USHAHIDI PLATFORM V3.9 MANUAL

About Ushahidi

Ushahidi is a non-profit technology company whose mission is to change the way information flows in the world. Founded in Nairobi, Kenya during the 2008 election violence and human rights abuses, Ushahidi means "testimony" in Swahili. The company builds digital tools and run programs to give marginalized people a voice. Since 2008, the Ushahidi Platform has grown to be the world-class open-source tool for human rights activism, crisis response, and transparency.

Global Mission
Over the past seven years, the Ushahidi Platform has been deployed more than 100,000 times in more than 159 countries, in 45 local languages, with 7 million testimonies, reaching nearly 20 million people. The platform has become a replicable solution for people worldwide, from Syrians reporting on human rights abuses at Syriatracker.crowdmap.com to tracking human rights abuses in Nepal at Nepalmonitor.org.

People around the world need a way to share their voice during a critical situation, to ask for and generate support, and to bring transparency to their issues. At the same time, organizations and governments lack understanding of what is happening on the ground; they need a way to make sense of how to respond effectively and quickly. These are just a handful of the thousands of impactful uses of the Ushahidi platform to amplify people’s voices.

Innovation is born here, ecosystems created.
Ushahidi has built six open-source software products: the Ushahidi Platform, SMSsync, Crowdmap, SwiftRiver, CrisisNet, and RollCall. Ushahidi has run numerous large on-the-ground programs that utilize its software and expertise, including the Haiti earthquake response, the Uchaguzi election program, the Resilience Network Initiative, and Making All Voices Count - a grand challenge for development.

In addition, Ushahidi has successfully catalyzed six organizations that work across its collective vision to create technologies that provide access, change the way information flows in the world, and improve decision-making. Together these organizations form the Ushahidi Ecosystem, an association, that works together to focus on how technology can and should be used for doing good in the world to solve global problems like humanitarian response & democracy (Ushahidi), technology-enabled humanitarian volunteering (Standby Task Force), open data as a global resource (Popily), making things to create jobs and economic growth (Gearbox), women in tech, job creation and empowerment (AkiraChix), technology built by and for the developing world (iHub), and access to information (BRCK).

About this Manual

This manual gives you a step by step overview of how to set up an Ushahidi version 3.0 deployment, and how to make full use of the features the platform offers. You can:-

- download the software at no cost and host it on your own servers from https://github.com/ushahidi/platform.
- sign up for a deployment on http://ushahidi.com. There are currently three different plans available for you to choose from, which you can review on our plans page here.
  For groups running social impact projects unable to afford the current pricing model, you can apply for a free responder plan here.

This manual will show you how to install the Ushahidi platform, or sign up for an ushahidi account, customise it to meet the needs of your project, manage people and incoming data, as well as visualise and analyse your data. It is meant to be a comprehensive learning guide for brand new users of the platform, as well as a reference point for those who may have some prior experience using the platform.

If you have any problems and need some guidance or help, reach out to us via:-

- Our chat feature on http://ushahidi.com
- Live Developer chat rooms on IRC/Gitter/Hipchat(posting on any one of these channels will post on all of them simultaneously)
- Ushahidi forums

Bumped into a bug on the platform or have a feature you would like to request? Share your feedback with us via our github issues page.

Looking to contribute to the Ushahidi platform? Visit our contribute page for directions on how to get started.

This guide has been updated based on content created on the initial support documentation by Sophie Shepherd, and new content on previously undocumented features by members of the Ushahidi team.

Feedback is welcome and will be incorporated into the guide.

Overview of Ushahidi Platform v3.0

What does Ushahidi Do?

- Ushahidi is a tool for collecting, managing, and visualizing data.
- Data can be collected from anyone, anytime, anywhere by SMS, email, web, Twitter, and RSS.
- Posts can be managed and triaged with filters and workflows.
- Data can be managed in different modes : on a map, in a Data, or as a visualization.

Who is Ushahidi For?

Anyone can use Ushahidi, but traditionally it has been a tool used by Crisis Responders, Human Rights Reporters, and Citizens & Governments (such as election monitoring or corruption reporters). We also serve environmental mappers, asset monitoring, citizen journalism, international development, and many others.

What's New in Version 3?

The biggest change in v3 is the unification of the administrative interface with Modes of action. There is now a single interface. Volunteers can now work directly on the data in modes, with permissions on what any particular person can see being set by role-based Permissions. While the guide will go into a full description of each part of the interface, this introduction gives a sample of what is to come:

- **Reports are now posts:** The name change from reports to posts is a recognition that data collected might not just be a traditional 'report' of an event.
- **Surveys:** Posts are no longer a fixed form with built in fields. You can customize them by creating many surveys, with different stages and custom fields to collect the data you need.
- **Posts now have tasks:** Each post is now made up of a number of tasks. These can be made required (or not) before the post is published. This lets you build the workflow you need.
- **One interface for all posts:** We no longer have separate views from managing posts and viewing posts.
- **Messages directly as 'posts':** The old 'messages ' views are gone. New SMS or twitter messages now come in directly as 'unknown' posts, meaning they don't yet belong to a survey, that are ready to be structured, completed, and published quickly and easily.
- **Collections**: Aggregate and save a group of posts, share them via a URL link share
- **Saved Searches**: You can create any search you want, save it, it continues to aggregate information, and the check again later for updates. Saved Searches are available from your

deployment's main menu. Sign up for notifications on your saved search to stay up to date as the posts that are most important to you are submitted to the deployment.

- **Visualization**: Every data set can be viewed as a map, list, bar chart or Data. Just select the time frame and variables you want to compare at any time.
- **Customize**: Add a description, create a new survey, configure how data flows through your deployment, and more - all from your deployment's settings.
- **Security and Permissions**: Controlling who has access to system functions and data is a critical aspect of every crowdsourcing platform. Ushahidi v3 is arranged around a role-based security model that conveys permissions to each class of user. These permissions can be customized. The code is also written in a way that allows for clients to more easily extend certain software classes to meet their needs. You can also make your deployment completely password protected, visible only to users with login credentials.
- **History of Posts and Messages**
    - In the process of turning an initial report from the field into a verified, published report, many people may touch the data. Someone may translate it, another may geolocate it, and a third may verify it against other data. Sometimes, additional information needs to get associated with the report, such as an image, document, or other set of messages.
    - To facilitate the aggregation and review of this network of data around the data, we built a history for every Post and Message. Your team can now add its commentary, ancillary documents to each Post and Message.
- **Workflows**
    - The management of reports through its lifecycle requires management of the state of the report, especially when multiple teams are involved in moving reports from unverified, untranslated states to verified, geolocated reports. Workflows support this management.
    - More than 90% of the work in an Ushahidi deployments happens behind the scenes. Unsurprisingly, most of our development efforts went to supporting this (often invisible) process.

Technical Specifications

Better development stack

Ushahidi 3.x is built on a modern PHP stack: dependencies are managed with composer, we're using Kohana 3 but phasing that out, and we've isolated the core logic of the platform standalone Entity and Usecase classes.

The user interface of Ushahidi 3.x is now a separate app (the client) built purely in JS, HTML + CSS using AngularJS and a collection of other libraries. Again this uses a modern stack, with a build pipeline using gulp and browserify.

What's new (and improved)?

- Dependencies are properly managed and easier to update or replace needed.
- We're using our own API to build the app, it gets first class support.
- You can work on just the UI without delving into the API code
- Modern libraries mean they're still being supported, we don't have the burden of supporting legacy libraries ourselves.

Code is easier to customize

- It's more structured making it easier to find what you want
- It doesn't repeat itself so a change can be made in one place, not need to be copied everywhere else
- UI is isolated to the client, allowing work on just the UI without having to delve into the API code

The stack

- Back-end: Linux, PHP, Apache/Nginx, MySQL or PostgreSQL
- Front-end: AngularJS, Javascript, Html, CSS. Built with NodeJS and Browserify. Using Leaflet for mapping, and a collection of other frontend libraries

1. Installing Ushahidi

There are two options for installing Ushahidi on various operating systems

- Install the latest release, which is a pre-built compressed package
- Install for development

We recommend that most users install the latest release.

Please note that we currently DO NOT RECOMMEND INSTALLATION ON WINDOWS OR MAC!

Other topics covered in this chapter include:-

- Upgrading your Ushahidi deployment code
- Connecting to the Ushahidi mobile app

1.1 Installing the latest release

The release bundles are pre-built compressed files for you, which don't require further building or downloading. These files bundles are available from the platform-release repository in Github. The files are named ushahidi-platorm-release-vX.Y.Z.tar.gz .

The installation procedure will vary depending on your setup, but the requirements in all cases are

- A web server supporting PHP
    - This can be apache2, nginx or a hosting provider
- PHP invokable from command line
- The following PHP modules installed:
    - curl, json, mcrypt, mysqli, pdo, pdo_mysql, imap and gd
- A MySQL database server

These instructions assume that you know how to create a database in your MySQL server and obtain user credentials with access to such database.

The instructions and example commands are written specifically for Debian Linux or a derivative of it (Ubuntu, Mint, etc). You may have to adjust some things if you are installing on a different flavour of Linux, or a different OS.

1.1.1 Apache 2 with mod_php

1. Ensure `mod_rewrite` is installed and enabled in your apache server.
2. Copy into your document root the contents of the `html/`folder after unzipping the ushahidi-platform-release-vX.Y.Z.tar.gz bundle file.

3. The `dist/` folder contains the suggested configurations for the virtual host (`apache-vhost.conf`). The configs are quite default, you just need to ensure that there is an `AllowOverride` directive set to `All` for your document root (where the app has been unzipped).
4. Create a `platform/.env` file with your database credentials, such as:
   ```
   DB_HOST=<address of your MySQL server>

   DB_NAME=<name of the database in your server>

   DB_USER=<user to connect to the database>

   DB_PASS=<password to connect to the database>

   DB_TYPE=MySQLi
   ```
5. Run the database migrations, execute this command from the `platform` folder:
   ```
   ./bin/phinx migrate -c application/phinx.php
   ```
6. Ensure that the folders `logs`, `cache` and `media/uploads` under `platform/application` are all owned by the user that the web server is running as.
   - i.e. in Debian derived Linux distributions, this user is `www-data`, belonging to group `www-data`, so you would run:
     ```
     chown -R www-data:www-data platform/application/{logs,cache,media/uploads}
     ```
7. Set up the cron jobs for tasks like receiving reports and sending e-mail messages.
   - You'll need to know again which user your web server is running as. We'll assume the Debian standard `www-data` here.
   - Run the command `crontab -u www-data -e` and ensure the following lines are present in the crontab:
     ```
     MAILTO=<your email address for system alerts

     */5 * * * * cd <your document root>/platform && ./bin/ushahidi dataprovider outgoing >> /dev/null

     */5 * * * * cd <your document root>/platform && ./bin/ushahidi dataprovider incoming >> /dev/null

     */5 * * * * cd <your document root>/platform && ./bin/ushahidi savedsearch >> /dev/null
     ```

`*/5 * * * * cd <your document root>/platform && ./bin/ushahidi notification queue >> /dev/null`

`*/5 * * * * cd <your document root>/platform && ./bin/ushahidi webhook send >> /dev/null`

8. Restart your apache web server and access your virtual host. You should see your website and be able to login with the credentials user name `admin` and password `admin`
    - **Make sure to change the credentials. Specially if the website is exposed to be accessed by anyone other than you.**

1.1.2 nginx with PHP

The procedure is pretty similar to the one detailed for apache above, with the following exceptions.

- Step 1: `mod_rewrite` is specific for Apache, in nginx the module is named `ngx_http_rewrite_module`. It's usually included and enabled.
- Step 2: instead of configuring Apache, you would need to configure `nginx-site.conf` in the `dist` folder. You would usually drop this file in a place where it's included from the main configuration file. It assumes php-fpm is listening in port 9000 of localhost.
- The default php-fpm configuration should work. Most importantly, you need to ensure the `listen` directive matches the `fastcgi_pass`directive in the nginx host configuration file.
- Once you are done, restart both your nginx and php-fpm services.

1.1.3 Shared hosting (Cpanel, Dreamhost, Bluehost, etc)

In general, the instructions for apache can be taken as a guideline. Each shared hosting provider comes with their own set of particularities, so we can only provide general directions here. In all cases, you'll need to ensure that:

- Decompress the release file and place the contents of the `html` folder in the webroot of your shared hosting domain or subdomain.
- Create a database for your website and write the access details in the `.env` file (as per step 4 of Apache 2 instructions)
- You have command line access (SSH) in order to run the `phinx` database migration utility in step 5 of Apache 2 instructions.
- A URL rewriting mechanism has to be in place so that
    - Requests to `/platform/api/v3/*` are to be forwarded to the `index.php` script inside`/platform/httpdocs`

- When invoking that script, the `api/v3/*` part of the url should be passed to the script into the a `$_SERVER` or environment variable.
- If your host uses Apache and supports `.htaccess` files, most of this should be taken care of for you.

1.2 Installing for development

1.2.1 Installing the API

1.2.1.1 Getting the API code

First, you will need a copy of the source code, which lives in our Github repository:

```
git clone https://github.com/ushahidi/platform.git
```

Note: if you're getting set up for development, you might want to fork the repository first.

Once you have the code, the next step is to prepare a web server.

1.2.1.2 Prerequisites

- Vagrant*
- VirtualBox*
- Composer
- PHP >= 5.6

**Windows users_may be required to _Enable VT-X (Intel Virtualization Technology) in the computer's bios settings, disable Hyper-V on program and features page in the _control* panel, and install the VirtualBox Extension Pack (installation instructions *here*)

1.2.1.3 Installing

First up we need to install the PHP dependencies

```
cd platform
```

```
composer install
```

If you get an error about "The requested PHP extension ... is missing from your system" you might need to run_composer install --ignore-platform-reqs_instead. You generally won't need all the PHP extensions on your host machine as they're installed in the vagrant box instead.

Then you can bring up the vagrant server and provision it:

```
vagrant up && vagrant provision
```

Our vagrant box is built on Laravel's Homestead, a pre-packaged Vagrant box that provides you with a pre-built development environment. Homestead includes the Nginx web server, PHP 7.1, MySQL, Postgres, Redis, Memcached, Node, and all of the other goodies you might need.

If you see errors about "Vagrant was unable to mount VirtualBox shared folders...", try upgrading VirtualBox or edit Homestead.yaml and change the folders to NFS as shown below, then re-run "vagrant" up.

```
  -
      map: "./"
      to: /vagrant
      type: "nfs"
  -
      map: "./"
      to: /home/vagrant/Code/platform-api
      type: "nfs"
```

At this point you should have a running web server but your deployment isn't set up yet. We still need to configure the database and run migrations.

```
cp .env.example .env
composer migrate
```

Go to 192.168.33.110 to check the API is up and running. You should see some JSON with an API version, endpoints and user info.

1.2.2 Installing the client

1.2.2.1 Getting the client code

First, you will need a copy of the source code, which lives in our Github repository:

```
git clone https://github.com/ushahidi/platform-client.git
```

The latest install instructions for the client are always in the README. If you have any trouble check those instructions first.

1.2.2.2 Client dependencies

First you'll need nodejs or io.js installed, npm takes care of the rest of our dependencies.

- nodejs >= v4.0

1.2.2.3 Install, build and run a local dev server

1. Clone the repo
   `git clone https://github.com/ushahidi/platform-client.git`

   Note: if you're getting set up for development, you might want to fork the repository first.

2. Navigate to project root
   `cd platform-client`

3. Install Build Requirements
   `npm install -g gulp`

4. Install Packages
   `npm install`

5. Set up build options. Create a `.env` file, you'll need to point `BACKEND_URL` at an instance of the platform api (If you followed the vagrant instructions above that'll be: http://192.168.33.110)
   `BACKEND_URL=http://192.168.33.110`

6. Run gulp
   `gulp`

7. You should now have a local development server running on http://localhost:3000/

1.2.3 Logging in the first time

The default install creates a user **admin** with password **admin**. Once logged in this user can create further user accounts or give others admin permissions too.

1.3 Upgrading Ushahidi

1.3.1 Updating your deployment to the latest version

1. Make a backup copy of the current folder where you have installed the Ushahidi Platform.
2. Make a backup copy of your database.
    a. The exact procedure to do this depends on your environment.
3. Download the latest .tar.gz file from our github releases page. Please note that pre-releases are not considered stable and you may find issues with them.
4. Uncompress the downloaded file on the same location where the Ushahidi Platform is currently installed.
5. If you had made any changes to .htaccess files, application config files or similar after installation, restore those from your backup copy.
6. Re-run some of the installation steps (refer to the installation guide for more detailed instructions). In particular, re-run these two steps
    a. Running database migrations
    b. Ensuring that log, cache and media/uploads under platform/application are owned by the proper user

1.3.2 Updating the client (for developers)

From your local repository fetch the latest code and run `npm install` to update your modules:

git pull

npm install

gulp build

The updated version should load when you reload your browser.

1.3.3 Updating the API

From your local repository fetch the latest code and run `bin/update` or `bin/update --production` if you are running on a production environment:

`git pull`

`bin/update`

OR

`bin/update --production`

1.4 Connecting to Ushahidi Mobile App

1.4.1 Configure your deployment to support the mobile app

First, it is necessary to edit the file config.json

```
{
        client_id: "ushahidiui",
        client_secret: "35e7f0bca957836d05ca0492211b0ac707671261",
        backend_url: "",
        google_analytics_id: "",
        intercom_app_id: "",
        mapbox_api_key: "",
        raven_url: ""
}
```

The following are the required settings to allow for mobile app support:

- **client_id:** this is the oauth client id that allows the mobile app to identify itself to your deployment's API instance. If you have not explicitly changed it then the default value is 'ushahidiui'
- **client_secret:** this is the oauth client secret, the second property that the mobile client uses to identify itself to the API instance. If you have not explicitly changed it then the default value is '35e7f0bca957836d05ca0492211b0ac707671261'
- **backend_url:** this should be set to the uri of the location of your API instance. For example, if your client is hosted at *'name.domain.com'* and your API is hosted at *'name.api.domain.com'*, then the value for this field should be *'name.api.domain.com'*

Optional properties:

- **google_analytics_id:** if you have a Google Analytics account and you wish for the Mobile App to log information to it then you should specify your google analytics id here.
- **intercom_app_id:** if you have an Intercom account and you wish to provide intercom support for your users then you can specify your Intercom app id here.
- **mapbox_api_key:** if you wish to use your own map box key, it can be set here
- **raven_url:** if you are using Sentry and wish to have the mobile app send any issues to your Sentry account then you can set the appropriate raven url here.

1.4.2 CORS headers

It's necessary to configure your web server to serve the config.json file along with a series of HTTP headers. Here are the headers:

Access-Control-Allow-Origin: *

Access-Control-Allow-Methods: GET, POST, OPTIONS

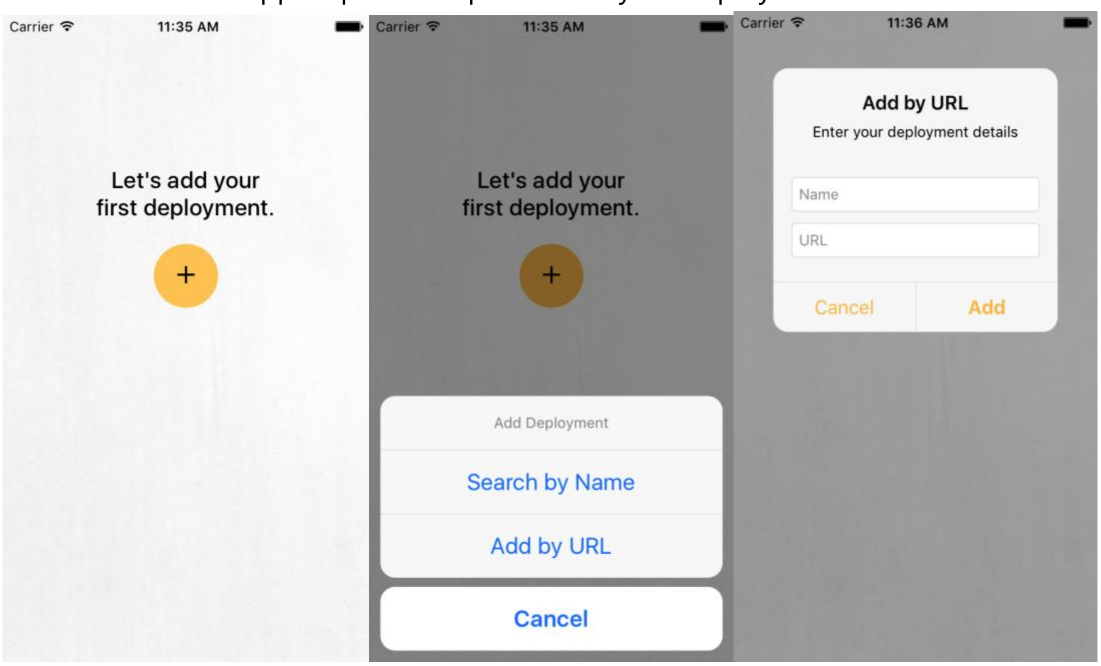
Access-Control-Allow-Headers:DNT,X-CustomHeader,Keep-Alive,User-Agent,X-Requested-With,If-Modified-Since,Cache-Control,Content-Type,Content-Range,Range

Access-Control-Expose-Headers:DNT,X-CustomHeader,Keep-Alive,User-Agent,X-Requested-With,If-Modified-Since,Cache-Control,Content-Type,Content-Range,Range

The exact way to accomplish this depends on the specific kind of web server that you are using.

1.4.3 Test your deployment to with the mobile app

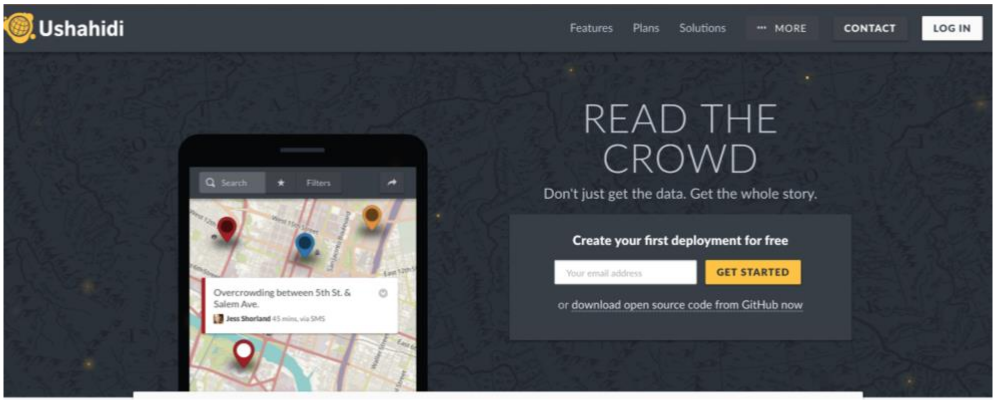
- Download the Ushahidi Mobile app for Android or iOS
- Follow the App steps to setup access to your deployment



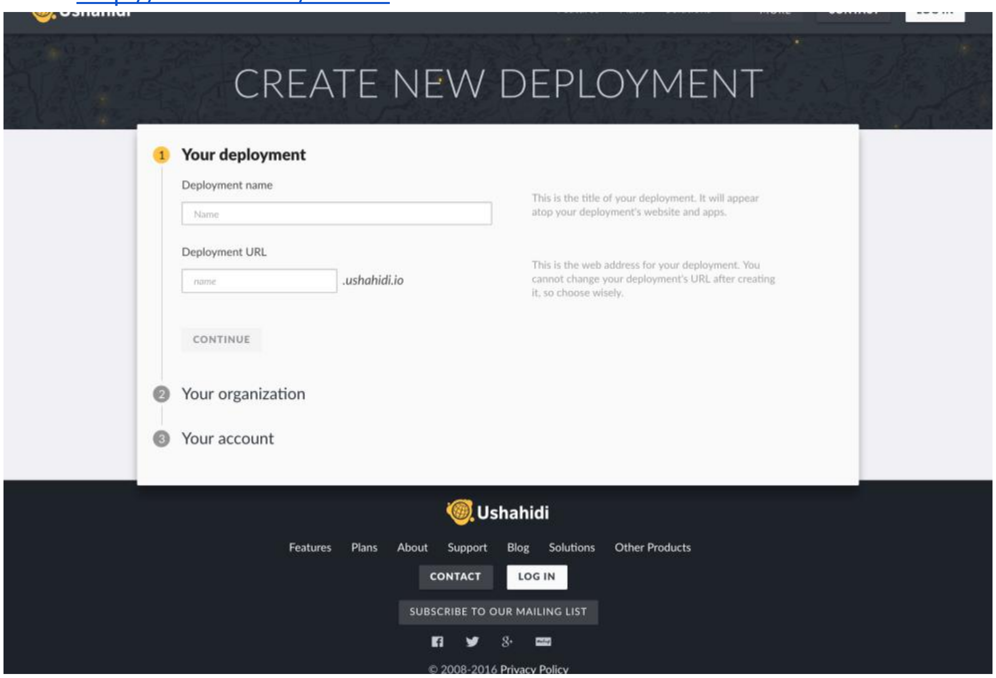
2. Setting up a deployment

You can create a new deployment in two ways:-

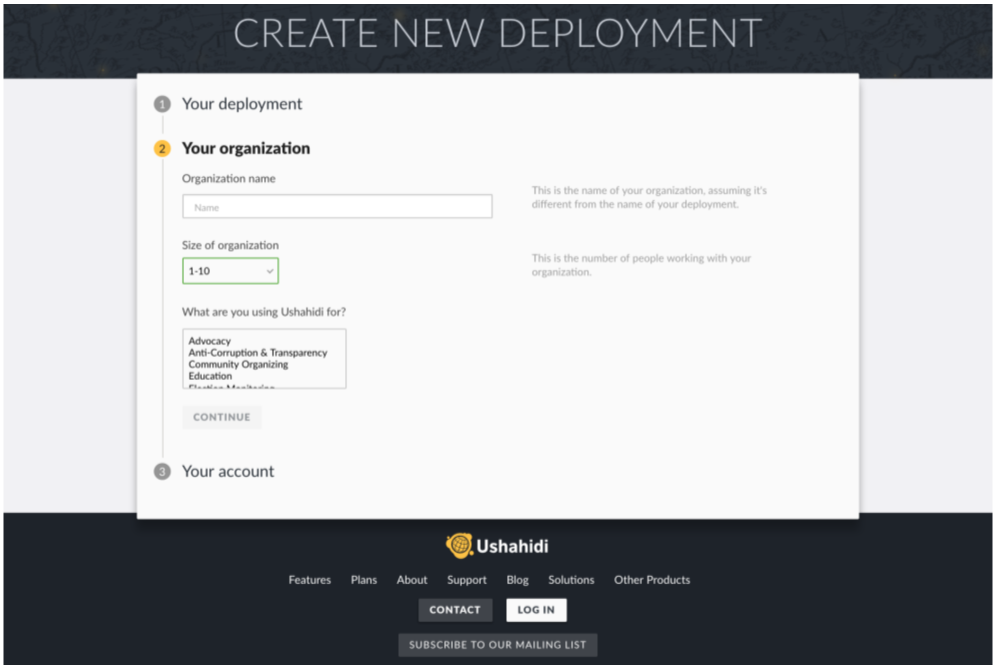
- From the homepage on ushahidi.com



- Or at http://ushahidi.io/create

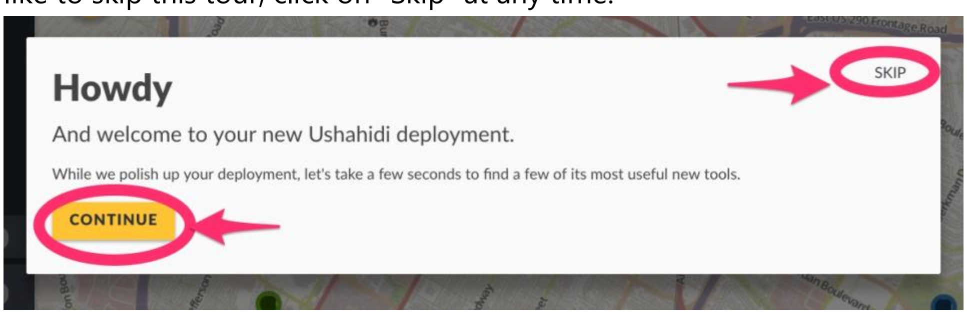


- **Fill out your deployment details**:-
  - **Deployment Name:** You can give your deployment any name
  - **Deployment URL:** Each deployment will have a unique web address. No two deployments can have the same web address. Once created, this CANNOT be changed, so be sure to countercheck the web address set is one you're okay having permanently.
  - Once you're done, click on ***Continue***.
- **Fill out your organization's details**

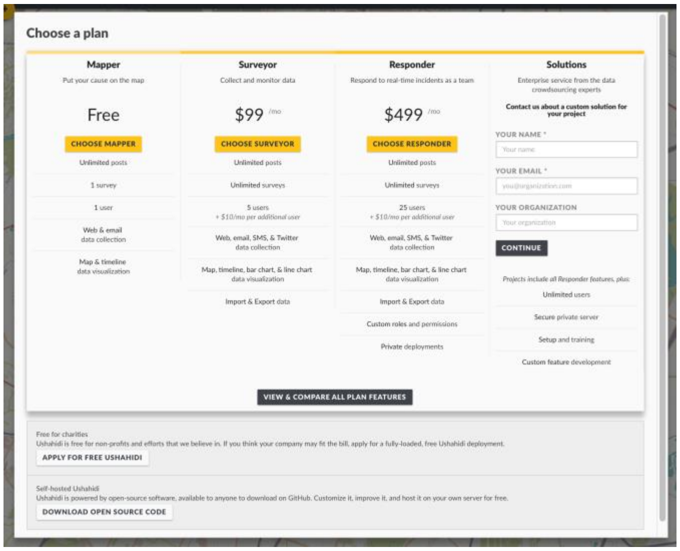


- **Organization name:** This is the name of your organization, assuming it's different from the name of your deployment
- ***Size of the organization:*** How many people are working with you in your organization?
- ***What are you using Ushahidi for:*** Select the appropriate category that matches what you will be using your deployment for
- Once you're done, click on ***Continue***.

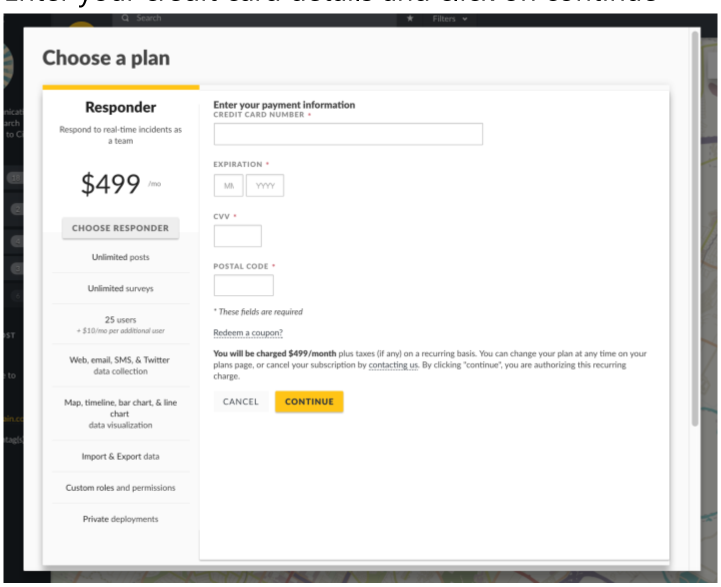
- **Fill out your account details**
  - **Name:** This will appear alongside your activity on the deployment
  - **Email address:** You'll use this email address to log into your deployment and receive notifications
  - Set a secure password that will be used to access this deployment.
  - Agree to our [**Terms and Conditions**]
- Once you're done, click on "**Create Deployment**"
- You will be taken on a brief tour of the user interface and main features of Ushahidi. If you'd like to skip this tour, click on "Skip" at any time.



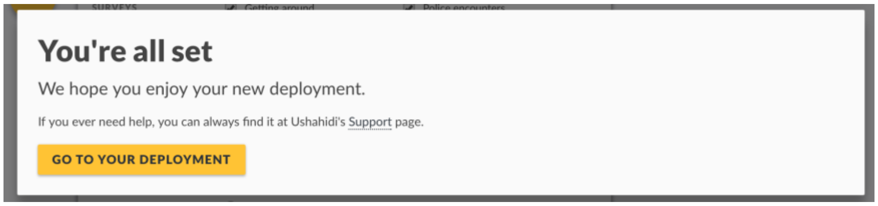
- After the tour, you will be prompted to choose a plan from a list. Select one of the options provided for you.



  You can dive deeper into the [full list of plan features here]() to help you choose a plan that will meet your needs. If you work for a grassroots organization that can't afford a paid plan, [apply for a free Responder plan here]().
- If you select the free Mapper plan, your deployment will build within a couple of minutes, and you'll see your deployment name at the top.
- If you select a paid plan, e.g Surveyor or Responder, you'll need to do the following:-
  - Enter your credit card details and click on continue



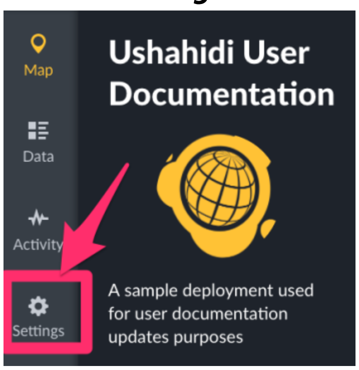
  - After validation and successful payment, your deployment will be set up and available for you to use in a couple of minutes.



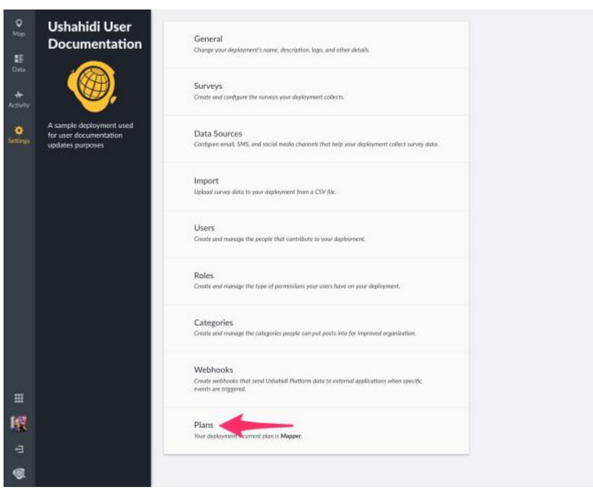
2.1 Upgrading/Downgrading your deployment plan

If you're subscribed to one of our plans on ushahidi and would like to upgrade to another available plan:-

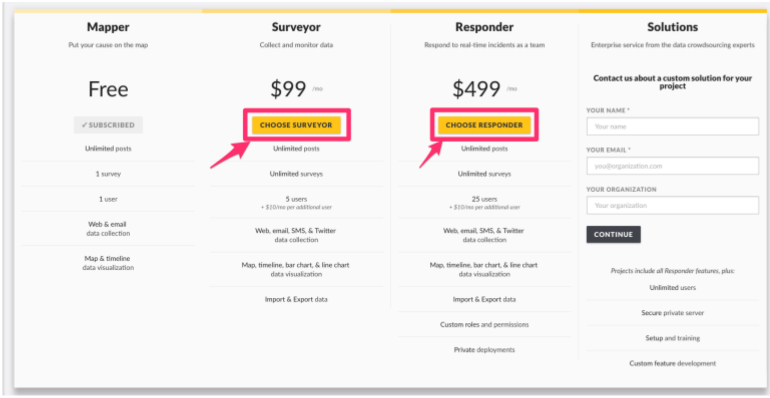
- Log into your deployment
- Click on ***Settings***



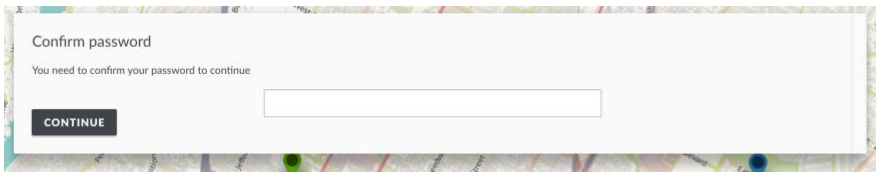
- Click on ***Plan.***



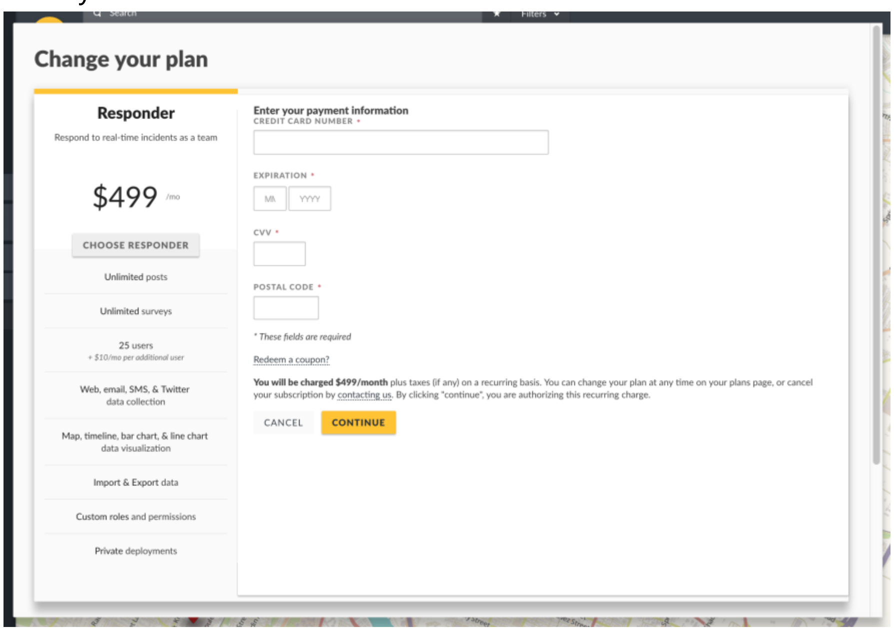
- On the list of all available plans, click on the one you would like to upgrade to e.g ***Choose Surveyor***, or ***Choose Responder***



- On selection of the plan you'd like to upgrade to, you'll have to confirm your password before proceeding and click on continue.



