Primero Glossary of Terms

Local Installer
A **local installer** describes a deployment to a machine that can run without internet connection. This is laptop based at this time, but future functionality may include mobile devices.

Instance
A single version in a setting in which Primero has been rolled out. This could be a local (single computer) instance, or a cloud (server/internet connected) instance.

Deployment
The act of setting up and releasing Primero to a group or an individual computer.

Modules
Many aspects of component functionality are configurable. This configuration is performed through **modules**. Modules represent how the system will be used. Out of the box, three modules will be configured:
- **Gender Based Violence (GBV)**: Tracks incidents related to GBV. Out of the box, it uses the case management component to aid GBV service providers.
- **Child Protection (CP)**: The module represents case management needed around child protection. This includes the use of the tracing request component to aid FTR.
- **Monitoring and Reporting Mechanism (MRM)**: Incident tracking of violations of child rights in situations of armed conflict.

Modules will specify what components will be available, and specify what forms will be associated to those components.

Programs
Modules belong to **Programs** which represent a set of features (CPIMS, GBVIMS, MRMIMS, etc.) for the application. An example of a program is child protection work within certain zones of a particular refugee camp. Application functionality cannot be configured within a program. The program merely provides descriptive information about the application's mission.

Users
Application **Users** represent people who interact with the system. Users log in, view and modify the information contained in Primero. Some examples of users are case workers, data clerks, or managers.

User Groups
User Groups represent teams of users working together. For example we may have a team of social workers in a particular refugee camp providing services to children. We may have another team responsible for the child's best interest determination. A **manager** of a user group will have some level of access, as defined by the user's role, to all of the data managed by that group, 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. Examples of roles are GBV Case Worker, GBV Manager, 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 Manager will only see a reduced set of information about that same person (age and sex, but not the name), and will not be allowed to edit any of it.
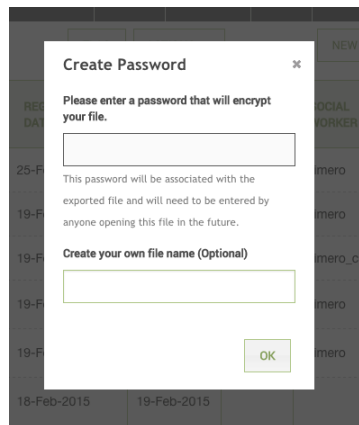
The general term for these limits to what the user can do and what a user can see is **authorization**.

Records

A **record** describes an individual piece of data. The three permitted record types are cases, incidents, and tracing requests.

Modals

A modal is a "floating window within the current window. This is used on exports, imports, flagging, etc. (See Below)

Fields

A **field** is an individual piece of information within a record. Fields are things like name, age, date of birth. Sometimes one field can be used to store several values like a list of protection concerns or all the languages spoken. Fields come in a handful of types:
- Text
- Text Area
- Check Boxes and Tick Box
  - "Options" - this will allow you to select what options can be checked by your users.

Text Field Type	
Text Area Type	
Check Box Type	☐ Check Box 1, Check Box 2, Check Box 3
Tick Box Type	☐ "Yes"

- Select Drop Down
  - "Options" or "Lookups" - Using Options will allow you to create the drop down values. Using Lookups will allow you to use a predetermined set of data as part of the field similar to Location. You cannot select both Option and Lookups. When entering Option, each value should be on a separate line.
- "Multi-select" - Allows a user to select more than one answer.
- Radio Button - "Options" - allows you up to 3 short choices for the radio button values
- Numeric Value

Select Drop Down Type	(Select...) ▼
Radio Button Type	○ Yes ○ No ○ Maybe
Numeric Field Type	

- Date Range

Date Field Type	
	dd-mmm-yyyy
Date Range Field Type	○ Date ● Date Range
	From:
	To:
	dd-mmm-yyyy

Help Text is an option within each field that will allow 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.

Forms

A **form** groups a set of fields for a record. By configuring the Primero application, you can specify new fields on a form, reorder the fields, or allow different forms to share the same field. For example, the standard form and field set for a child protection case has a form called "Protection Concerns" which has a multi-select field listing the protection concerns. Further down the form list, there appears a form called "Protection Concern Details" which contains the same list (for reference) and an ability to elaborate on each protection concern with an additional set of fields. This narrows the information in each form and allows the form to be targeted to a particular purpose or a step in the case management workflow.

Form - Subform

Within a form there are two additional form sections that can be created and used for different purposes. The first, the **subform,** is a section of a form where a user can repeat form data for additional instances where that case is needed to document nearly identical data for various visits, services, follow ups, etc.

Form - Separator

The second, a **separator,** becomes a new section within the form. An example is within the case closure from. This is not a sub-form because you only close a case once.

Form Groups

A **Form Group** is how Primero groups forms into similar information (example: Registration). You set what form group each individual form belongs to on creation or edit. This allows for the form navigation panel to be organized in concise, navigable, groupings to keep the panel shorter and easier to use. When multiple forms are added to a group, it becomes expandable/ collapsible and should be grouped accordingly. For example, Identity/Registration form group includes all forms specific to the identity (Basic Identity, Protection Concerns) and registration (Interview Details) of a case.