Stichting BRAC International

User Manual for BInsight

For end User

Version:01

Date: April 10, 2025

Change Record

SL	Version	Documented By	Designation	Date of Revision
1	1.0	Nafisa Tasnim	Officer, IT	April 13, 2025

Contents

Chapter-1

1. Logging into BInsight

1.1. Background

The users will have to log in to the BInsight mobile app to make data entries for the AIM program activities. The web platform will include the modules admin panel, activity mapping, work plan, event module, group management, survey, and livelihood support through which the users (BM, PM, FOM) will make data entries on the web platform. The PA will need to log in through the mobile app to make data entries of the participants.

1.2. Logging Into the Mobile Application

First, the administration manager must register potential users in the system. After your account is registered, you can log in to the system as follows.

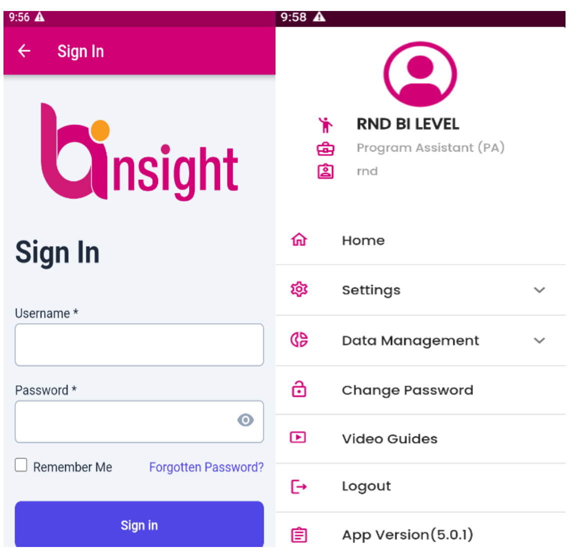


Photo 1: The sign in and log out interface of BInsight on the mobile app

- Download the latest version of BInsight app from the google play store.
- Then log in with the username and password.
- To log out the user will click the “menu” button on the home page. Then he will be able to see the log out option, he will click the “logout” button to log out from the mobile app.

1.3. Changing Password

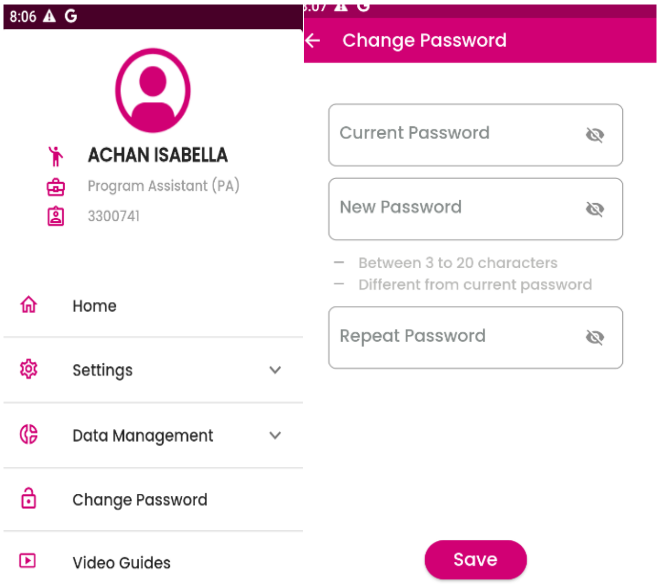


Photo 1: The "Change password" interface.

- To change the password the user will click the "Menu" button at the bottom right corner of the home page. Then he will be able to see the "Change password" option. The user will click that option.

- The user will then land on the change password interface and he will be able to change his password by providing the following information as shown in the image.

1.4. Language Settings

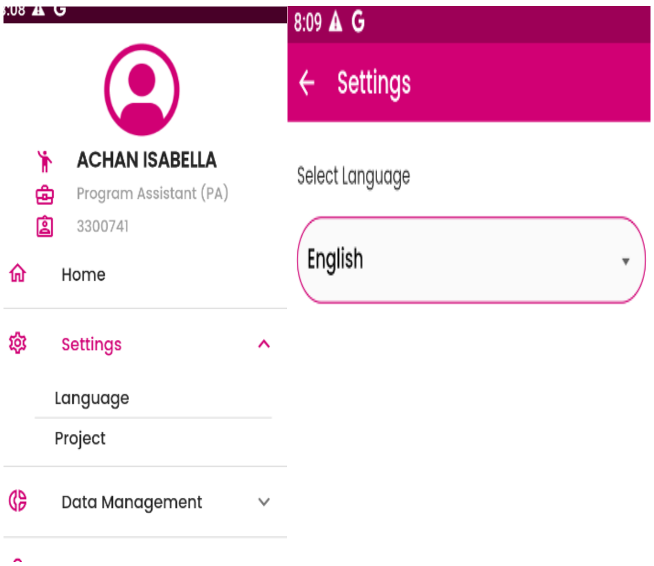


Photo 1: The "Settings" interface.

- To change the language the user will click the "Menu" button at the bottom left of the home page.
- Then he will be able to see the settings option. The user will click the "Settings" button then he will be able to see the language option.
- The user will then click "Language" and land on the settings page. He can change the language by selecting a language.

Chapter 2

2. Household Survey

2.1. Background

The Household Survey Module is designed to do a survey of a household. After taking necessary information of household, it collects the household members information.

2.2. Accessing the Household Survey

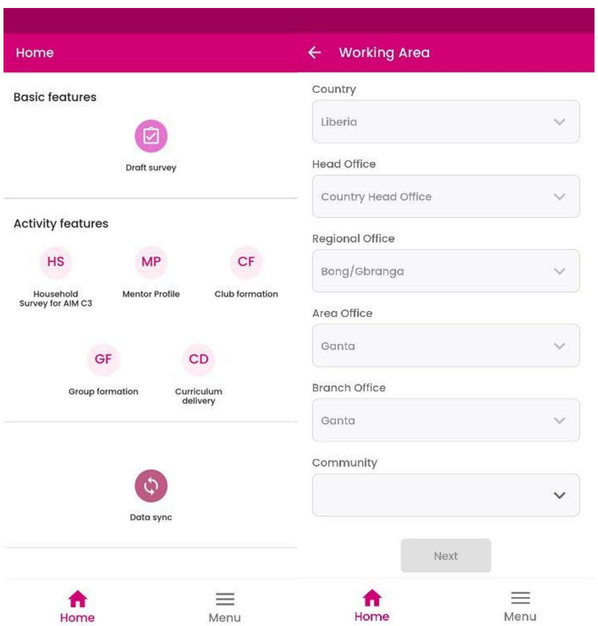


Photo 1: The "Homepage" and "Household survey" interface.

- After logging into the mobile application, navigate to the "home" screen
- Then he will be able to see the household survey module option. The user will click the "household survey" button then he will be able to see the working area.
- The user will then select the working "community" from the dropdown and click the "Next" Button. He will see the household list page based on the selected Working area.

