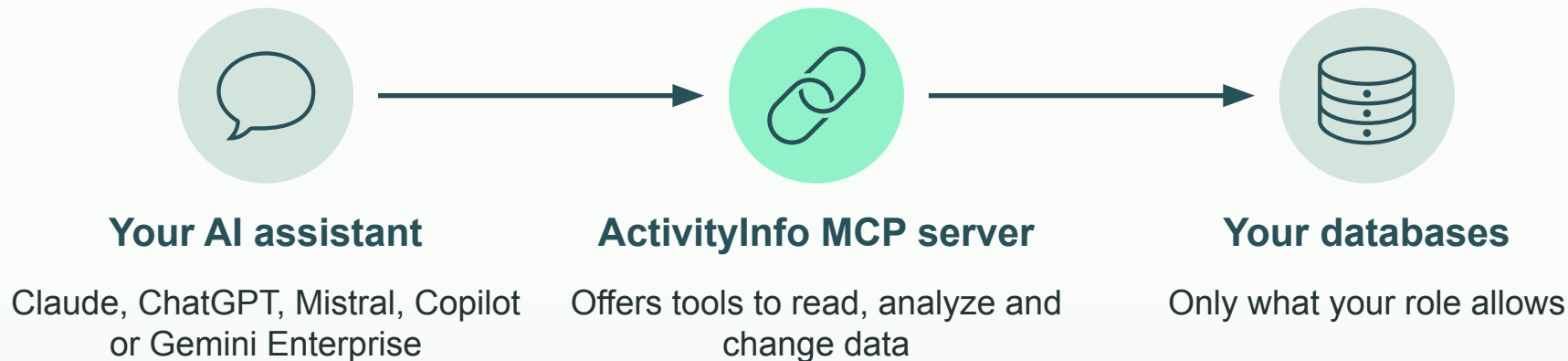
Agenda

- MCP Server definition
- Permissions and data security
- Connecting an AI assistant
- Best practices for prompts
- Real-life demonstrations
- Q&A

Part 1

What the ActivityInfo MCP server is

One connection for every assistant



MCP means Model Context Protocol, an open standard.

One address for every assistant: <https://www.activityinfo.org/mcp>

How an assistant answers a question

01 Finds your databases

02 Finds the right forms

03 Reads the fields

04 Runs a pivot analysis

05 Writes the answer

Example question

“What share of the farmers we trained had a bigger harvest the year after?”

Every step is a request you could make yourself.

The assistant chooses the steps and reads the results.

