

Create and Manage CommCare Mobile Workers

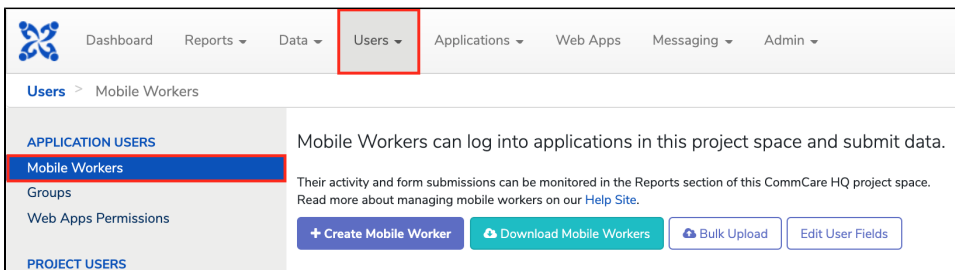
CommCare mobile workers are the accounts people will use to log in on their phones and submit data to your project space. CommCare mobile workers can also log in to CommCareHQ but they will only be able to see the same information on their phone (Your application must be Web Apps-enabled for this to work - see [Web Apps](#)).

To manage mobile workers, click on "Users" in the top navigation bar. You will automatically be taken to the Mobile Workers section.

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Create a CommCare Mobile Worker

1. Navigate to the **Mobile Workers** page on your CommCareHQ project space.
CommCareHQ > Users > Mobile Workers (the page to manage Mobile Workers will show by default)



2. Click on "**Create Mobile Worker**"
3. In the Window that pops up, add a username and password, and click "**Create**". After clicking on "Create" your new mobile worker has been created; it is NOT necessary to add any additional information unless you choose to.
The username and password you set here will be what the CommCare mobile worker uses to log into the phone application.
Note: All usernames must be in Roman alphabet, and once created the username can NOT be changed! (More information on usernames, see choosing a username section below)

Web Apps Messaging Admin

Create New Mobile Worker ✕

Basic Information

Username*

First Name

Last Name

Password*

- a. If you have [Custom User Data](#) or [Locations](#) that are required, you will also have to add that information at this time.

Web Apps Messaging Admin

Create New Mobile Worker ✕

Basic Information

Username*

First Name

Last Name

Location

Password*

Additional Information

prefijo*

Choosing a Username

We recommend you consider carefully what types of usernames you want to use. Here are some different approaches:

- **First name** - this is simple for people to remember but if you have multiple users with the same name you will have to come up with a strategy, such as serials (laxmi, laxmi2, laxmi3) or use of a second initial
- **Phone number** - is a unique number and easy for most people to remember
- **First.last name** - is longer and more complex but more likely to be unique for each user
- **Sector/Coverage area name** - this has the advantage that if there is lots of turnover multiple people can use the same username; however you will not be able to tell which individual person has submitted the data when analyzing later.

Best practices for Mobile Worker Usernames:

- Design the username so that it is meaningful for the Mobile Worker entering data.
- If you are tracking performance of each Mobile Worker individually, we recommend each Mobile Worker should have their own username even if they are sharing device. CommCareHQ will give you reports on the performance/productivity of your Mobile Workers. If you have multiple Mobile Workers sharing a username then the performance reports on CommCareHQ will reflect team performance and not necessarily individual performance.
- You may not have duplicate usernames. According to your format if there is a duplicate username, then you should add some distinction. For example, if there are two Kherunishas in this mobile project, assign one with the username "kherunisha" and the other "kherunisha2."
- You may use periods '.' in the username.
- You may not use '_' in the username.
- You may use numbers and/or letters in your username.
- All characters should be lowercase in the username
- All usernames should be in English (Roman Alphabet).

Best practices for Mobile Worker Passwords:

- Avoid setting the Mobile Worker's passwords the same as the Admin password. Technical staff associated with your project will have access to the Admin password and may login in Admin mode for installation and troubleshooting. The default Admin password is 234. (Note that the Admin password is configurable).
- We recommend keeping passwords simple so Mobile Workers do not forget the password and thus face a barrier in using the application.

Edit a CommCare Mobile Worker

User Information

You can change the First/Last names, E-mail, default language, and role. In general it is only useful to add the First and Last names as you can see these names in reports, in addition to the username.

It is NOT possible to change the username.

It is possible to add additional information about your users with [Custom User Data](#), an advanced feature. Additional user information you may want to consider are listed below:

- Mobile Phone IMEI number and Device Model for inventory of the devices handed out to Mobile Workers
- Mobile Worker demographic information such as education, age, literacy for training purposes.