2.3. Filling-up the household Survey Form

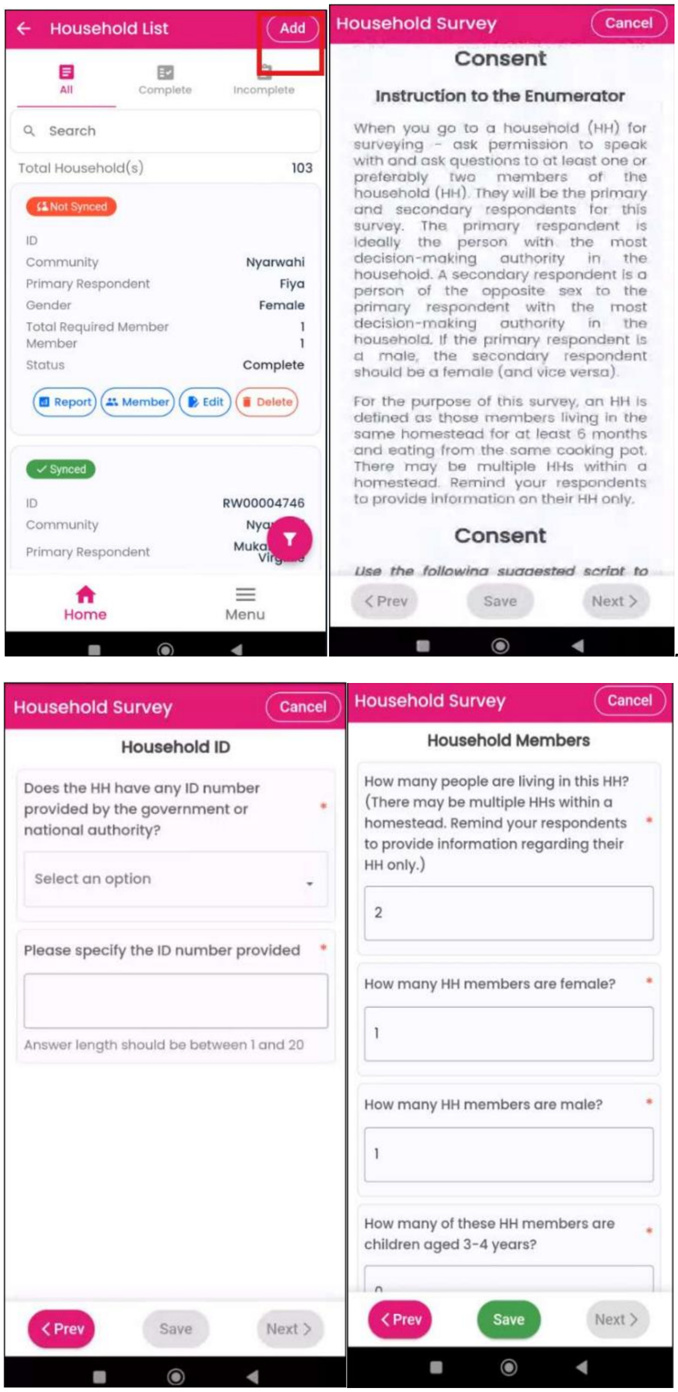
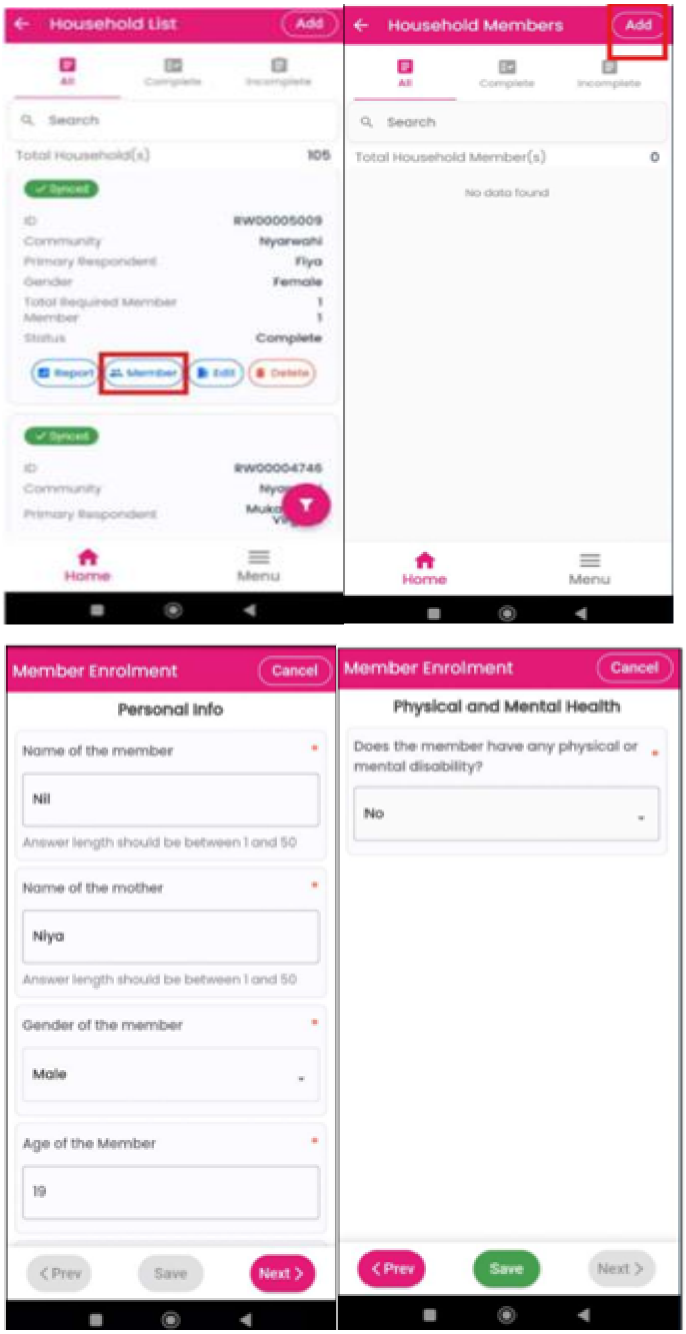


Photo 1: The "Household survey" Form

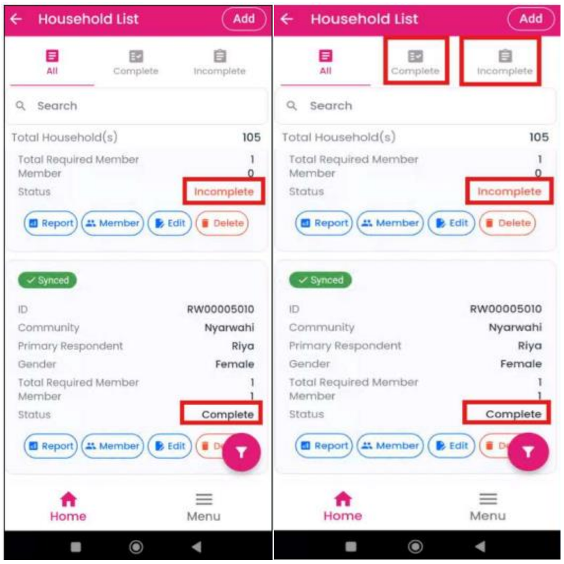
- After clicking the "Next" button the user will see a list of complete and incomplete forms. He can report/edit/delete them as per need.
- In-order to start a new household List, the user needs to click on the "Add" button on the top right corner of the house hold List page.
- The user will then view the consent form Users can continue the survey if the Household member gives their consent to participate in the survey
- The User will then Fill in all the required fields to complete the household survey and click on the "Save" Button for saving the form.

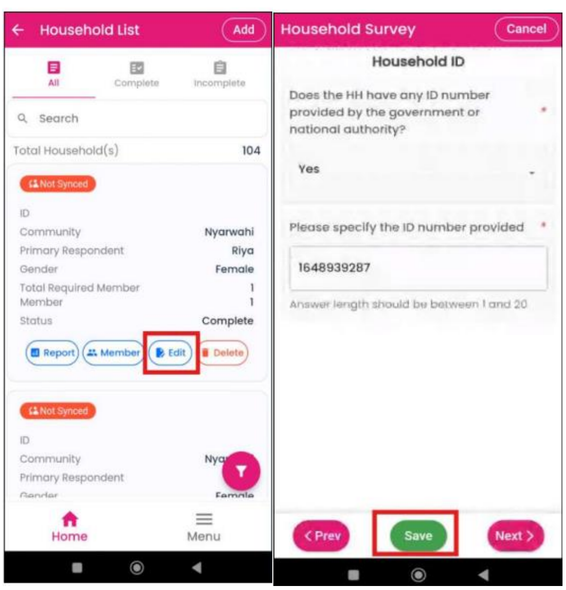
2.4. Filling-up the household Member Form for member enrollment



- After saving it will be saved to the household survey list. User has to click on the "Member" button.
- The User needs to click on the "Add" button to add household Members.
- The user will then view the household member enrollment form where users need to fill up the required fields for enrollment.
- The User will then Fill in all the required fields to complete the household survey and click on the "Save" Button for saving the form.
- Navigating Between Pages:
    - Use the Next button to move to the next page.
    - Use the Previous button to return to the previous page.

