



## Configuring GBVIMS+

Primero/GBVIMS+ is an information management system that allows for case management, incident data entry and reporting on gender-based violence in humanitarian settings. It can be configured in each setting according to the local context and program.

Primero is a configurable system with several different modules, including gender-based violence, child protection and monitoring and reporting mechanism. This guidance will cover the gender-based violence module. The module cannot be edited unless by a system administrator.

### Learn the Language



#### **Contact Information**

This is where you can put your contact information, after log-in.

#### **Program**

This section provides descriptive information about the program. It should only be edited by an organizational focal point.

#### **User Groups**

User groups represent teams of users working together. For example, there may be a team of social workers in a particular refugee camp providing services to GBV survivors. There may be another group of social workers in a different camp. A manager of a user group will have some level of access to all of the data managed by the group of users they supervise, but not to the data managed by a different group.

#### **Roles**

Users will have Roles, which define what particular users are allowed to do: read records, modify records, run reports, configure the system. Some examples of roles are: GBV Social Worker, GBV Manager, and GBV Coordinator. Along with defining what actions the user is allowed to perform, roles also limit what kind of information is visible about individual records for a specific user. For example, a GBV Social Worker may be allowed to view and edit personally identifiable information (such as name, age, and sex) about a particular client, while a GBV Coordinator may only see a reduced set of information about that same person (age and sex, but not the name), and may not be allowed to edit any of it.

#### **Agency**

Agency is a required field before establishing users so these should be configured before creating users. This also configures the logo(s) that appear in the top right corner of the Primero application

## **Users**

Users are the individuals working for service-providing organizations who use the system.

## **Forms**

A form contains information about an individual, similar to the way you would collect information with a paper-based form.

## **Fields**

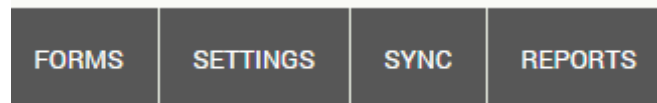
A field (data field) is information within a form. Fields include examples like name, age, date of birth.

Fields types include:

- Text
- Text Area
- Date
- Check Boxes
- Tick Box
- Select Drop Down
- Radio Button
- Numeric Field
- Date Field / Date Range

## **How to Configure GBVIMS+**

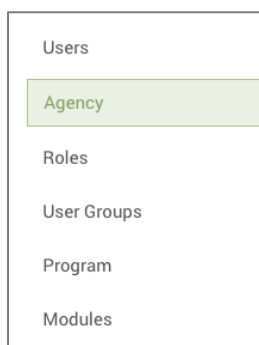
The gender-based violence module comes with a default set of configurations and forms. These configurations can be further customized in country. GBVIMS+ can be configured by clicking on the 'settings' button in the header navigation bar.



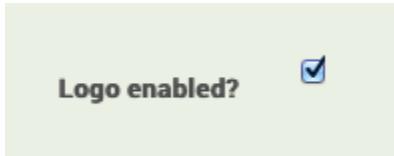
## **Configuring the Agency**

Agency is a required field for setting up users so these should be configured before creating users. This also configures the logo(s) that appear in the top right corner of the database. To create an agency:

1. Click on **Settings** in the header navigation bar.
2. Click on **Agency** from the left panel navigation bar.



3. Click on **Create**.
4. Add the name of the agency (this field is mandatory). You can also add a description of the agency and a logo.
5. For the logo to appear at the top right of the screen in the Primero application, check the box at the bottom of the form as shown below and click on the **Save** button once all the information is entered.



To edit an existing agency:

1. Click on **Agency**.
2. Find the agency you want to edit. Click on **Show** or **Edit** in the right column.
3. Edit any information, then click **Save**.

### Managing Users and Setting up User Roles

Each individual using GBVIMS+ needs at least one role and one user group assignment. This will customize user access to records (cases or incidents) and functions.

- **Users** are the individuals using GBVIMS+ who each have a unique username and password.
- Their **Role** sets the actions they can and cannot perform - write, export, flag, import, etc. and the data they can see - their own, their group or all.
- Their **User Group** creates teams of users who can share information. However, what the users in this group can see is governed by the data set in the role.

Each of the above elements is created or edited from the **Settings** function.

