

CommCare | How to Series

HOW TO GRANT PARTNERS ACCESS TO CRS COMM CARE DATA

Updated 11/30/2020

IMPORTANT:

- It is not possible to access data in CommCare without having a CommCare account with proper permissions in a Project Space.
- Before inviting a user into a project space, please ensure that there is a valid role in your project space that you would want to assign to a user. To grant default access to data, you can request the “Read Only” access for the user who only needs to access data. For projects where you will need to be more specific on access permissions to data, you will create a custom role. If you are unsure which role to use, reach out to your local ICT4D focal point or Regional Solution Engineer.
- Users with the default “Read Only” Role cannot create new reports or data exports. They are also unable to modify the application.
- Prior to providing any research partner access to CommCare data for projects with IRB approval, coordinate with the partner to obtain the following:
 - The list of staff and their corresponding permissions.
 - Any training requirements for CRS and partner staff prior to accessing data (e.g. [protecting human research participants training](#)).
 - Data deidentification requirements for setting up the file

STEP 1) Verify what permissions the new user will need and [what pre-set roles may exist](#) to meet those needs. If the permissions match a pre-set role, proceed to 2a. If not, verify what permissions the user will need and proceed to step 2b.

STEP 2a) [Request a Web User Account](#) for the CRS staff member that you would like to grant access to who does not already have a CommCare account. Please consider what permissions are appropriate for the intended user before requesting access.

- Granting a web user the Default “Read Only” role provides the following:
 - Access to **all** existing Reports and Data exports (form and case exports) in the project space.
 - Access to data collected within multiple applications.

NOTE: Before inviting a user into a Project Space, Service Desk will contact the Approver and Secondary Contact to get their confirmation.

Request CommCare Web User Account

Using this form, you'll be able to submit web user account request for your respective project space(s). This helps limit the possibility of "un-authorized" access to the platform and eventually beneficiary data. It is very important to understand the standard roles and their underlying permissions, making sure that you request the right role for this user. For more guidance on Standard roles and permission in CommCare under CRS-Dimagi Enterprise agreement - [Click here](#)

↳ Extra in categories

Requestor's User ID

Requestor's First Name

Requestor's Last Name

Requestor's Email address

* Are you requesting multiple web user accounts?

* Action

* User information same as requestor's

* Project Space URL

* Role for Web User

STEP 2b) [Request a Custom Role](#) for the CRS staff member that you'd like to grant access to.

Requestor's Email address

* Action

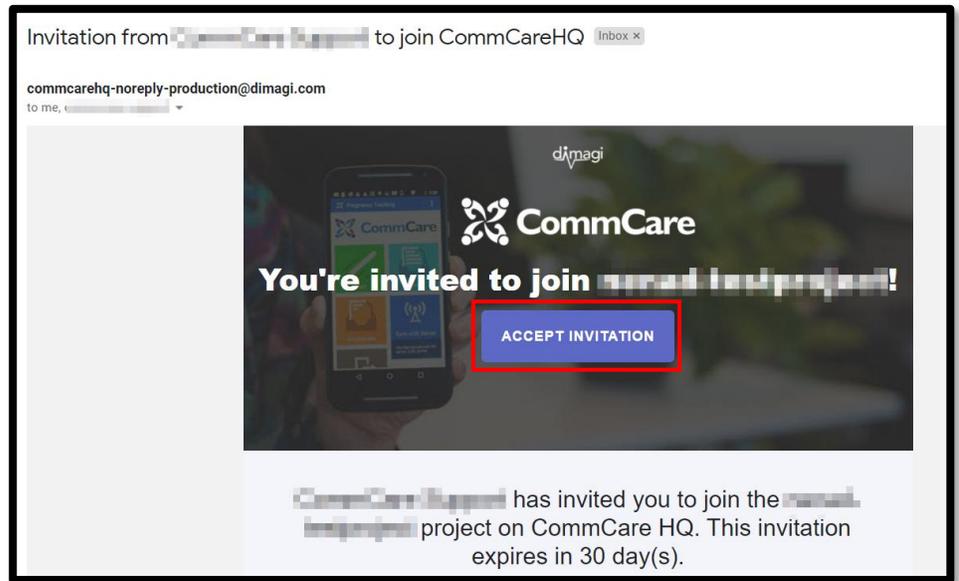
* Role Name

Role Permissions

- View Web Users (Allow role to see the list of web users.)
- View Mobile Workers (Allow role to see basic information like first name, last name, Username, Groups and location of the mobile workers.)
- Edit Mobile Workers (Allow role to create new accounts, manage accounts settings, deactivate or delete mobile workers.)
- View Groups (Allow role to see the group Name, group membership and group data.)
- Edit Groups (Allow users add group, change group membership, edit group data, Delete group.)
- Edit Locations (Allow role to edit, archive, delete location, download organization structure, bulk upload, edit location fields.)
- View Locations (Allow role to see active and archived locations, Download organization structure.)
- Edit Data (Allow role to view, export, and edit form and case data, reassign cases.)
- Edit Web Apps (Allow role to use Web Apps for online data entry)
- Edit Access APIs (Allow role to use CommCare HQ APIs to read and update data. Specific APIs may require additional permissions)
- View All Reports (Allow to access all reports.)
- Full Organizational Access (Allow role to access data from all locations.)
- Allow Reporting Issues (Allow this role to report issues.)

* Report Names
 ▶ More Information

STEP 3) Once confirmed, the user will receive an email like in the screenshot below. They will need to click 'Accept Invitation'. Upon accepting the invitation, users without a CommCare account will need to create one.



Create Account

To accept this invitation, you must create an account.

Full Name

Email Address

You will use this email to log in.

Create Password

Good Job! Your password is strong!

I have read and agree to Dimagi's [Privacy Policy](#), [Terms of Service](#), [Business Agreement](#), and [Acceptable Use Policy](#).

Create Account

STEP 4) If you want to revoke a user’s access to your project space, please use the [Request Web User Account](#) and select ‘Remove Account’ in the “Action drop-down menu visualized below.

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▶ Exists in categories

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