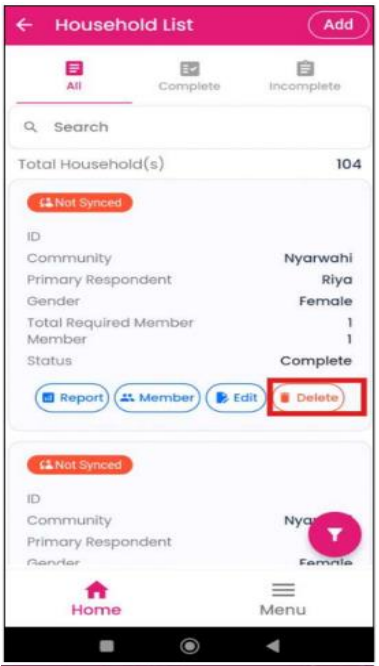
2.5. Cancel/Edit Household Survey

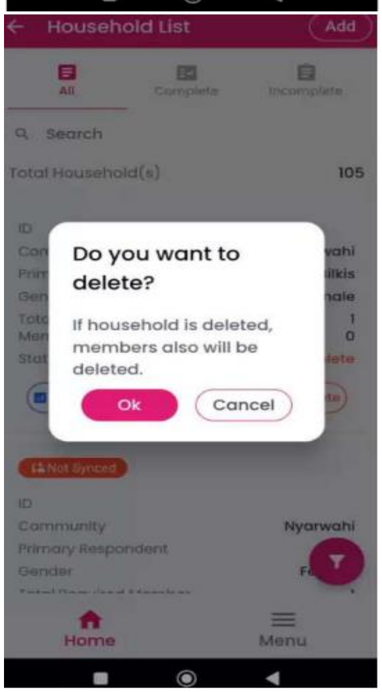




- Cancelling Household/Household Member Addition:
  - Click the Cancel button to return to the household/household member page without saving any input.
- Saving Household Information:
  - If the required fields are not completed, the Save button will not be enabled.
- Household Survey Status:
  - There are two types of status User can see in the card, Complete and Incomplete. Total required member and Surveyed Member should be equal to make a survey complete, otherwise it will show the status Incomplete.
- Edit a Household:
  - On the Home screen, select **Household Survey** and choose values for all **Working Area** dropdowns. The **Household List** page will appear; click **Edit** to make changes, then click **Save**. The updated information will be displayed in the list.

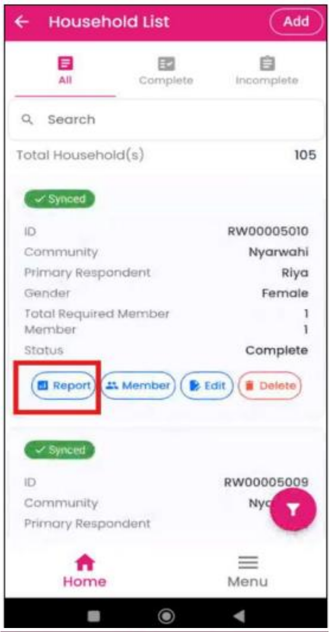
2.6. Delete Household Survey

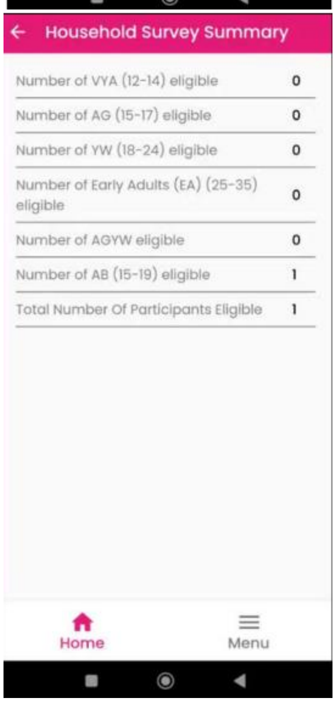




- To delete a household, the user will select "Household Survey" on the home screen, choose community from the dropdown on the "Working Area" page, and click "Delete" on the "Household List" page.
- A pop-up will appear asking for confirmation—clicking "OK" will delete the household, while "Cancel" will abort the action.
- After deletion, the updated household list will be displayed on the screen.
- A household cannot be deleted if a member is linked to a group or if it was created by another user.

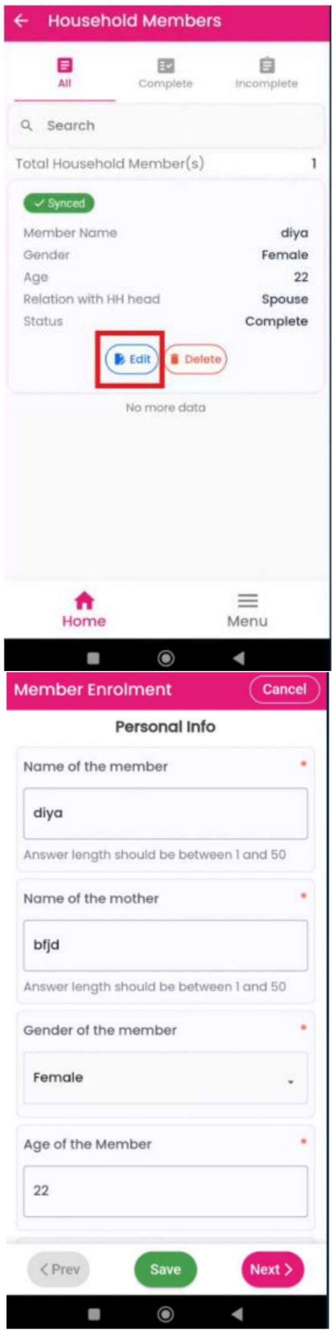
2.7. See Household Survey Report





- Open the BInsight app and select 'Household Survey' on the home screen.
- On the Working Area page, the user will fill in the community in the dropdown dropdowns.
- After clicking next, the system will take the user to the “The Household List” page will appear.
- Tap the 'Report' button displayed below each list.
- The Report page will open.

2.8. Edit a Household Member

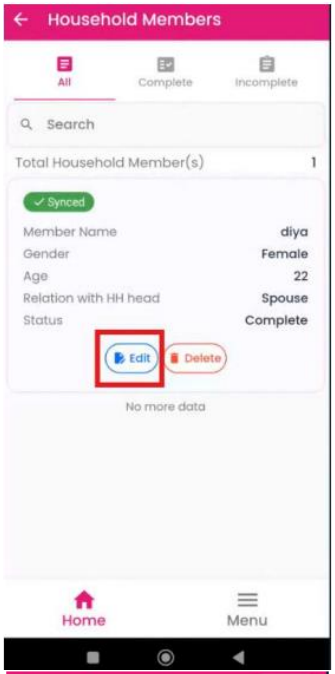


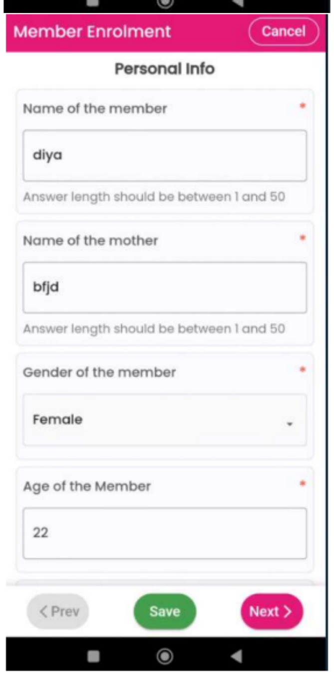
- After logging into the mobile application, navigate to the **Home** screen.
- Then the user will see the **Household Survey** module option. Click the **'Household Survey'** button to access the **Working Area**.
- The user will select the working **community** from the dropdown and click the **'Next'** button to view the **Household List** page.
- On the Household List page, the user will click the **'Member'** button to view the **Member Information** page.
- Then the user will click the **'Edit'** button to open the **Member Enrollment** page.
- The user will make the necessary changes and click the **'Save'** button.
- The updated member information will be displayed.

Reasons why the household member will not be edited:

If the member reference is used in any group, the member cannot be deleted.

