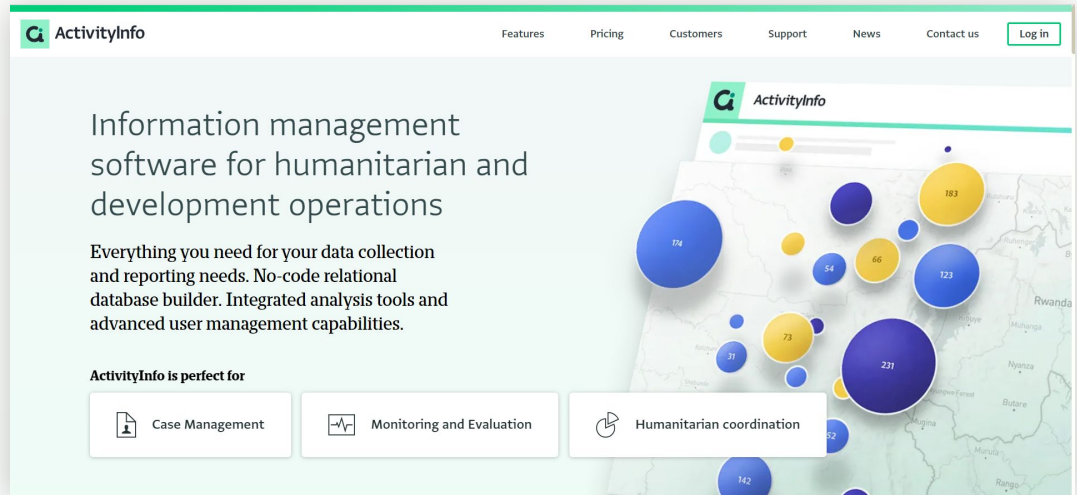# Introduction to Automations in ActivityInfo

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

ActivityInfo

Meet your instructor

Victoria Manya
Customer Education Specialist
BeDataDriven

ActivityInfo

Outline

01 Principles of automations in ActivityInfo

02 Practical techniques for designing and implementing automations

03 Demo

04 Best practices for optimizing automations

05 Q/A session

Principles of automations in ActivityInfo

Principles of automations in ActivityInfo

Understanding automations in ActivityInfo

Automations

- Automations in ActivityInfo streamline workflows by minimizing manual tasks, offering tailored processes for faster data utilization.

- **Efficiency:** Automations optimize workflows, reducing manual intervention by automating repetitive tasks, thus enhancing overall efficiency.
- **Precision:** Automated processes are meticulously executed, ensuring activation solely upon meeting predetermined conditions, thereby upholding accuracy and relevance.

ActivityInfo

Principles of automations in ActivityInfo

Components of automations in ActivityInfo

> Triggers

> Filters

> Actions
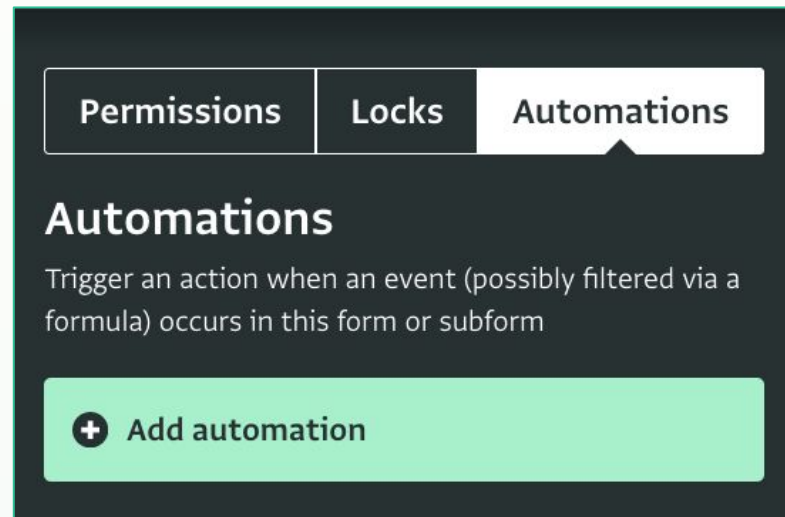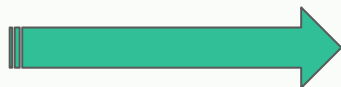
ActivityInfo

Principles of automations in ActivityInfo

Components of automations in ActivityInfo

Triggers

Events initiating automations are:

- Adding records
- Editing records
or
- deleting records.

Automations

Trigger an action when an event (possibly filtered via a formula) occurs in this form or subform

Add automation

Label

Trigger

⊙ On record added

⬤ On record edited

⬤ On record deleted

ActivityInfo

8

Principles of automations in ActivityInfo

Components of automations in ActivityInfo

Filters

Conditions defining when an automation should execute.

- You define a filter using a formula that evaluates to true or false.
- For automations triggered by record edits, you can create a formula reflecting the alterations.
- The formula editor showcases previous field values for reference.
- This feature is valuable for actions contingent on specific changes.
- You can utilize "_previous" keyword to incorporate previous values into your formula.