- Enter your credit card details and click on continue



- After validation and successful payment, your deployment will be upgraded to your new plan in a couple of minutes!

NB:You can downgrade your deployment at any time by following the same process described above.

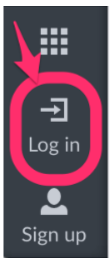
3. Configuring your deployment

One of the first things you should do as the admin of your new deployment, is customize certain settings based on the project you're working on. This section describes how to change your general and map settings, as well as how to configure data sources, manage surveys and categories.

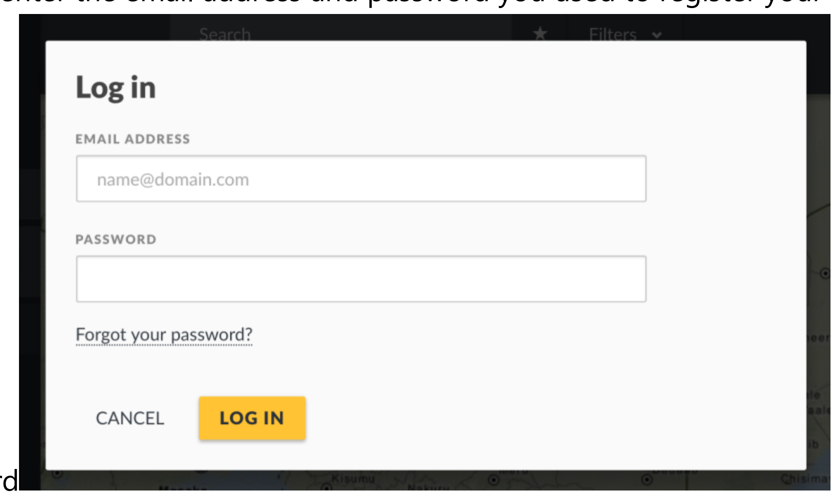
3.1 Accessing your deployment

3.1.1 Log in

If your deployment website is www.yourdomain.com, you should be able to login via http://yourdomain.com/login, or by clicking on the ***Log in*** link on the bottom left hand corner of your deployment as illustrated below.



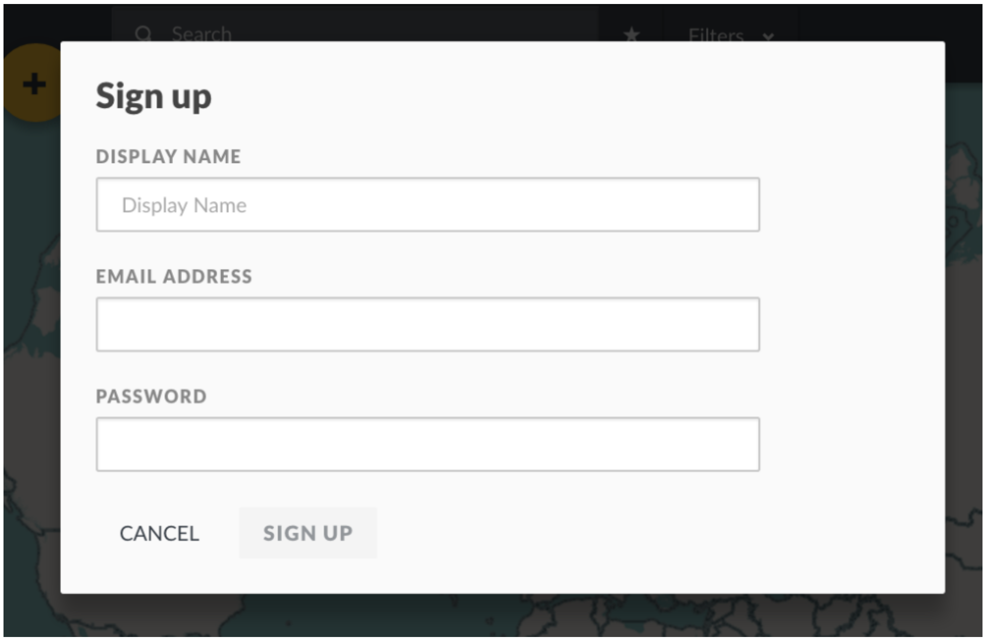
- For Open Source deployments, the default install will create a user admin, with password admin. Be sure to edit this user's password once you're logged in.
- For ushahidi.io deployments, enter the email address and password you used to register your deployment, and the password



NB: You can use EITHER an email address OR username with a corresponding password to log into your deployment.

3.1.2 Create an account

If you don't have an account already, you can create one by clicking on ***Sign Up*** and filling in the required details.

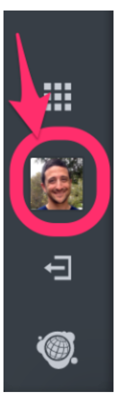


You'll will be able to log in and perform basic actions on the platform, but won't have much privilege within the platform until an administrator upgrades your access level.

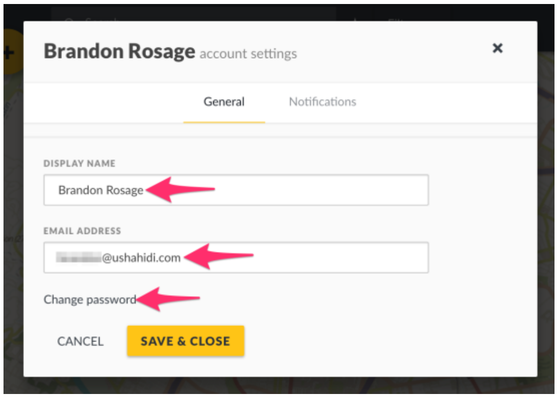
3.1.2.1 Your Account details

Once you're logged in, you can access and change your account details at any time. To do so

- Click on your account favicon at the bottom left hand corner of your deployment as illustrated below.



- A pop up will appear on your screen. Make changes to your profile as desired, then click on ***Save & Close***

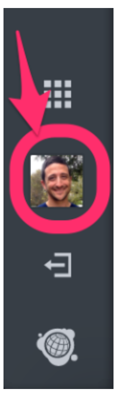


3.1.2.2 Notifications

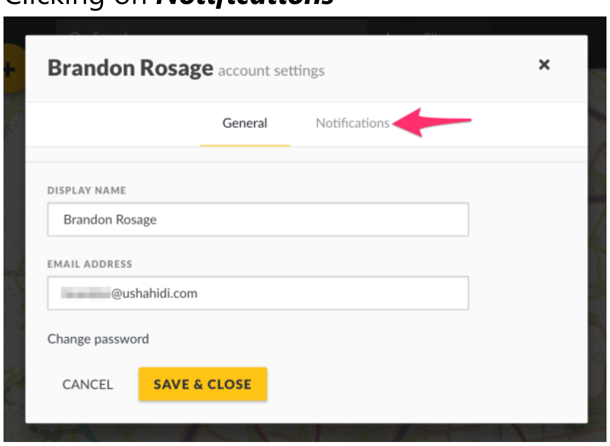
As a registered and logged in user, you can set up notifications on Saved Searches(Section 7.1 of this manual) and Collections(Section 7.2 of this manual). This means that any time a post is added to a saved search/collection, you will receive an email or phone notification.

You can manage(turn these notification on or off) by

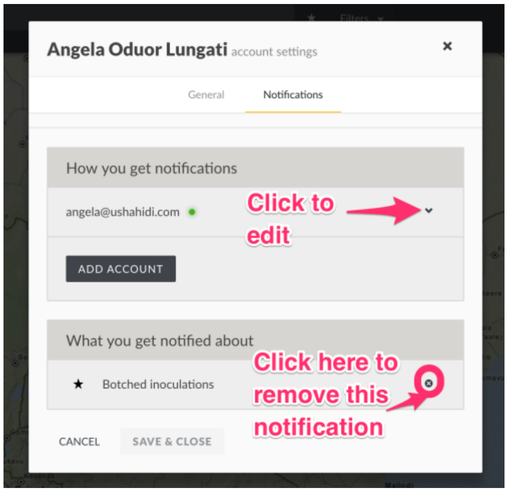
- Clicking on your account favicon at the bottom left hand corner of your deployment as illustrated below.

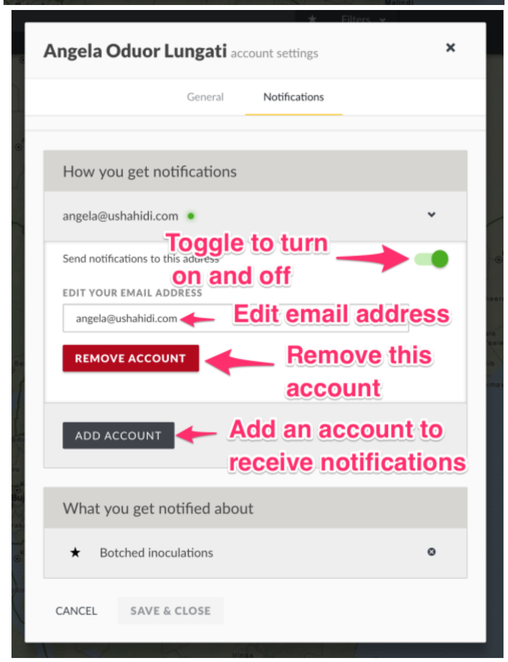


- Clicking on ***Notifications***

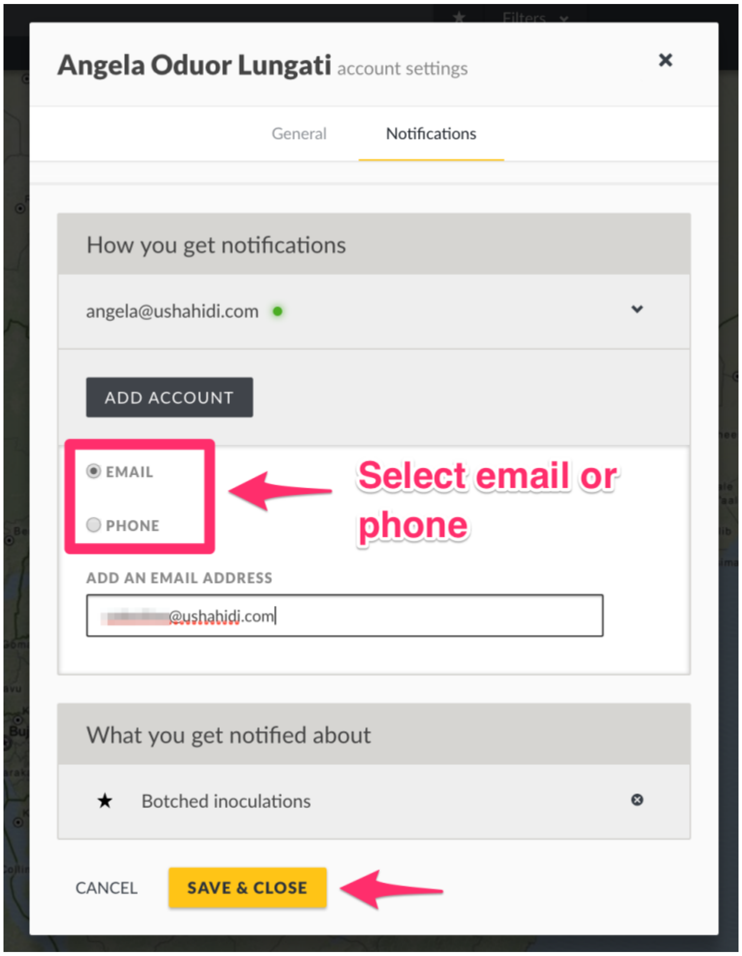


- A list of all notifications you've signed up for will appear, with the option of turning them on and off. You'll also be able to determine the email address or phone number through which you would like to receive notifications. You must have SMS configured to enable.





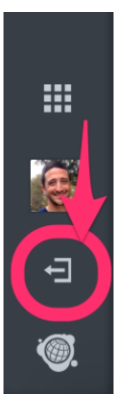
- You can also add additional contacts to receive notifications via email/phone.



3.1.3 Logging out

To log out of your deployment,

- Click on the log out icon at the bottom left hand corner of your deployment as illustrated below.



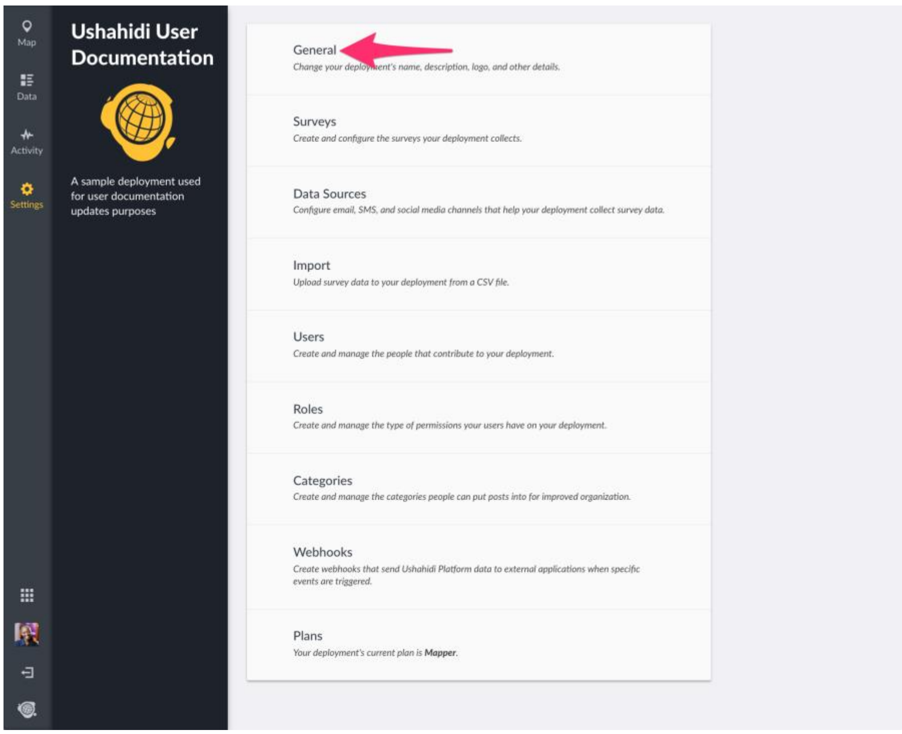
- You should be successfully logged out of your deployment, and redirected to the homepage.

3.2 General Settings

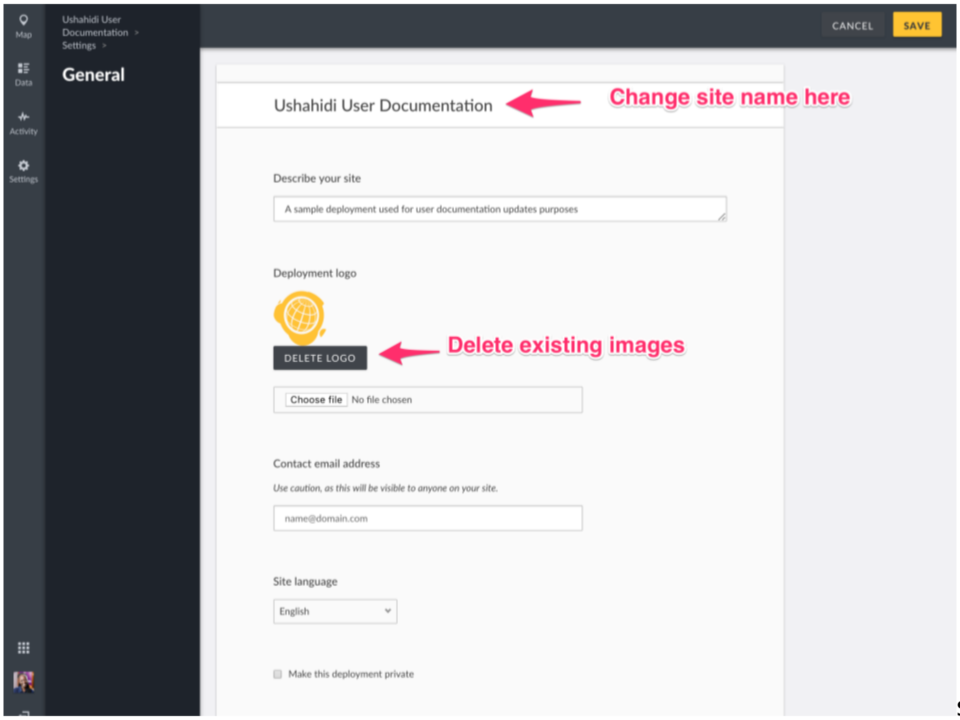
This page allows you to set the basic appearance of your deployment. To access General Settings:-

- On the left hand menu bar, click on ***Settings***

- Then, click on ***General Settings***.

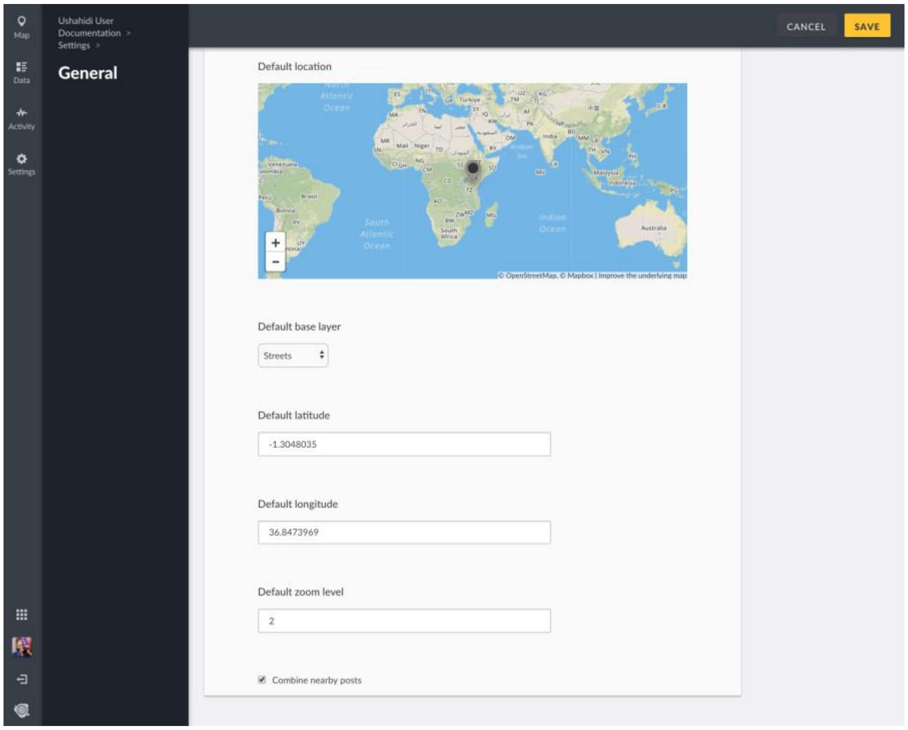


- Add the following detail



s

  - ***Site Name:*** This changes the main title of your deployment, and is typically the title of your project. You can change this at any time.
  - ***Site Description:*** This tagline appears below your deployment name, and should be a one or two sentence overview of what your deployment is about.
  - ***Deployment logo:*** Your deployment logo will appear on the right hand sidebar on your homepage, under your deployment name and above your deployment description. If you'd like to remove it once it has been added, just hit the ***Delete Logo*** button
  - ***Contact Email Address:*** This optional contact email will be displayed publicly to visitors of your deployment.
  - ***Site Language:*** You can update the default language of your deployment. This will update the labels within your user interface, and will update the layout of the deployment if you select a language that reads from the right to the left.
  - ***Private deployment:*** Ticking this checkbox makes your deployment and it's data only accessible to registered users(with the correct privileges) on your deployment, who must sign in for access.
- You'll also need to configure your map settings from this page. Your map settings allow you to select the type of base map you want for your project(the style your map will display as.



- ○ ***Default base layer***: Currently, the platform only offers Openstreetmap as a map provider. Plans are being made to add additional map providers.
  You can choose between the *map*, *satellite* and *humanitarian* views. This will determine the style your map will display as on your homepage.
- ○ ***Default latitude and Default longitude***: Dragging and dropping the blue pointer on the map automatically fills in these two fields. In the event that you have lat/lon values, you can also type them in and the pointer on the map will automatically update to match the points entered.
- ○ ***Default zoom level***: Zooming in and out of the map using the small menu bar on the left top hand side of the map will automatically set a value in this field. You may also optionally set the zoom level by manually adding a figure in this field and your map will update to match.
- ○ ***Combine nearby posts:*** This checkbox is checked by default, meaning that posts near each other will be bundled together and denoted as a single point on the map with a number to show how many posts they are. If you uncheck this option, each post will appear as a single point on the map.

- Click on ***Save*** and refresh the page to ensure that your settings update.

3.3 Surveys

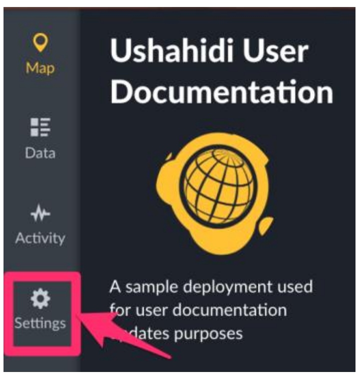
If you're someone who uses Ushahidi v2, ***Surveys*** (previously referred to as ***post types)*** in v3 are what we used to refer to as custom forms. A survey defines critical aspects of a post's structure and permissions. For example, a post's "survey" defines which fields are available for contributors to complete, and who can see it when it's published.

This section will show you how to create and manage surveys on your deployment.

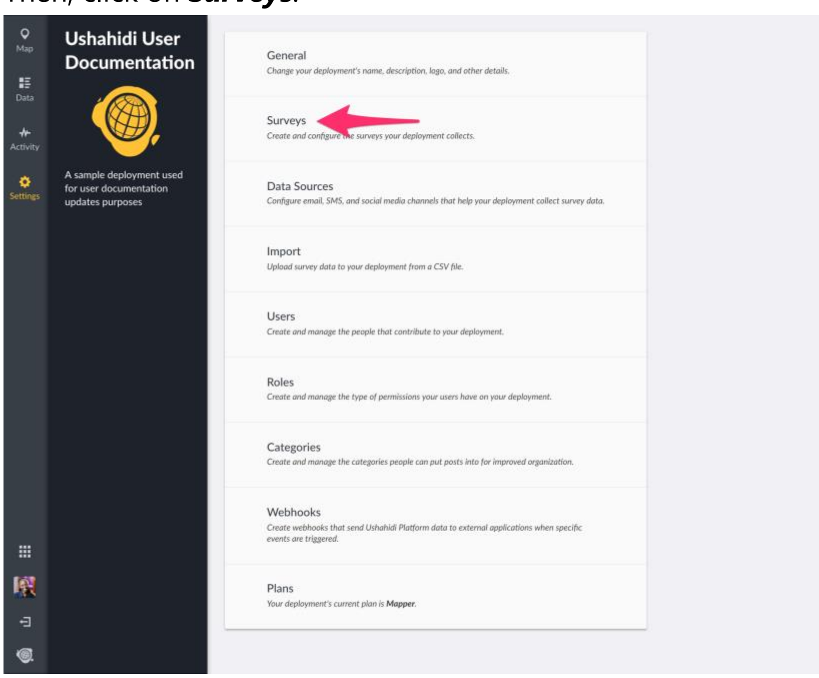
NB: If you're a user on ushahidi.com, there are limits to the the number of surveys you can create, based on the Ushahidi plan you are subscribed to. You may review these from [our plans page](). For open source/self hosted deployments, you can create as many surveys as desired.

To access the Surveys configuration page,

- On the left hand menu bar, click on ***Settings***



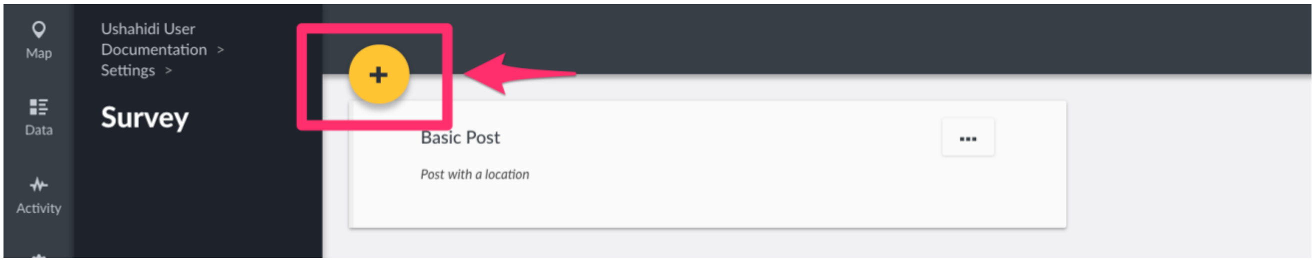
- Then, click on ***Surveys***.



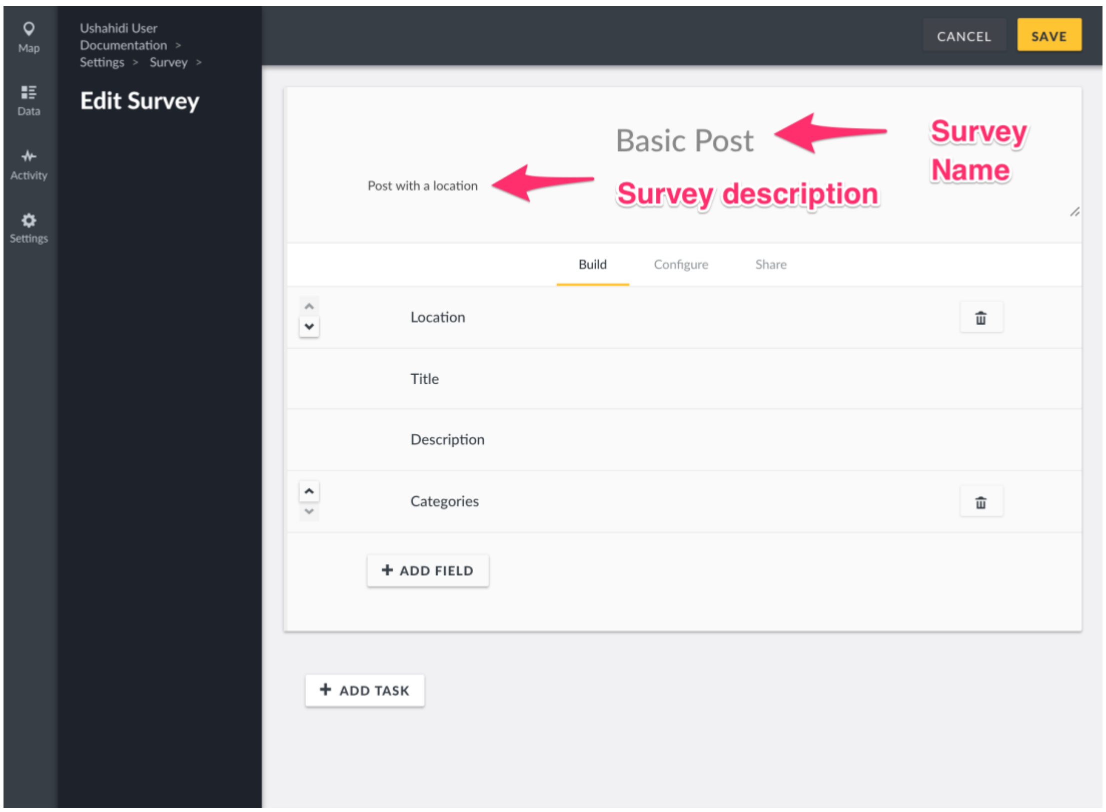
3.3.1 Building Surveys

By default, each deployment has a ***Basic Post*** survey, which can be deleted or modified as needed. To create a new survey,

- Click on the ***yellow icon*** as shown below

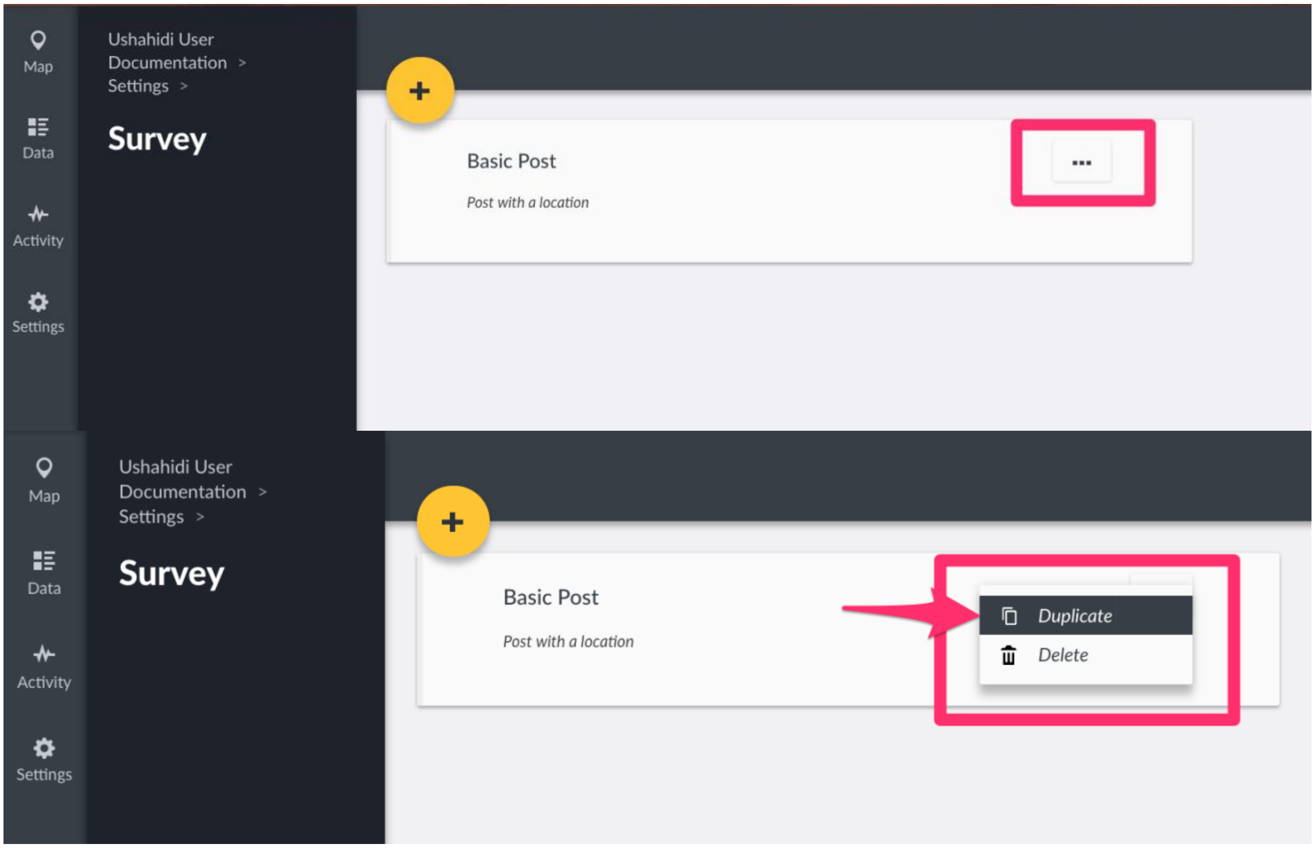


- Fill in the required details.



  - ***Survey Name:*** Try being as specific as possible when creating your survey name so that users will understand what they are selecting when creating new posts
  - ***Description:*** Provide a brief description of what kind of data you'll be collecting with this survey
  - ***Fields + Tasks:*** See below for details on how to add fields and tasks into your survey.
- Click on ***save*** once you're done building your survey.

NB: If you're setting up multiple surveys with similar structures, here's a neat trick for you - you can duplicate your survey from the survey list page as follows :).


Map
Data
Activity
Settings
Ushahidi User Documentation > Settings >
Survey
Basic Post
Post with a location
Map
Data
Activity
Settings
Ushahidi User Documentation > Settings >
Survey
Basic Post
Post with a location
Duplicate
Delete

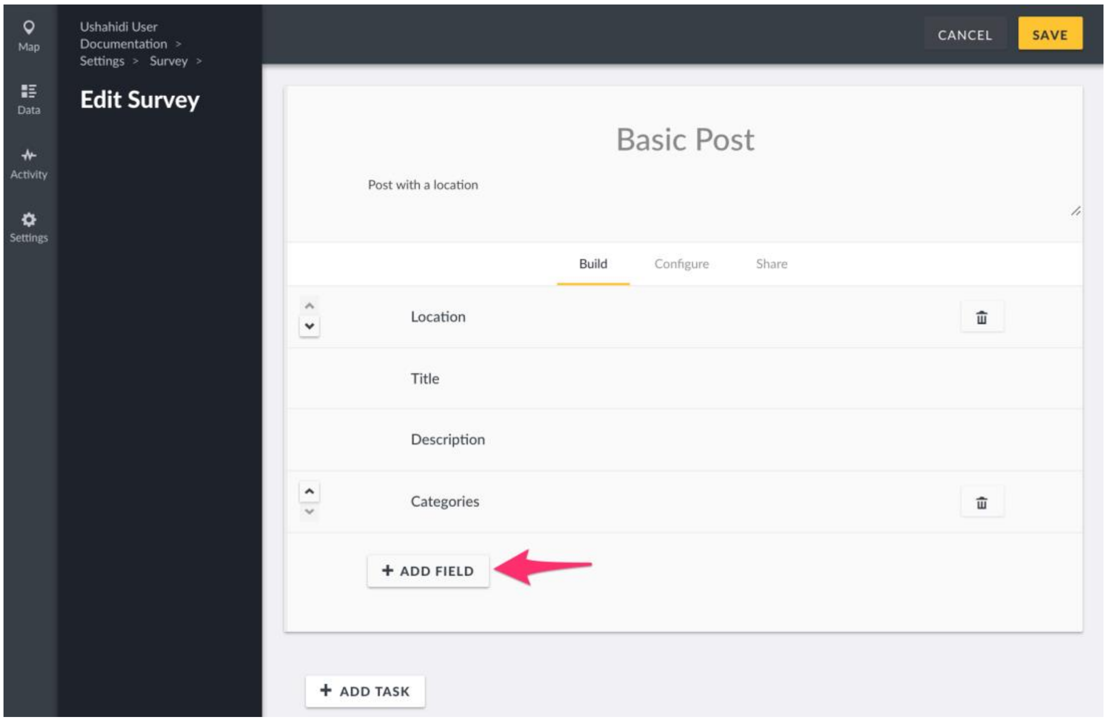
3.3.1.1 Fields

Each survey you create will have a title and description field by default. It's important to note these fields can be edited, ***but cannot be deleted***.