2.9. Edit a Household Member



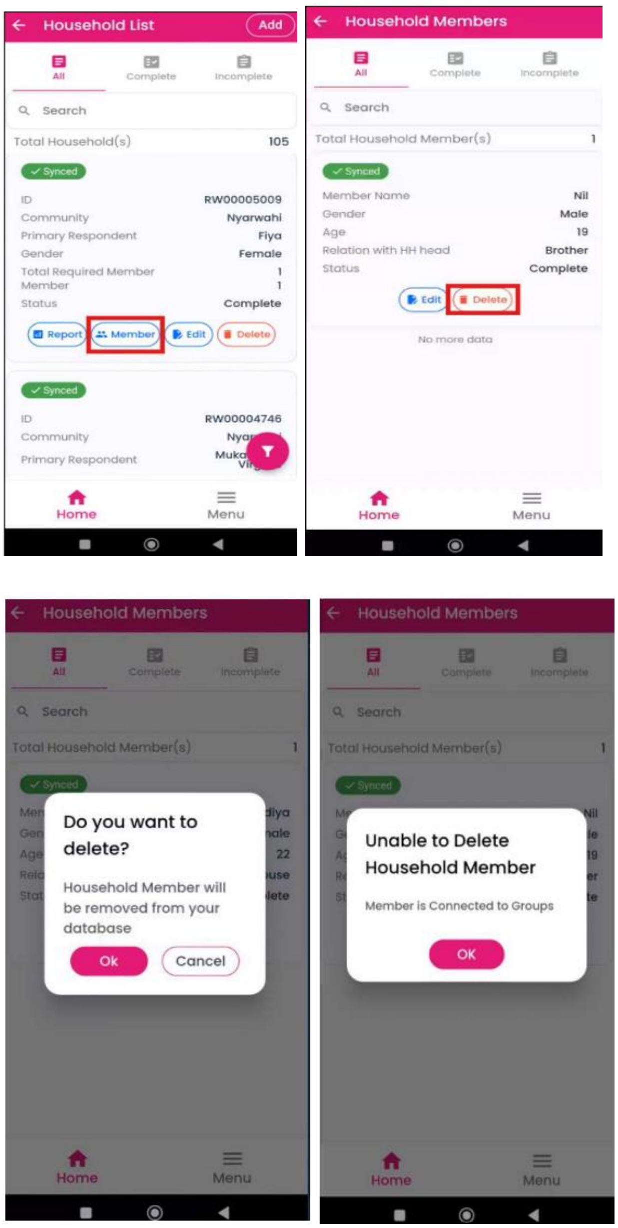


- After logging into the mobile application, navigate to the "**Home**" screen.
- Then the user will see the **Household Survey** module option. Click the **'Household Survey'** button to access the **Working Area**.
- The user will select the working **community** from the dropdown and click the **'Next'** button to view the **Household List** page.
- On the Household List page, the user will click the **'Member'** button to view the **Member Information** page.
- Then the user will click the **'Edit'** button to open the **Member Enrollment** page.
- The user will make the necessary changes and click the **'Save'** button.
- The updated member information will be displayed.

Reasons why the household member will not be edited:

If the member reference is used in any group, the member cannot be deleted.

2.10. Delete a Household Member



- The user will see the Household Survey module option. The user will click the 'Household Survey' button to access the Working Area.
- The user will select the working community from the dropdown and click the 'Next' button to view the Household List page.
- On the Household List page, the user will click the 'Member' button to open the Member Information page.
- Then the user will click the 'Delete' button.
- A pop-up will appear asking “Do you want to delete?” — clicking 'OK' will delete the member, while clicking 'Cancel' will cancel the action.
- The updated member list will be displayed.

Reasons why the household member will not be deleted:

1. If a household member is connected to a group, the user cannot delete the household member.

2. The user cannot delete which are created by other users.

Chapter-3

3. Mentor Profile

3.1. Accessing the Mentor Profile

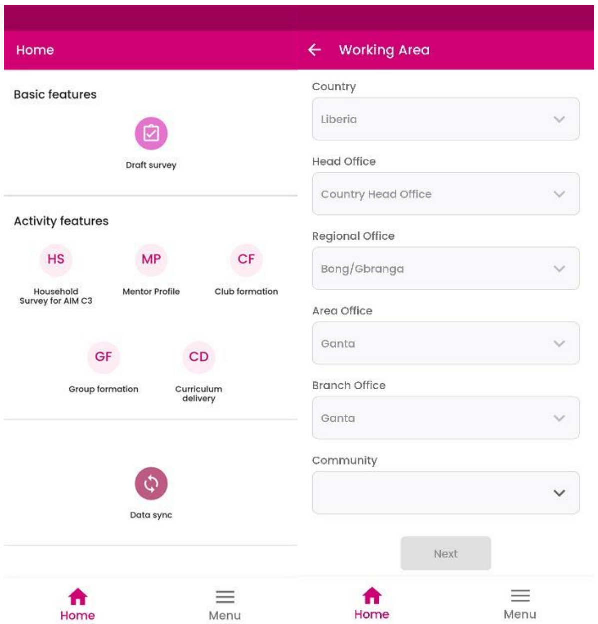
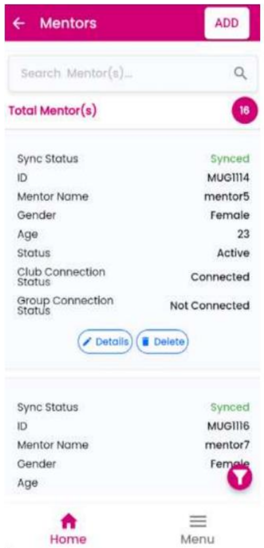
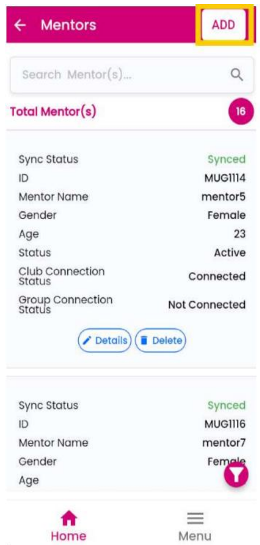


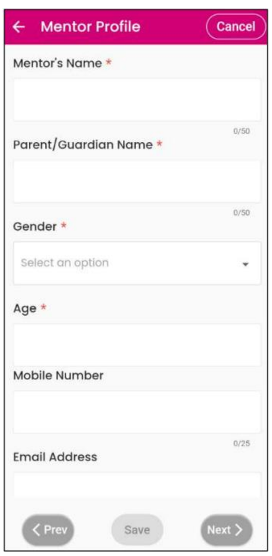
Photo 1: The "Homepage" and "Household survey" interface.

- After logging into the mobile application, navigate to the "home" screen
- Then he will be able to see the household survey module option. The user will click the "Mentor Profile" button then he will be able to see the working area.
- The user will then select the working "community" from the dropdown and click the "Next" Button. He will see the Mentors list page based on the selected Working area.

3.2. Adding a New Mentor

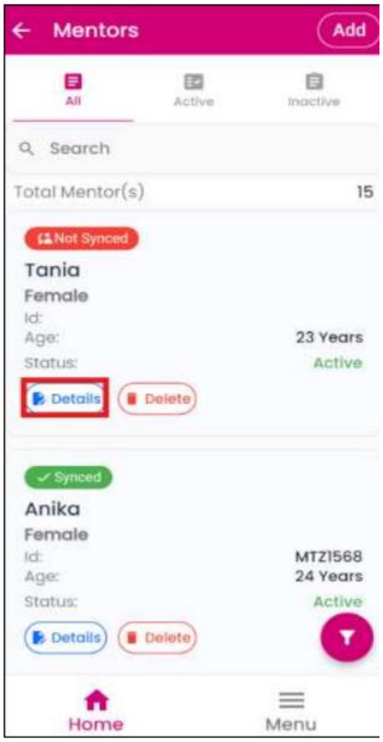


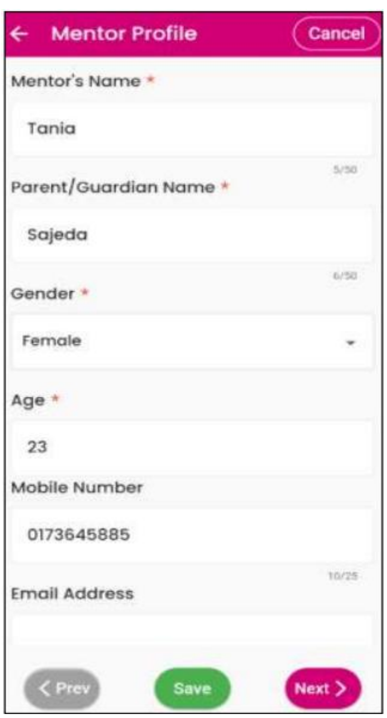




- After logging into the mobile application, the user will navigate to the Mentors page.
- The user will tap the 'Add' button to open the Mentor Profile page.
- On the Mentor Profile page, the user will fill in all the required fields.
- If the Status field is set to ‘Inactive’, the mentor will not appear in the Mentor Selection dropdown during Club Formation.
- The user can tap the 'Next' button to go to the next page or the 'Previous' button to return to the previous page.
- To cancel the action, the user can tap the 'Cancel' button to return to the Mentors page without saving any information.
- The 'Save' button will only be enabled when all required fields are filled.
- Once completed, the user can tap 'Save' to save the information and return to the Mentors page.

