# CommCare | How to Series

HOW TO GRANT PARTNERS ACCESS TO CRS COMMCARE 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.

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



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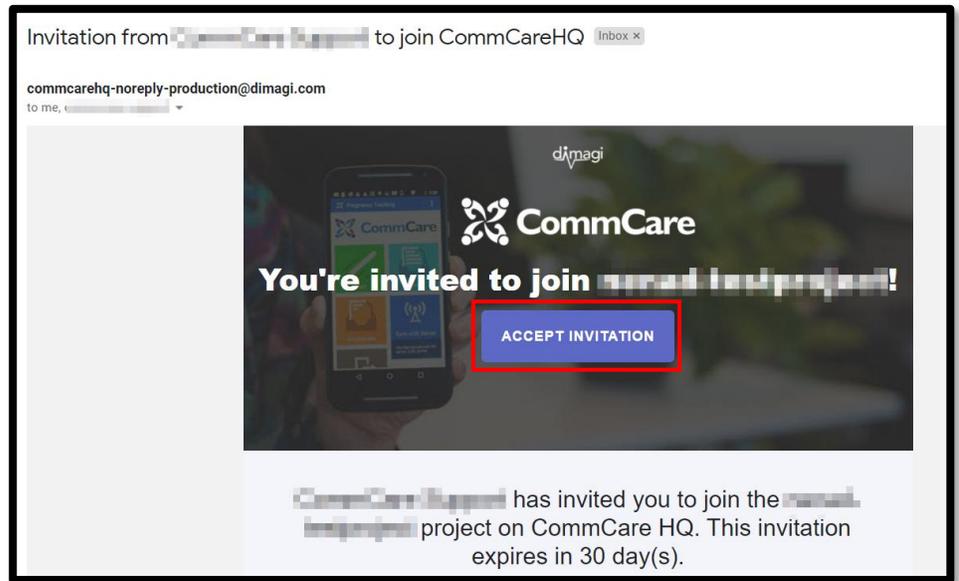
**STEP 4)** If you want to revoke a user's access to your project space, please use the [Request Web User Account](Request Web User Account) and select 'Remove Account" in the "Action drop-down menu visualized below.

Catholic Relief Services | 228 W. Lexington Street, Baltimore, MD 21201, USA | crs.org | crsespanol.org
For more information, contact servicedesk@crs.org.