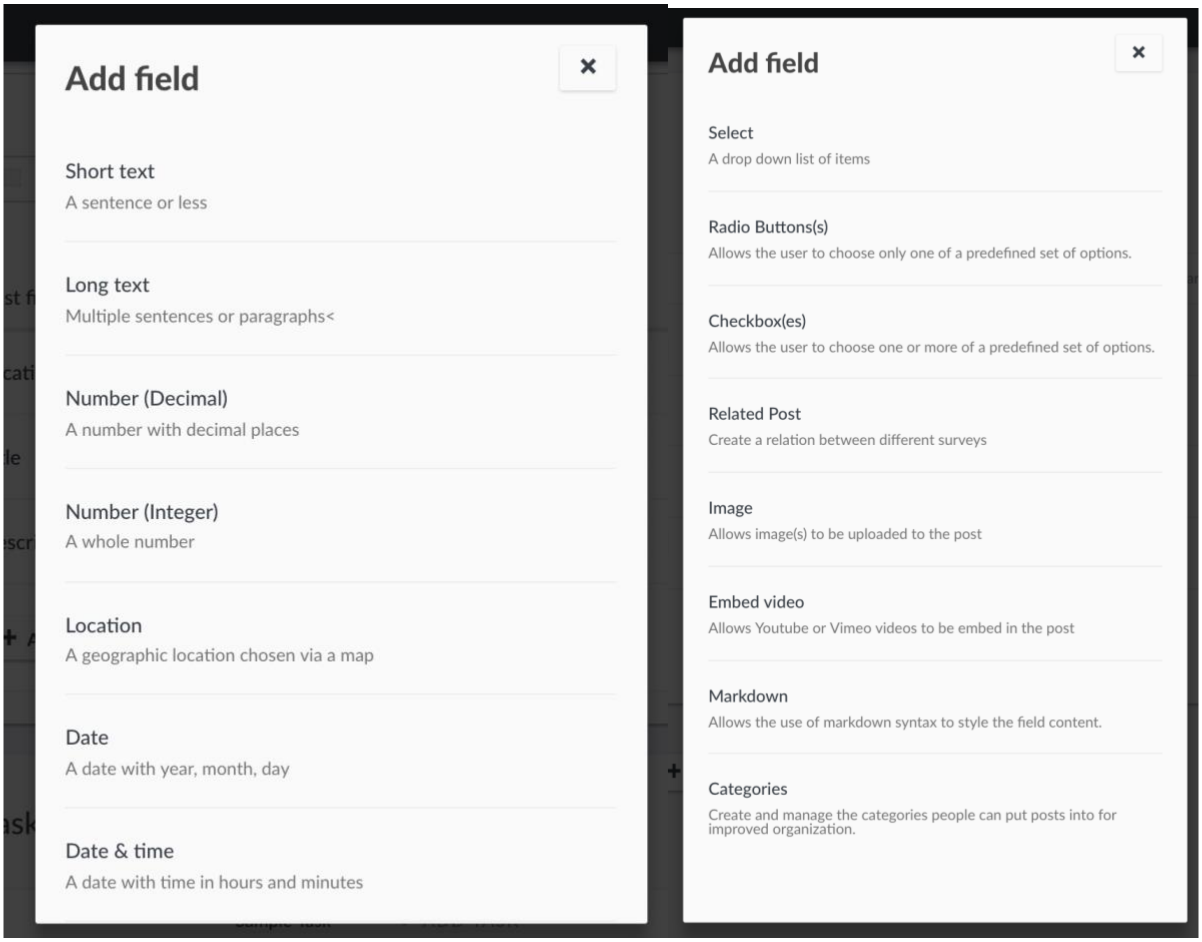
3.3.1.1.1 Adding Fields

You can add as many custom fields to your survey as you see fit.To add a new field,

- Click on **Add Field**

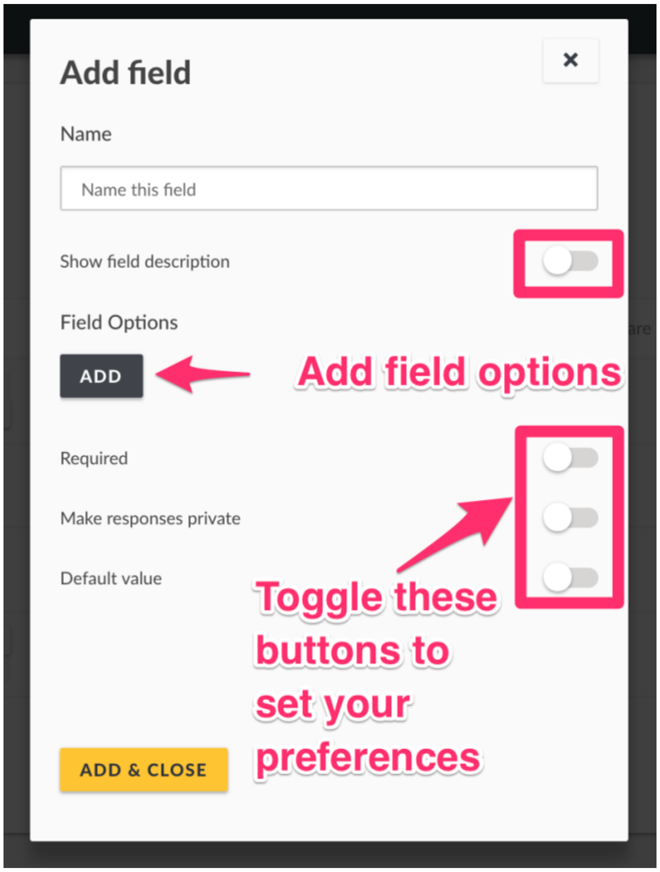


- A pop up box with a list of different field types will appear on your screen. Choose whichever one will work best for the type of data you are trying to capture.



- Add the following details
    - ***Name:*** This is what is displayed as a label for your newly created field
    - ***Show field description:*** You may add help text that provides additional details about this field.
    - ***Required:*** If set to yes, post submission will be only be successful once this field has been filled out.
    - ***Make responses private***: This allows limiting access to responses to this field to specific users.
    - ***Default Value:*** You can set a default value displayed every time someone is creating a new post
    - ***Field Options:*** This appears in cases where you're creating a checkbox, select or radio button field. You can add as many options as you would like

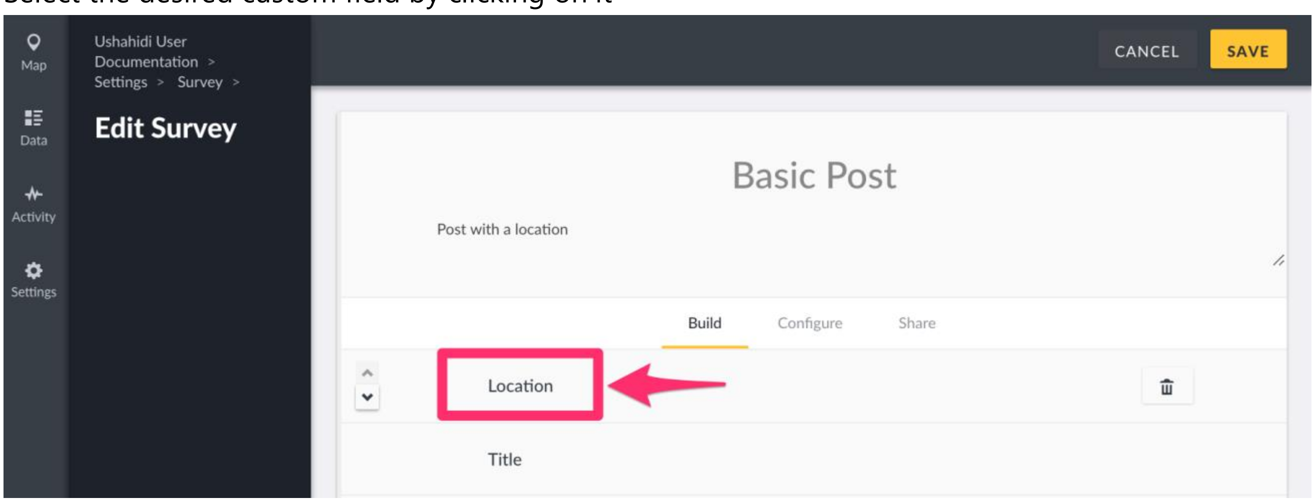
Once you're done, click on ***Add&Close.***



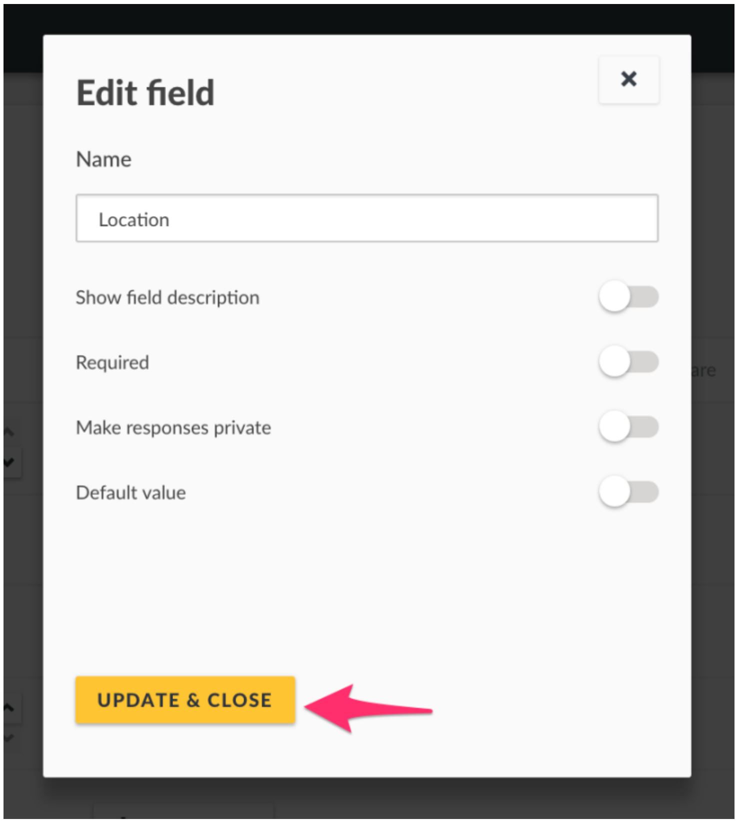
3.3.1.1.2 Editing Fields

To edit an existing field,

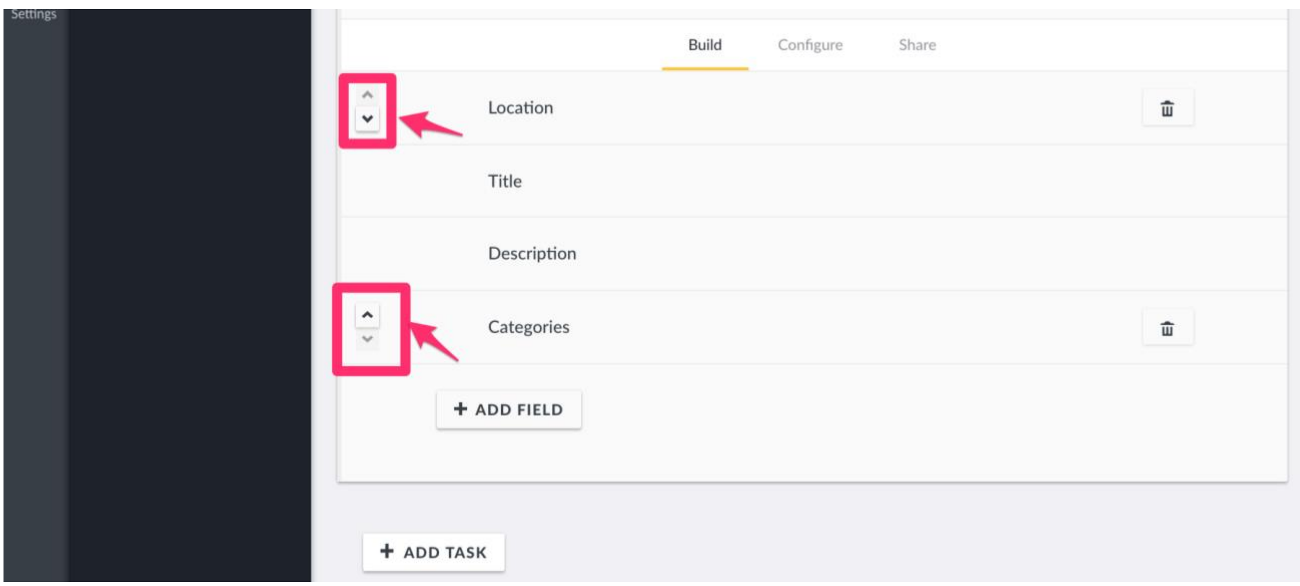
- Select the desired custom field by clicking on it



- Edit the fields(as described in the section above on [Adding fields](#)) as desired.
- Click on ***Update&close*** when done.



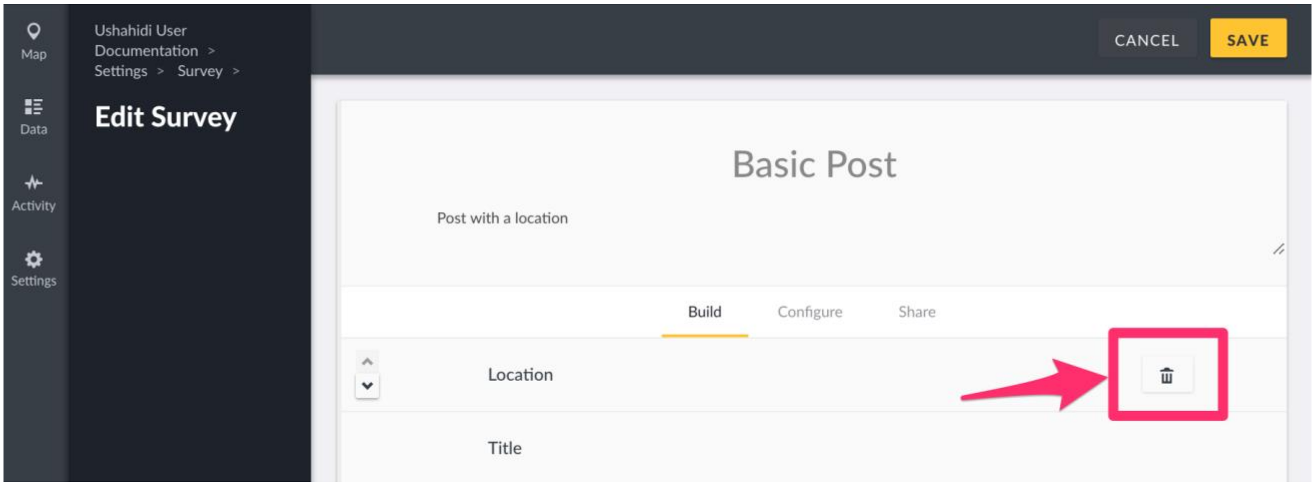
You can also change the position of existing fields by clicking on the scroll icons to the left of every field as shown below.



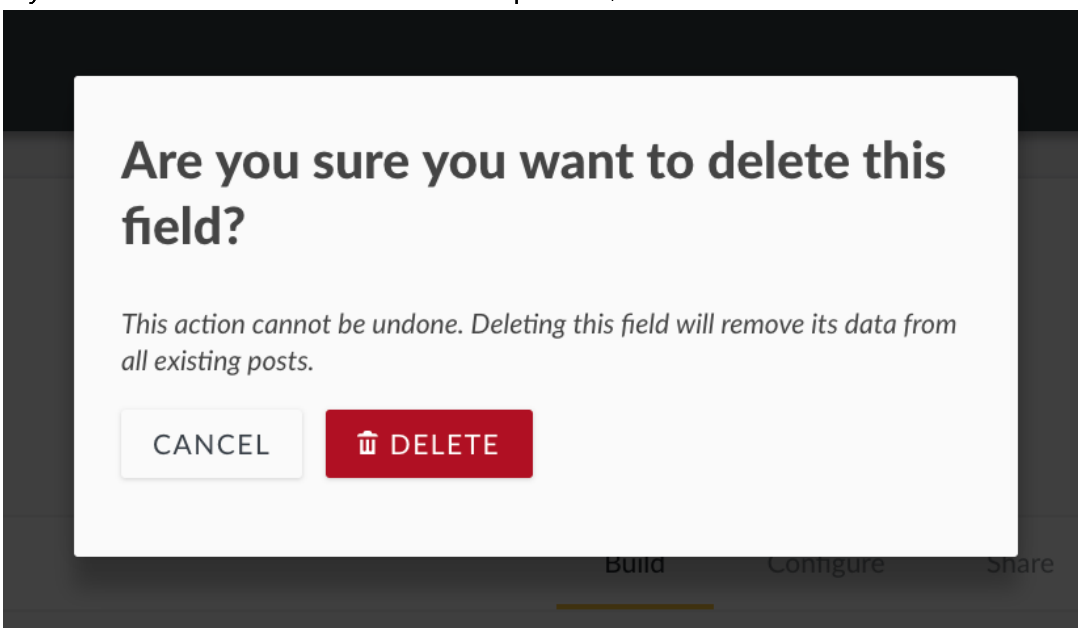
3.3.1.1.3 Deleting Fields

To delete an existing field

- Click on the trash icon adjacent to the field you'd like to delete



- A pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete the field
    - Click on ***Delete*** to delete the field
    - If you'd like to cancel the field deletion process, click on Cancel



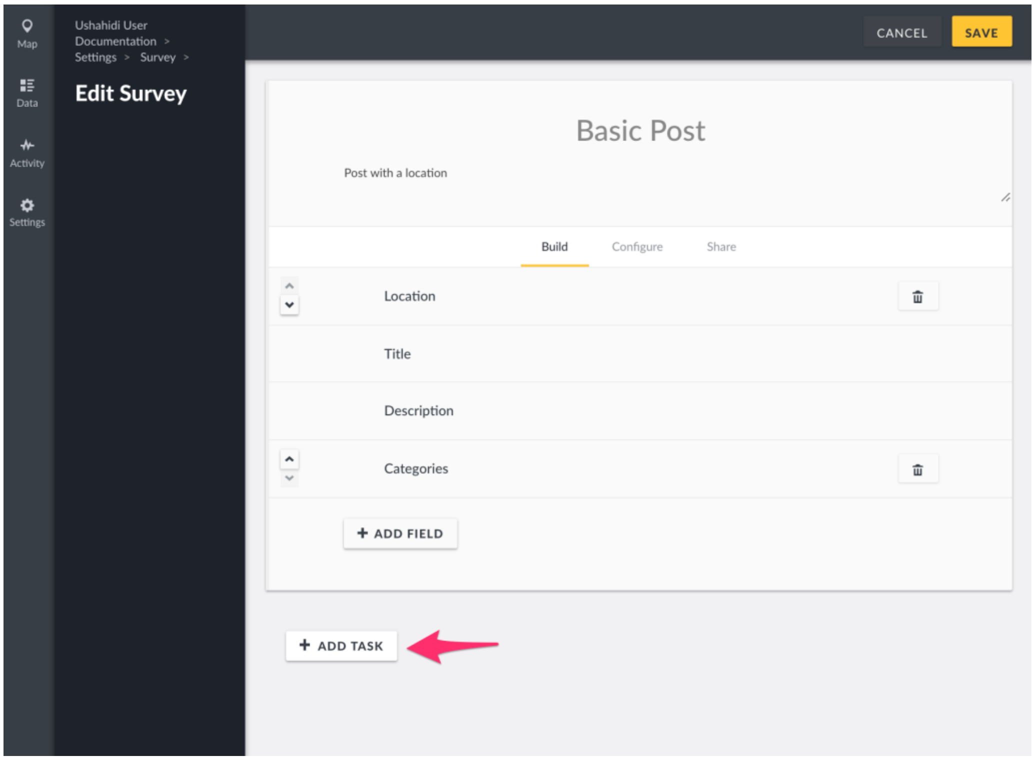
3.3.1.2 Tasks

You can organize your survey into "Tasks", allowing a deployment to add fields related to actions that need to be taken, like translation or verification. These groups of tasks are visible to specified users and can be marked as 'complete.' For example, if a particular survey requires verification upon submission, you can design a task to ensure your team knows the post needs to be verified before publishing. The task could include fields like whether the information was verified or not, who verified the information, how they verified it, and when they verified it. After verification, the task can be marked as complete and the post can either be moved to the next task if necessary, or published.

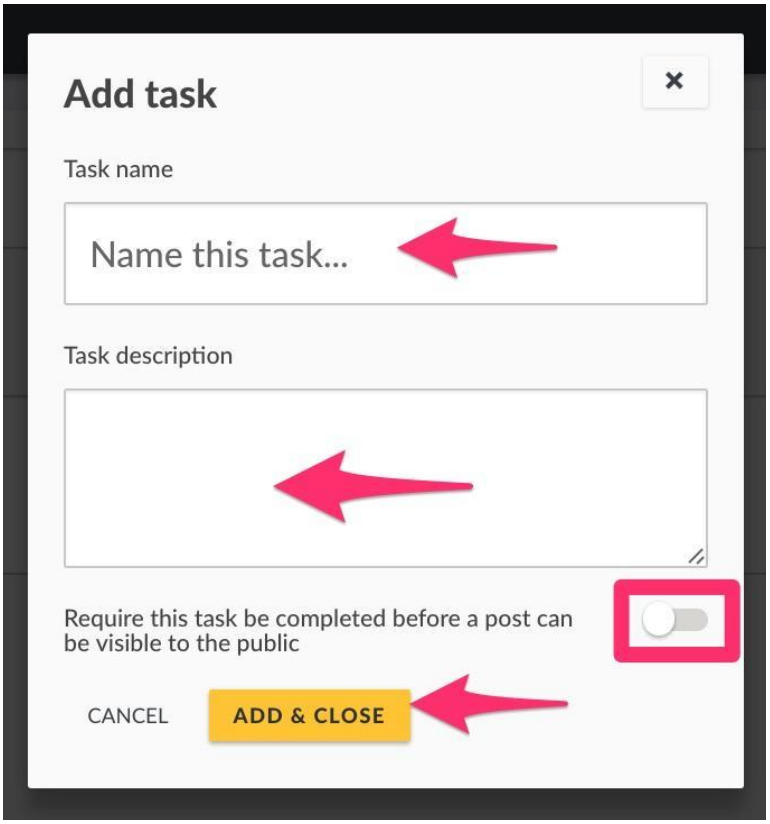
3.3.1.2.1 Building Tasks

To add a new task,

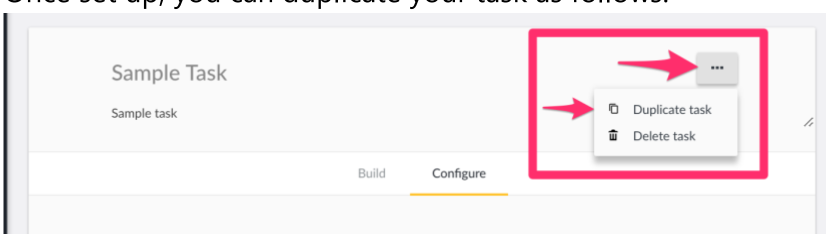
- Click on Add Task on your survey creation/edit page



- A small pop up box will appear, prompting you to give your task a name
- If you'd like to make this task required before post submission, toggle the ***Require this task be completed before a post can be visible to the public button***. This means that, a post will not be published until this task is marked as complete
- Click on ***Add & Close***

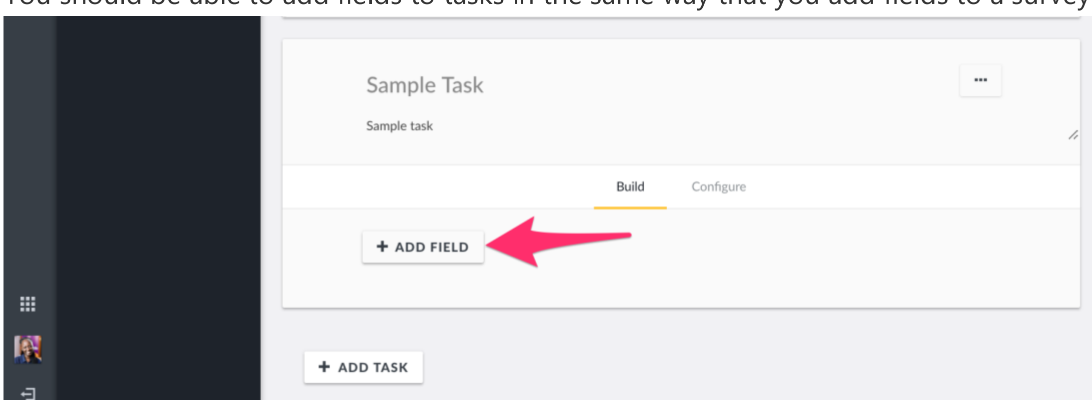


Once set up, you can duplicate your task as follows.



Adding task fields

You should be able to add fields to tasks in the same way that you add fields to a survey.

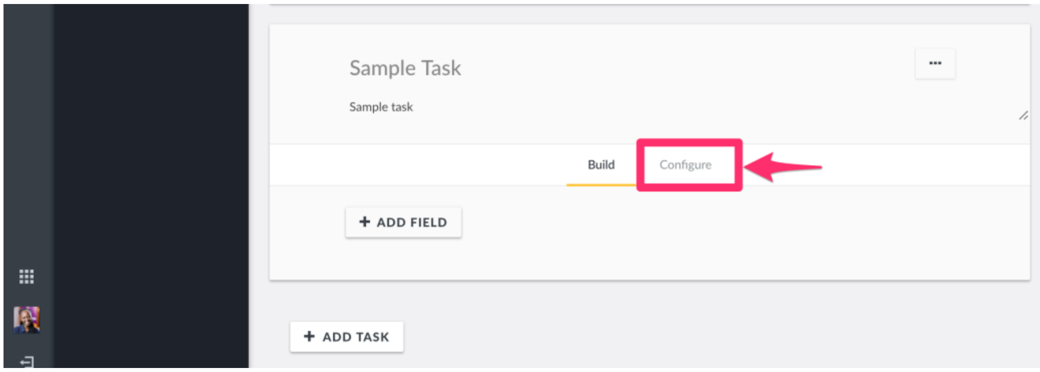


Please refer to the [Fields section](#) of this manual for details on how to add, edit and delete task fields.

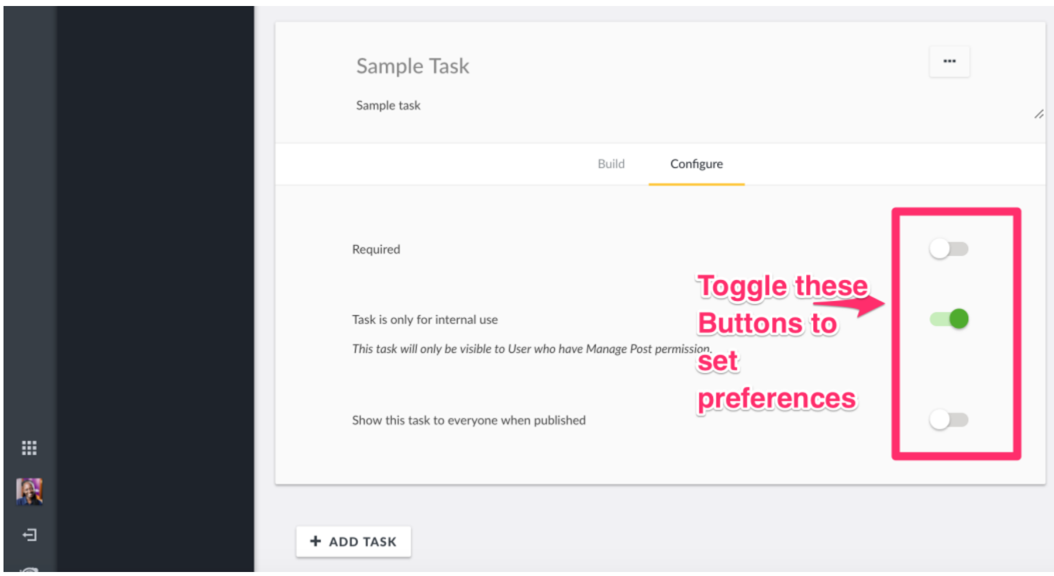
3.3.1.2.2 Configuring tasks

To make additional configurations to your task,

- Click on ***Configure***



- Set the following options



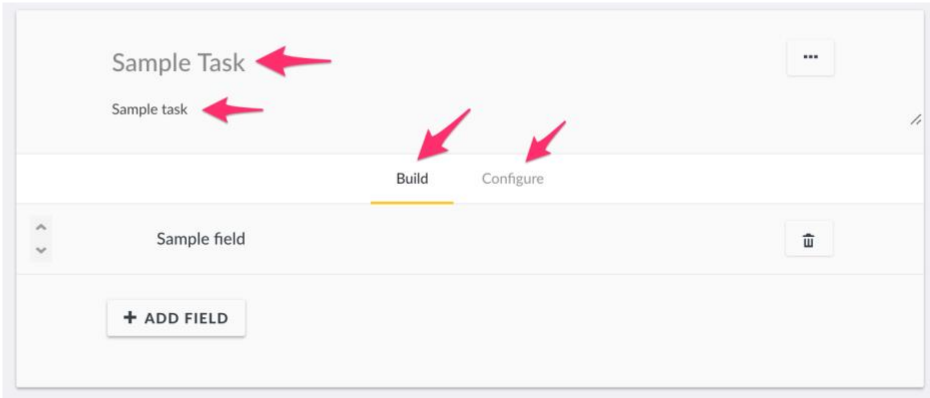
  - ***Required:*** When set to yes, this task must be set as complete for successful post submission
  - ***Task is only for internal use:*** This limits visibility of this task during submission only to teams with permissions to manage posts on your deployment i.e only internal team members will be able to submit responses to this task
  - ***Show this task to everyone when published:*** This limits visibility of task responses when viewing submitted posts if not enabled i.e it limits visibility of responses to tasks to internal teams only.

3.3.1.2.3 Editing Tasks

To edit an existing task,

- Scroll down to the the desired task

- Make changes as desired, e.g changing the task name, description, and/or making a task required or not

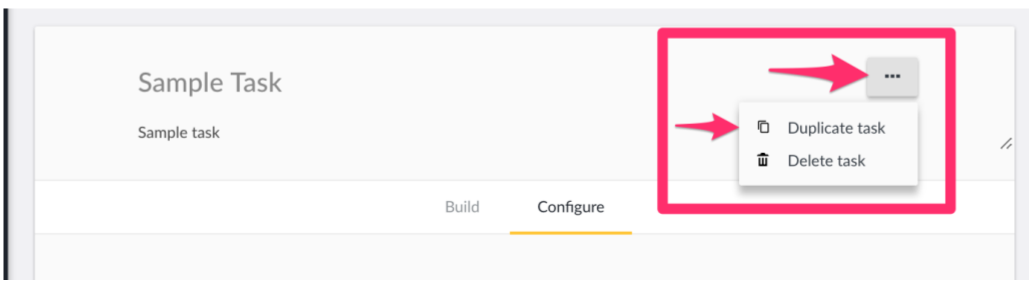


- When done, click on ***Save*** on the top of the page

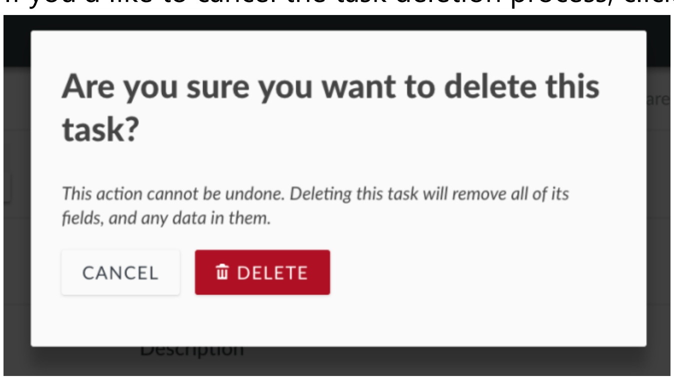
3.3.1.2.4 Deleting Tasks

To delete an existing task

- Scroll down to the desired task
- Click on the three dotted icon, and select ***Delete Task***



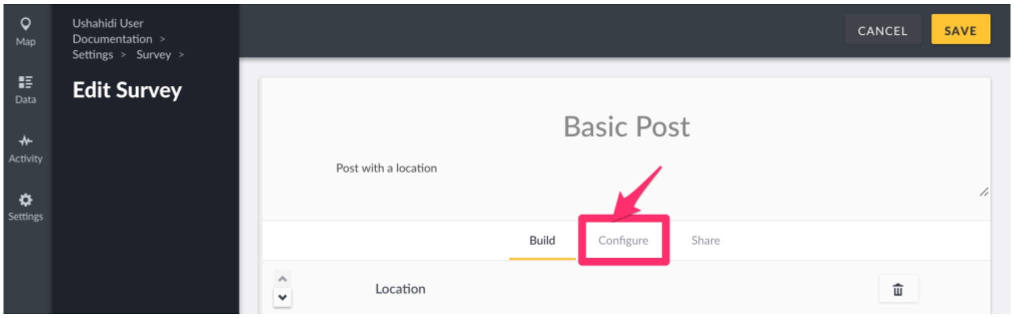
- A pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete the task
  - Click on ***delete*** to delete the task
  - If you'd like to cancel the task deletion process, click on ***Cancel***



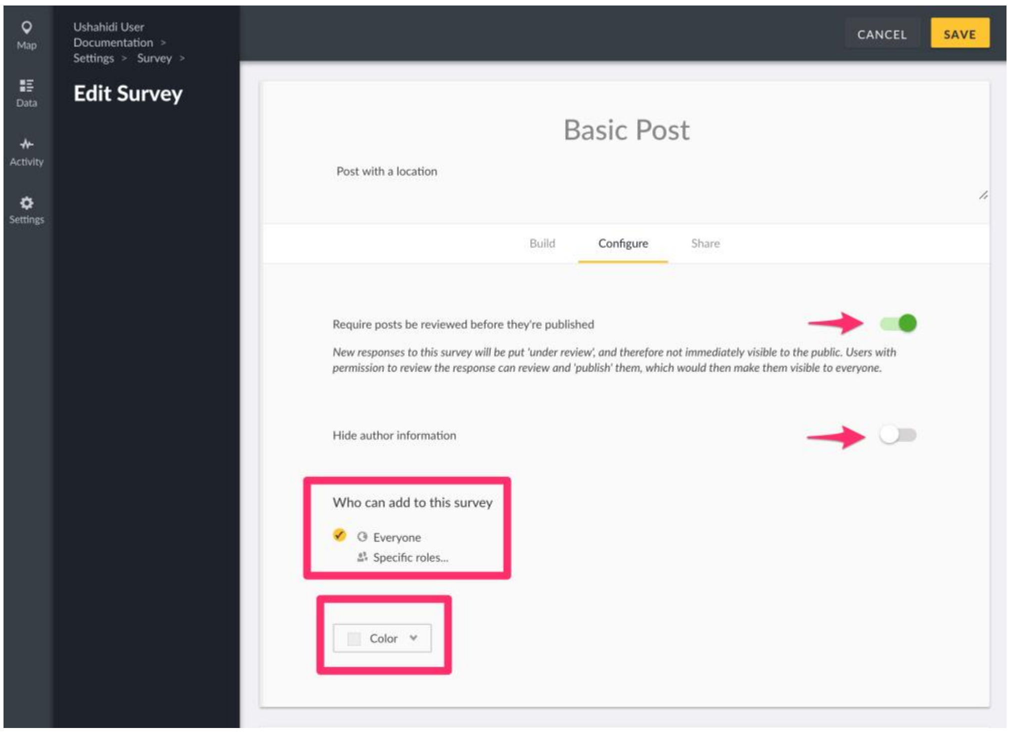
3.3.2 Configuring Surveys

You can add additional configurations to your survey e.g setting a survey color etc. To do so,

- Click on ***Configure*** on the top of the survey editor



- Configure the settings to suit your needs

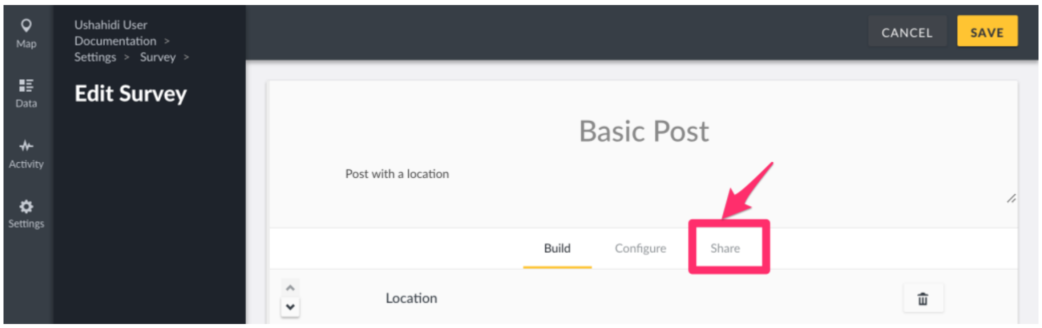


  - ***Require posts be reviewed before they're published:*** When toggled on, posts submitted on your deployment will not be made public i.e accessible to anyone beyond your internal team, until it is reviewed (It will remain in draft). Setting this option off will automatically publish all posts submitted on your deployment.
  - ***Hide author information:*** When toggled on, this option hides author information e.g phone numbers, twitter handles and email addresses of people who submit posts to your deployment from the public. *Note: logged in users with the permission to manage posts will still be able to see author information.*

- Who can add to this survey: You can limit submission of posts to your survey by roles. By default, surveys are open to the general public for submissions, and not limited to internal roles.
    - *Color:* Select a color or input a specific hex value to choose which color will be associated with this survey. Pins on the map will match whichever color you select.
- Click on ***save*** once your configuration options are complete

3.3.3 Sharing Surveys

Ushahidi provides the ability to ***Share*** your survey across multiple platforms.