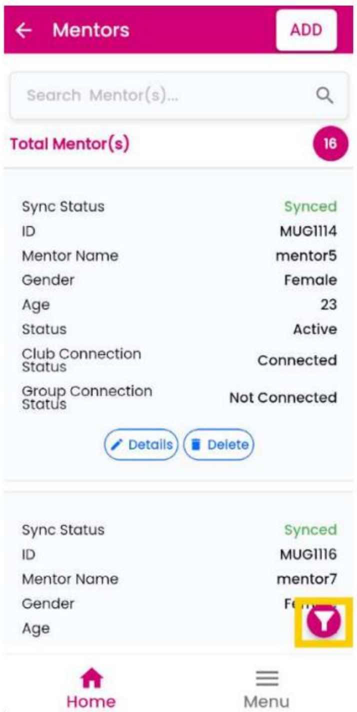
3.3. Editing a Mentor

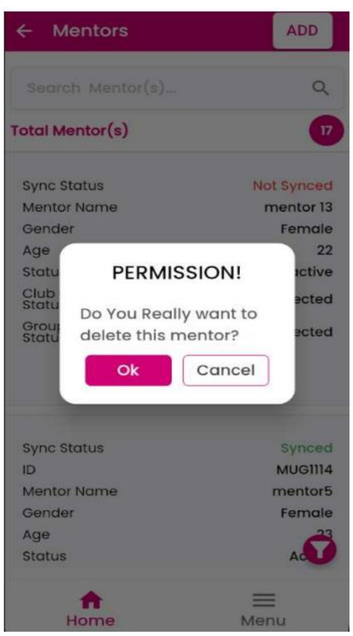




- After logging into the mobile application, the user will navigate to the Home screen.
- The user will tap the 'Mentor Profile' option to access the Working Area page.
- On the Working Area page, the user will select all required values from the dropdowns and tap the 'Next' button.
- The Mentors page will appear based on the selected working area.
- To edit a mentor, the user will tap the 'Details' button of the desired mentor. The Edit Mentor page will open with prefilled data.
- Field validations will be available to ensure proper data entry.
- The user can tap 'Next' to proceed or 'Previous' to go back.
- If the Status is set to ‘Inactive’, the mentor will not appear in the Mentor Selection dropdown during Club Formation.
- Tapping the 'Cancel' button on any edit page will return the user to the Mentors page without saving.
- Tapping 'Save' after completing all required fields will save the information and return the user to the Mentors page.

3.4. Delete a Mentor



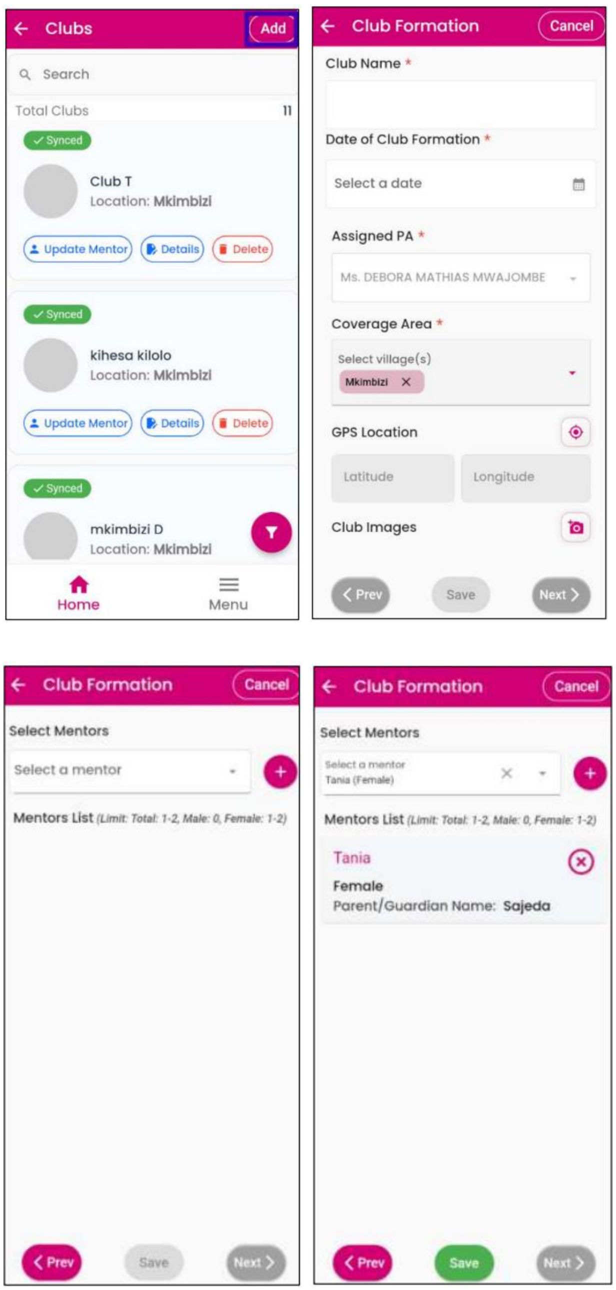


- After logging into the mobile application, the user will navigate to the “Home” screen.
- The user will tap the 'Mentor Profile' option to access the Working Area page.
- On the Working Area page, the user will select all required values from the dropdowns and tap the 'Next' button.
- The Mentors page will appear with the existing list of mentors based on the selected working area.
- To delete a mentor, the user will tap the Delete icon next to the mentor’s name. A mentor cannot be deleted if they are assigned to a group.
- A confirmation message will appear saying, "Are you sure you want to delete?" with 'Yes' and 'No' options.
- Tapping 'Yes' will delete the mentor, while tapping 'No' will cancel the action.
- The Mentors list will be updated automatically after deletion.

Chapter-4

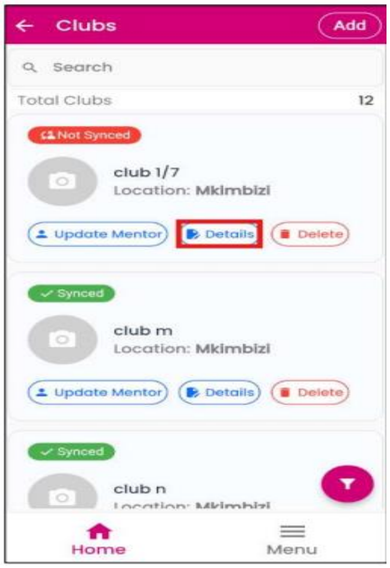
4. Club Formation

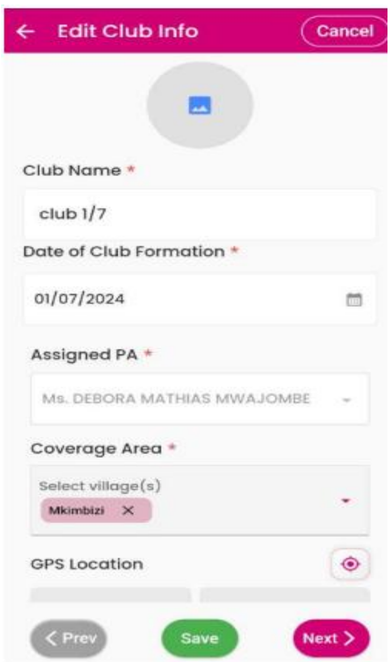
4.1. Adding a Club



- After logging into the mobile application, the user will navigate to the “Home” screen.
- The user will tap the 'Club Formation' option to access the Working Area page.
- On the Working Area page, the user will select all required values from the dropdowns and tap the 'Next' button.
- The Clubs page will appear based on the selected working area.
- The user will tap the 'Add' button to open the Club Formation page.
- All required fields must be filled in before proceeding.
- The user can use the 'Next' and 'Previous' buttons to navigate through the pages.
- To select a mentor, the user will choose from the dropdown options based on the working area and tap the Plus (+) icon.
- After completing the form, the user will tap 'Save' to save the inputs.