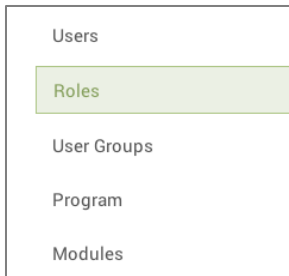
### Creating and Editing User Roles

User Roles are important because they set the:

- *Records*: what records can be accessed by this role includes all records, only users in my group or only my records.
- *Permissions*: what actions the user can perform; this includes, for example, read, write, flag, etc. This can be uniquely customized for cases and incidents. Under permissions it is also determined who can edit roles, users, groups, forms, lookups, system and reporting.
- *Forms*: the specific forms a user can access. All fields on the form will be visible if the user has access to the form.

To create a role:

1. Click on **Settings** in the header navigation bar.
2. Click on **Roles** from the left panel navigation bar.



3. Click on **Create Role**.
4. In the box that appears, you can set the **Records, Permissions, and Forms** a user with this role can access. Click on the **Save** button once all the information is entered. It is required that the user have access to the **Record Owner** form. A user cannot edit this form, but access will be needed for the system to allow the user to access the record type.

To edit an existing role:

1. Click on **Roles**.
2. Find the role you want to edit. Click on **Show** or **Edit** in the right column.
3. Edit any information, then click **Save**.

NOTE: It is recommended not to delete a role unless it was created in error as this may have a negative impact on any users who have been assigned that role.

### Recommendations for Creating Roles

- When creating the role, if you do not check any forms, users with this role will see the default set of forms for the GBV module assigned when their username is created. However, if you check even one form in Case or Incident, you must click all the forms the user should access in all groups of forms.
- Record Owner is a required form. If you are selecting forms, you must include Record Owner with any other forms within the group otherwise users with this role will be crippled. The Record Owner form must be selected within each group of Case, Incident and Tracing Request forms. Selecting it once is not adequate.
- The list of forms for Cases contains forms for both the GBV and Child Protection modules and, likewise, the list of forms for Incidents contains forms for the GBV module. For the user to see the forms, the role must have access to the form and the username must have access to the module. This will need to be customized in country.
- **Incident Forms** related to the GBVIMS+: Alleged Perpetrator, GBV Incident, GBV Individual Details, Other Documents, Record Owner, Service Referrals, and Type of Violence
- **Case Forms** related to the GBVIMS+: Action Plan, Case Closure, Consent for Referrals, Consent for Services, Other Documents, Record Owner, Referrals and Transfers, Safety Plan, Survivor Assessment, and Survivor Information.

GBVIMS+ users do not need access to any other default system forms other than those listed above.

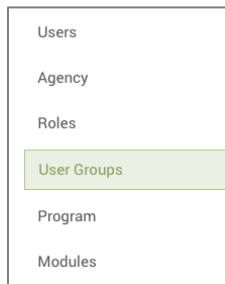
## Creating and Editing User Groups

User Groups are used to create teams of users and allow different levels of access to records within the group. As with Roles, this should be set up before creating individual users. Users are assigned to a User Group when each user is created. Access to the records (cases or incidents) must be one of the following options:

- Access only my records
- Access all records owned by users in my group
- Access all records

To create a user group:

1. Click on **Settings** in the header navigation bar.
2. Click on **User Groups** from the left panel navigation bar.



3. Click on **Create User Group**.
4. Add the name of the group (this field is mandatory). You can also add a description of the user group.
5. Click on the **Save** button once all the information is entered.

To edit the user group:

1. Click on **User Group**.
2. Find the role you want to edit. Click on **Show** or **Edit** in the right column.
3. Edit any information, then click **Save**.
4. NOTE: It is recommended not to delete a user group unless it was created in error as this may have a negative impact on any users who have been assigned that user group.

## Creating and Editing Users

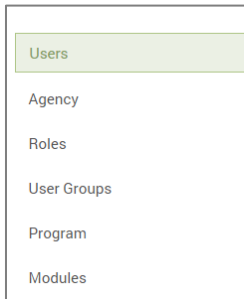
Users are the individuals using GBVIMS+ who each have a unique username and password. Before setting up users, the roles, user group and agency for that user must be set up. For each individual user, the following information is specified:

- *Full Name*: This should be the user's name.
- *Username*: This should be unique.
- *User Code*: This is the user's staff code, per the GBVIMS coding system. This is essential to add for the users if you are exporting data for analysis into the incident recorder.
- *Password*: This should be unique. There is no way for a user to reset their password. A standard password should not be given for all users with the expectation that they can change it. It must have 8 characters and include both letters and numbers.
- *Role*: Select an existing role.
- *Modules*: A user is given access to one or more modules in Primero. The default modules are CP and GBV. It should be set to GBV only.