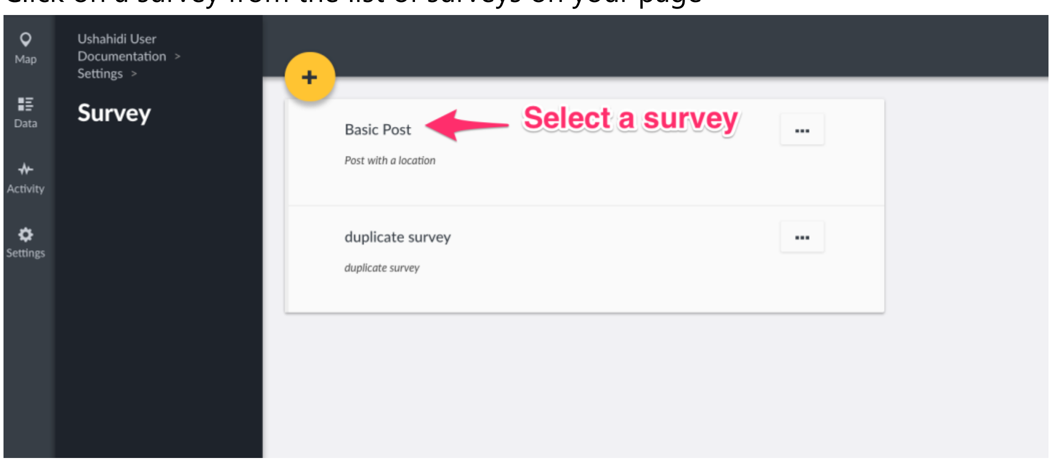


- ***Web address:*** Copy and paste this link to direct people to your survey form
- ***Facebook:*** Share the survey form on Facebook
- ***Twitter:*** Share the survey form on Twitter
- ***Embed:*** Copy and paste this HTML block of code to embed the survey form on any site across the web

3.3.4 Editing surveys

To edit a survey

- Click on a survey from the list of surveys on your page

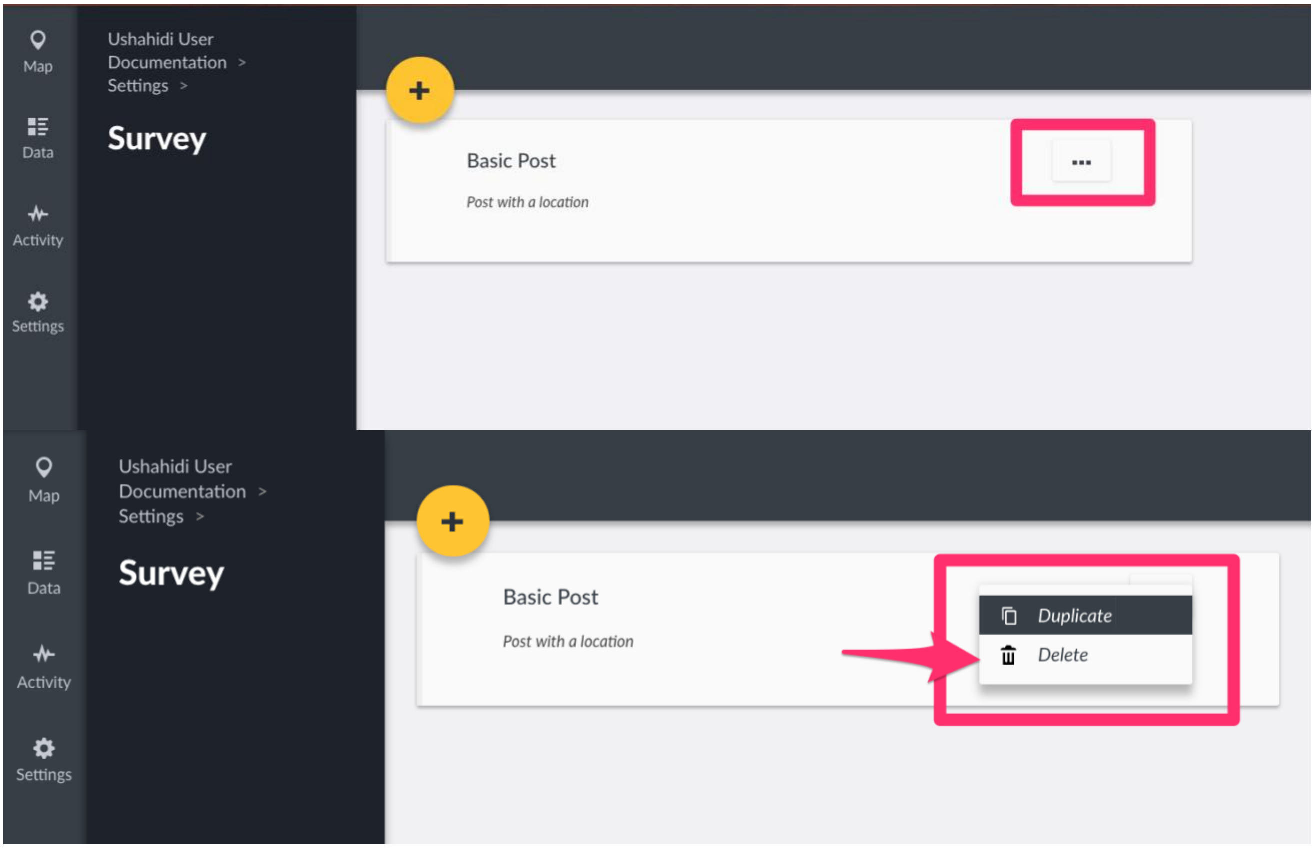


- From here, change your survey details as desired then click on ***Save***

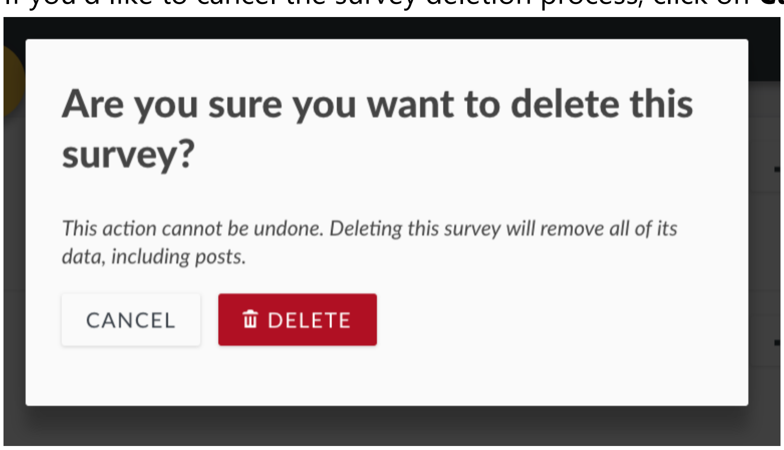
3.3.5 Deleting surveys

To delete a survey,

- Select the desired survey from the surveys list page, and click on the three dots icon adjacent to it. Then, select ***delete***



- A pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete the survey
    - Click on **Delete** to delete the survey
    - If you'd like to cancel the survey deletion process, click on ***Cancel***



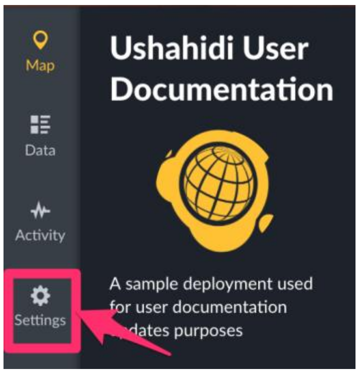
3.4 Data Sources

There are many ways to enter posts into your Ushahidi deployment other than from the deployment itself. This section shows you how to configure all the possible data source types.

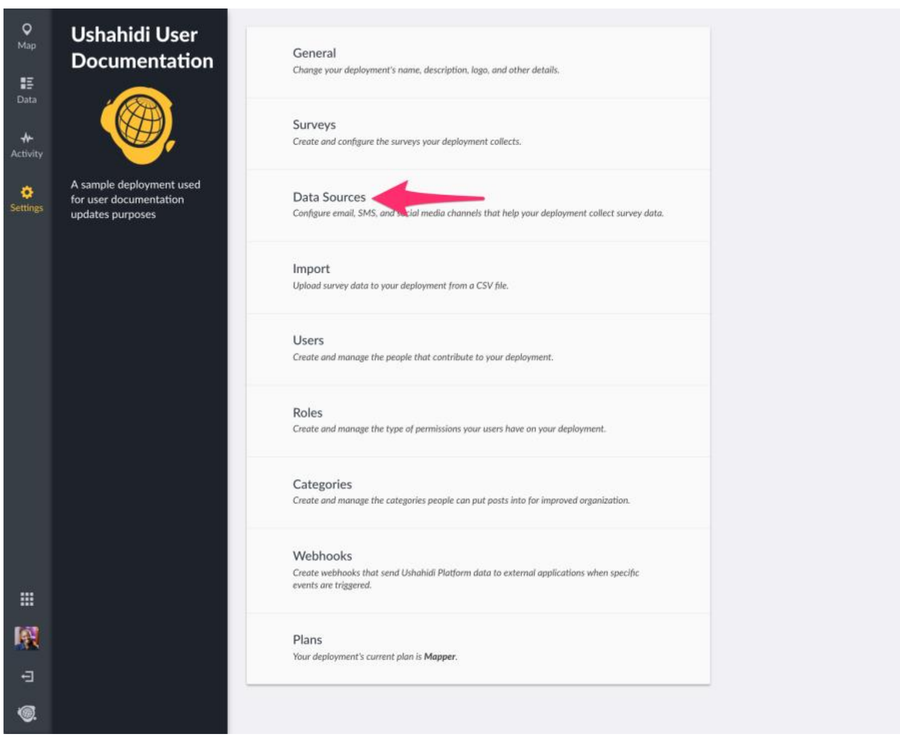
NB: If you're a user on ushahidi.com, the number of data source types available to you may be limited, based on the Ushahidi plan you are subscribed to. You may review these from [our plans page](). For open source/self hosted deployments, all data source types are available to you

To access the data sources configuration page,

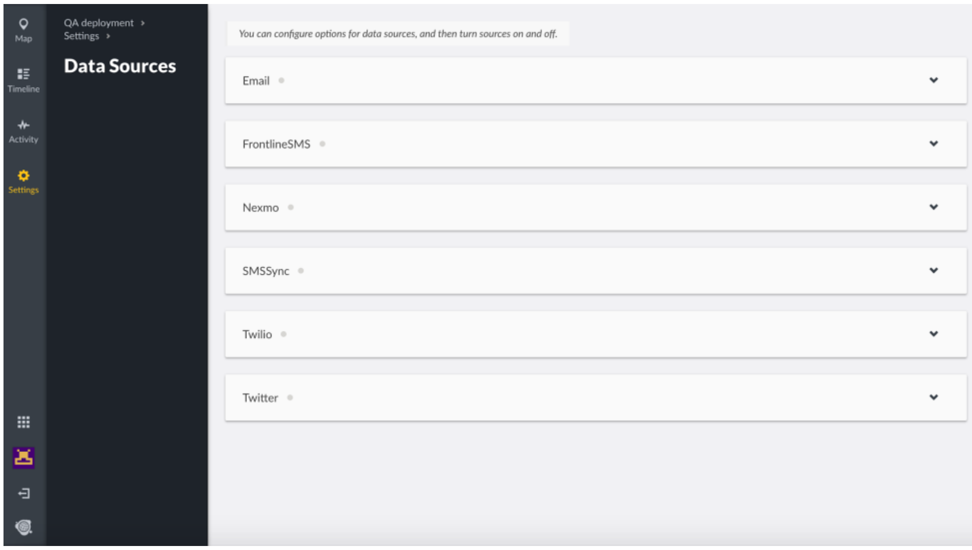
- On the left hand menu bar, click on ***Settings***



- Then, click on ***Data Sources***.



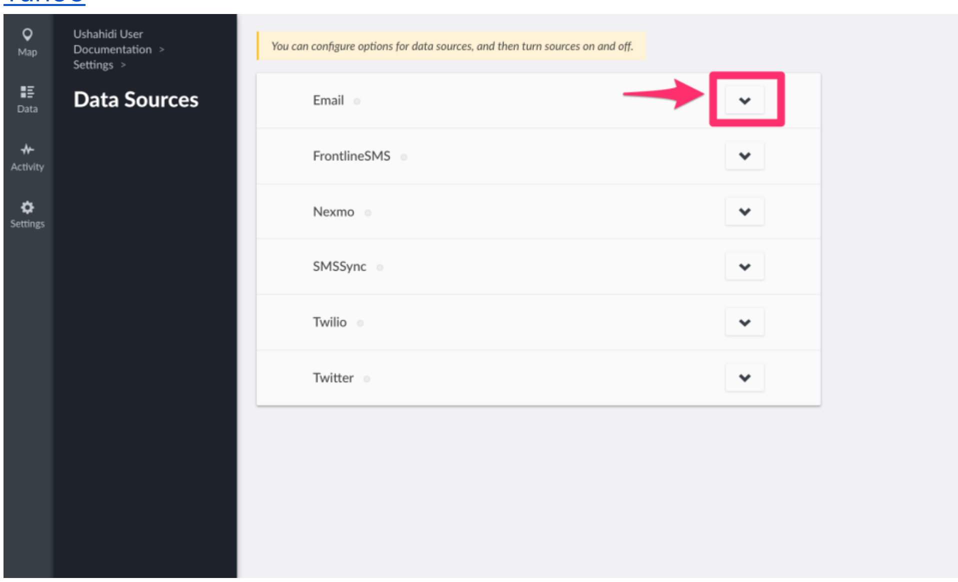
- You should get a full list of data sources as shown below



3.4.1 Email

This section allows you to set up the platform to receive emails from user. Before getting started, make sure that you have an email account set up on Gmail, Yahoo or any other service provider. Make sure that you have IMAP/POP enabled (For more information on these two protocols, visit this website. Instructions on how to enable the IMAP/POP settings in your email can be found here

- Gmail
- Yahoo

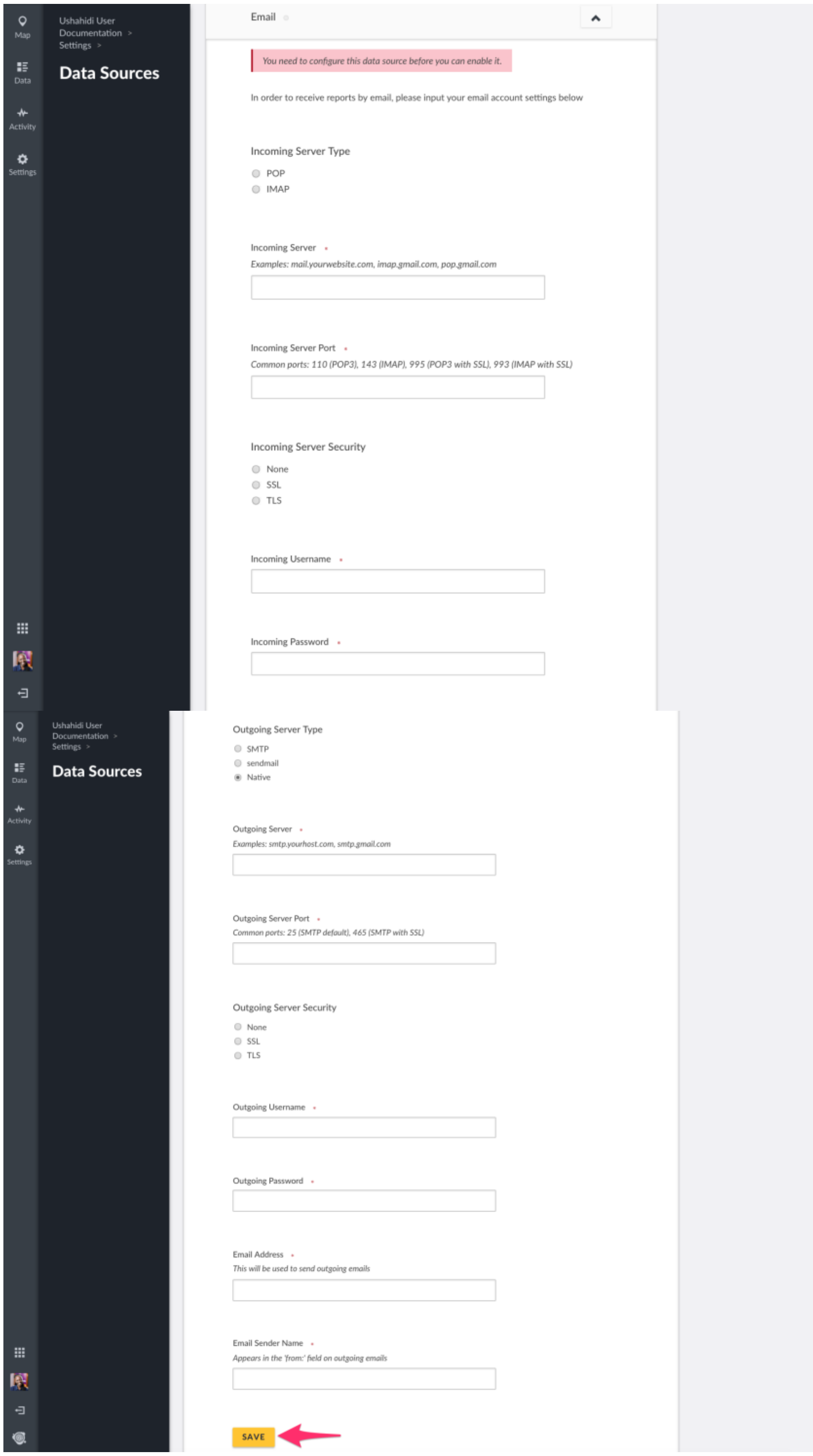


To get started with email set up,

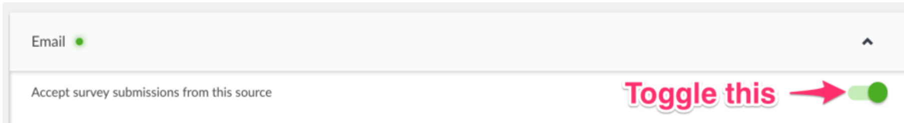
- Click on ***the drop down icon on the right as shown***
- Input the following email account settings:-

- ***Incoming server type***: You have two options to select from, ***POP*** and ***IMAP***. We recommend using IMAP if possible because it's the best way to make sure you can see all your mail at any time on all of your devices
- ***Incoming server***: Enter the address of the server where your email services are hosted. E.g *mail.yourwebsite.com*, *imap.gmail.com* or *pop.gmail.com*
- ***Incoming server port***: Enter the port that your email account uses for incoming emails. This is also provided by your service provider and depends on the use of SSL(Secure Sockets Layer)/Transport Layer Security(TLS) or not. As a standard rule;
  - IMAP uses port 143 , but SSL/TLS encrypted IMAP uses port 993 .
  - POP uses port 110 , but SSL/TLS encrypted POP uses port 995
- ***Incoming server security***: You have 3 options to choose from to enhance secure connection to your email mailbox, depending on which is supported by your email service provider.
  - None
  - TLS - Read more on Transport Layer Security
  - SSL - Read more on Secure Sockets Layer
- ***Incoming user name***: Enter the email address you want to use to receive emails e.g ***sample@youremail.com***. We recommend setting up a separate email address for this purpose, preferably one that has lot of available space to avoid the account getting full in a short time, especially if the platform will be receiving a lot of submission via email.
- ***Incoming password***: Enter the password of the email account inserted above.
- ***Outgoing server type***: Select one of the three options presented to you:-
  - SMTP: Simple Mail Transfer Protocol (SMTP) is recommended for use with the ushahidi platform.
  - Sendmail
  - Native
- ***Outgoing server***: Enter the address of the server from which emails are sent out. This is also provided by the email service provider
- ***Outgoing server port***: Enter the port your email service provider uses for outgoing emails. The default port tends to be 25, but SMTP with SSL support uses port 465 or 587
- ***Outgoing server security***: Select one of the three options provided to you
  - None
  - SSL
  - TLS, which is recommended by the service provider for outgoing server security.

- ***Outgoing user name***: Enter the email address you want to use to send emails. E.g ***sample@youremail.com***
- ***Outgoing password***: Enter the password of the email account inserted above.
- ***Email sender name***: This is what appears in the "from" field in outgoing emails.



- Click on ***Save*** and this data source's settings will be saved. Unstructured posts from email will now be pulled into the platform.
- To enable/disable the email data source, simply click on the green toggle.



- If you'd like to edit your email configuration, simply click on the drop down icon on the right while on the data sources list page and make your changes.

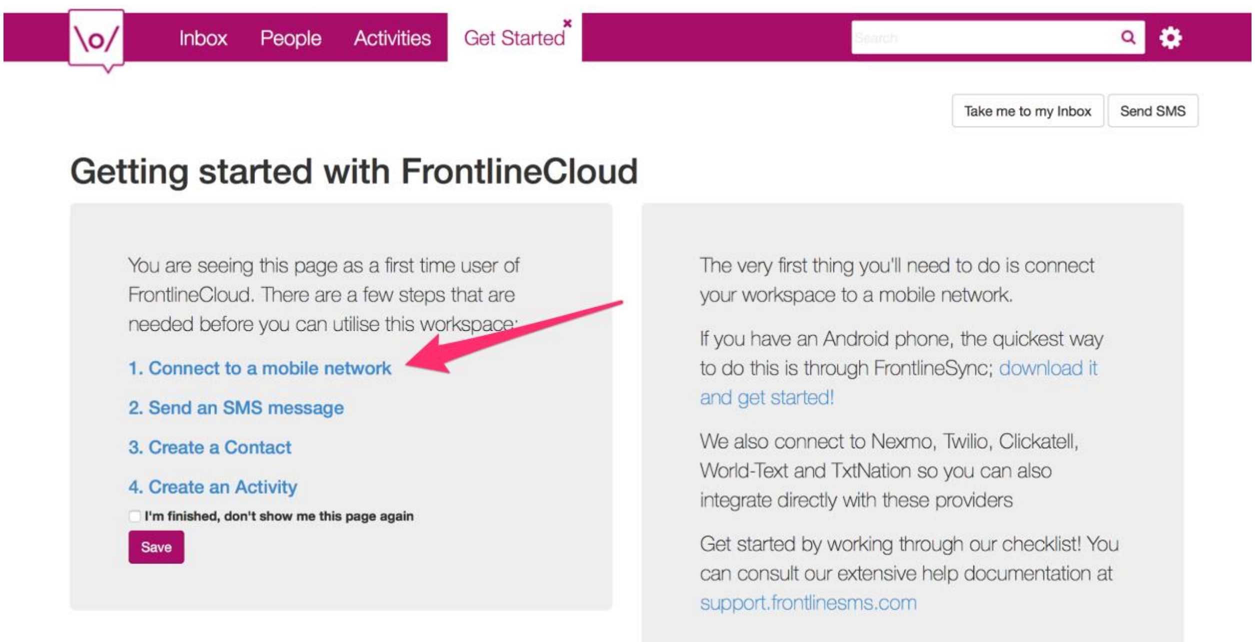
3.4.2 FrontlineSMS

FrontlineCloud is an online SMS management platform that lets you control and manage 2-way SMS engagement with anyone in the world.

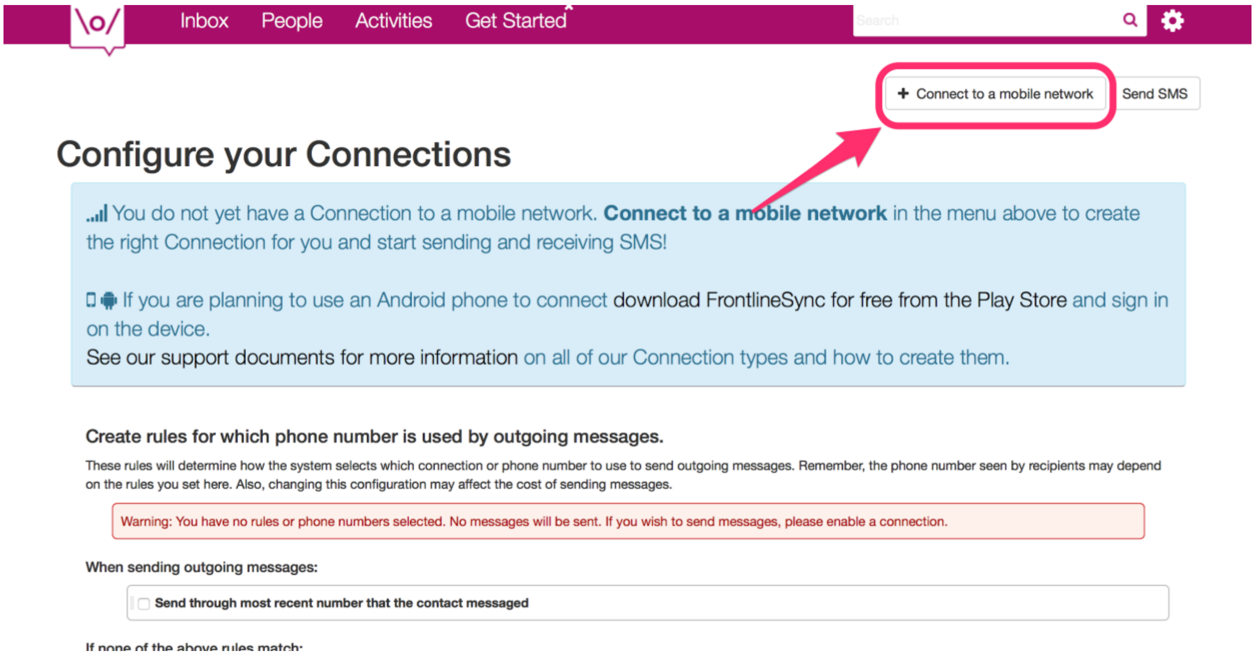
NB: You need a FrontlineCloud Starter or Pro account to be able to configure this as a data source. To sign up, go to https://cloud.frontlinesms.com.

To get started with FrontlineCloud set up,

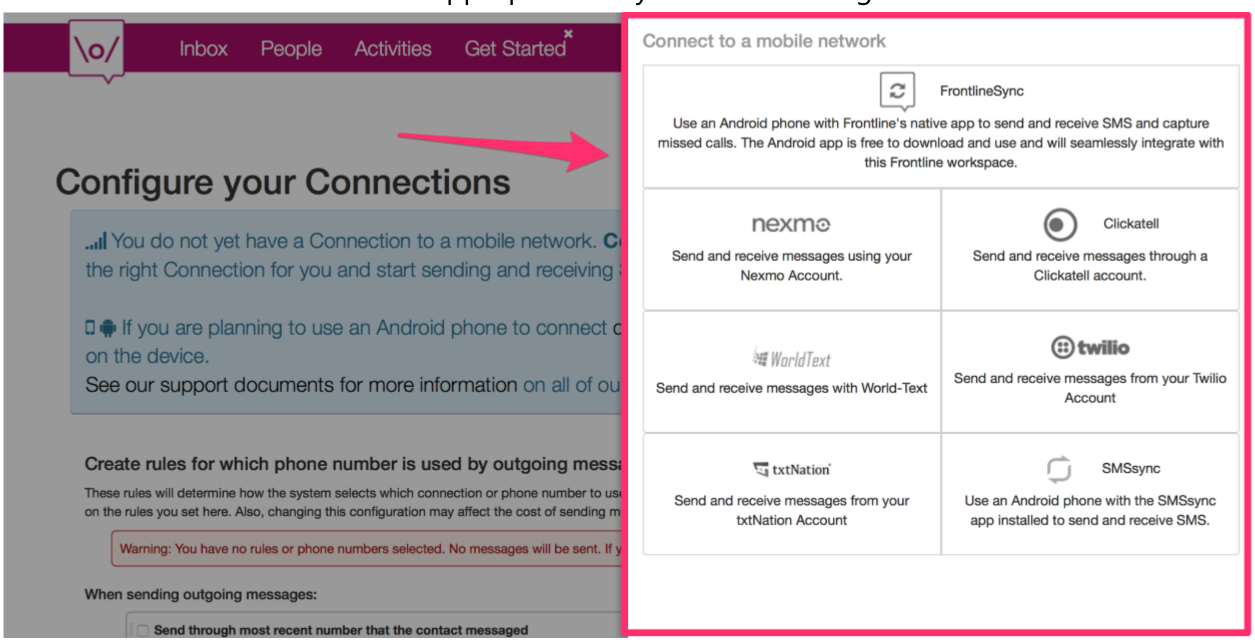
- Log into your FrontlineCloud account.
- You'll need to setup your network connection



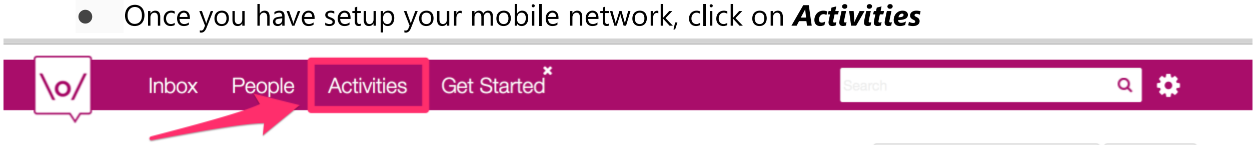
- Click on ***Connect to a Mobile Network***



- FrontlineSMS gives you several different mobile network options to end and receive SMS. Choose the most appropriate for you from the list given below.

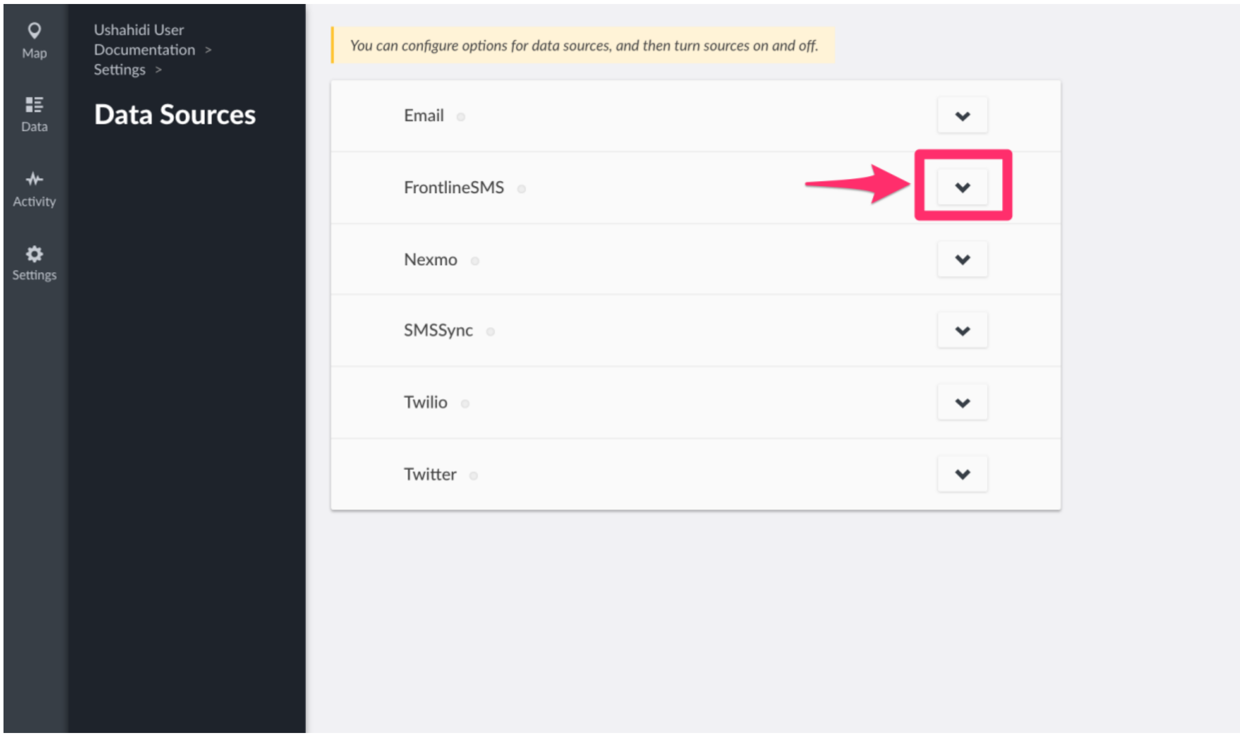


- Once you have setup your mobile network, click on ***Activities***

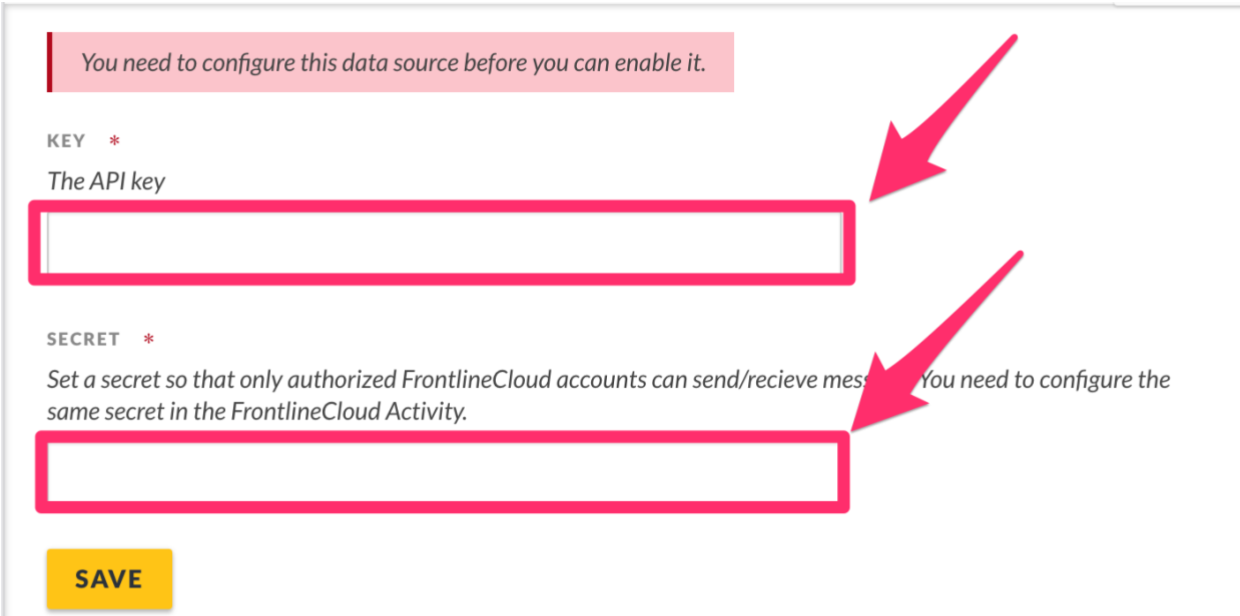


- Next you will need to setup *An Activity* to allow sending SMS from Ushahidi via Frontline
  - Follow these instructions on how to [Send SMS from a Web Service Activity]()

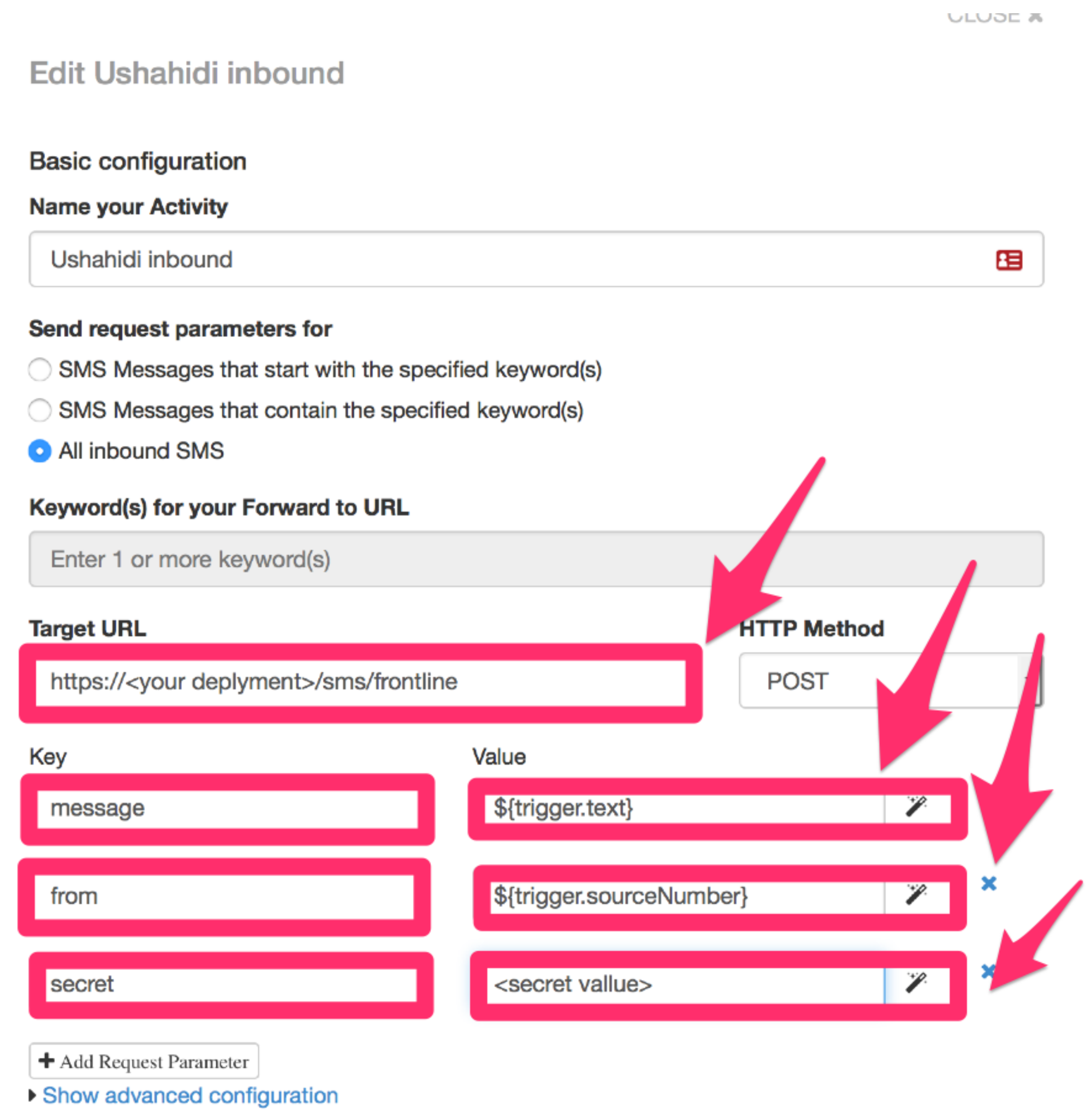
    - Copy the API KEY generated during this step, as you will need it in the next step
- Setup the FrontlineSMS data source on your Ushahidi platform
    - Click on the drop down icon on the right as shown



-
    - Enter the FrontlineCloud API KEY that you generated in the previous step in the ***Api Key*** field
    - Enter a secret code in the ***Secret*** field. This code will be used by FrontlineCloud to connect to the Ushahidi deployment. You can enter any value you like here. It should ideally contain numbers and letters and be ~20 characters long.