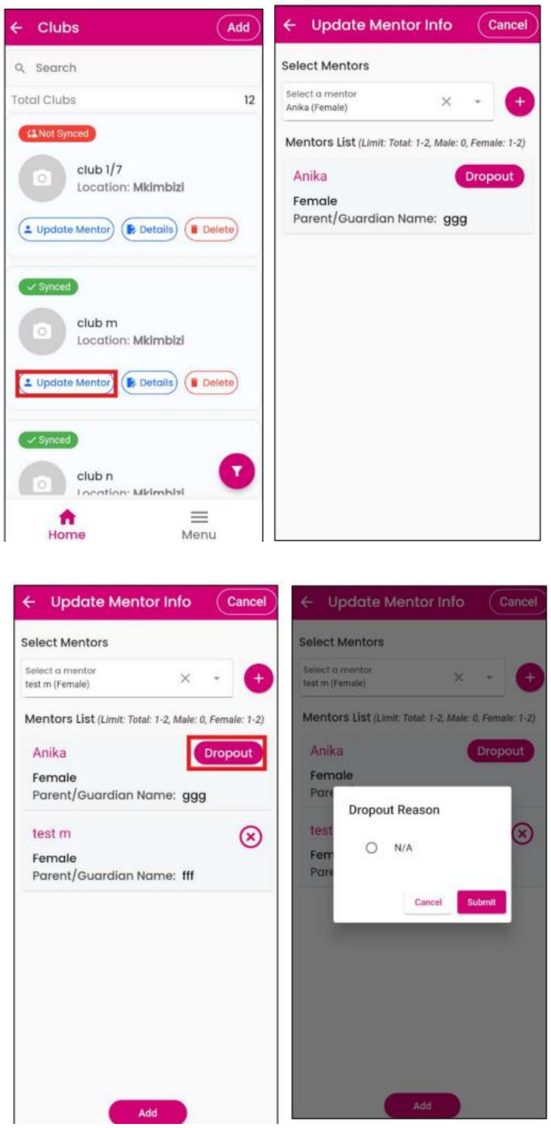
4.2. Edit a Club





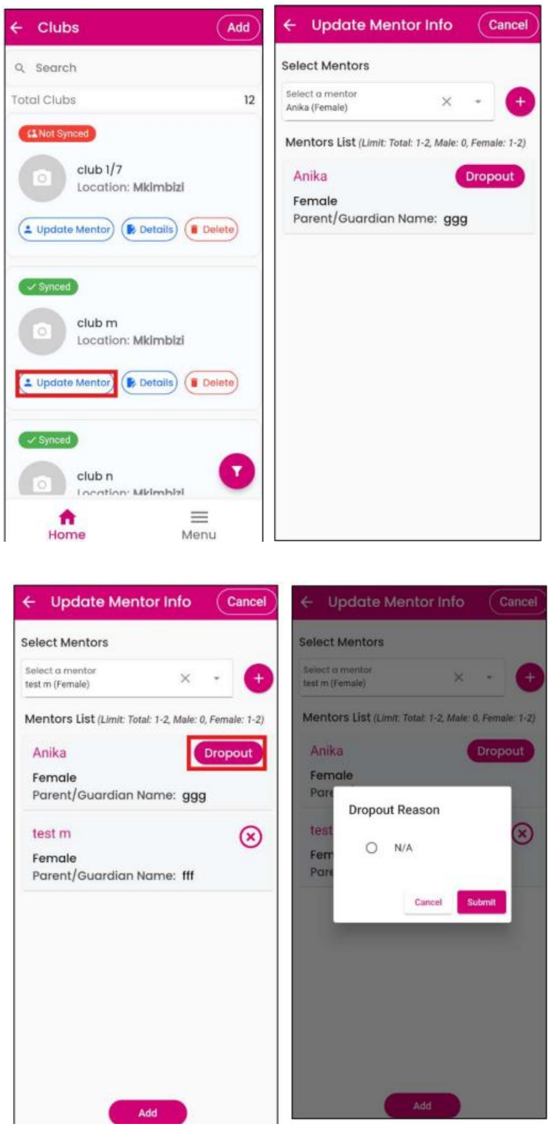
- After logging into the mobile application, the user will navigate to the Home screen.
- The user will tap the 'Club Formation' option to access the Working Area page.
- On the Working Area page, the user will select all required values from the dropdowns and tap the 'Next' button.
- The Clubs page will appear based on the selected working area.
- To edit a club, the user will tap the 'Details' button next to the desired club. The Club Formation page will open with prefilled club details.
- All required fields must be validated and filled correctly.
- The user can use the 'Next' and 'Previous' buttons to navigate through the pages.
- Click on “Save” to save the inputs.

4.3. Updating Club and Member Dropout



- After logging into the mobile application, the user will navigate to the Home screen.
- The user will tap the 'Club Formation' option to access the Working Area page.
- On the Working Area page, the user will select all required values from the dropdowns and tap the 'Next' button.
- On the Clubs page, the user will tap the 'Update Mentor' button to open the Update Mentor Info page with the selected mentors.
- The user will select a mentor from the dropdowns based on the working area and tap the Plus (+) icon to add.
- To drop a mentor, the user will tap the 'Dropout' button next to the mentor's name, select a dropout reason, and tap 'Submit'. Once dropped, the mentor will be marked as inactive.
- Finally, the user will tap 'Add' to save the inputs.

4.4. Deleting a Club

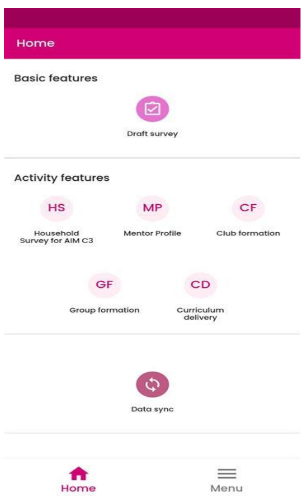


- After logging into the mobile application, the user will navigate to the Home screen.
- The user will tap the 'Club Formation' option to access the Working Area page.
- On the Working Area page, the user will select all required values from the dropdowns and tap the 'Next' button.
- On the Clubs page, the user will tap the Delete icon next to the club they want to remove.
- A confirmation message will appear—tapping 'OK' will delete the club.

Chapter-5

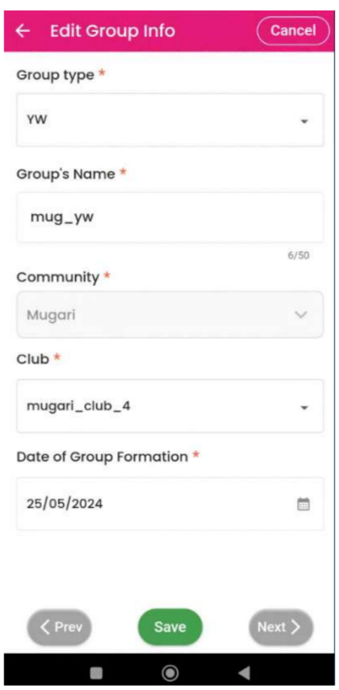
5. Group Formation

5.1. Accessing Group Information Module



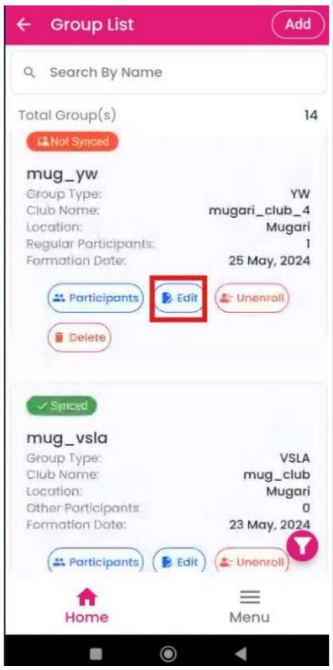
- After logging into the mobile application, the user will navigate to the “Home” screen.
- The user will tap the Group Formation' page.
- Select the Group Information option on the home screen.
- The user will see the existing Group List

5.2. Add a Group



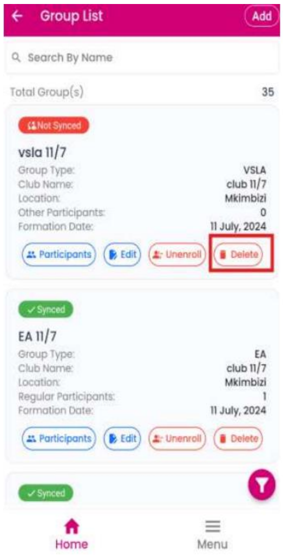
- After logging into the mobile application, the user will navigate to the Groups section.
- The user will tap the 'Add' button to create a new group.
- The user will select the Group Type from the dropdown, which is configured from the web Group Management Module.
- All required fields must be filled in correctly—relevant field validations will be applied.
- The user can tap the 'Next' button to move forward or 'Previous' to go back to the previous page.
- Tapping 'Save' will save the group information.
- If the user taps 'Back', a confirmation message will appear— “Do you want to discard your changes?”
- – Tapping 'Yes' will discard changes and go back.
- – Tapping 'Cancel' will return the user to the current page without discarding.