What an assistant can do



Explore

List databases, forms, reports and fields



Read and analyze

Retrieve records or run a pivot analysis



Design forms

Add forms and fields.
Change or delete fields



Enter data

Add records and correct existing ones



Build reports

Create reports you can open and share



Translate

Read and save translations of a database

What it does not do

1

No new access

It acts as you
and sees only
what you can see

2

Off by default

Someone must
turn it on for
each database

3

No attachments

It does not (yet)
read attached
files

4

Not on its own

It acts only when
you ask it to

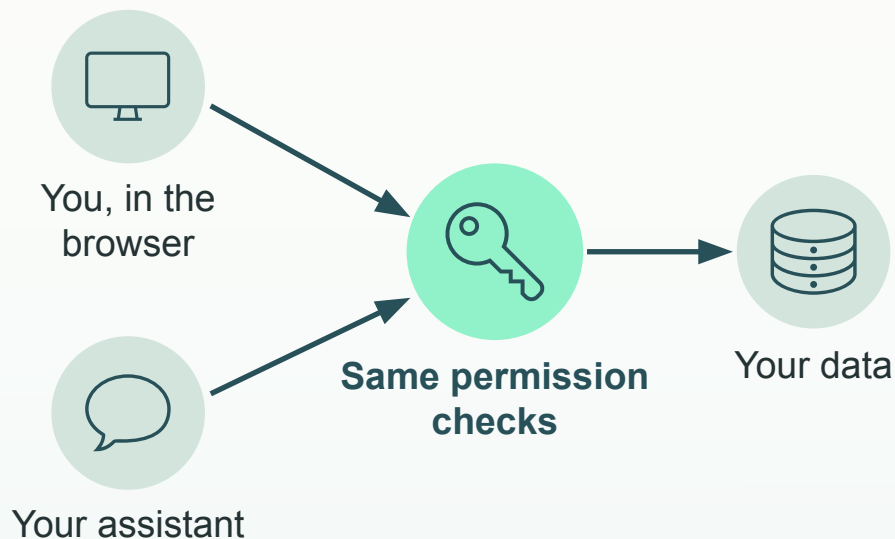
Part 2

Permissions and data security

The assistant acts as you

An assistant has no permissions of its own. It acts as the person who connected it.

If you can see sensitive data, the assistant you connect can see it too.



Two gates on every request

Gate 1

Database allows it

The MCP server is on for this database. It is off by default.

Gate 2

Your role allows it

The assistant can do only what your role allows.

If not

Request stops

If a gate is closed, the request fails. The assistant says why.

Turning on the MCP server gives no one new access to data.

Same question, different answers

How many households did we reach this year?



Database administrator

Gets a total for all projects



Limited to two projects

Gets a total for two provinces

Neither answer says what it covers. Check what the connected account can see.

Your role decides what it can reach

Your role in the database	What an assistant you connect can do
Administrator	Read every form and record, and change any form
Add and edit in one folder	Read and change records in that folder only
Limited to one province	Read only the records for that province
Cannot view a field	Not read that field, in records or in analyses
Read-only on the whole database	Read everything, including personal data

Three ways to remove access

01	One assistant, one person	The person revokes it: Account settings, then Authorized Applications.
02	All assistants, one database	Someone who can change the database settings turns off the MCP server.
03	One person, everywhere	An administrator changes or removes the person's role in the database.

What the AI provider receives



Names and descriptions of databases, forms and fields



Values in the records it reads, including free text



Results of the analyses it runs



Your questions and its answers

Treat it as shared!

Everything the assistant reads goes to the company that runs the assistant.

Assume it stays in the conversation history.

Six checks before you connect

Settle these before anyone connects a database that holds personal data.

1

Use a business or enterprise account, not a personal one

4

Check where data is processed. Consider providers in your region

2

Review the Data Processing Agreement (DPA)

5

Give the assistant only the access it needs

3

Keep your data out of model training

6

Decide as an organization who may connect

Some data should stay out completely

Unless your data protection advisor says otherwise, keep this data out of any database an assistant can reach:



Health data



**Protection and
gender-based violence
(GBV) cases**



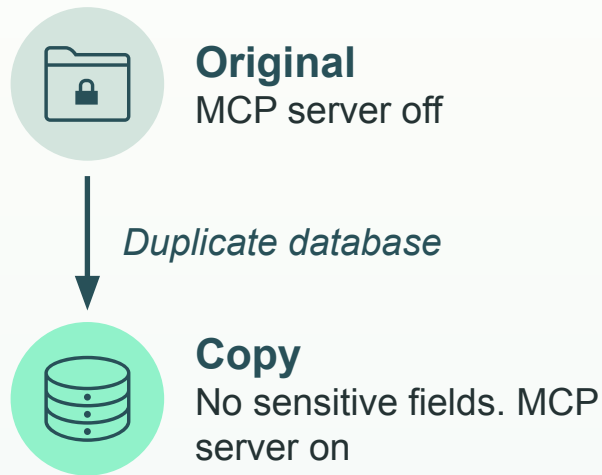
**Any data that could put a
person at risk**



Keep it in a separate database with the MCP server turned off.

Option 1: Analyze a safe copy instead

- 1 Duplicate the database, Schema only
- 2 Turn on the MCP server for the copy only
- 3 Ask assistant to fill it with dummy data
- 4 Test, then make the change in the original.



Option 2: Use a service account

1

Create a role

No sensitive fields.
Only what is needed.

2

Add an account

For the assistant only.
Give it that role.

3

Switch it on

Turn on the MCP server
for the database.

4

Connect

Only with that account.
Choose read-only.



It still depends on trust. Once the MCP server is on, anyone with access can connect their own assistant, and it sees what they see.