- Copy the ***Secret*** you just created (You will need it for the final FrontlineCloud configuration), then click on ***Save***
- Return to your FrontLineCloud account
- Follow this guide:
  - [Connecting to another web service: creating a Forward to URL Activity]()
  - For Step 2 part 4, you will need to set the url in the following form:
    - ***https://<your deployment url>/sms/frontline***
    - Make sure to replace <your deployment> with the url of your deployment e.g ***mytest.ushahidi.io***
  - For Step 2 part 6, you will need to define the following key, value pairs shown in the image below:
    - **key:** message **value:** ${trigger.text}
    - **key:** from **value:** ${trigger.sourceNumber}
    - **key:** message **value:** <secret value>, where the secret value is the one you created on the Ushahidi datasource step. Replace <secret value> with the secret you copied earlier



- Finally, test that the system is setup correctly by sending a test sms to your number. The message should be forward to the Ushahidi deployment and appear in your list of posts.

3.4.3 Nexmo

Nexmo is a cloud-based SMS API that lets you send and receive a high volume of messages to mobile phones in any country at wholesale rates.

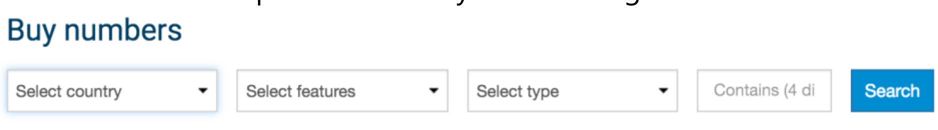
NB: You need a nexmo account to be able to configure this as a data source. To sign up, go to https://dashboard.nexmo.com/sign-up

To get started with Nexmo set up,

- Log into your Nexmo Dashboard https://dashboard.nexmo.com
- If you haven't already, you'll need buy a number that you will use to receive SMS messages from.
    - Click on Numbers on the top menu bar on your nexmo dashboard

    - Click on Buy Numbers

    - Set the desired criteria of the phone number you're looking to use

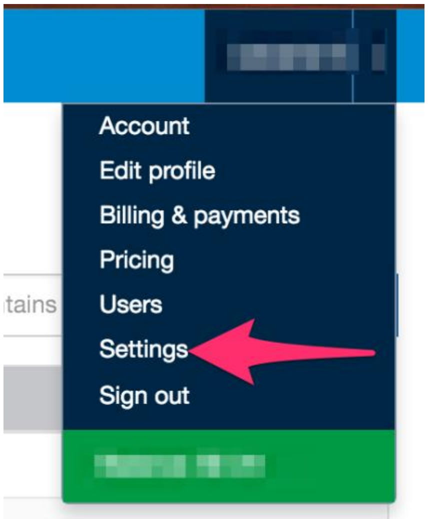


        - Select the country in which the SMS Number will likely be operating in
        - Select the features of this phone number(SMS only, Voice only or SMS & Voice)
        - Select the type of phone number it will be (Mobile, Landline, Toll free)
    - Click on ***Search***. A list of available numbers based on the criteria set above will appear.

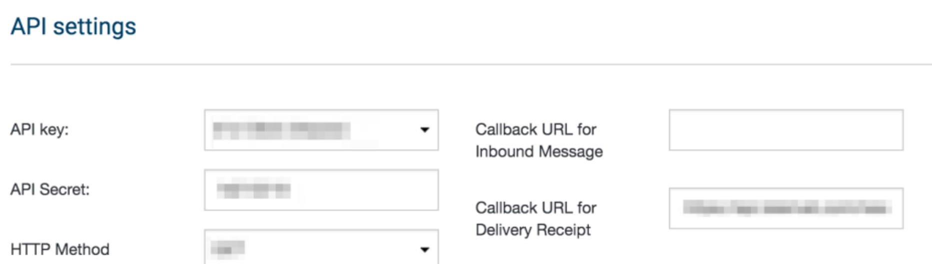
Numbers	Features	Type	Cost (€)/per month	
[redacted]	VOICE, SMS	Mobile	3.00	Buy
[redacted]	VOICE, SMS	Mobile	3.00	Buy
[redacted]	VOICE, SMS	Mobile	3.00	Buy
[redacted]	VOICE, SMS	Mobile	3.00	Buy
[redacted]	VOICE, SMS	Mobile	3.00	Buy
[redacted]	VOICE, SMS	Mobile	3.00	Buy
[redacted]	VOICE, SMS	Mobile	3.00	Buy

    - Click ***Buy*** on the number you'd like to use.
- Once you have a phone number, note it down as you'll need it to configure your data source later on.

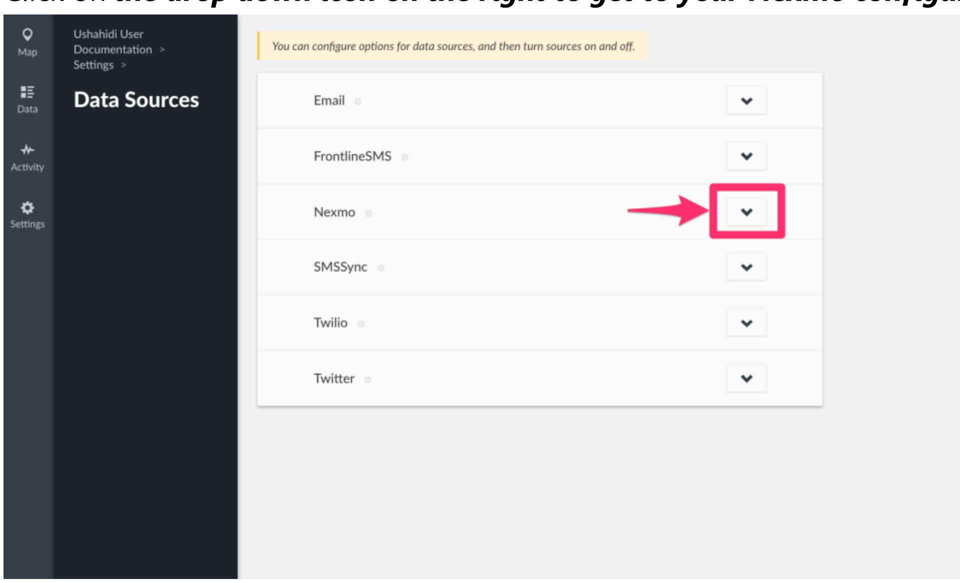
- You'll need to grab your API credentials from your nexmo settings page.



- Pick your *API KEY* and *API SECRET* from the ***API Settings*** section.

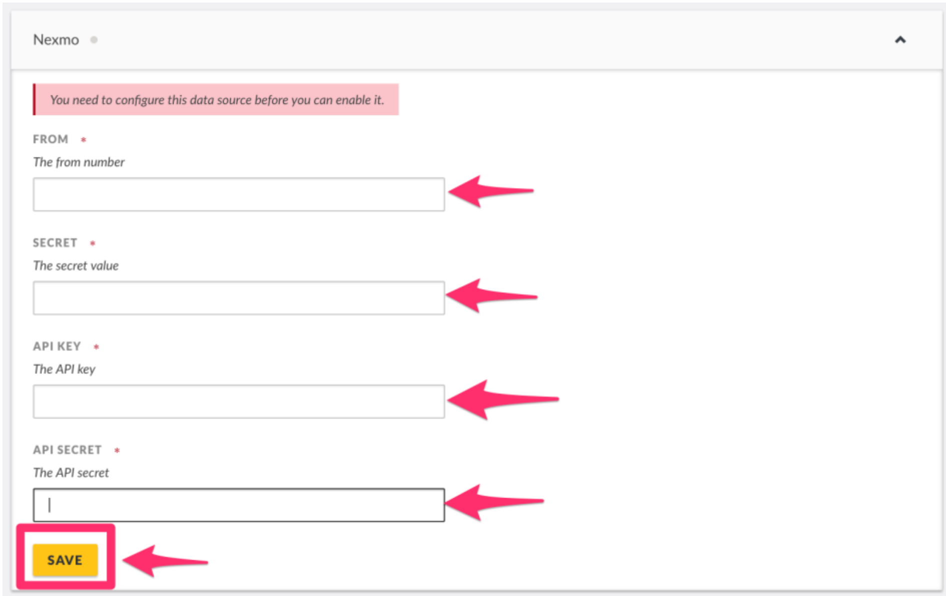


- Go back to your Data source settings page on your deployment
- Click on ***the drop down icon on the right to get to your Nexmo configuration page***

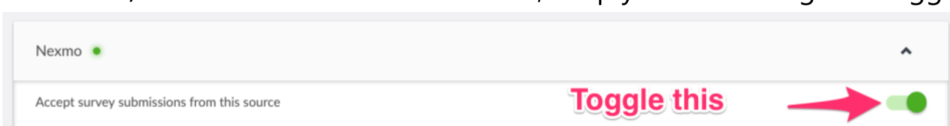


- Enter the following details, which you got earlier from your Nexmo Dashboard
    - ***From***: Enter the phone number you will use to receive SMS messages from your nexmo account

  - ***Secret***: Enter a secret value for security purposes.
  - ***API KEY***: Enter the API key retrieved from your nexmo settings page.
  - ***API SECRET***: Enter the API secret retrieved from your nexmo settings page.
- Click on ***Save*** and this data source's settings will be saved. Unstructured posts from SMS will now be pulled into the platform from Nexmo.



- To enable/disable the nexmo data source, simply click on the green toggle.



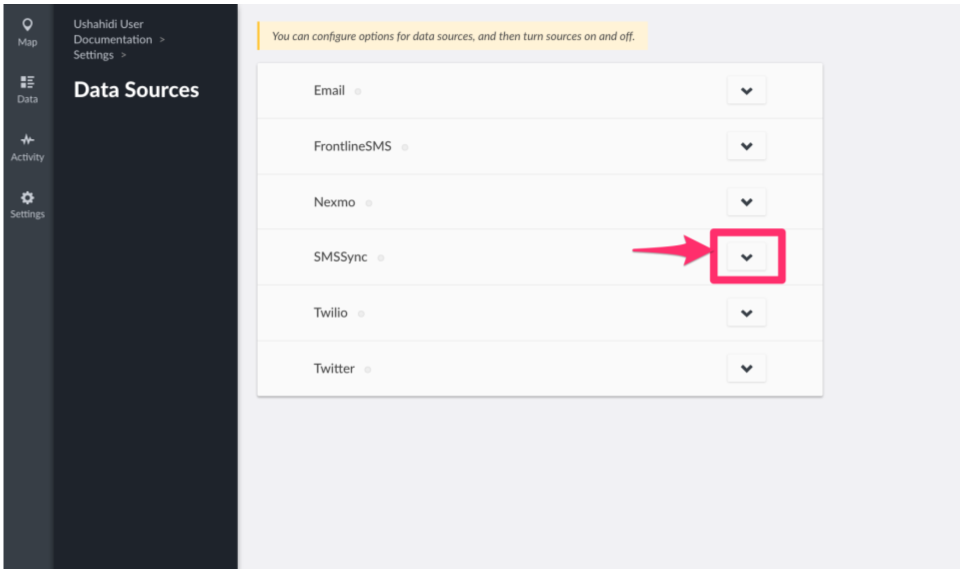
- If you'd like to edit your nexmo configuration, simply click on the drop down icon on the right while on the data sources list page and make your changes.

3.4.4 SMSSync

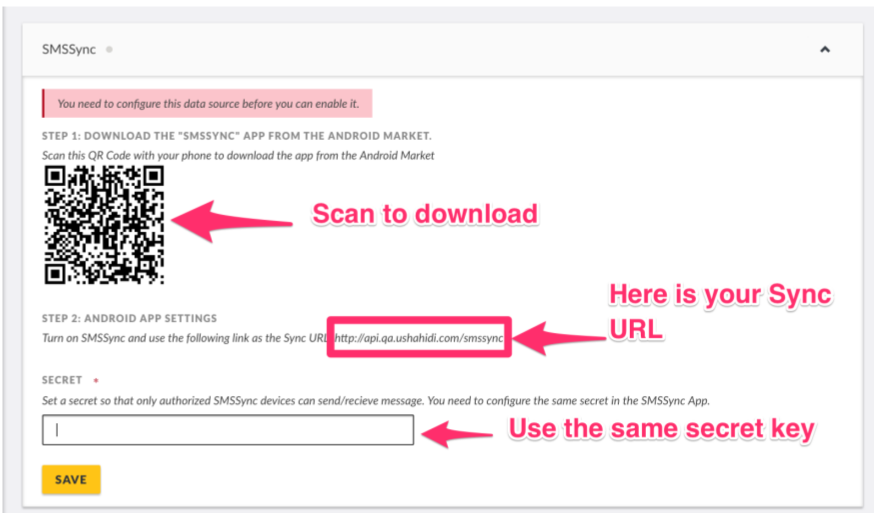
SMSsync is a simple, yet powerful SMS to HTTP sync utility that turns any Android phone into a local SMS gateway by sending incoming messages (SMS) to a configured URL (web service).

To get started with SMSSync set up,

- Click on ***the drop down icon on the right as shown***



- Follow the instructions given to you below.

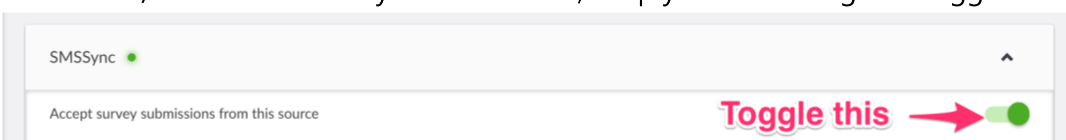


  - Download the application from the Android Market by scanning the QR Code presented to you on the settings page or simply search for it in the android market. *Please note that SMSsync works on any SMS-enabled device running Android 2.1 and above.*
  - Retrieve the ***Sync URL***, which you'll need to configure SMSSync with under ***Step 2: ANDROID APP SETTINGS***
  - You can also set an SMSSync secret key for security purposes
  - Click on ***Save***
- Open up the SMSSync Application on your android device. You'll note that you can manage multiple Sync URLs on the app.
- To add a new Sync URL
  - Tap on the Sync URL from the navigation drawer.
  - Tap on the Add icon icon on the actionbar. An input dialog should open.

- Enter a title for the Sync URL.
- Enter a secret key(If you set one above). Make sure you enter the exact key here.
- The secret key should be presented as string of any characters without spaces.
- Enter a comma separated value for the keyword(s). These keywords will be used by SMSsync to filter incoming SMS and pending messages to the Sync URL you are adding. As of v2.0.2. You can now add Regular Expression code for filtering. This means, it can either be CSV or RegExp. It cannot be both.
- Enter the URL for your web service. Don't forget to start with the HTTP or HTTPS protocol. e.g. https://example.com/api-v1/add-record/
- Tap OK to save the new entry.

Note: Version 2.5 or higher supports basic auth credentials in the URL, e.g. https://username:pass@example.com/api-v1/add-record/.

- You will now need to start the SMSSync Service to start forwarding messages to the platform. To start the SMSSync service
    - Make sure that you have added and enabled(checked) the Sync URL you added above.
    - On the SYNC URL screen, tap on the Start SMSsync service to start the service. You only do this if the service is disabled.
- You should be all set to work with SMSSync and Ushahidi now. Unstructured posts via SMS will now be pulled into the platform.
- To enable/disable the SMSSync data source, simply click on the green toggle.



- If you'd like to edit your SMSSync configuration, simply click on the drop down icon on the right while on the data sources list page and make your changes.

For more details on how to manage messages within SMSSync, see configuration instructions on the SMSSync Website

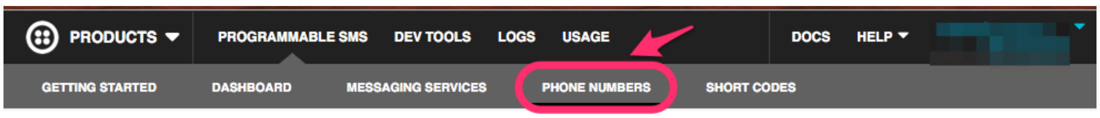
3.4.5 Twilio

Twilio allows you to programmatically make and receive phone calls and send and receive text messages using its web service APIs.

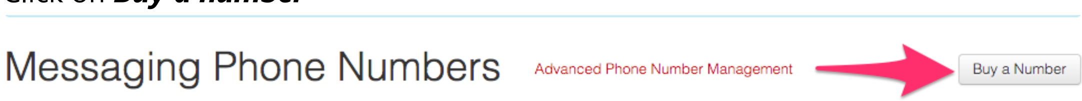
NB: You need a Twilio account to be able to configure this as a data source. To sign up, go to https://www.twilio.com/try-twilio

To get started with Twilio set up,

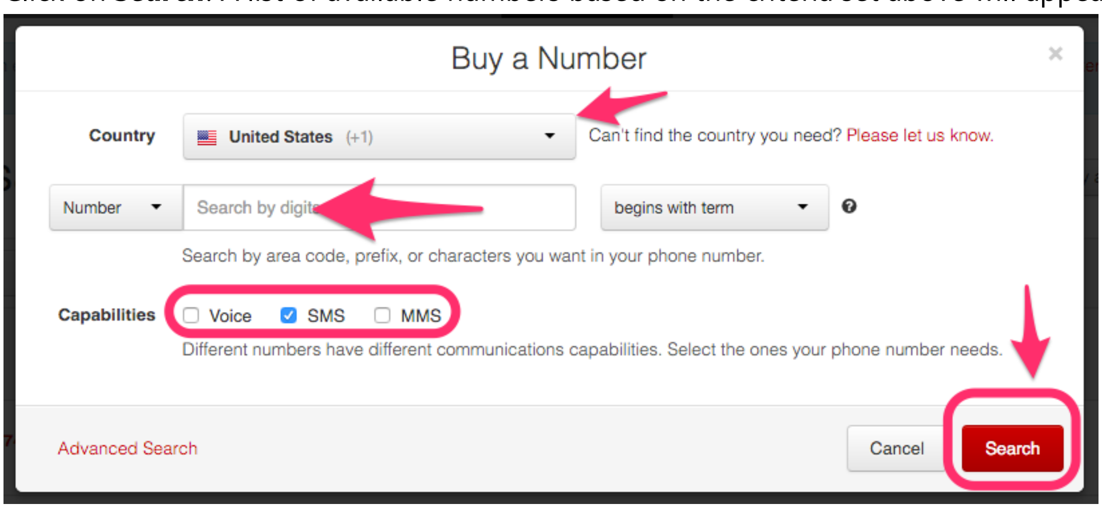
- Log into your twilio account.
- You'll need to buy a number to use. Click on ***PHONE NUMBERS.***



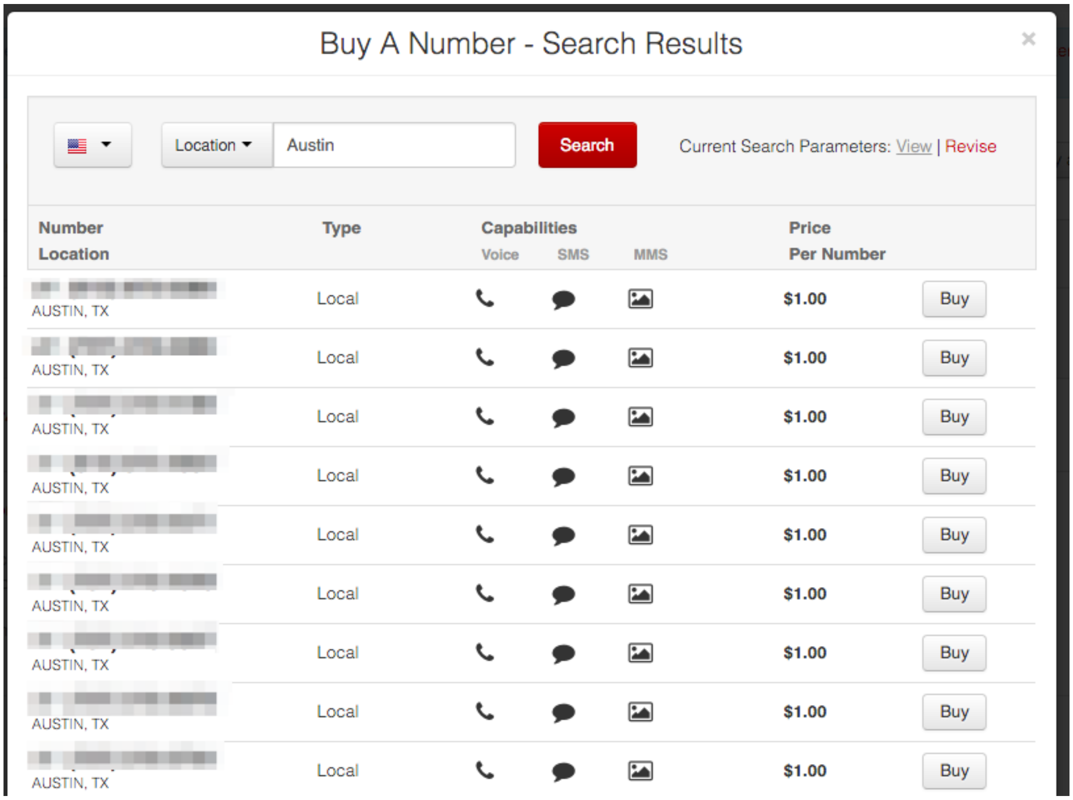
- Click on ***Buy a number***



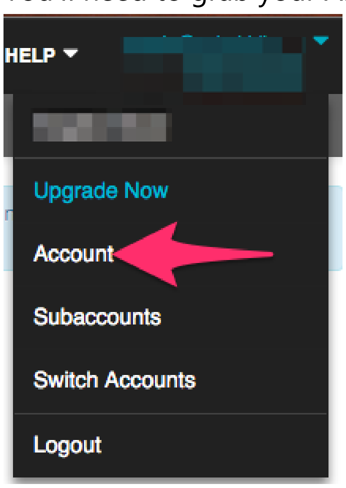
- Select the desired criteria for your phone number
  - Country
  - Location/Number
  - Capabilities (Voice, SMS, MMS)
- Click on ***Search***. A list of available numbers based on the criteria set above will appear.



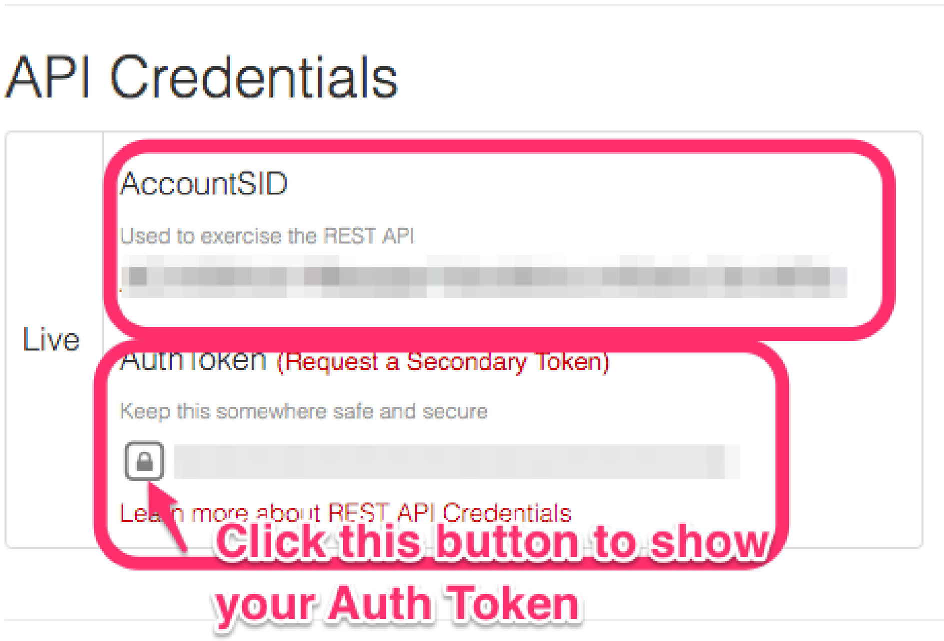
- Click ***Buy*** on the number you'd like to use.



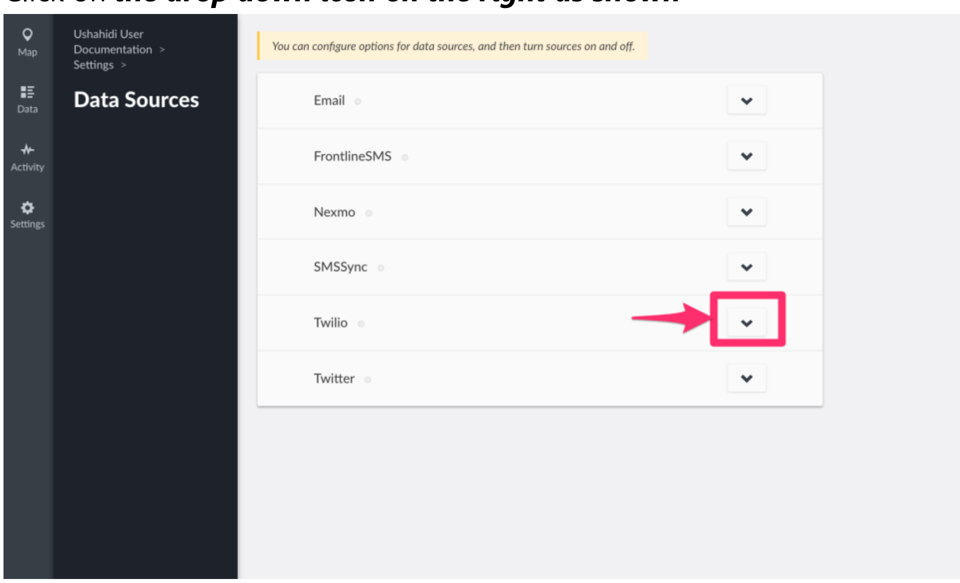
- Once you have a phone number, note it down as you'll need it to configure your data source later on.
- You'll need to grab your API credentials from your Twilio Account settings page.



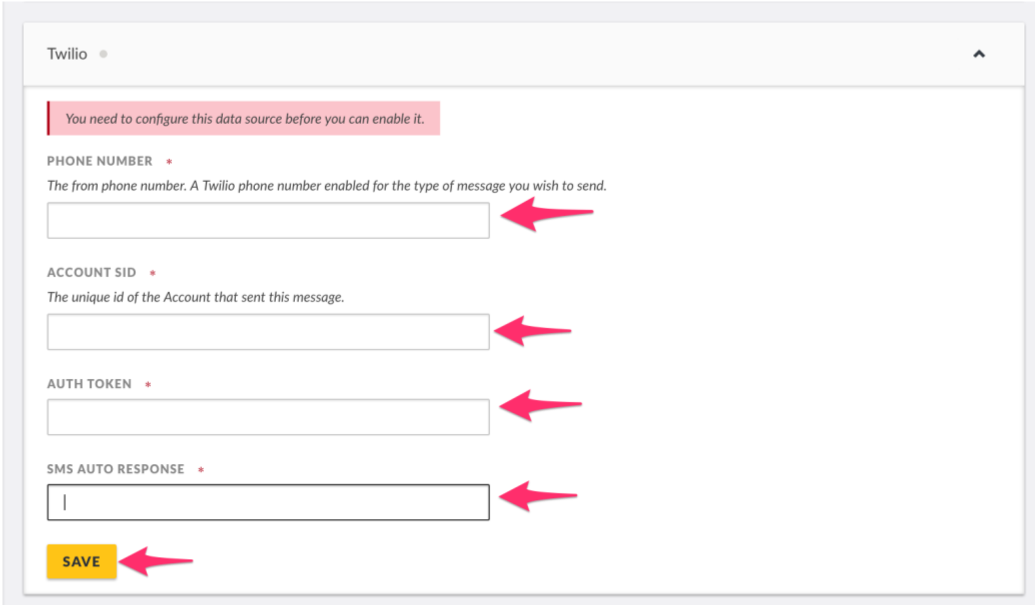
- Pick your *ACCOUNT SID* and *AUTH TOKEN* from the ***API Credentials*** section.



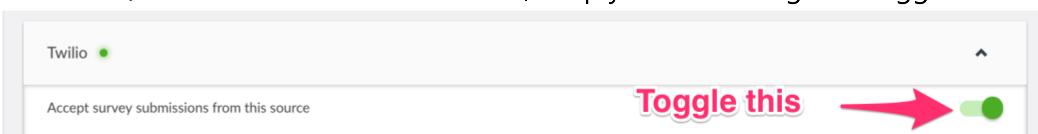
- Go back to your Data source settings page on your deployment
- Click on ***the drop down icon on the right as shown***



- Enter the following details, which you got earlier from your Twilio Account
  - ***From***: Enter the phone number you will use to receive SMS messages from your twilio account
  - ***ACCOUNT SID***: Enter the unique ID of your twilio account
  - ***AUTH TOKEN***: Enter the Auth Token retrieved from your twilio settings page.
  - ***SMS Auto Response***: This will likely be the message sent back to users who send you SMS Messages.
- Click on ***Save*** and this data source's settings will be saved. Unstructured posts from SMS will now be pulled into the platform from Twilio.



- To enable/disable the Twilio data source, simply click on the green toggle.



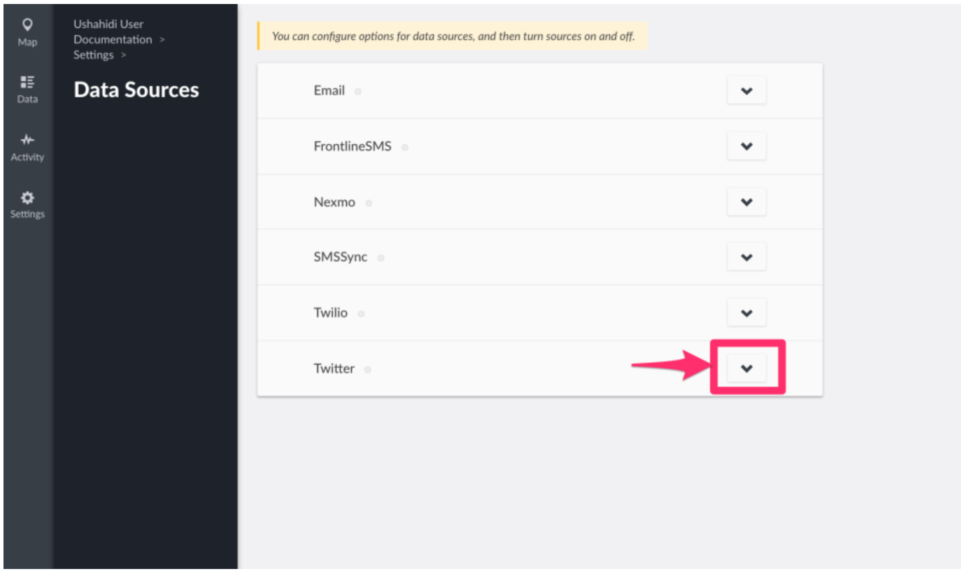
- If you'd like to edit your Twilio configuration, simply click on the drop down icon on the right while on the data sources list page and make your changes.

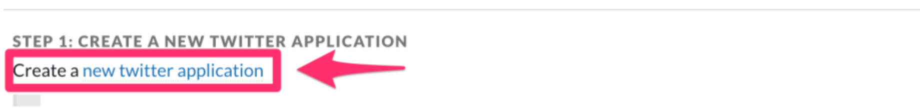
3.4.6 Twitter

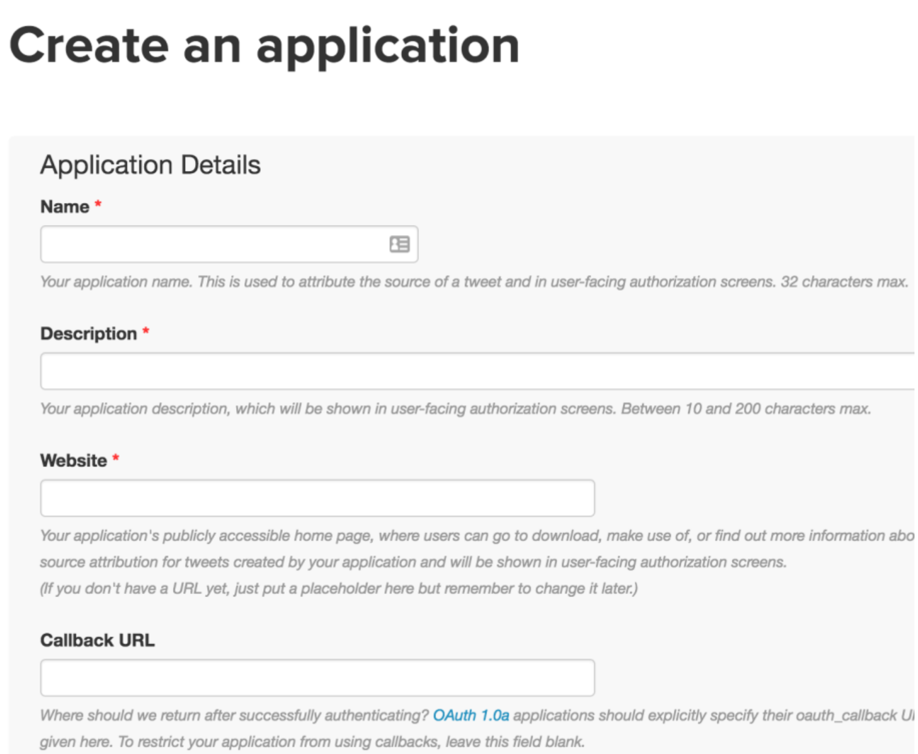
This section allows you to configure twitter as a data source, and subsequently pull unstructured posts from specific twitter hashtags.