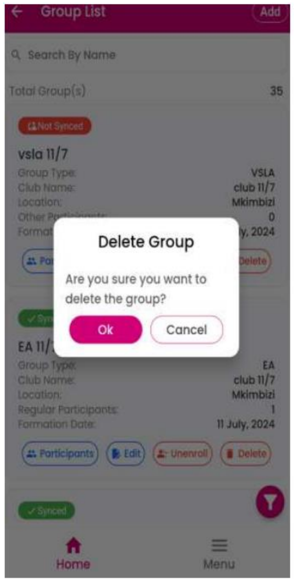
5.3. Edit a Group

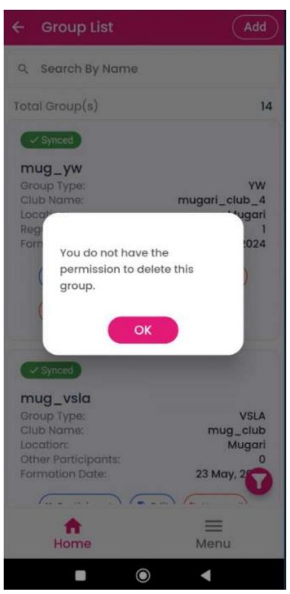


- After logging into the mobile application, the user will navigate to the Groups section.
- The user will tap the 'Edit' button next to the group they want to update.
- Relevant field validations will be applied to ensure correct data entry.
- After making the necessary changes, the user will tap 'Save' to update the group information.

5.4. Deleting a Group

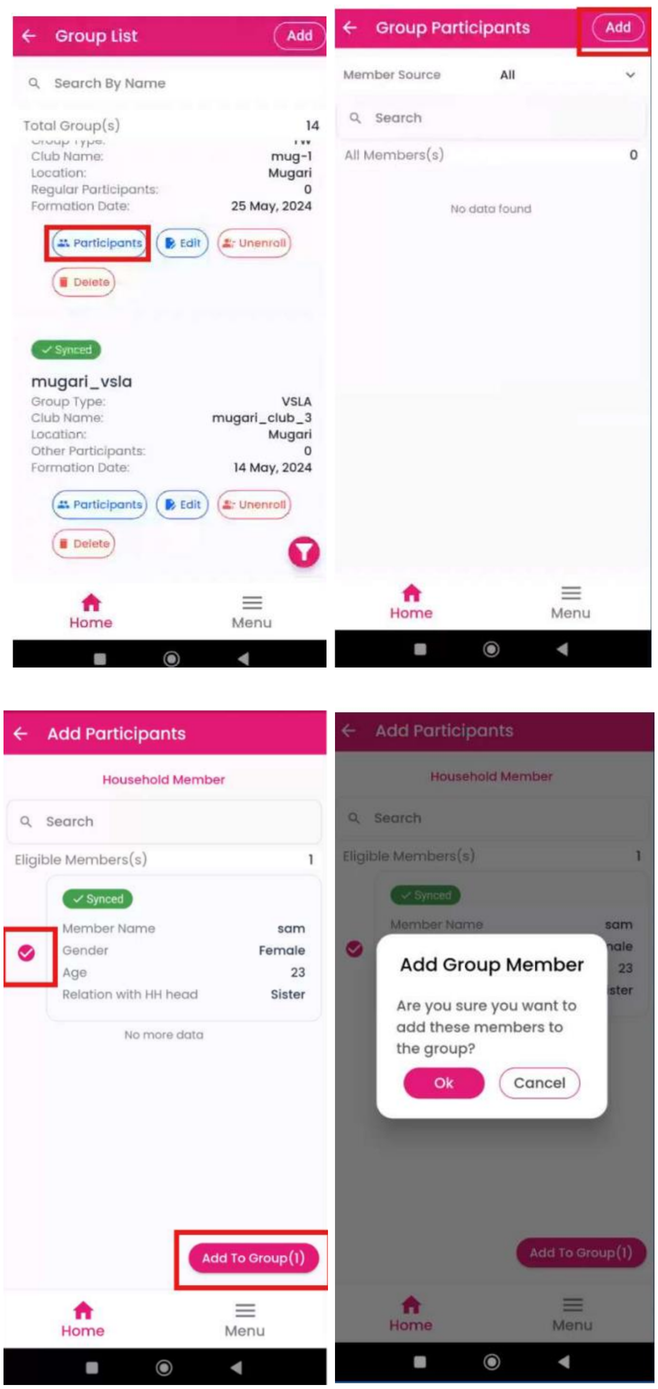






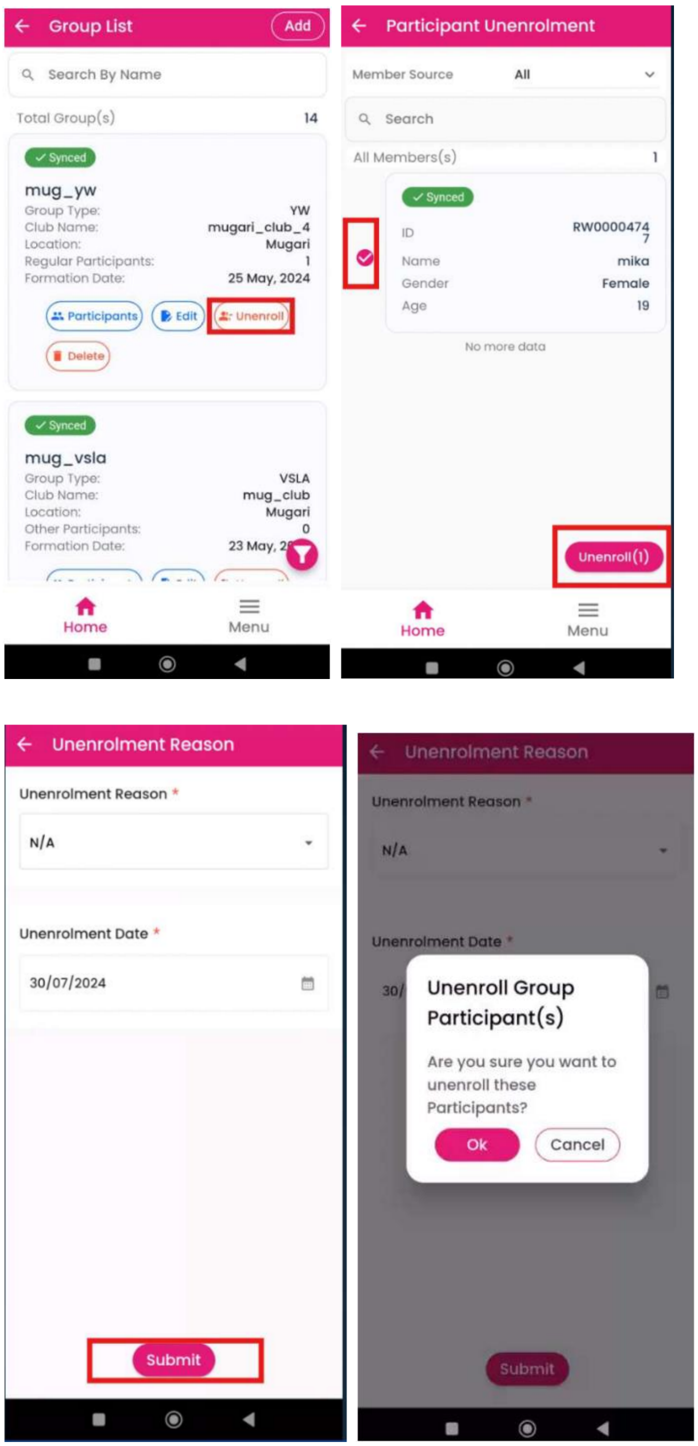
- After logging into the mobile application, the user will navigate to the Groups section.
- The user will tap the 'Delete' button next to the group they want to remove.
- A warning message will appear asking for confirmation.
- Tapping 'YES' will delete the group, while tapping 'NO' will cancel the action.
- **A group cannot be deleted if it was created by another user or if the group has participants linked to it.**

5.5. Add Participant to a group



- After logging into the mobile application, the user will navigate to the Groups section.
- The user will tap the 'Participants' button to add a participant to the group.
- On the Participants page, the user will tap the 'Add' button to view available members.
- A list of available members will be displayed based on the selected Group Type.
- The user will select a member and tap 'Add to Group'.
- A confirmation popup will appear saying, "Are you sure you want to add these members to the group?"
  – Tapping 'OK' will add the member to the group.
  – Tapping 'Cancel' will discard the action without changes.