The default language and role are only relevant for mobile workers that are using Web Apps or working on CommCareHQ.

Phone Number

Make sure to add the international code, without any symbols (do NOT add +). After adding a new number, you will be prompted to verify it. This will send you an SMS to which you must reply.

Basic
Groups
Locations
Password
Actions

Information for test user

Username	test2
Role	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Field Implementer ▾ </div> <p><small>📘 Only applies to mobile workers who will be entering data using Web Apps</small></p>
First Name	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> test ⊞ </div>
Last Name	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> user ⊞ </div>
E-Mail	<div style="border: 1px solid #ccc; padding: 2px; height: 20px;"></div>
Language	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Select a language... ▾ </div> <p><small>📘 Becomes default language seen in Web Apps and reports (if applicable), but does not affect mobile applications. Supported languages for reports are en, fr (partial), and hin (partial).</small></p>

Additional Information

prefijo*	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> T1 ⊞ </div>
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Update Information

Add a Phone Number

Phone Number	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <div style="background-color: #e0e0e0; padding: 0 5px; margin-right: 5px;">+</div> <div style="flex-grow: 1; border: 1px solid #ccc;"></div> </div> <p><small>Please enter number, including country code, in digits only.</small></p>
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Change or Reset the password for a mobile worker

On CommCare HQ, you can change or reset the password for any mobile worker by navigating to the "Password" tab and specifying the new password. However, it is important to note that the user login information (username and password) is stored locally on the phone. So, when you change in CommCareHQ, the username and password aren't communicated downward to the phone until the phone "synchronizes with server".

On CommCare, "Sync with server" is an option on the home page of the phone. So, the CommCare mobile worker must synchronize with the server for the username and/or password change to be reflected on the phone side.

Use Bulk Upload to create multiple users at once

📘 This feature requires a CommCare Software Plan

This feature (Bulk User Management) is only available to CommCare users with a **Standard Plan** or higher. For more details, see the [CommCare Software Plan page](#).

1. Navigate to the **Mobile Workers** page on your CommCareHQ project space, as above.
CommCareHQ > Users > Mobile Workers (the page to manage Mobile Workers will show by default)
2. Click on "**Bulk Upload**"

Users > Mobile Workers

APPLICATION USERS

Mobile Workers Mobile Workers can log into applications in this project space and submit data.

Groups Their activity and form submissions can be monitored in the Reports section of this CommCare HQ project space. Read more about managing mobile workers on our [Help Site](#).

Web Apps Permissions

+ Create Mobile Worker Download Mobile Workers **Bulk Upload** Edit User Fields

3. Follow the three steps indicated to download the user.xlsx file. This contains all of your current user data.
4. Click the "Upload mobile workers" button to upload the completed file.

Users > Mobile Workers > Bulk Upload Mobile Workers

APPLICATION USERS

Mobile Workers

Bulk Upload Upload mobile workers using Excel

Groups

Web Apps Permissions

PROJECT USERS

Web Users

Roles & Permissions

1. Download your current mobile worker Excel file.

Download mobile workers

2. Update the downloaded file. Check the [CommCare Help Site](#) for instructions.

3. Upload your updated file.

Choose File No file chosen

Upload mobile workers

Bulk Upload Tips and Advanced Info

Sample bulk users excel template

username	language	password	user_id	is_active
newuser01	en	123		TRUE

***user_id will be blank if this is a new mobile worker

Tips

- Your first column in excel should say "username", with no spaces. Note that username **is required**.
- Your second column in excel should say "language". Use the language codes in CommCare, (ex. English = en, French = fra)
- Name and phone number are optional (but recommended!) fields.
- For any new users, the password is required. For existing users that are in the download, the password will be listed as a *****. When uploading the file again, the password for these existing users **will not be changed**.
- Remember to add the international code to the phone numbers.
- Add a space between the first and last name of your CommCare user. Do not need to use periods or other punctuation to separate.

Advanced

- Any additional data can be stored by user by adding columns with 'data: xxxx' in the first row of the column. For instance, village, block, etc can be added, and will be stored. For more information, see [Custom User Data](#)
- Users can be pre-assigned to groups during bulk upload. To do this, any column needs to have the syntax 'group (xxxx)' in the first row of the column. (Note that the 'xxxx' is any identifier, and is **not** the group name. To keep things simple, this can be sequential numbering, such as "group 1" then "group 2" and so on.) Any user can be a member of multiple groups of different types by simply adding columns with the correct group syntax. For groups, make sure you define the group on the 'groups' tab of the spreadsheet, and indicate which type of group it is. For more detail see [Mobile Worker Groups](#).
- For groups, make sure you define the group on the 'groups' tab of the spreadsheet, and indicate which type of group it is: There are two types of groups: 1) Reporting groups - these groups users to view by group in the Filters on the Reporting section of HQ. For example, you can group all mobile users within one Village or SubCenter. 2) Case sharing groups - these groups allow cases to be shared by different users. For instance, if two mobile users were sharing the same catchment area, case information could be shared between these two users.