For you to be able to pull tweets based on hashtags, you will need to set up your ushahidi deployment as an application on twitter. To get started,

- Click on ***the drop down icon on the right as shown***
- Click on Create a new twitter application. This will redirect you to https://apps.twitter.com
- Sign into https://apps.twitter.com using your twitter username and password
- Click on "Create New App"



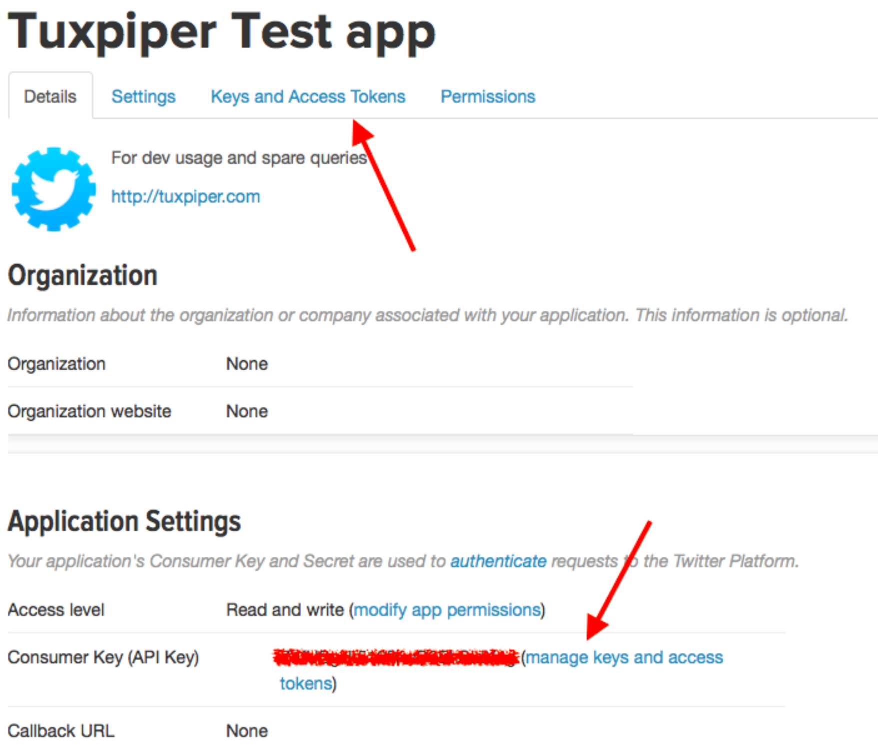




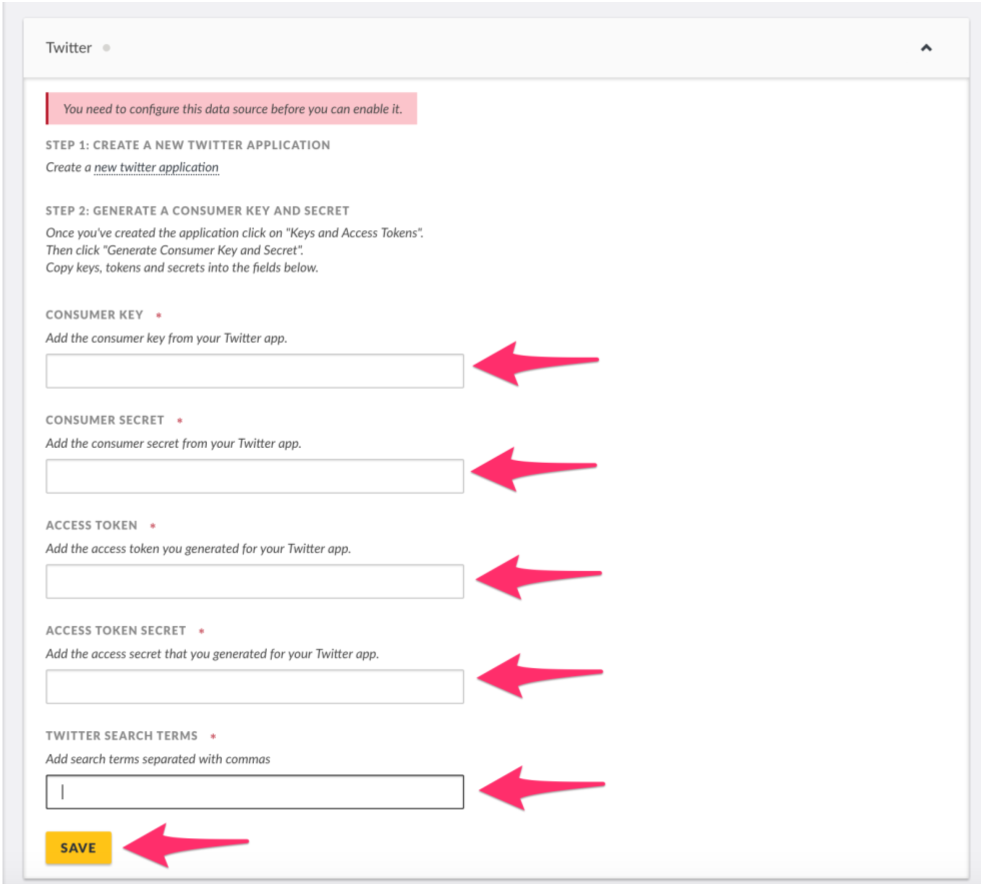
- Fill in the application details
    - Name – this can be your deployment/site name e.g Uchaguzi
    - Description – this is your deployment/site description – what your deployment does
    - Website – this is your deployment url/link i.e http://yourdeployment
    - Callback url – Leave this blank.

- Agree to the terms and conditions then click on ***Create your twitter*** application

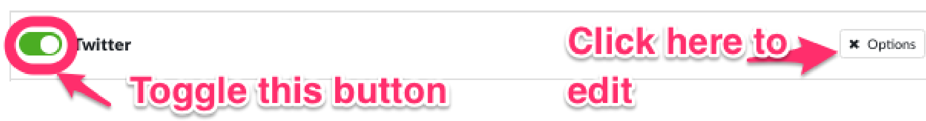
- Once your application has been successfully created, you should now be able to access your access keys and tokens. To do so, click on ***Keys and Access Tokens*** or ***Manage Keys and Access***



- You'll get redirected to a page where you can grab details needed to configure your Ushahidi deployment i.e ***CONSUMER KEY***, ***CONSUMER SECRET***, ***ACCESS TOKEN***, ***ACCESS TOKEN SECRET***.
- You'll have to generate an ***ACCESS TOKEN*** and ***ACCESS TOKEN SECRET*** by clicking on ***Generate my access token and token secret.*** This may take a couple of minutes, and your page will refresh with all the details you require.
- Go back to your twitter configuration page on your deployment and fill in all the details from your twitter app management page.
- Add the hashtags you want to pull tweets from in the "Twitter Search Terms" section. You can choose more than one hashtag, separated by a comma. It is recommended that short and clear hashtags be chosen.
- Click on ***Save*** and this data source's settings will be saved. Unstructured posts from twitter will now get pulled into the platform.



- To enable/disable the twitter data source, simply click on the green toggle.
- If you'd like to edit your twitter configuration, simply click on the drop down icon on the right while on the data sources list page and make your changes.

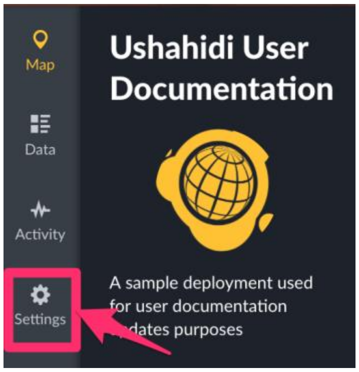


3.5 Categories

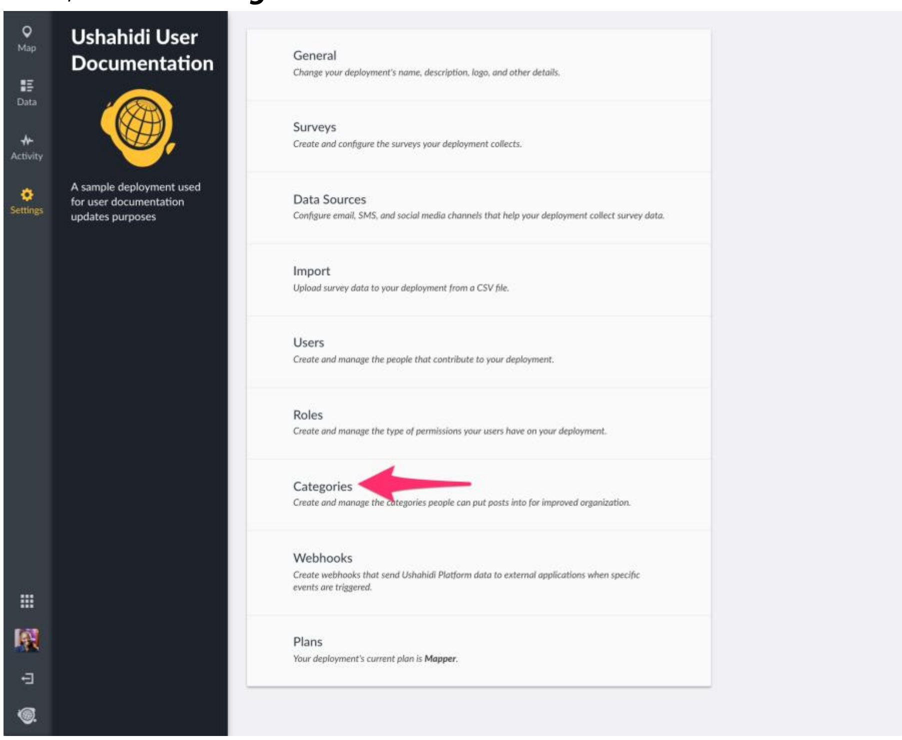
Categories are a way of grouping your posts based on their content within a Survey.

To access the Categories configuration page,

- On the left hand menu bar, click on ***Settings***



- Then, click on ***Categories***.



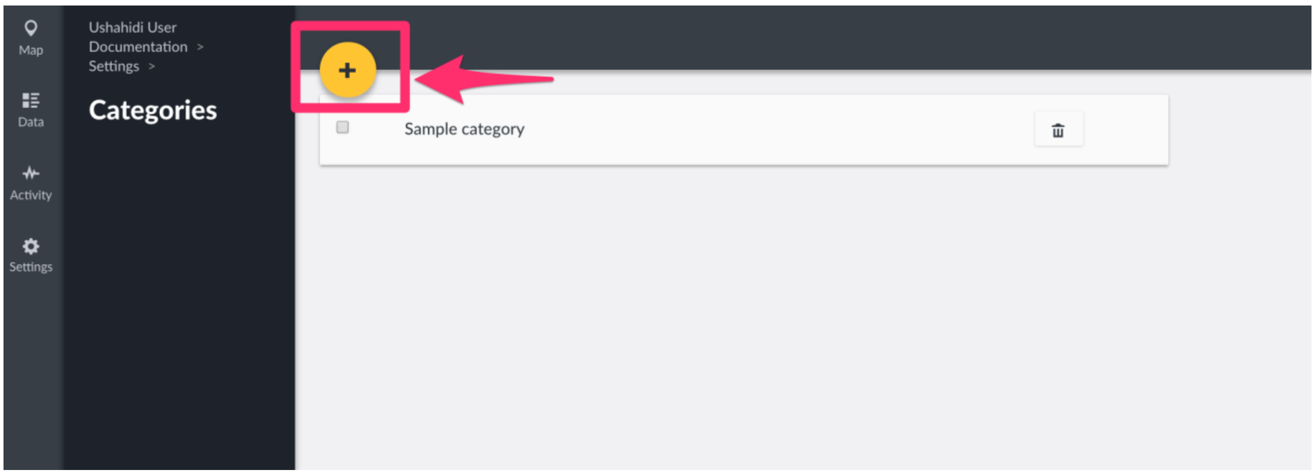
- You'll be redirected to a page where you can manage categories on your deployment

3.5.1 Adding and Configuring Categories

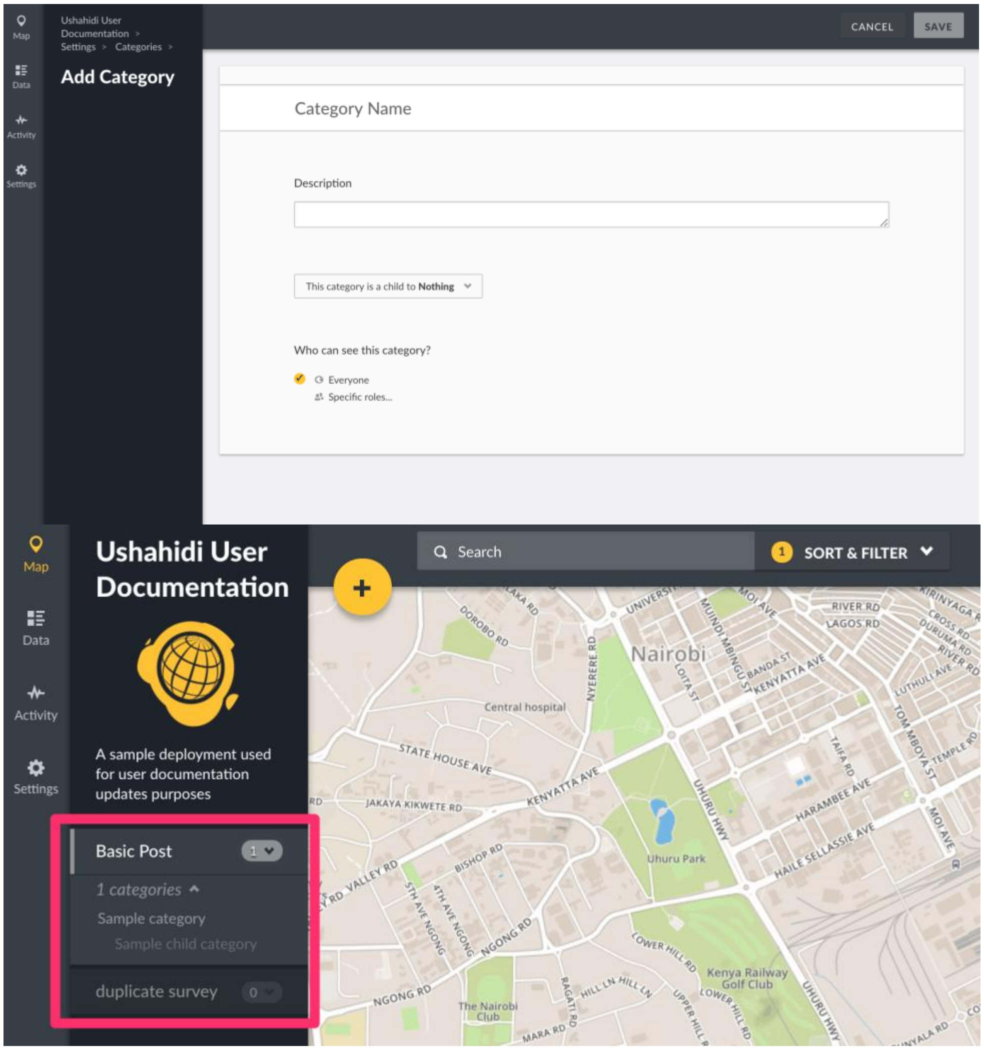
Unlike Ushahidi v2.x, your deployment DOES NOT come with pre installed/set-up categories. You will need to create this on your new Ushahidi deployment. Categories are now treated as custom fields within a Survey. This gives you the flexibility to add certain categories to some surveys, but not others.

There are two ways to create new categories. First, navigate to ***Settings → Categories***

- Click on the ***Add Category icon as shown below***



- Add the following details
    - ***Category Name:*** Give your category a name that will appear on your homepage and when users are creating new posts.
    - ***Description:*** You can provide a brief description of what kind of information you will fall under this category
    - ***Roles***: You can opt to set your category as visible to specific user roles on your deployment here. This list is populated based on custom roles created. More on Roles in [Chapter 4](#) of this manual
    - ***Child / parent settings***: You can choose to set any category as a "child" to another, creating a hierarchy within the categories themselves, and will reflect this in their positioning on the sidebar.

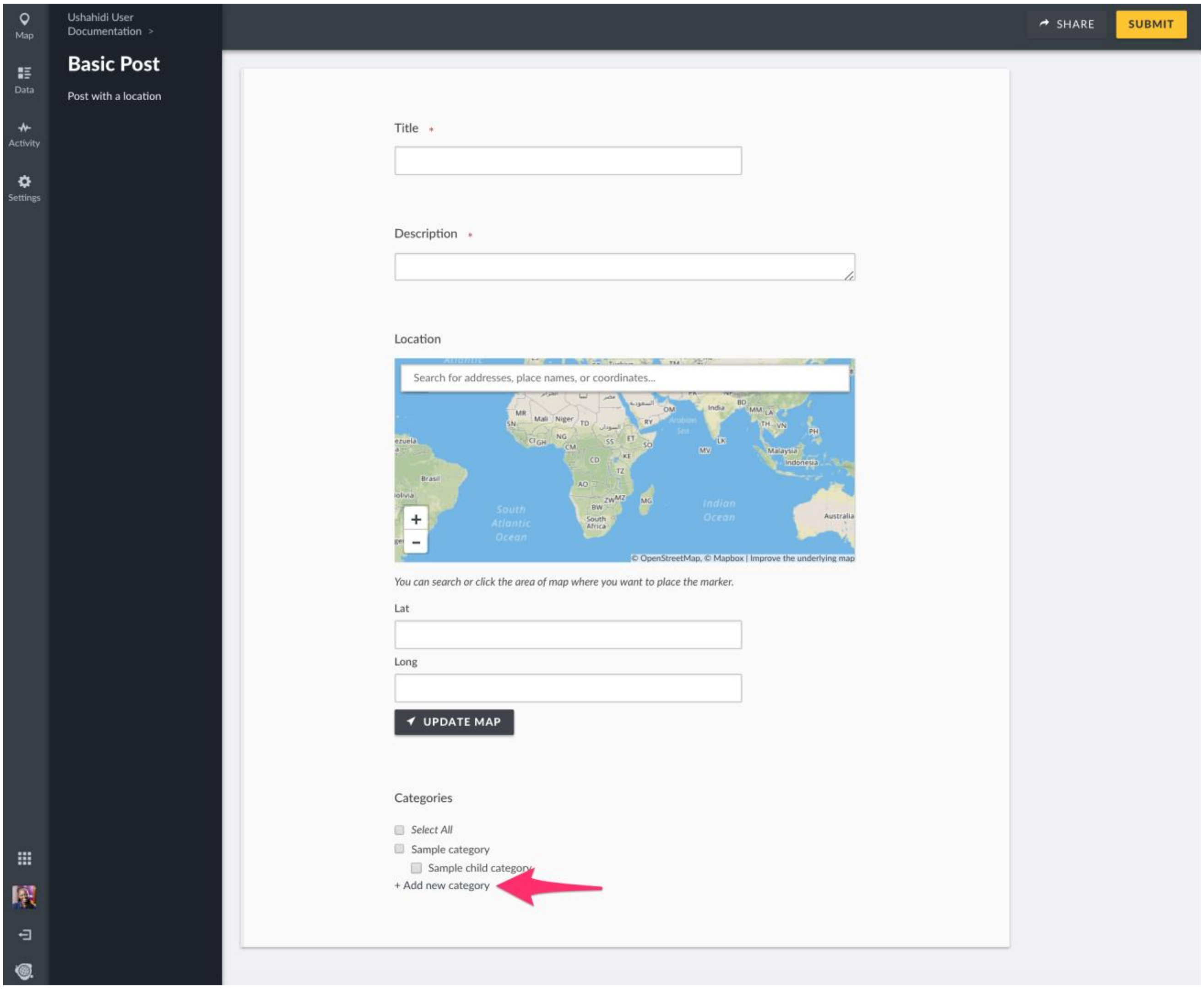


- Click on ***Save*** to create the category. You can now choose to add this category to any of your Surveys.

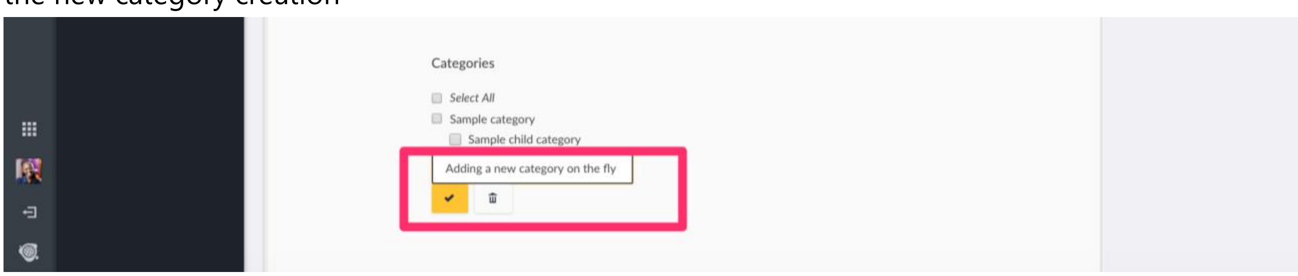
You can also create categories on the fly within the survey form itself

- Navigate to a Survey form that already has a categories field

- Under the categories field, you will see an option to ***Add new category***. Click this.



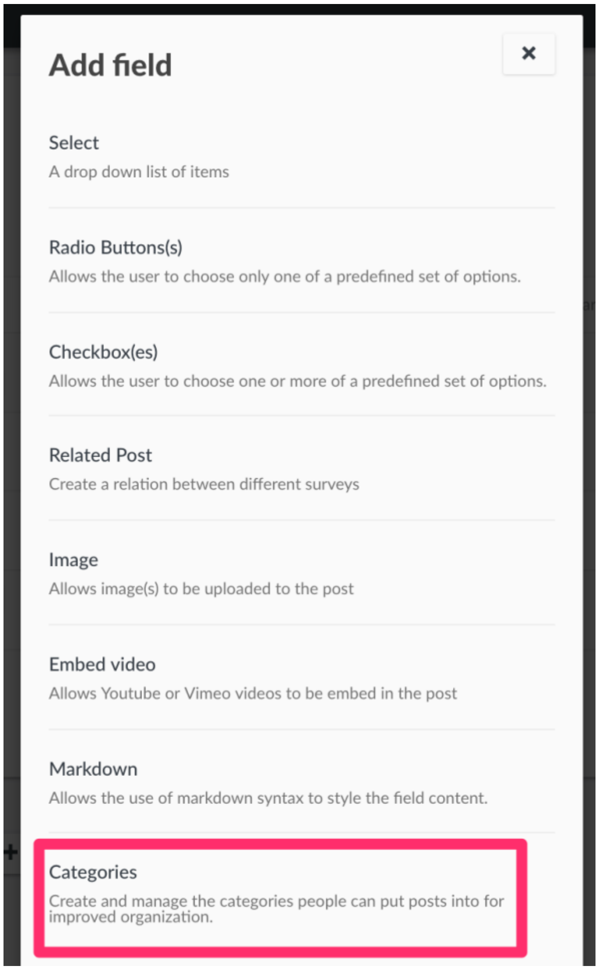
- Type the name of the new category you'd like to add
- Click the yellow check mark to save your new category, or click the trash can icon to cancel the new category creation



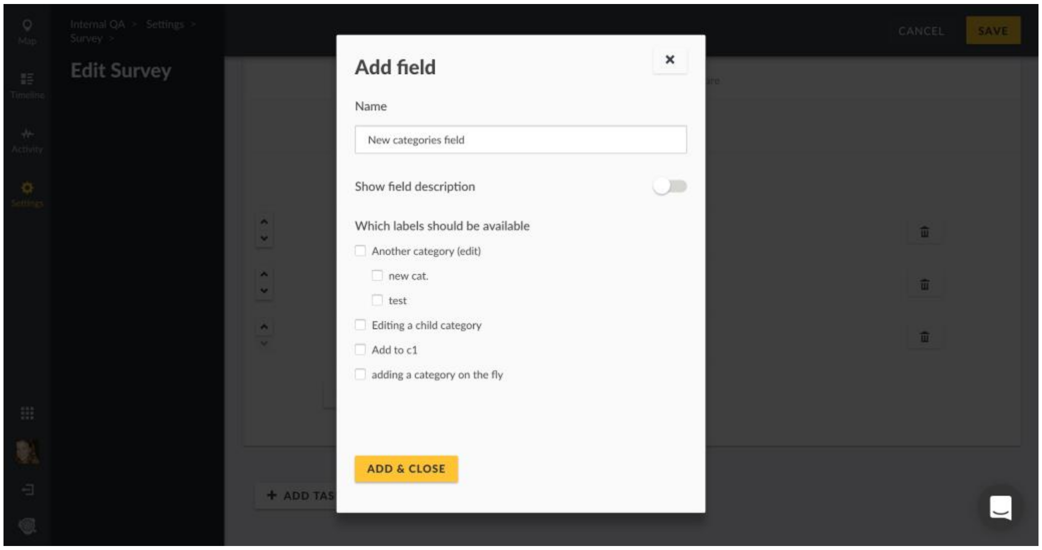
- To edit or manage your category and its settings, navigate to **Settings → Categories**

Add categories as custom fields as you build and edit Surveys. First, navigate to **Settings → Surveys,** and either select the already existing Survey you'd like to edit, or create a new Survey.

- Click on ***Add field*** at the bottom of the survey builder and select ***Categories*** from the list of field options

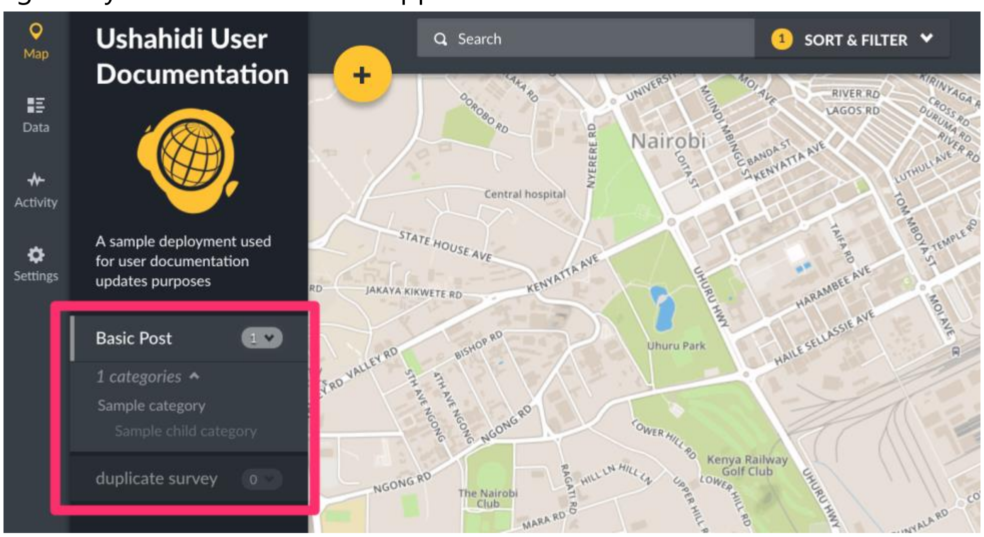


- Configure the following:
    - ***Name:*** Name or prompt for your survey field
    - ***Show field description:*** Turn this on if you'd like to add a short description or help text to the field
    - ***Which labels should be available:*** Select which categories you'd like to add to the field as options



- Click ***Add & Close*** to save your new categories field
- It will now appear as a custom field with the appropriate categories on your Survey form

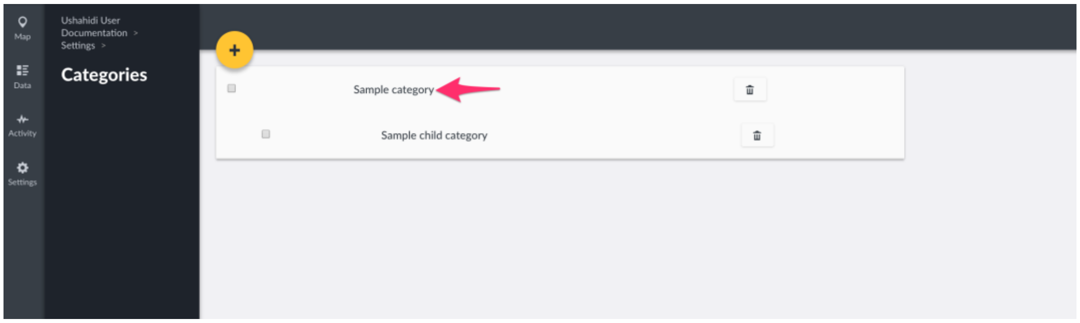
The categories you selected will also appear in the left side context modal as filtering options



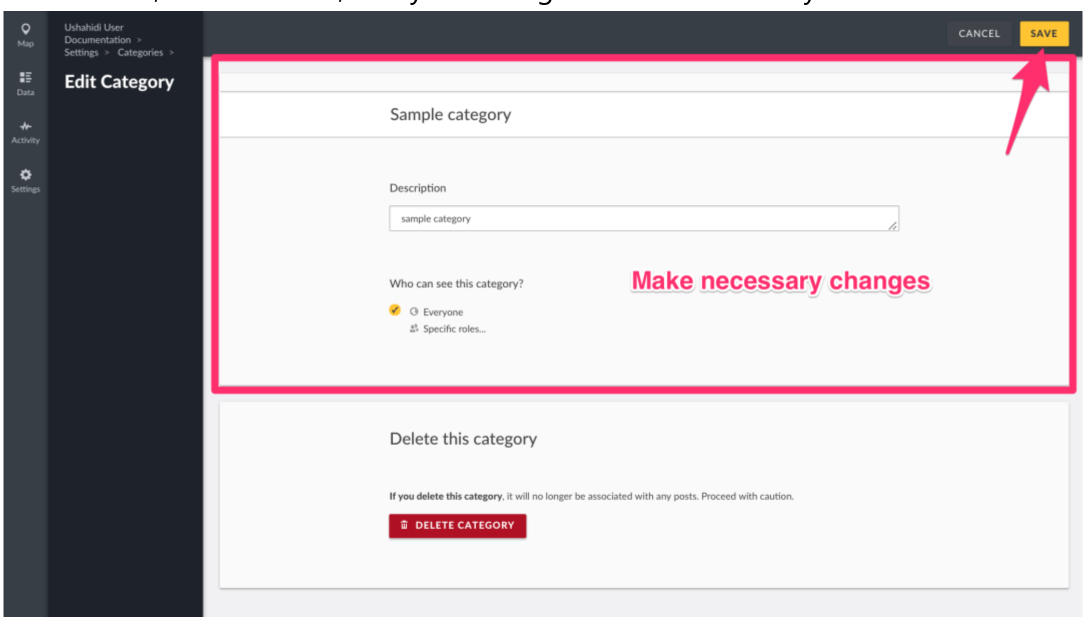
3.5.2 Editing Categories

To edit a category,

- Click on the desired category from the category list page



- You'll get redirected to the ***Edit Category*** page, where you should be able to add/edit details as described in the [Add category section](#) above.
- When done, click on ***Save***, and your changes will reflect shortly.

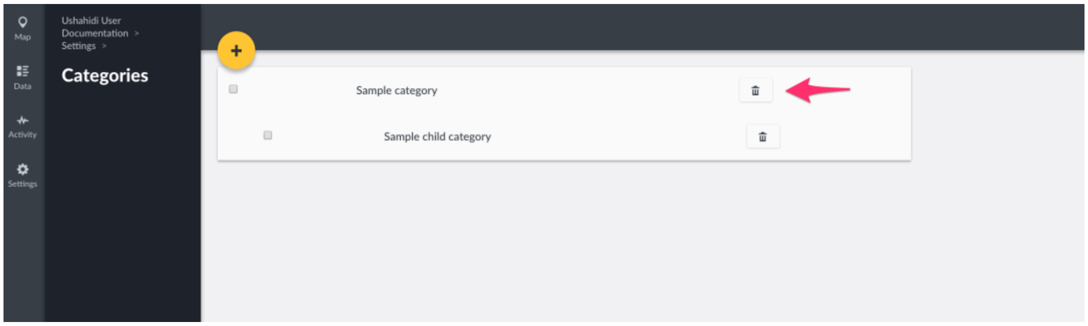


3.5.3 Deleting Categories

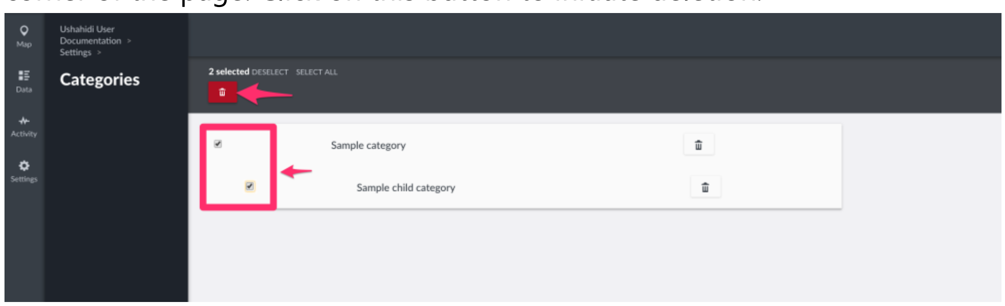
You can delete one or multiple categories at a time.

To delete a category,

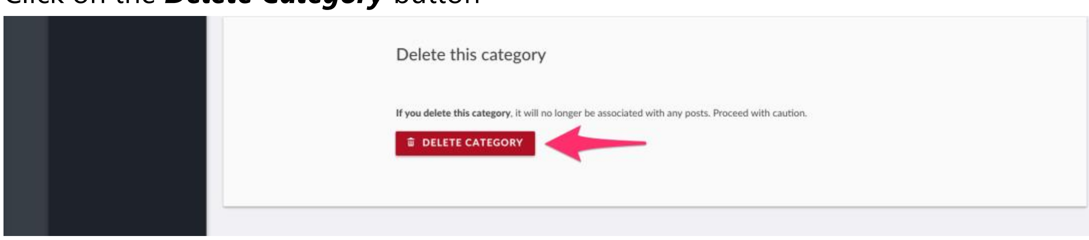
- From the category list page,
  - To delete a single category, select the trash icon adjacent to the category



  - To delete multiple categories,
    - Tick the checkbox on the left, adjacent to the category/categories you would like to delete from the category list page
    - This action will activate the previously inactive ***Delete*** button on top left hand corner of the page. Click on this button to initiate deletion.

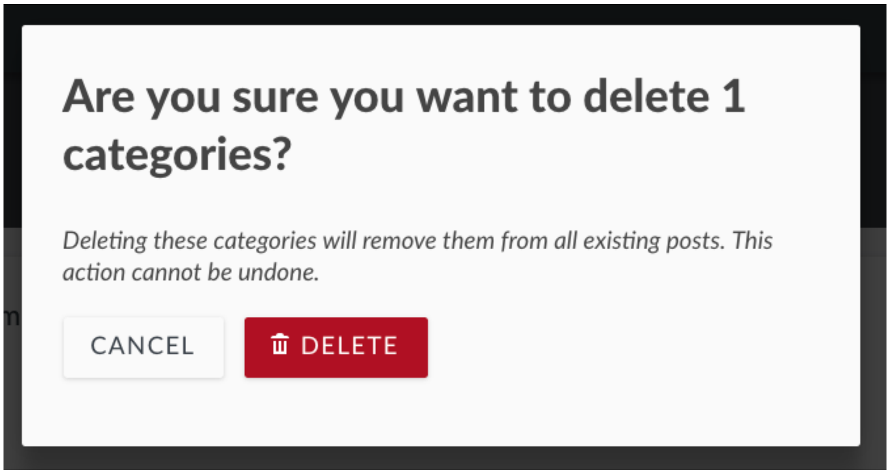


- From the category edit page,
  - Click on the ***Delete Category*** button



- A pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete the category/categories
  - Click on ***Delete*** to delete your category/categories

○ If you'd like to cancel the category deletion process, click on ***Cancel***



4. Managing People on your deployment

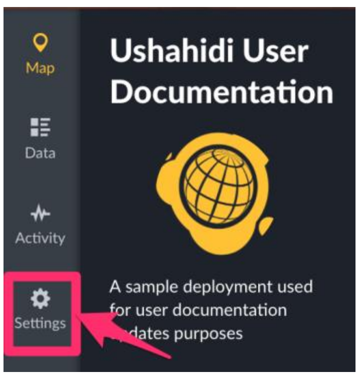
In some cases, we've seen large groups of people teaming up to work on managing data on Ushahidi deployments. This section describes how to create and manage custom roles and users on your deployment.

4.1 Roles

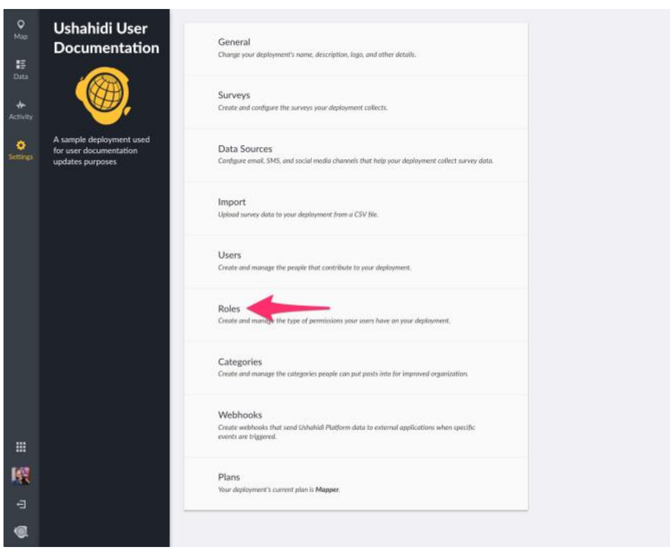
This feature allows you to set up and manage default and custom roles and permissions for different user groups on your deployment. Each deployment has a **default "Admin" and "Member"role**, which cannot be deleted, but can be edited. The **default "Admin" role** allows for full control over ALL functionality on your deployment, while the **default "Member" role** only grants access to edit their own posts.