- *User Groups*: This must be an existing user group or groups.
- *Agency*: The agency is a required field.

To create a new user:

1. Click on **Settings** in the header navigation bar.
2. Click on **Users** from the left panel navigation bar.



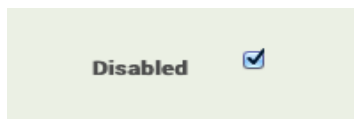
3. Click on **Create User**.
4. Add the mandatory fields: name, username (must be unique), password, and re-enter the password, organization (agency).
5. Then, select none, one or multiple of the roles, modules (should be only GBV), user groups, and other optional information such as phone, email, position, and location.
6. Click on the **Save** button once all the information is entered.

### Disabling and Deleting Users

It is recommended not to delete a user unless it was created in error as this may have a negative impact on any users who have been assigned that role. Instead, it is recommended that a user access be disabled. Disabling a username will prohibit that username from being used to log in to GBVIMS+

To disable a user:

1. Click on **Settings** in the header navigation bar.
2. Click on **Users** from the left panel navigation bar.
3. From the list of users, find the username to be changed and click **Edit** in the right column. Check the box at the bottom of the form as shown below to disable the Username and click on the **Save** button once all the desired information is entered.



Although not recommended, if for some reason a user needs to be deleted, follow these steps:

1. Click on **Settings** in the header navigation bar.
2. Click on **Users** from the left panel navigation bar.
3. From the list of users, find the username to be deleted. Click **Delete** in the options in the right column. A confirmation box will appear:



4. Then click OK. To cancel and keep the username click on the **Cancel** button. Deleting a user cannot be undone.

## Form and Field Configuration

A form contains information about an individual, similar to the way you collect information with a paper-based form. By configuring GBVIMS+ you can create a new form, modify existing forms, add new fields to a form, reorder the fields, or allow different forms to share the same field.

A field (data field) is information within a form. Fields include examples like name, age, date of birth. The same field can be 'shared' on different forms so that you can enter a date of birth on one form and see it on multiple forms. Fields can only be shared between cases or shared between incidents. A field cannot be shared across cases and incidents though. There are a variety of field types including:

- Text
- Text Area
- Date
- Check Boxes
- Tick Box
- Select Drop Down
- Radio Button
- Numeric Field
- Date Field / Date Range

Forms are created first and then the fields on those forms are added once the form is created. Forms can only be created or modified by a user with the appropriate permissions.

## Creating and Editing a New Form

GBVIMS+ should come pre-loaded with forms for use. However, you may need to add additional forms.

To create a new form:

1. Click on **Forms** in the header navigation bar.
2. Select **GBV** from the box on the right.
3. Then select either **Case** or **Incident**, depending on the type of form you want to create.
4. Then select **New Form Section**.



5. Add in the information for the name, description, and form group name.

- *Form Name*: this is the name of the form that will appear in the list of forms.
- *Description*: this is a description of the form and is not displayed.
- *Form Group Name*: this is the name that displays in the left navigation panel when forms are grouped. The form group has a dropdown to the right of the name in the left navigation panel. Clicking on this dropdown expands or contracts the form group. To add the form group name, you can select an existing form group from the dropdown list or add a new one. To add a new one, type the desired name in the box directly below the field and then click on the phrase 'Click to add <form group name> directly below that:

If you want the form to appear by itself and not as part of a group at the top level in the Left Navigation Panel, you must enter same the Form Name in the Form Group Name field by using the instructions to add as described above.

- The system will default to making this form visible. If you do not want it visible, simply uncheck that tick box.

6. Click on the **Save** button once all the information is entered.
7. Once you have saved the form, you can add fields to the form (instructions in the section below).

To edit an existing form:

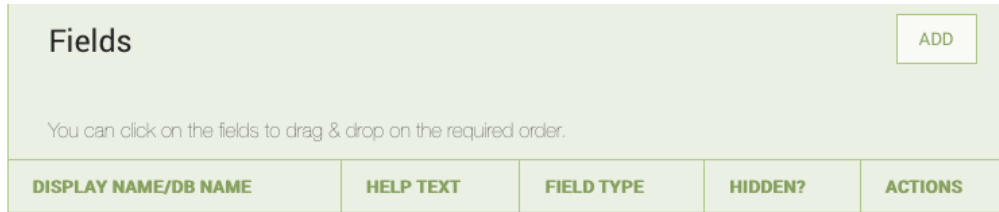
1. Click on **Forms** in the header navigation bar.
2. Click on **Forms** from the left panel navigation bar.
3. From the list of forms, find the form to be changed and click **Edit** in the right column, and edit any information.