[See sample excel file.](#)

Search for Mobile Workers

You can use the search box to find specific mobile workers. Type in any word to search for that term across all columns, or use the syntax below to search in a specific column.

Names

Insert "first_name:" or "last_name" before your search term, e.g.

```
first_name: amelia
```

```
last_name:
```

Dates

You can search by the dates **date_joined**, **last_login**, e.g.

```
date_joined:[2011-01-01 TO 2012-01-01]
```

```
last_login:[2013-01-01 TO *]
```

```
date_joined:[2011-01-01 TO *] AND last_login:[2013-01-01 TO *]
```

Searching across multiple columns

Searches can be chained using AND and OR, e.g. but AND and OR must be capitalized.

```
first_name:parker AND last_login:[2012-01-01 TO *]
```

Partial Searches

"" can be appended to the end of search terms to perform partial searches, e.g.

```
first_name: chris*
```

The above will return any mobile worker whose first name begins with "chris" - e.g. users named Christopher, Christine, Chrissy would all be returned

Deactivate (Formerly "Archive") and Delete Mobile Workers

You can unclutter your reports in two different ways. You may either **deactivate** a user, removing them from the limelight while keeping their data around in the export; or you can **delete** a user removing all their data permanently.

Deactivate users: This will remove users from the report dashboards, while keeping their data in the export. Deactivate a user by clicking the "deactivate" button on the main Mobile Workers page. Deactivated users will no longer be able to log into a new phone for the first time. (Note that you can deactivate a large number of mobile workers by following the "**Bulk deactivation**" process below)

If a deactivated user submits a form, the following will occur:

- If your app is using [secure submissions](#), deactivated users' new submissions will be rejected and will stay on the phone
- If your app is not using secure submissions, then it behaves as any other submission, and all case transactions are processed
- **Note:** Secure Submissions are enabled for your project by default. For more information, please see [this help page](#)

Delete users: This will remove all of the user's data permanently. Delete a user by clicking on a user's name and navigating to "Permanent Actions". Then press the "Delete Mobile Worker" button and following the directions.

Let's say that while you were testing your app, you created a mobile worker called "test". You might play around with the user and submit a few forms, but none of that data is real so it shouldn't interfere with the real data, and you will never need to use this data again. In this case you may want to **delete** the user and all their data.

Let's say instead that you have a mobile worker who has submitted some data but who has taken a leave of absence. You do not want them showing up in your reports day-to-day, but you want to keep their data around. Then you would **deactivate** them.

If you have deactivated users, you can click on the **Show Deactivated Users** link to display them on the screen. Click on **reactivate** to start displaying this user's data in the reports once again.

Note: Deactivate mobile worker was formerly called Archive mobile worker. When looking for information in the [Commcare User's Forum](#) relevant discussions may sometimes be described as "archive"



Deleting Mobile Users: Are you sure you want to do that?

You may notice that we make it a bit difficult to delete mobile workers. This is because **if you delete a mobile worker you will also be deleting all data that that worker ever submitted**. It is not possible to ever get that information back if you delete a mobile worker. We very strongly recommend deactivating mobile workers if there is any chance you will ever want to see any of the data submitted by that worker.

Bulk Deactivation of Mobile workers: if you need to deactivate a large number of mobile workers, follow those steps. Please note that this feature requires a paid software plan.

1. Go to the User page, click "Bulk upload", click on "download Mobile workers", get to the downloaded excel spreadsheet
2. For the workers you want to deactivate, go to the column "is active" and change the value to false.
3. Save the Excel file. Re-upload the excel file.
4. If you created a subscription just to perform this step, go back to the created subscription and downgrade it back to community

Other Important Information

Admin Users (J2ME ONLY)

You can set your own admin password in the 'Applications' tab. The default password is 234.

Follow these steps to customize the password for admin users:

1. Navigate to 'Structure and Configuration' and in the first box, called 'Application Settings'.
2. Look for 'Admin password.'
3. Click on 'reset' and you will be prompted to enter your desired password. Re-enter that same password. Hit OK.