To access the roles management page,

- On the left hand menu bar, click on ***Settings***



- Then, click on ***Roles***

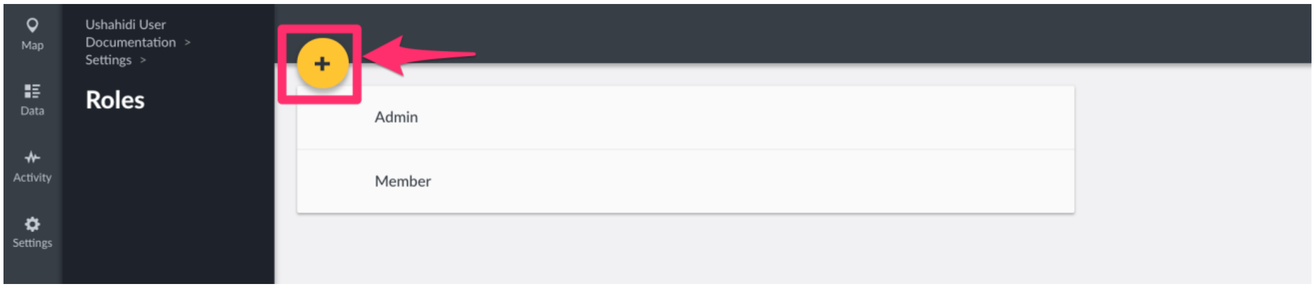


- You'll be redirected to a page with a list of all existing roles - default & custom roles (created by admins if any exist).

4.1.1 Add Role

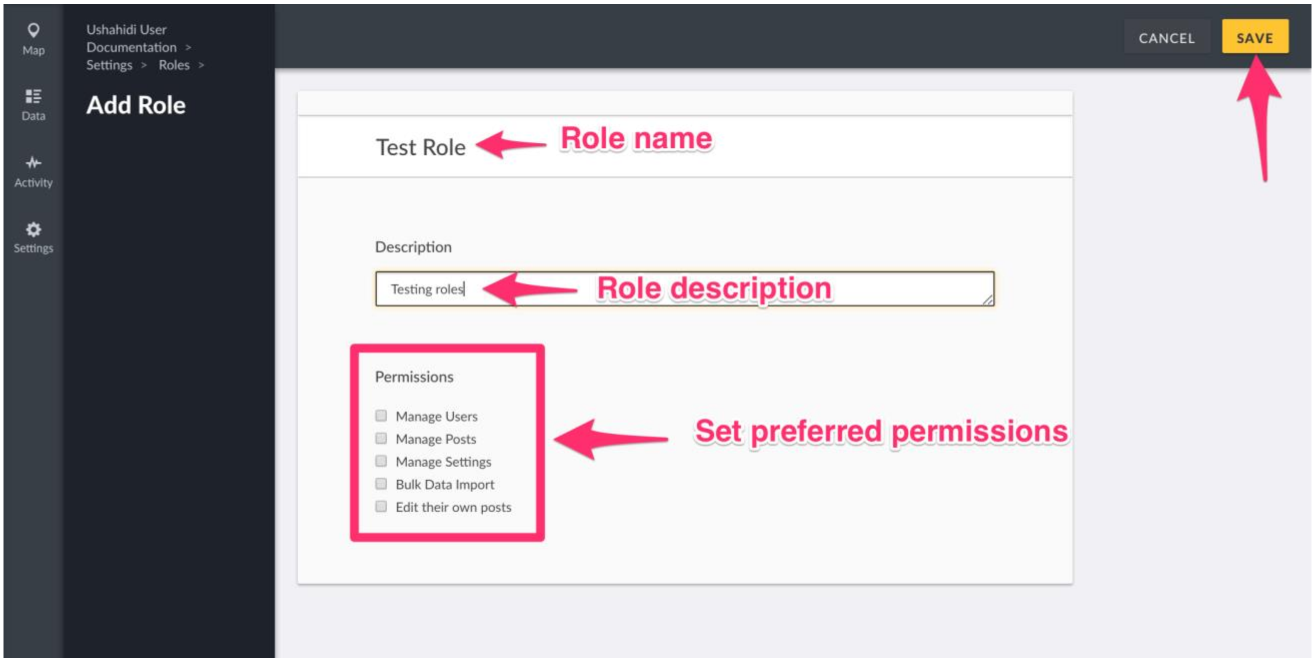
To add a custom user role,

- Click on the yellow ***Add icon***



- Add the following details
    - ***Name***: Provide a name for this new custom role
    - ***Description***: Provide a brief description of what/who this custom role has been created for
    - ***Set your permissions***. Below is a brief breakdown of what permissions get granted to users on selecting the options provided.
        - ***Manage Users***: Allows for
            - Viewing Users
            - Adding, Editing, Deleting Users
            - and Changing roles for Users
        - ***Manage Posts:*** Allows for
            - Viewing posts
            - Editing and Deleting Posts
            - Publishing posts (Setting specific audiences to view)
            - Adding posts to collections
            - Creating new collections
        - ***Manage Settings:*** Allows for managing
            - General Settings
            - Map Settings
            - Data Sources
            - Surveys
            - Categories
        - ***Bulk Data import:*** Allows for upload of data via CSV files
        - ***Edit their own posts***: Allows for editing of posts submitted by user
- Click on ***Save***.

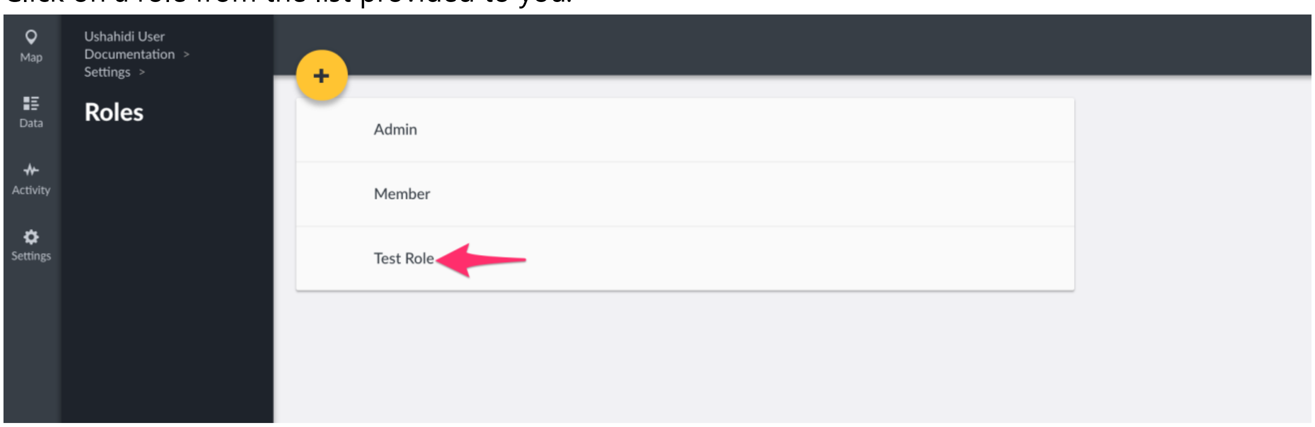
See the illustration below



4.1.2 Edit Role

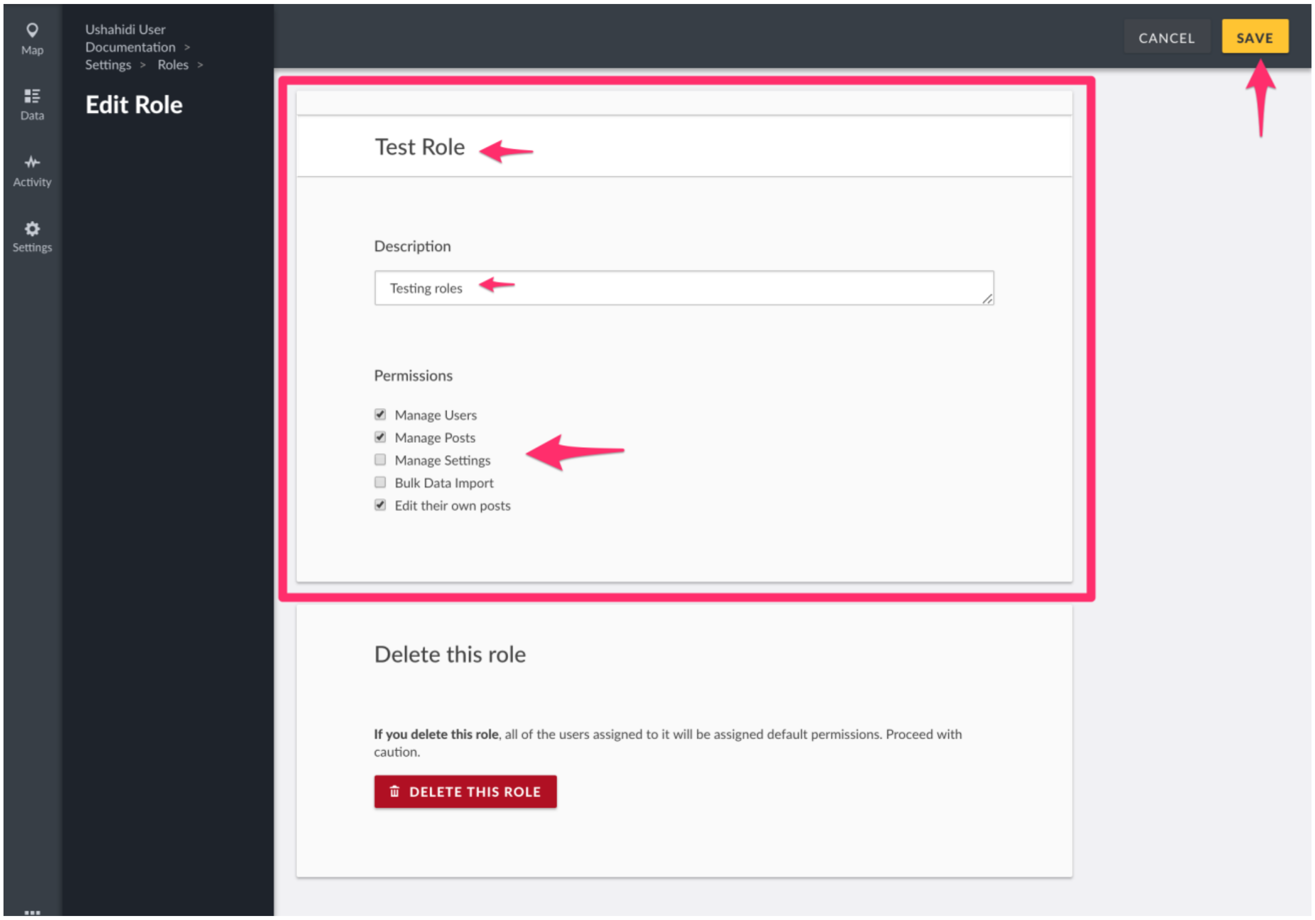
To edit a role

- Click on a role from the list provided to you.



- On redirection to the edit page, make your desired changes to the role (i.e fill out details as directed in the Add role section)

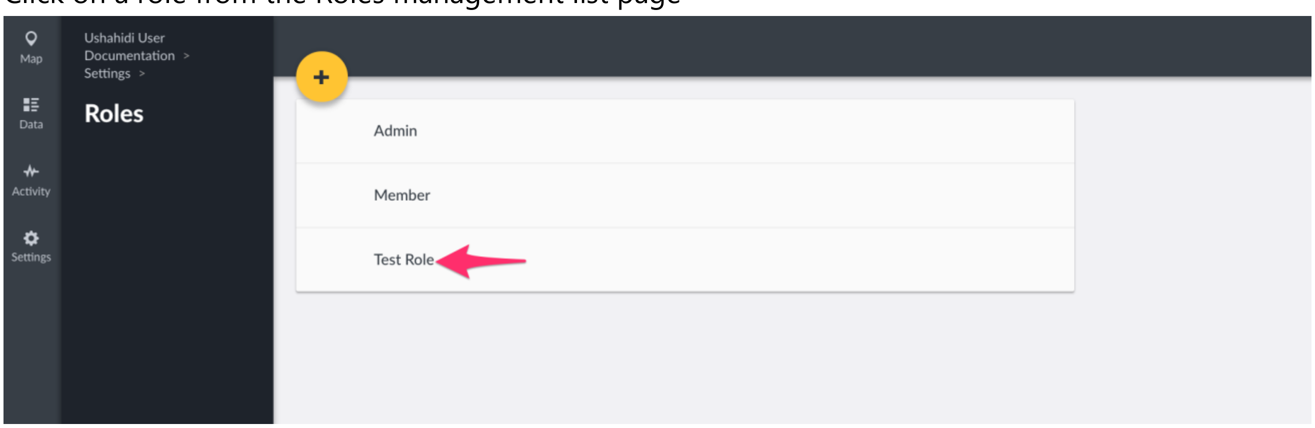
- Click on ***Save*** to update the role.



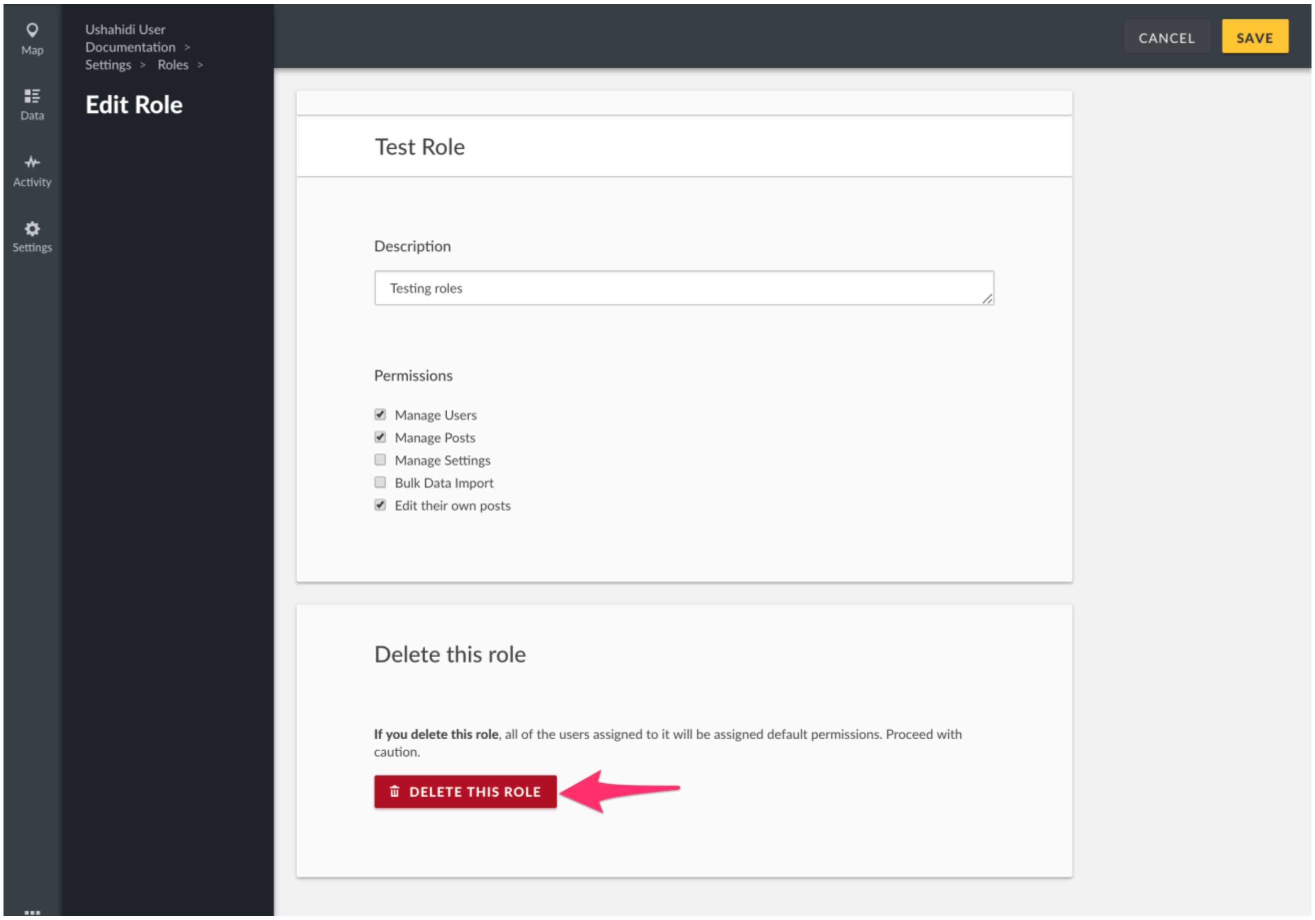
4.1.3 Delete Role

To delete a role

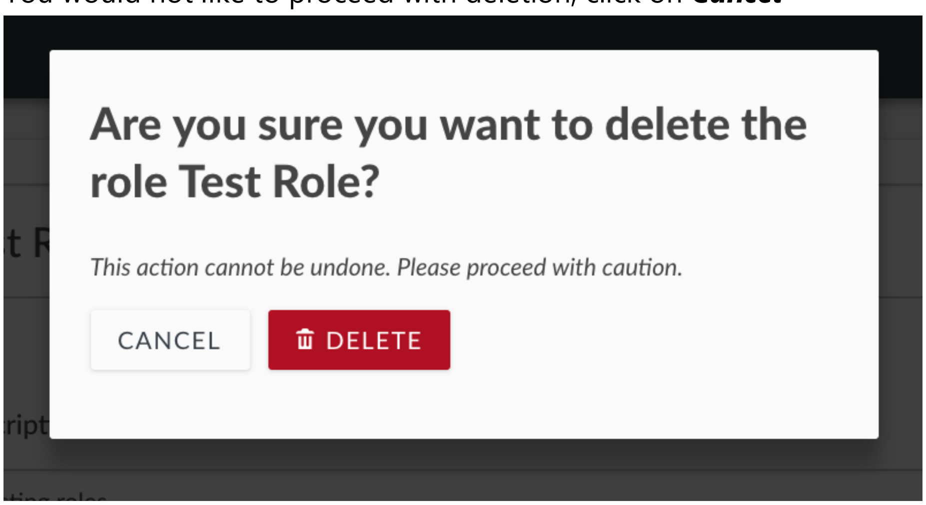
- Click on a role from the Roles management list page



- Then, click on the ***Delete This Role*** button at the bottom of the page



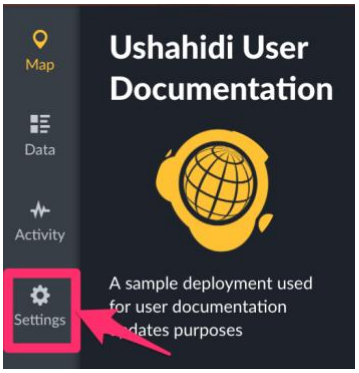
- A pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete the custom role. If
    - You would like to proceed with deletion, click on ***Delete***
    - You would not like to proceed with deletion, click on ***Cancel***



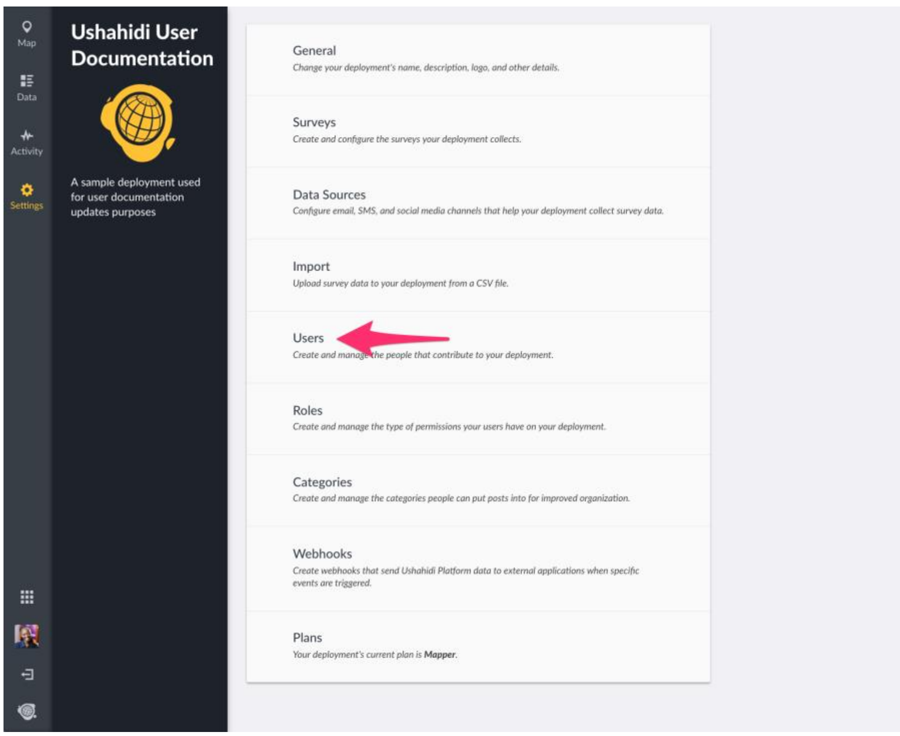
4.2 Users

To access the User management page,

- On the left hand menu bar, click on ***Settings***

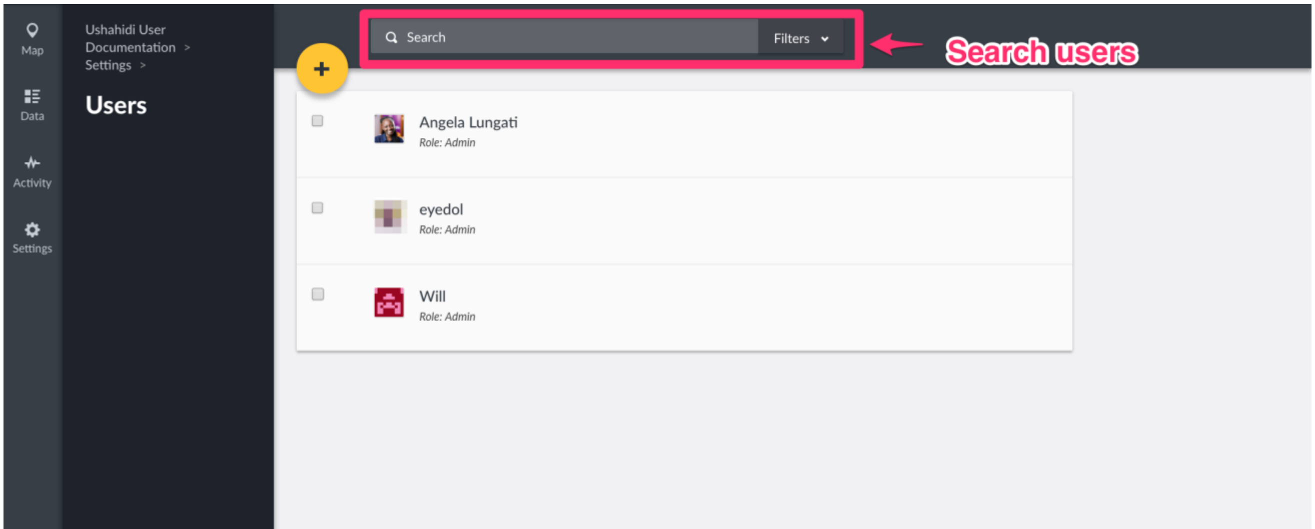


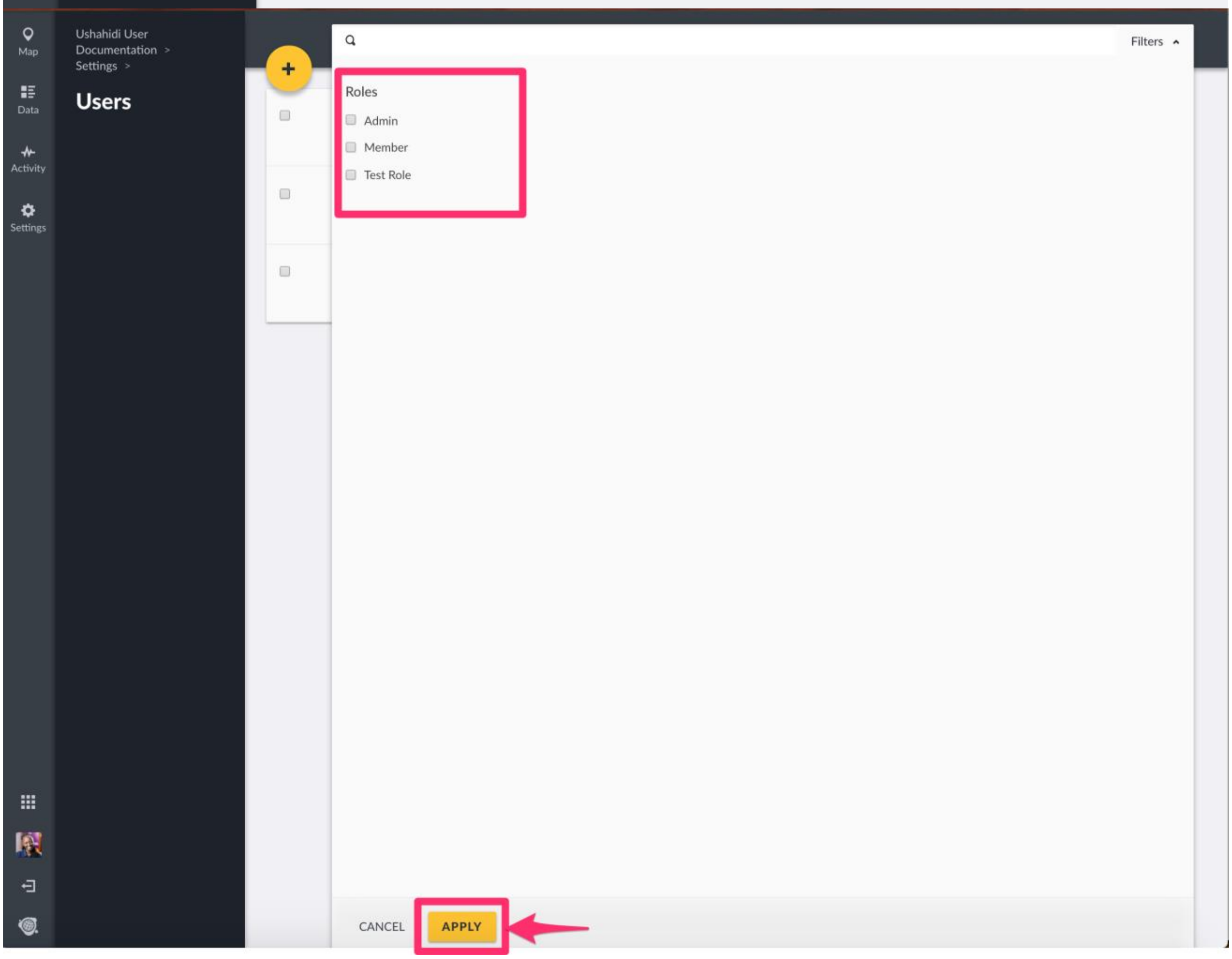
- Then, click on ***Users***.



- You'll be redirected to a page with a list of all existing users on your deployment
- If you are an ushahidi.io user, you should see the the user you created on set up listed on this page. If you are an ushahidi open source user, every installation comes with a default username: ***admin*** and password: ***admin***

- From here, you can search for users either by name or by custom role

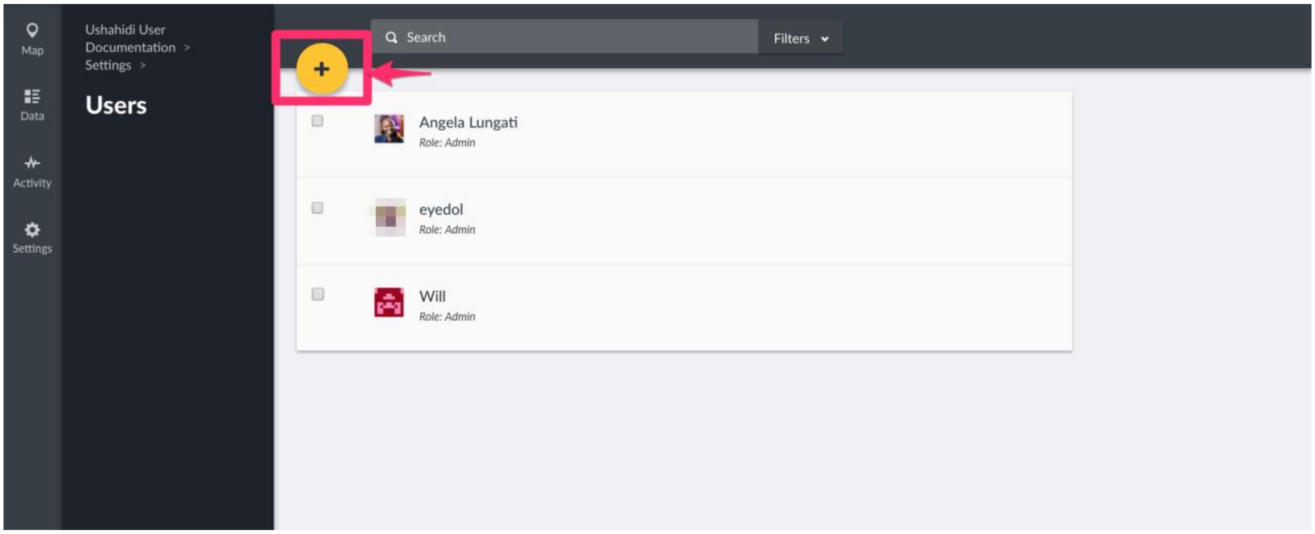




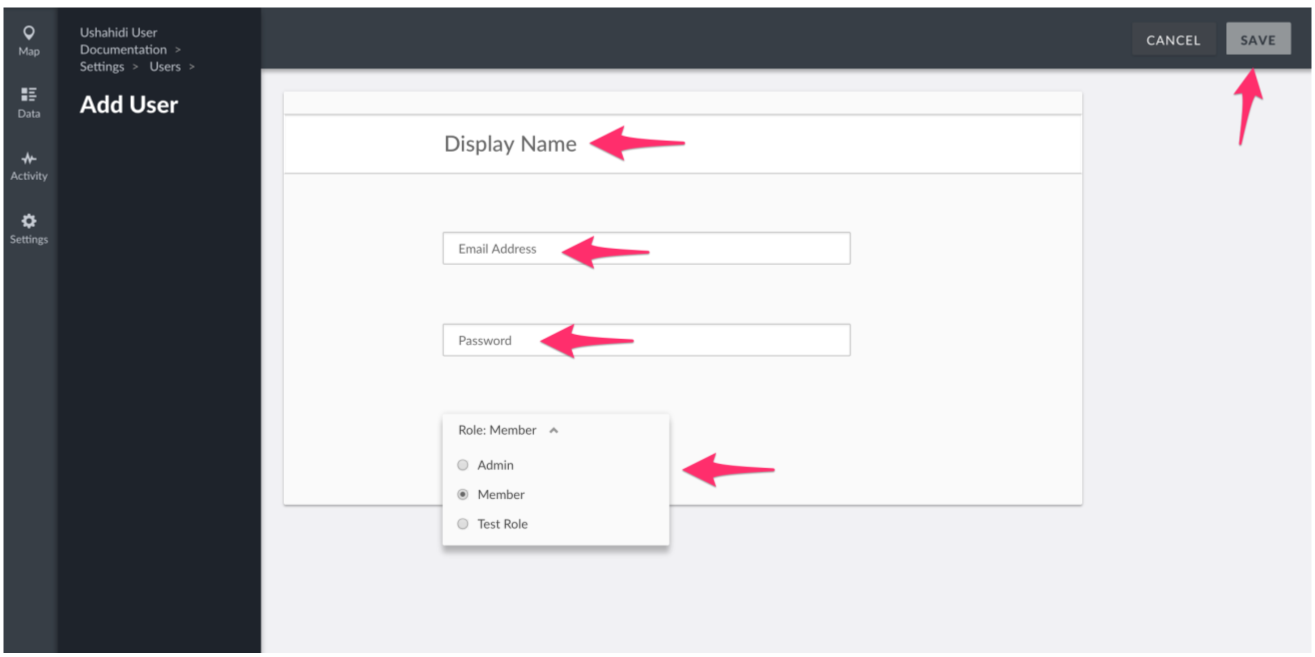
4.2.1 Adding new users

To add a new user,

- Click on the ***yellow icon*** as shown below



- Fill out the details below

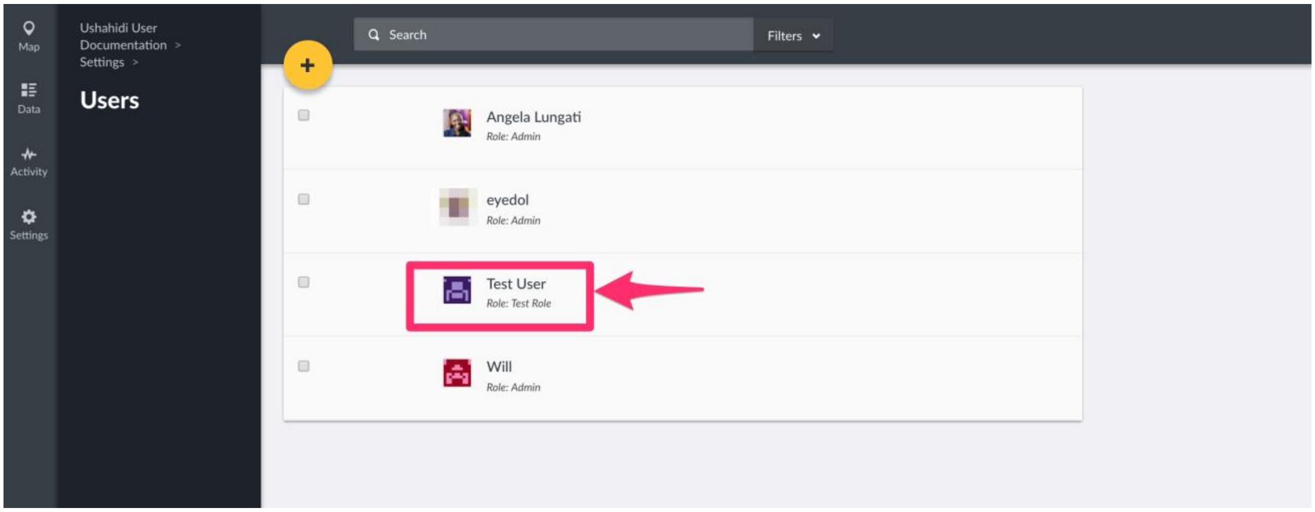


  - ***Display Name***: This is the name that will be displayed
  - ***Email address:*** This is the email address that will be tied to this new user's account, and will be used to log in.
  - ***Password:*** Set a strong and secure password for your new user. Each password must have at least 7 characters
  - ***Role:*** Choose the level of administration access you would like this user to have
- Click on ***Save*** to create one.