Part 3

Connecting an AI assistant

Connect in five steps

Before you start

- Settle the data protection questions
- Use an assistant plan your organization bought

Step 1. Turn on the MCP server for the database

Step 2. Add ActivityInfo to your assistant (Use the address
<https://www.activityinfo.org/mcp>)

Step 3. Sign in, and choose read-only or read and write

Step 4. Test it: *“List my ActivityInfo databases.”*

Step 1: Turn on the MCP server for the database



DATABASES > 2026 REPORTING

2026 Reporting

DATABASE OWNER
Timothy Macheru

YOUR ROLE
Owner

 Download for offline use

 Database settings

 Add form

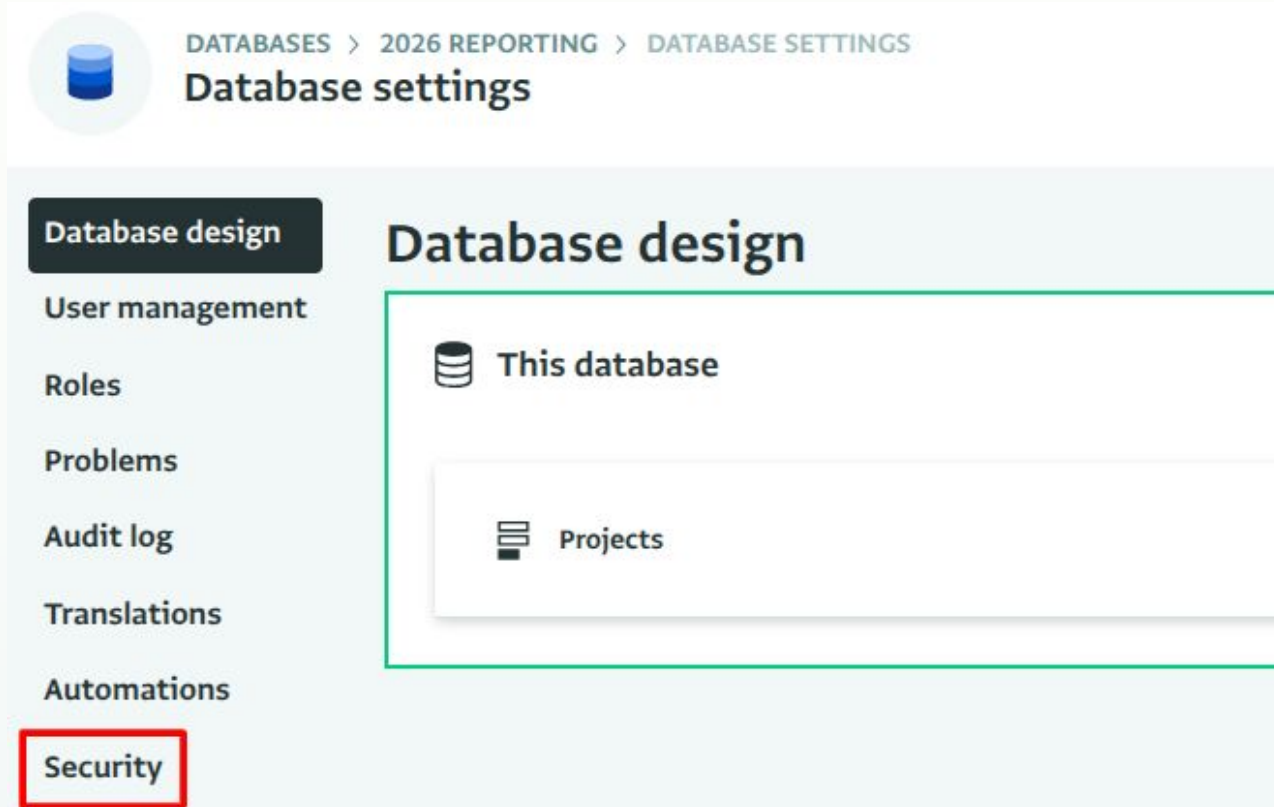
 Add folder

 Import XLSForm ^{Beta}

 Export ▾

 Projects

Step 1: Turn on the MCP server for the database



The screenshot shows the 'Database settings' page in ActivityInfo. The breadcrumb trail at the top reads 'DATABASES > 2026 REPORTING > DATABASE SETTINGS'. Below this, the page title is 'Database settings'. On the left, a sidebar contains several menu items: 'Database design' (highlighted with a dark background), 'User management', 'Roles', 'Problems', 'Audit log', 'Translations', 'Automations', and 'Security' (highlighted with a red border). The main content area is titled 'Database design' and contains a section 'This database' with a database icon. Below this, there is a box labeled 'Projects' with a document icon.

DATABASES > 2026 REPORTING > DATABASE SETTINGS

Database settings

Database design

User management

Roles

Problems

Audit log

Translations

Automations

Security

This database

Projects

Step 1: Turn on the MCP server for the database



DATABASES > 2026 REPORTING > DATABASE SETTINGS

Database settings

Database design

User management

Roles

Problems

Audit log

Translations

Automations

Security

Security

MCP server

Lets AI assistants (such as Claude or ChatGPT) connect to this database via the Model Context Protocol, on behalf of users who already have access to it. Off by default; turn on only if your organisation has a data processing agreement that covers the AI provider.

☒ Enable the MCP server for this database

Step 2: Add ActivityInfo to your LLM assistant



ActivityInfo.org

Community

Connect to your databases on ActivityInfo.org



Connect to Claude



ActivityInfo.org

Connect to your databases



Install plugin

Step 2: Add ActivityInfo to your LLM assistant

Assistant	How you add it	Good to know
 Claude	Claude directory	Team and Enterprise: an owner enables it once
 ChatGPT	ChatGPT plugin directory	Enterprise and Edu: an admin enables it first