- Click on the **Save** button once all the desired information is entered.

### Creating and Editing Fields on a Form

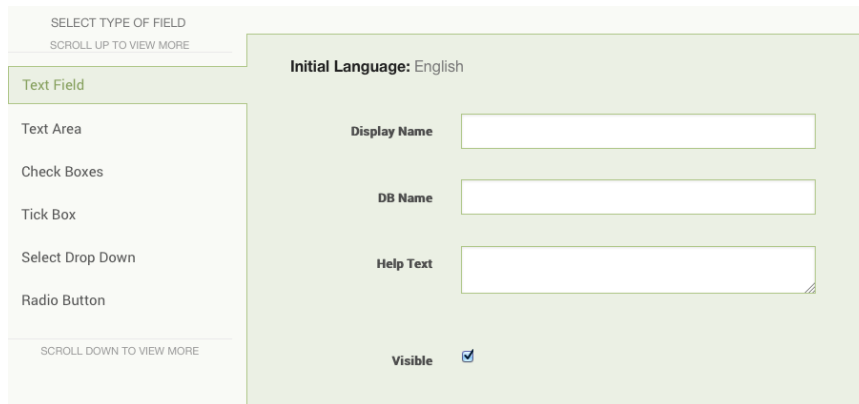
In order to create or edit fields on a form, you must first create and save the form before you are able to enter the fields to be displayed on the form. Once you have saved the Form, you will see the following at the bottom of the form creation page:



DISPLAY NAME/DB NAME	HELP TEXT	FIELD TYPE	HIDDEN?	ACTIONS
----------------------	-----------	------------	---------	---------

To add a field to the form:

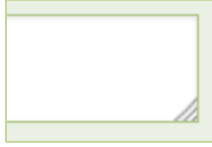
- Click on **Add**, and the following will appear:



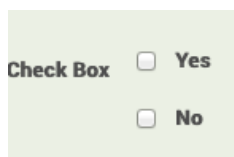
- Choose one of the **Field Types** from the left hand navigation panel. Once a field type is selected, the fields required to create that type of field will appear. All field types will ask for the following information:
  - Display Name:** This is the name that will display on the form.
  - DB Name:** This is the name for the database field. If you leave this blank, the application will name the database field for you. This is important to note if you want to share fields as described later.
  - Help Text:** The help text will appear below the field only when you are editing or entering in information. The help text is not visible when you are only viewing the record. This allows you to provide some guiding language to give the user a frame of reference for the proper answer or how to come to a conclusion based on information provided.
  - Visible:** Use this indicator to have the field show on the form (Checkbox is checked) or hidden on the form. It is highly recommended that you hide unwanted fields rather than delete them. The exception is in the case of a field created in error or duplicated. Once a field has been in use, it is preferable to hide it rather than delete it.
- When you have entered all the information for the field, click Save.
- Repeat until you have all the fields entered.
- When all the fields have been entered, click **Save** below the header navigation to save the form with the fields.

A brief description of each field type and any additional information to build the field is detailed below:

- **Text Field:** This is used for brief lines of text. It will not expand to fit the text entered. Text will not be truncated but it is not easy to view.
- **Text Area:** Unlike a Text Field, a Text Area will expand to fit the text entered. A Text Area is differentiated by the hash marks in the bottom right corner:

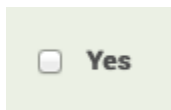


- **Check Boxes:** this is most appropriate when there are two or three options for a field as shown below:



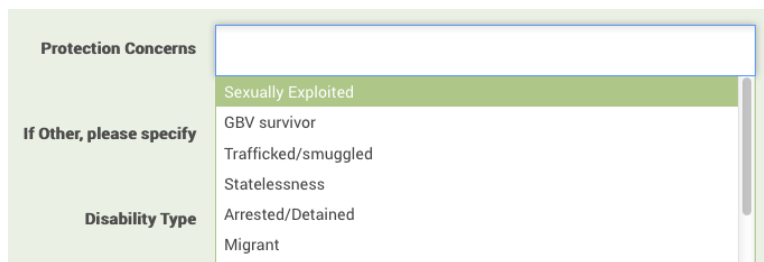
The check boxes will display in Edit mode. In View mode, only the text of the option selected, such as 'Yes' or 'No' will appear.