5.6. Add Participant to a group

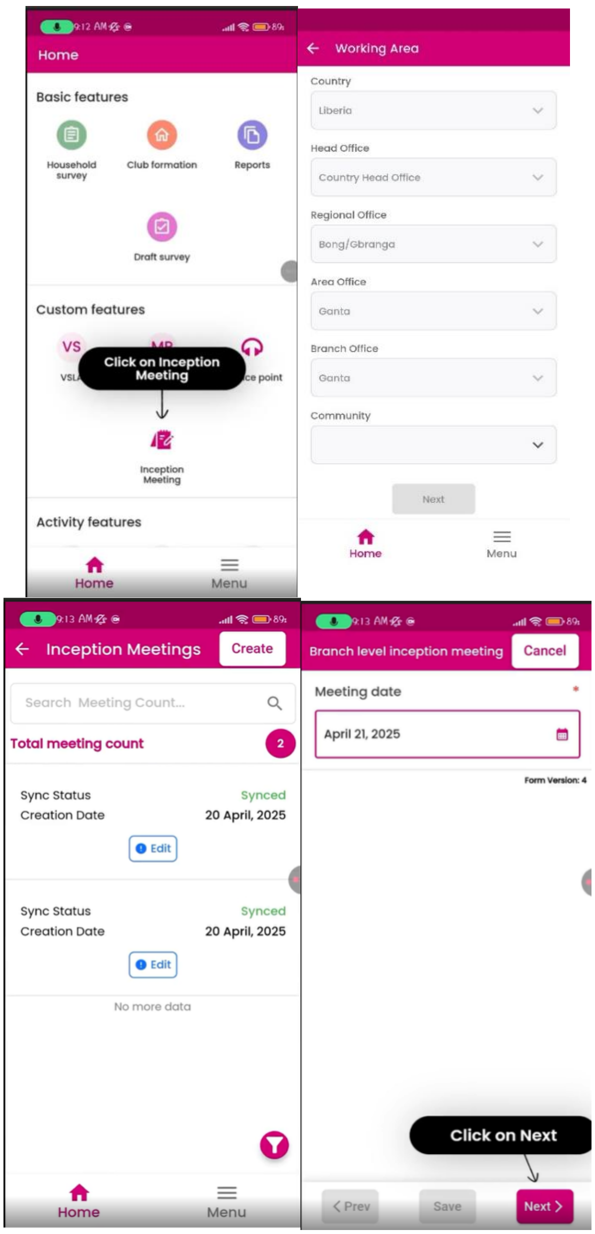


- After logging into the mobile application, the user will navigate to the Groups section.
- The user will tap the 'Unenroll' button to begin the unenrollment process for a participant.
- The user will select the member they want to unenroll and tap the 'Unenroll' button.
- Relevant field validations will be applied to ensure proper input.
- After completing the required fields, the user will tap the 'Submit' button.
- A confirmation popup will appear saying, "Are you sure you want to unenroll these participants?"
  - – Tapping 'OK' will unenroll the member.
  - – Tapping 'Cancel' will cancel the action without making changes.

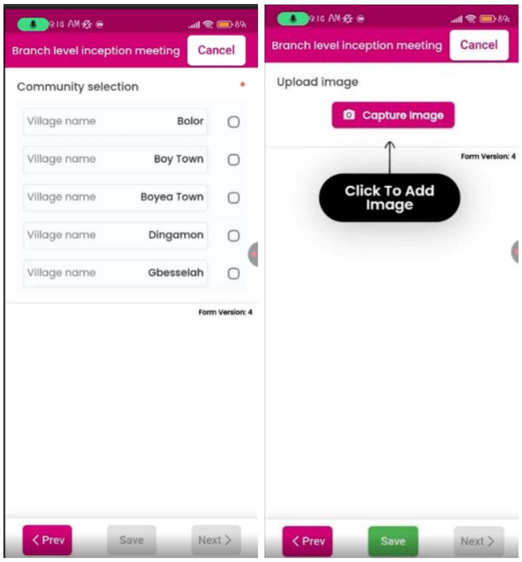
Chapter-6

6. Inception Meeting

6.1. Adding New Inception Meeting



- Once logged into the mobile application, navigate to the "Inception Meeting" section.
- Select the relevant community and tap "Next".
- You will now see the Inception Meeting interface, displaying a list of previously set up meetings.
- Tap the "Create" button to start setting up a new inception meeting.
- You will be taken to the "Branch level inception meeting" page. Select the appropriate date for the meeting here.

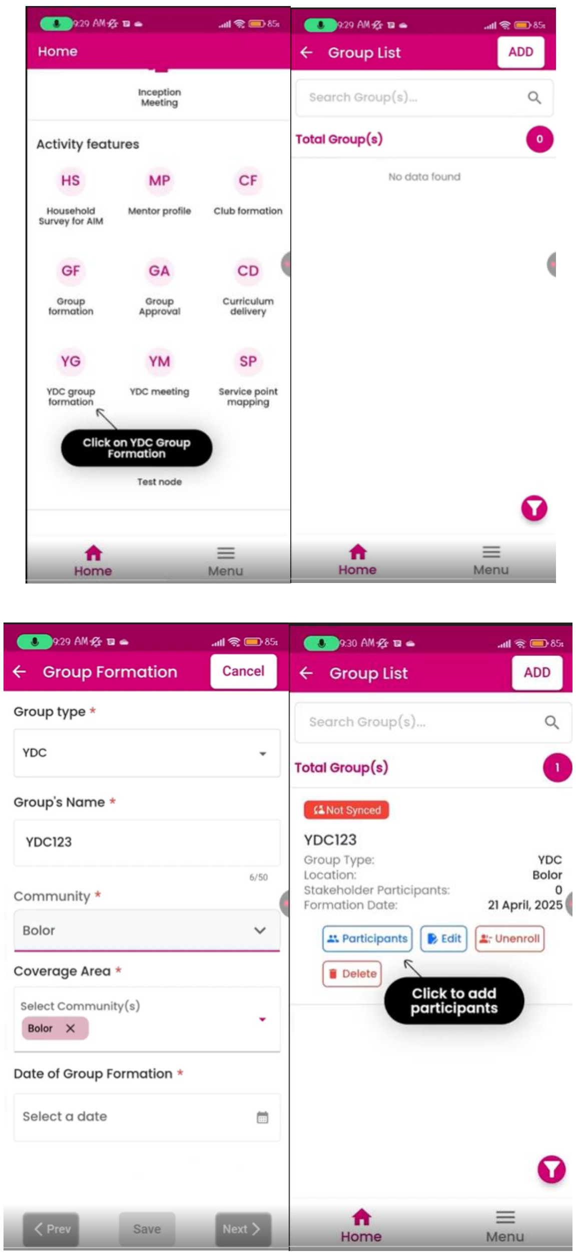


- Select the communities where the inception meeting will take place and tap "Next".
- After tapping "Next", select the targeted groups for this Inception Meeting.
- Next, capture an image related to the inception meeting and tap "Save".
- To synchronize the saved meeting data, return to the "Home" page and tap "Data Sync".

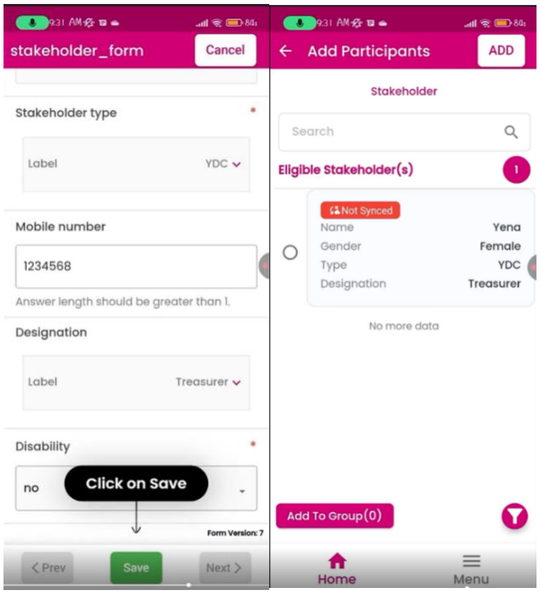
Chapter-7

7. YDC Group Formation

7.1. Adding New YDC Group



- Once you have logged into the mobile application, locate and tap on the “YDC group formation menu”
- On the next screen, you will see a list of any groups that have been previously set up. If you need to narrow down the list, tap the “filter” icon to apply filters.
- To create a new YDC Group, tap the “Add” button.
- You will now be taken to the “Group Formation” page. Here, you will need to select the correct date.
- After entering all the required information on the form, tap the “Save” button.
- Once the group has been created, you will need to add participants. To do this, tap the “Applicants” button to go to the stakeholder form.



- You will need to fill out the stakeholder form with the necessary information. Once complete, tap the 'Save' button.
- After saving the stakeholder's information, select the specific stakeholders you want to include in the YDC group.
- Finally, tap the 'Add To Group' button to add the selected stakeholders to the group.