 Mistral	Custom connector	States it hosts data in the EU by default
 Microsoft 365 Copilot / Studio	Added by IT	Read-only. Each user needs an add-on license
 Gemini Enterprise	MCP server connection	An administrator registers it once

All of them use the same address <https://www.activityinfo.org/mcp>

Step 3: Sign in

Authorize application

An application is asking to access your ActivityInfo data on your behalf. Before you approve, check that you trust the application's domain.

Your authorization code will be sent to

 **chatgpt.com**

After you approve, your browser hands the authorization code to this domain. Continue only if you recognise it as the application you started.

Reported name: **ChatGPT** UNVERIFIED

If you approve, it will be able to:

☒ View the databases, forms and records you have access to

☒ Also make changes on your behalf

 Deny

 Allow access

Step 4: Test it

List my ActivityInfo databases

Worked for a couple of seconds >

{≡} Called tool ∨

You have access to 2 ActivityInfo databases:

Database	MCP access
Test Database 1	✓ Enabled
Test Database 2	⚠ Disabled

For **Test Database 2**, the MCP server must be enabled in the database's Security settings before I can access its forms or data.



Part 4

Best practices for prompts

Habit 1: Ask for a plan before a build

Propose a set of forms for these indicators. For each form, tell me what one record represents.

Do not create anything yet

- Review the plan and change it. Only then ask the assistant to build it.
- This works for forms, coding frames, translations and **anything that changes data.**

Change a plan
A minute

Rebuild forms made on a misunderstanding
An afternoon

Habit 2: Ask the assistant to show its work

Which forms and fields did you use for that number, and how did you calculate it?



Why ask

The assistant picks the form, the field and the calculation. When it picks wrong, it sounds just as sure.



Then check

Are these the forms and fields you expected? For an important number, compare it with a report in ActivityInfo.

Habit 3: Retrieve records or run a pivot analysis



Retrieve records

- Returns every record of a form
- Good for a few hundred records and for free text
- On large forms, it fills the conversation



Run a pivot analysis

- ActivityInfo does the calculation
- Returns only the result, as a small table
- Good for totals, counts and breakdowns

Run a pivot analysis instead of retrieving the records.

Habit 4: Make one change at a time

1. Ask for one change

One change per prompt. If something goes wrong, you know which request caused it.