- **Tick Box:** this is a checkbox with one selection as shown below:



Like a check box, the tick box will display in Edit mode. In View mode, only the text of the option will appear. In some cases, even when the tick box is not selected, the opposite value will show in View mode. For example, if the value of the tick box is 'Yes' and it is unchecked, the field may contain 'No' in view mode.

- **Select Drop Down:** this field allows the user to pick a value or values from a defined list of options as shown below:



To configure a select drop down, there are some additional fields in the window:

The image shows a configuration panel with three sections: 'Options' with a text input field, 'Lookups' with a text input field, and 'Multiple Selection' with an unchecked checkbox.

The Options field is one way to configure the list of items that a user will see when they access this field. To add options, each option must be on a separate line. The Lookups field is a way to indicate that the list of items should come from a Lookup, which is a list of items that may be referenced by multiple fields like Nationality, Ethnicity, or Languages and it is important that the values be consistent across Primero. The Lookup must be created before the field. See the section on Lookup Management for instructions. The Multiple Selection checkbox indicates if the user is allowed to pick more than one item from the list. If the box is unchecked, only one selection is allowed.

- *Date*: this field type will automatically validate that what the user enters is a valid date field. The standard date format for Primero is dd-mmm-yyyy.
- *Date Range*: this field type allow the user to enter a From and To date as shown below:

The image shows a configuration panel for a Date Range field. It has two radio buttons: 'Date' (unchecked) and 'Date Range' (checked). Below are two text input fields labeled 'From:' and 'To:'. At the bottom, the date format 'dd-mmm-yyyy' is displayed.

Within a form there are two additional field types that are unique from other field types:

- The **Subform**, also referred to as a Nested form, is a section of a form where a user can collect the same set of data for multiple occurrences within the same case or incident. This is used throughout GBVIMS+ to collect information where a case may have multiple follow-up visits, for example or information on multiple alleged perpetrators.
- A **Separator** identifies a new section within the form. An example is within a form, there may be a separate section that is only completed once. This is not a sub-form because you only complete it once.

To create a subform:

1. Select **Subform** from the list of field types in **Forms**.
2. Find the Subform in the list of fields and click **Edit**.
3. Edit any information and **Save**.

### Editing an Existing Field

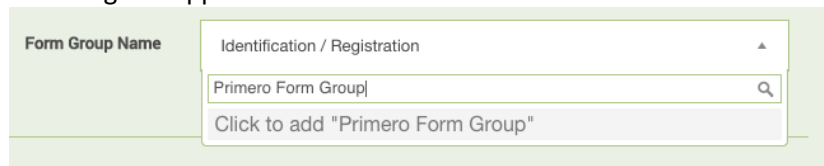
The capability to change a field from one type to another is currently not supported. It is necessary to create a new field with the desired type and then hide the field you are replacing. If you want the data in the existing field to appear in the new field, make note of the database name of the existing field. Create a new field with the proper type and use the existing database name. You will need to create a unique field label - the text that appears on the page. Once this is done hide the field you are replacing.

### Changing the Field Order within a Form

You may click and drag a single field to anywhere in the form to change the order in which they appear on the form. You must do this one field at a time.

### Changing the Form Group

While creating or editing a form, to add a new form group, type the name of the new form group in the field. The following will appear:



The screenshot shows a user interface for selecting a form group. On the left, there is a label 'Form Group Name'. To its right is a dropdown menu currently showing 'Identification / Registration'. Below the dropdown is a search input field containing the text 'Primero Form Group' and a magnifying glass icon. At the bottom of the search area is a button with the text 'Click to add "Primero Form Group"'. The entire interface is set against a light green background.

Then click “**Click to Add**” and it will create a new form group name.

### Managing Lookup Values

“Lookups” is the term used for a set of values that might be used in the dropdown selection for multiple fields. For example, it may be more efficient to define the values for fields such as Language, Ethnicity, and Nationality once and then reference them for several fields throughout the database. This will ensure certain data points are consistent and improve data entry speed and accuracy.

To create a new lookup:

1. Click on **Forms** in the header navigation bar.
2. Click on **Lookups** from the left panel navigation bar.
3. Click **New Lookup**.
4. Add a name of the lookup you are creating.
5. Add a single option in each “Option” field adding new fields or removing as needed.
6. When all information is entered, click **Save**.
7. Once a lookup is created, you can add to a field type and select whether you can pick one of more of the values.

To edit an existing lookup:

1. Click on **Forms** in the header navigation bar.
2. Click on **Lookups** from the left panel navigation bar.
3. Find the lookup you want to edit and click **Edit** in the right column.
4. Edit any information, then click **Save**.