ActivityInfo

Principles of automations in ActivityInfo

Components of automations in ActivityInfo

Actions

Tasks performed when filter conditions are met. This i ActivityInfo involves sending Webhooks to external applications for further processing.

- ActivityInfo restricts automation actions to sending Webhooks to external applications.
- Webhooks are automated messages dispatched by apps upon event triggers, carrying event information.
- To utilize this feature, you generate a unique Webhook URL via an external application such as Power Automate.
- Input this URL into your ActivityInfo automation as the destination for event information transmission.
- The external application utilizes this data to execute additional tasks, such as sending notifications.

ActivityInfo

Principles of automations in ActivityInfo

✅ Ensure you have access to an application that supports webhooks and notification workflows. An example of this is Power Automate,

✅ If you do not have access to an external application that supports webhooks, you can still test automation with developer tools like Pipedream, Webhook.site and others.

✅ Only the Database owner and users with the "Manage automations" operation granted can create and modify automations.

✅ Automations are set up for a specific Form or Subform.

✅ Automations must be set to "Active" in order to run.

Ci ActivityInfo

Principles of automations in ActivityInfo

Audit log and automations in ActivityInfo

▶ Audit log

Practical techniques for designing and implementing automations

Practical techniques for designing and implementing automations

Steps involved in setting up automations in ActivityInfo

Before you start

- Make sure you have already added a database and you have been assigned to a role with the automations operations permitted.
- If not, for practice purposes, you can use the training and monitoring template to add a new database.

1. Identify your resource in ActivityInfo

2. Select your trigger event

    a. Optionally, add a filter

3. Specify a webhook URL from an external system or a development site

4. Set your automation to active

ActivityInfo

Practical techniques for designing and implementing automations

Testing your automation

- Add, edit or delete a record

- Visit your external system to confirm it received the event

- Alternatively, if you used a development site,you can visit it to examine the raw data
- Data will include update values for fields that were added or edited and previous values for fields edited or deleted

ActivityInfo

Practical techniques for designing and implementing automations

Steps involved in setting up automations with power automate

Before you start

- Make sure you have already added a database and you have been assigned to a role with the automations operations permitted.
- If not, for practice purposes, you can use the training and monitoring template to add a new database.
- Ensure you have access to power automate

1. Set up your custom connector

2. Create an automated cloud flow

3. Set up automation(trigger and parameters)

4. Test your workflow

ActivityInfo

Practical techniques for designing and implementing automations

Real-world examples ,automations and project workflows.

Here are some common scenarios where automations might be useful:

- Notify a case worker when new cases are assigned to them
- Notify a programme manager when implementing partners submit indicator reports
- Notify supervisors when a beneficiary's status changes

ActivityInfo

Practical techniques for designing and implementing automations

Step-by-step guidance on setting up filters

➤ Add a trigger and deploy email notifications in power automate

➤ Add a filter using ActivityInfo's formular editor

➤ Test your workflow

ActivityInfo

Demo

Practical techniques for designing and implementing automations

Example 1:Step-by-step guidance on setting up triggers, filters, and actions

Scenario:In a humanitarian organization, new cases are regularly assigned to case workers for management and resolution.

Requirement: The organization needs a system to automatically notify case workers whenever new cases are assigned to them to ensure timely and efficient handling of cases.

Solution: Implement an automation that triggers a notification to the respective case worker whenever a new case is assigned to them, ensuring prompt attention and action on newly assigned cases.

ActivityInfo

Practical techniques for designing and implementing automations

Example:Step-by-step guidance on setting up triggers, filters, and actions

Scenario: Setting up a filter in ActivityInfo to trigger actions based on changes in beneficiaries' ages, ensuring timely interventions for adulthood transitions.

Requirement : Ensure timely actions based on transition from minor to adult.

Solution : Utilize _previous keyword to reference previous values in formulas

ActivityInfo

Best practices for optimizing automations

Best practices for designing and implementing automations

Step-by-step guidance on setting up triggers, filters, and actions

- **Use of field codes:**This makes it easier for you to work with event data
- **Efficient Streamlining:** Design automations to streamline workflows, minimizing manual tasks and boosting efficiency.
- **Precise Triggers:** Employ accurate triggering mechanisms to activate automations only under specific conditions, maintaining precision and relevance.
- **Thorough Testing:** Conduct comprehensive testing pre-deployment to ensure seamless integration with external applications, eliminating errors.
- **Robust Error Handling:** Implement strong error management systems to handle errors and ensure continuous and reliable automation execution.
- **Regular Maintenance:** Continuously monitor and maintain automations, identifying and addressing issues promptly to optimize performance and integration with external applications.

ActivityInfo

Questions?

Follow us:

LinkedIn page: https://www.linkedin.com/showcase/activityinfo/
LinkedIn group: https://www.linkedin.com/groups/5098257/
Twitter: https://twitter.com/activityinfo

ActivityInfo