2. Check the result

Open ActivityInfo and look at the form or the records it changed.

3. Before deleting, ask

“Which fields would be deleted, and would any data be lost?”

Deleting a field also deletes the data in it.

Part 5

Real-life demonstrations

Logical framework

Hygiene items for 60 households in 5 districts, 2026

Level	Narrative summary	Ref	Indicator	Means of verification
Goal	Fewer cases of water-borne disease in the 5 districts			
Outcome 1	Households have soap and water for handwashing at home	Ind 1.1	% of monitored households with soap and water at the handwashing place	Post-distribution monitoring visits
Outcome 2	Distributions meet households' needs	Ind 2.1	% of monitored households satisfied with the distribution	Post-distribution monitoring visits
		Ind 2.2	Main issues households raise about the distribution	Post-distribution monitoring visits
Output 3	Households receive hygiene kits, soap bars and water purification tablets	Ind 3.1	Number of households that received each item, by district and by sex of the head of household	Household register and distribution records
		Ind 3.2	Number of people in the households reached	Household register (number of members) and distribution records
Activities	Register households	Act 1	Data captured: head's name, sex, date of birth, phone, district, number of members	
	Distribute items to households	Act 2	Items: hygiene kits, soap bars and water purification tablets	
	Visit each household a few weeks after the distribution for post-distribution monitoring	Act 3	Provides the data for indicators 1.1, 2.1 and 2.2	

Demo 1: From a logframe to a database

Why it matters

- A logframe becomes a proposed form design
- A person reviews the design first
- The assistant creates the forms

Prompt

*“Here is our logframe (photo).
Propose ActivityInfo forms for its
indicators. For each form: what one
record represents, the fields, and the
indicator it serves. Do not create
anything yet”*

Demo 2: Understand a database you did not build

Why it matters

- Ask what a database does, in your own words
- Get a summary and a diagram of how the forms link
- It covers only what your account can see

Prompt

"I inherited this database. Summarize what it does, and draw a simple diagram of its data model"

Demo 3: Translations with context

Why it matters

- People answer in their own language. Your team may read another.
- Context gets the sector words right.
- The original stays. The translation goes in a field of its own

Prompt

“Translate the French answers into English. This is post-distribution monitoring after a WASH distribution. Save them in a new field. Keep the originals.”

Demo 4: Working with qualitative data

Why it matters

- Open answers are rich, but difficult to analyze
- It proposes a coding frame. A person decides.
- The themes become a field you can analyze and visualize in ActivityInfo

Prompt

“Propose 4 to 6 tags for the English answers. Wait for my OK. Then add a Theme field and give every answer one theme.”

Demo 5: From indicators to a report

Why it matters

- Start from what the donor asks for: the indicators
- Each number comes with the forms and fields behind it
- The report stays in ActivityInfo, for people who never use an assistant

Prompt

“Calculate indicators 1.1, 2.1, 2.2 and 3.1. Show which forms and fields you used. Then create a report with one analysis per indicator”

Going further



Save your rules once

Skills and Projects in Claude, Gems in Gemini, custom GPTs in ChatGPT. The whole team starts from the same rules.



Combine tools

Read ActivityInfo, then draw the model in Miro or write the report in a Google Doc. Zapier reaches more apps.



Agents

One task, many steps and tools. We are only at the start.

Each tool you add is one more place your data goes. The same checks apply.

The ActivityInfo Data Model Generator (beta)



Start a free trial

activityinfo.org/signUp



Describe your program

Get a proposed data model



Connect to ActivityInfo

Build your database

Built on a skill: our saved rules for field types and names, record identifiers, lists and links. The assistant proposes. You decide.

Learn more



Documentation: AI assistants in ActivityInfo

<https://www.activityinfo.org/support/docs/integrations/mcp/index.html>



Tutorial: build a database from a logical framework

Step by step, with prompts you can copy



Using AI assistants with sensitive data

What to settle before you connect



Questions and feedback: the ActivityInfo community

<https://community.activityinfo.org>

Questions?

Follow us:

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LinkedIn group: <https://www.linkedin.com/groups/5098257/>