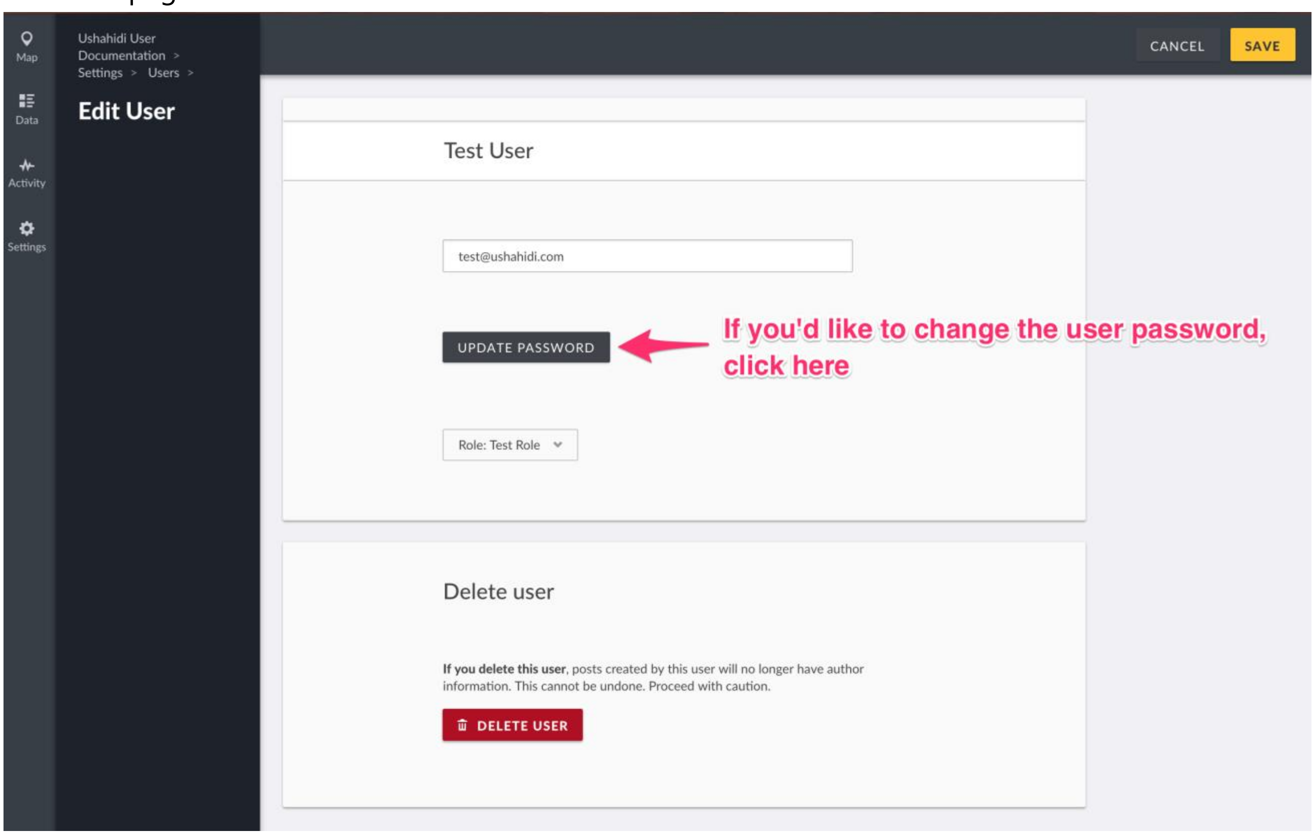
4.2.2 Editing users

To edit a user,

- Click on the user you intend to edit from the user list page



- You should be able to edit the user's display name, email address, password and user role from this page.

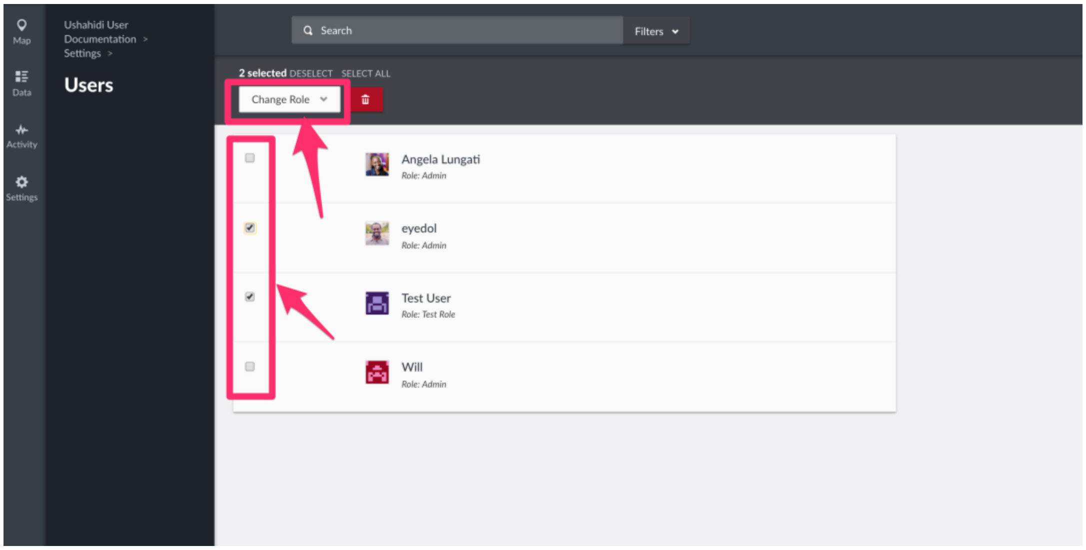


- Click on save when done.

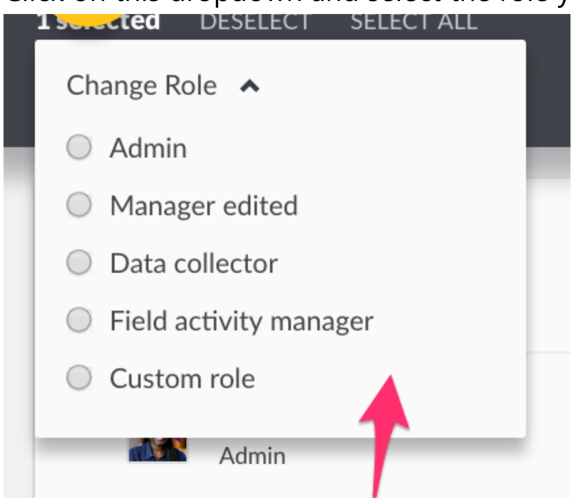
4.2.3 Changing User roles

You can change multiple users' roles at once from the user management page.

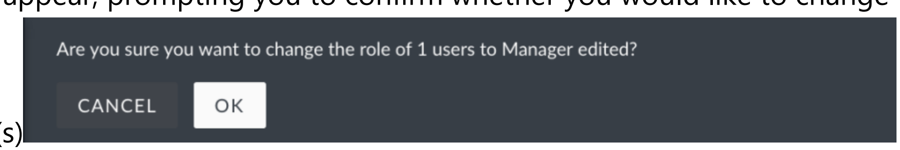
- Tick the checkbox on the left, adjacent to the user(s) whose role you would like to change from the user list page



- This action will activate the previously inactive ***Change Role*** dropdown button on the top menu bar.
- Click on this dropdown and select the role you would like to assign your users to.



- A pop up box will appear, prompting you to confirm whether you would like to change the



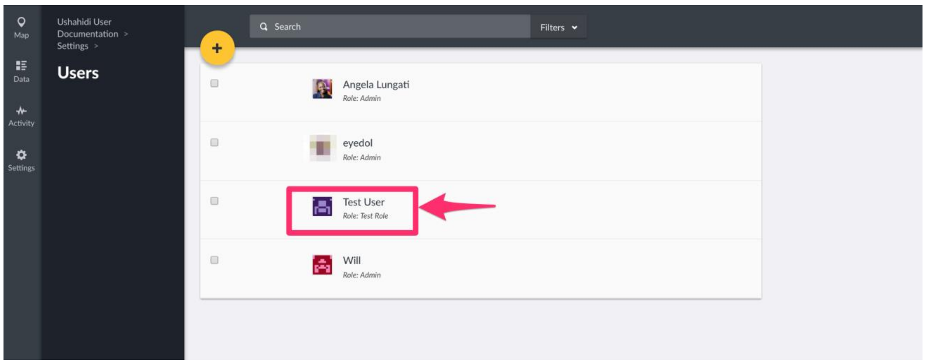
roles of your user(s)
  - Click on ***OK*** to change your user(s) role
  - If you'd like to cancel the role change process, click on ***Cancel***

4.2.4 Deleting users

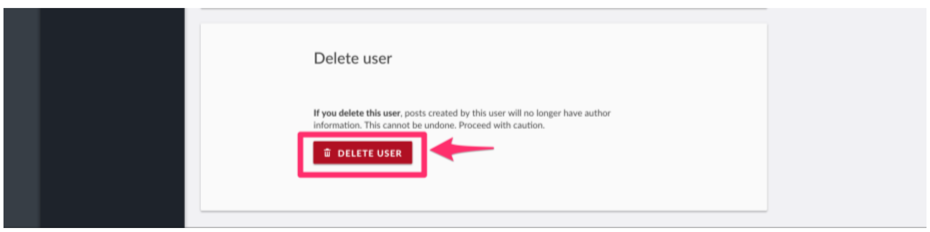
Similarly, you can delete multiple users at once from the user management page, or from the individual user edit page.

To delete a user

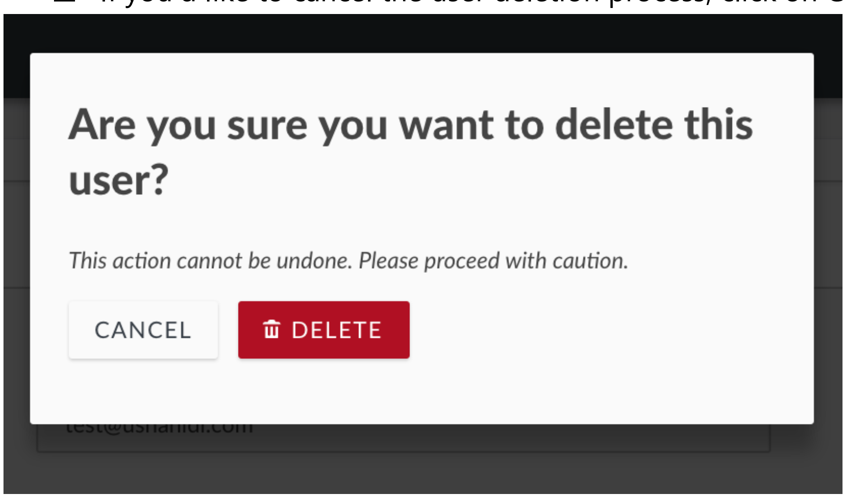
- From the individual user edit page
  - Click on the user you intend to edit from the user list page



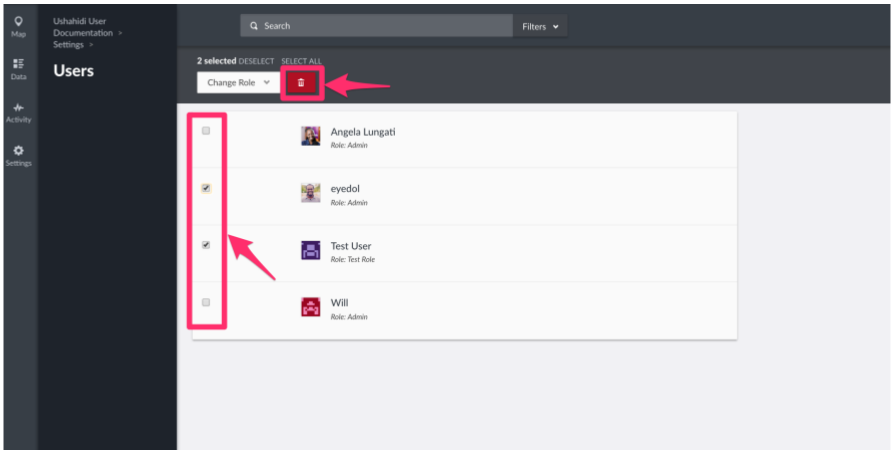
  - Click on ***Delete User***



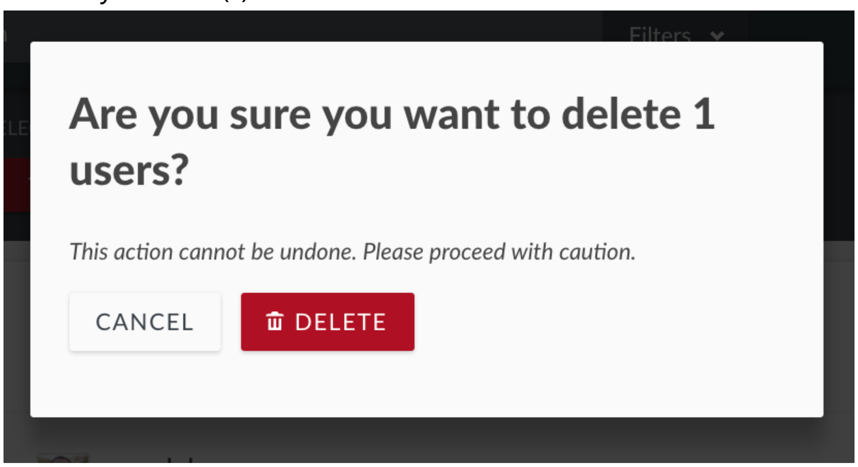
  - A pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete your user
    - Click on ***DELETE*** to delete your user(s)
    - If you'd like to cancel the user deletion process, click on Cancel



- From the User management page
  - Tick the checkbox on the left, adjacent to the user(s) you would like to delete from the user list page



- This action will activate the previously inactive ***Delete*** button on the top menu bar. Click on it to initiate the deletion process
- A pop up box will appear, prompting you to confirm whether you would like to delete your user(s)

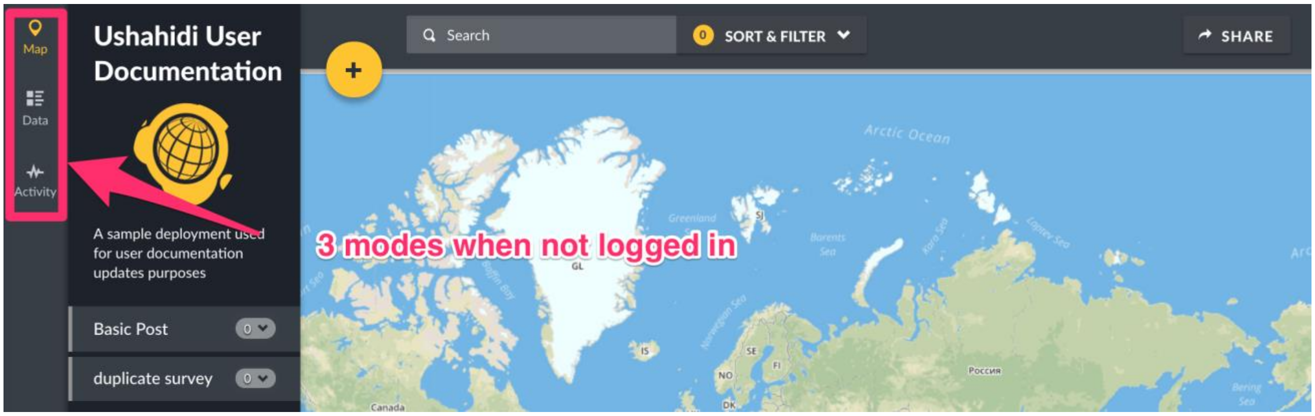


  - Click on ***DELETE*** to delete your user(s)
  - If you'd like to cancel the user deletion process, click on ***Cancel***

5. Modes for visualizing and managing data on your deployment

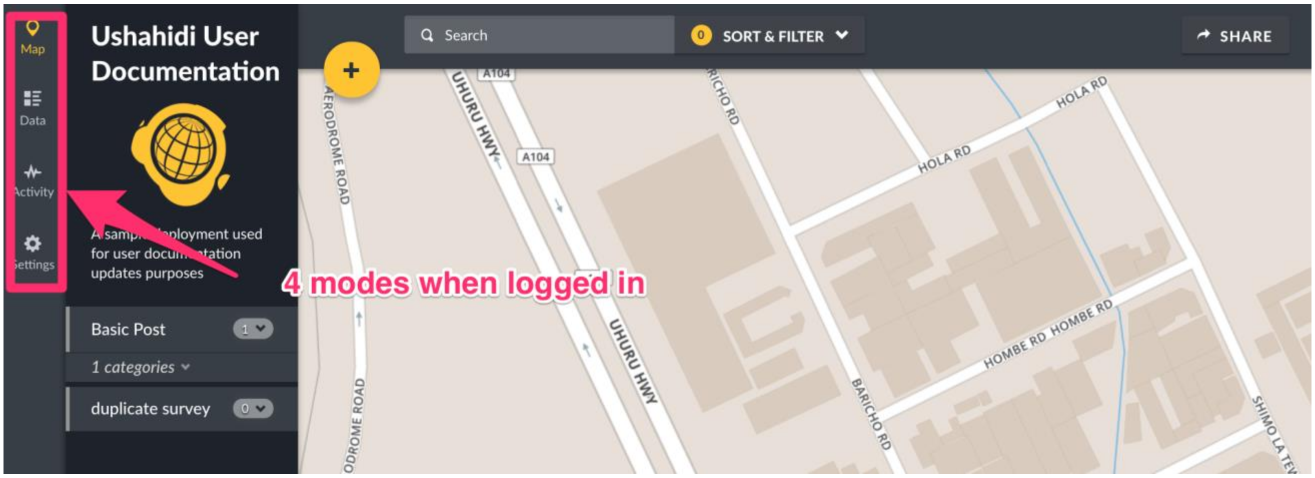
The Ushahidi platform provides you with ***modes*** to not only **visualise** your data in different ways, but to also **manage it**.
We designed "modes" for the discrete and specific actions users need to take within the platform, in a bid to make the platform to be more intuitive and action-oriented for different user types on a deployment.
Ordinary viewers of a deployment can access three different modes as shown below:-

- Map
- Data
- Activity



Signed in users(with the necessary permissions) can access four different modes as shown below:-

- Map
- Data
- Activity
- Settings



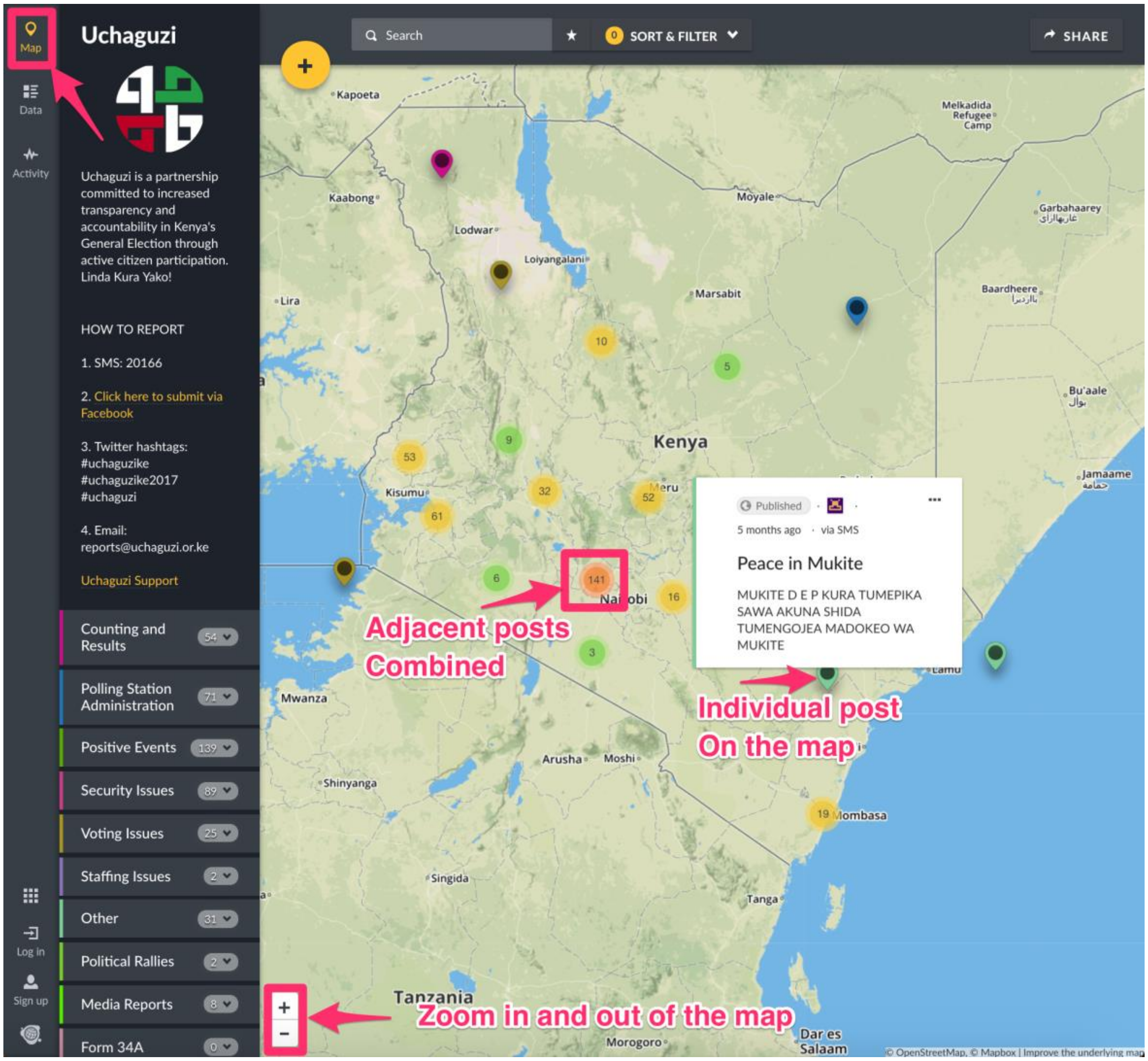
Your ushahidi deployment defaults to the map mode for anyone who visits your homepage(as illustrated above). To change your current mode, select any of the options provided to you from the menu on your left.

5.1 Map Mode

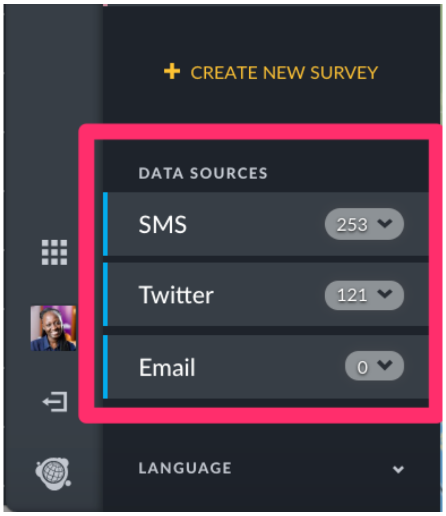
This mode displays all published posts on a map.

- Each post appears as an icon on the map. In the event that you opted to combine nearby posts on your Map settings page (General Settings section of this manual), posts adjacent to each other on the map will cluster together, displaying a number denoting number of posts combined.
- Clicking on each individual post displays a small pop up box with the ***post title*** and ***description.***
- You should also be able to zoom in and out of the map as desired.

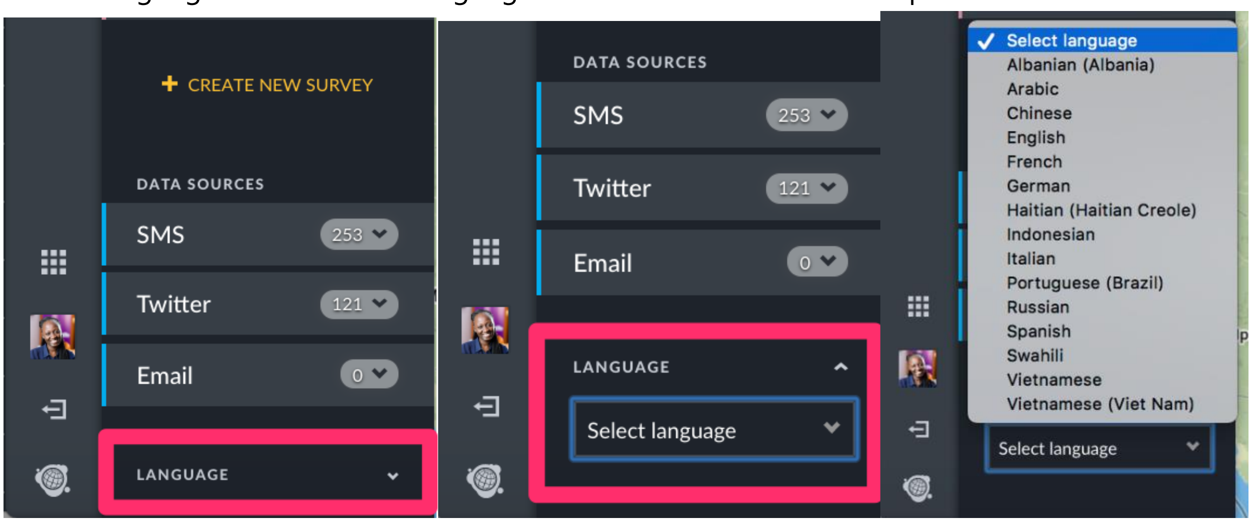
See below for an example from the Uchaguzi deployment



You also get a breakdown of incoming posts by source, as shown below.

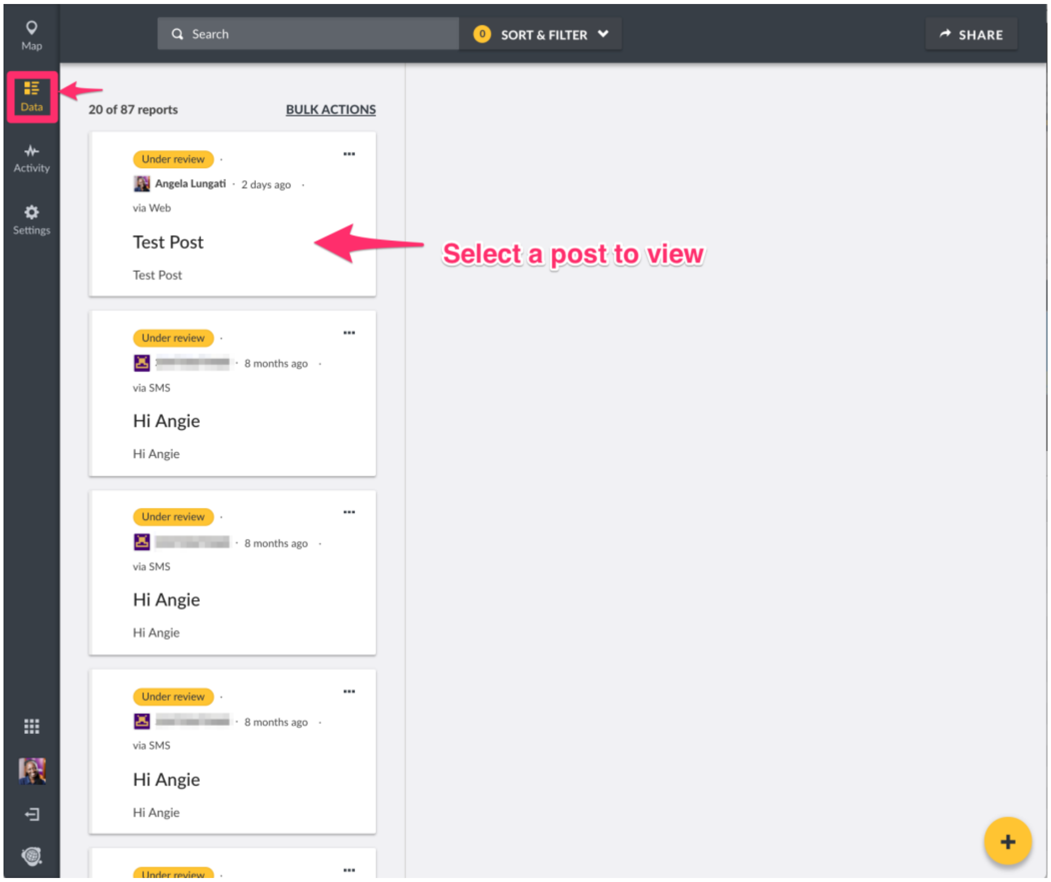


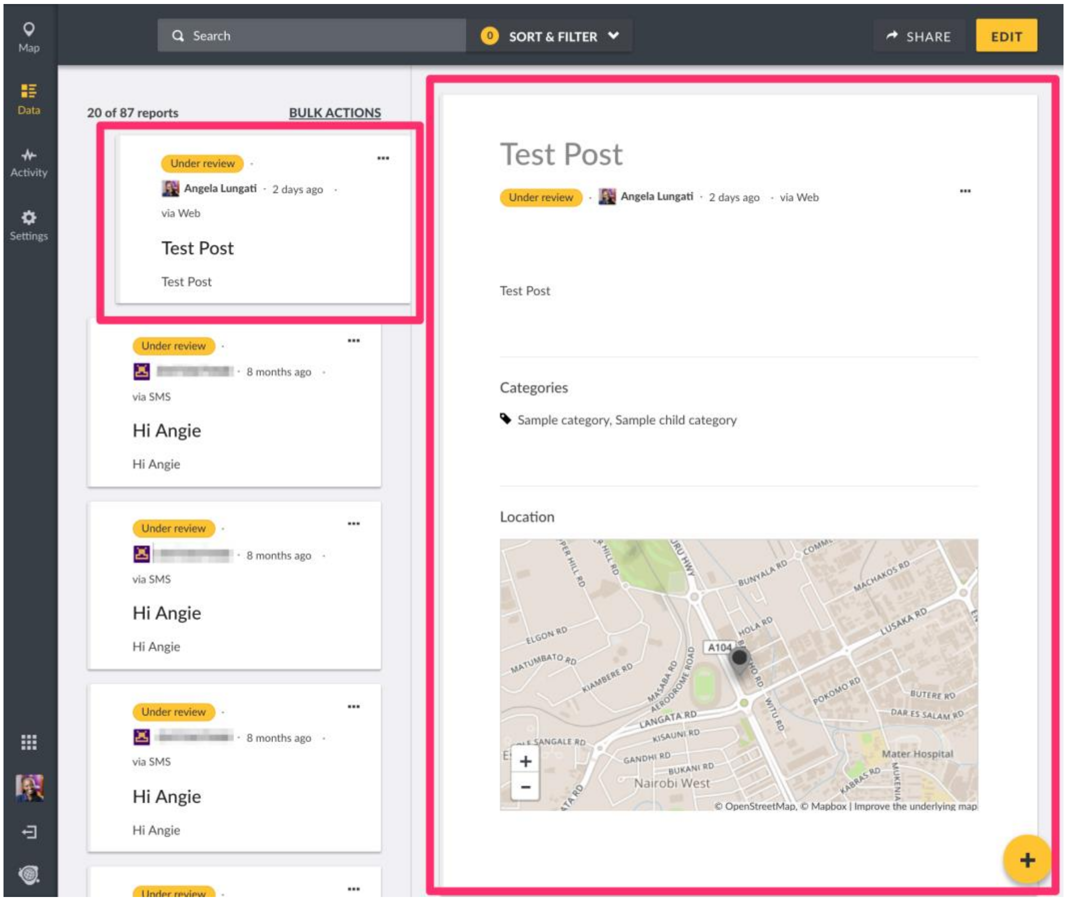
Visitors to your ushahidi instance can also select the language they'd like to interact with your data in. The language list consists of languages that have been translated upto 80%.



5.2 Data Mode

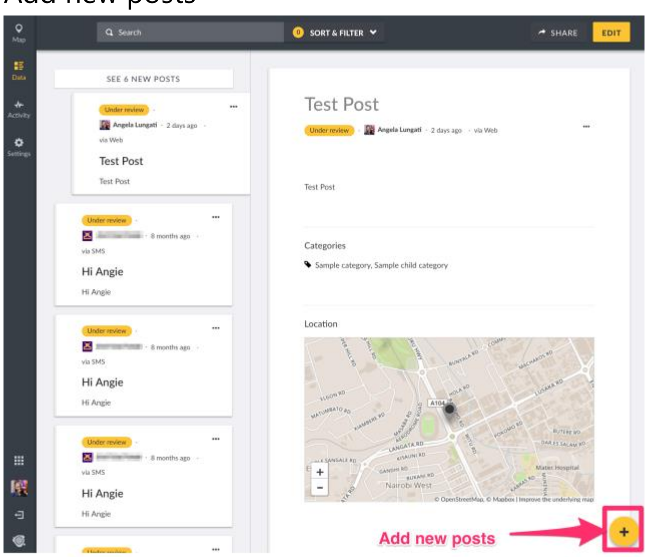
This mode allows you to view, triage, and manage posts coming into your deployment as a chronological list of events over time. It provides a split pane that allows for viewing post summaries on the left pane, and post details and editing in the right.





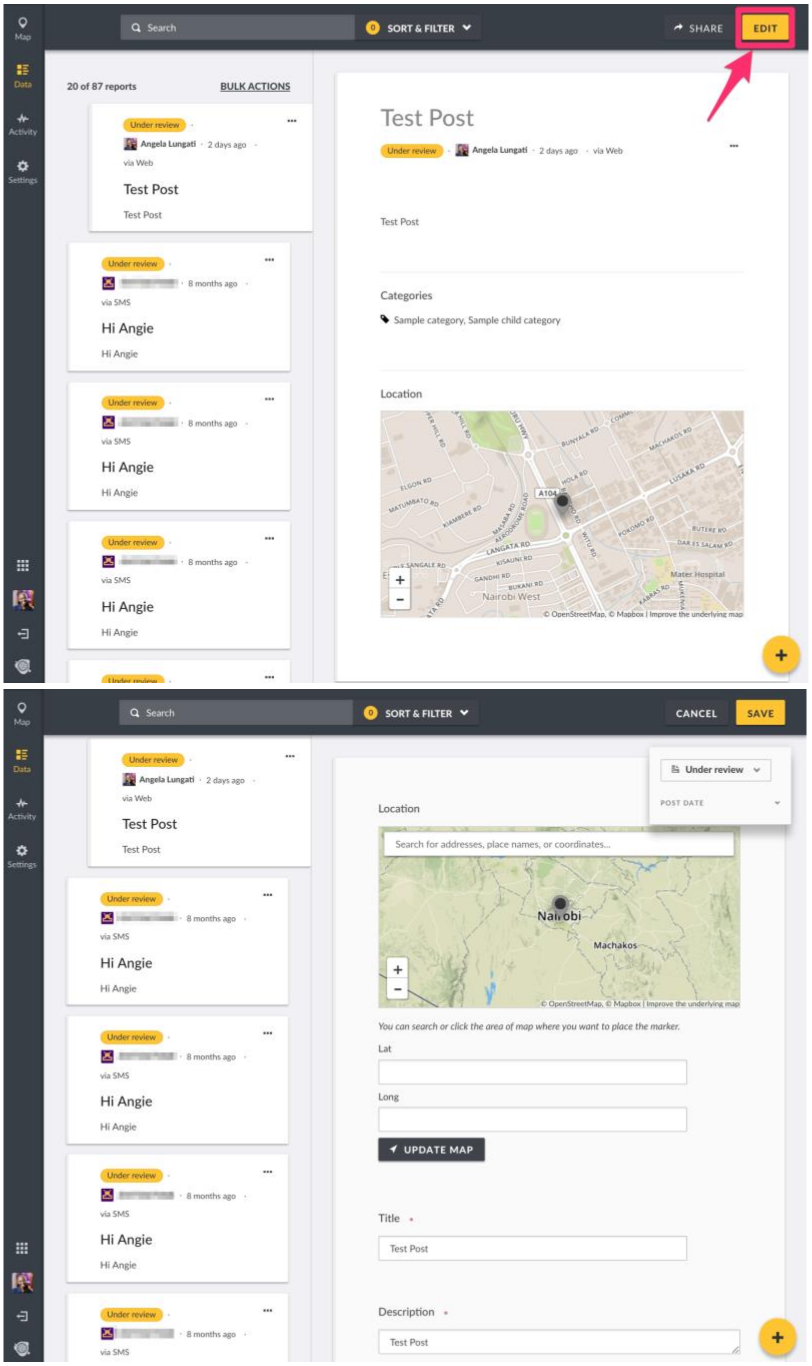
From here, you should be able to:-

- Add new posts



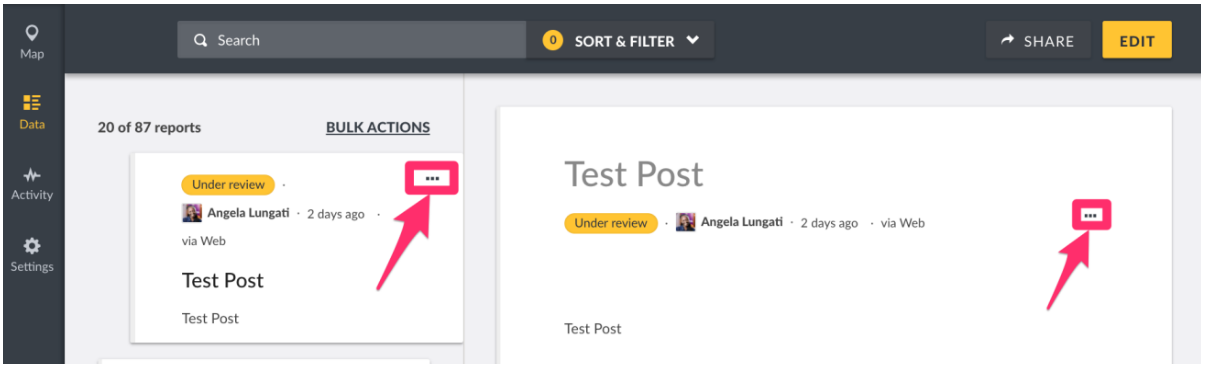
- View individual post details

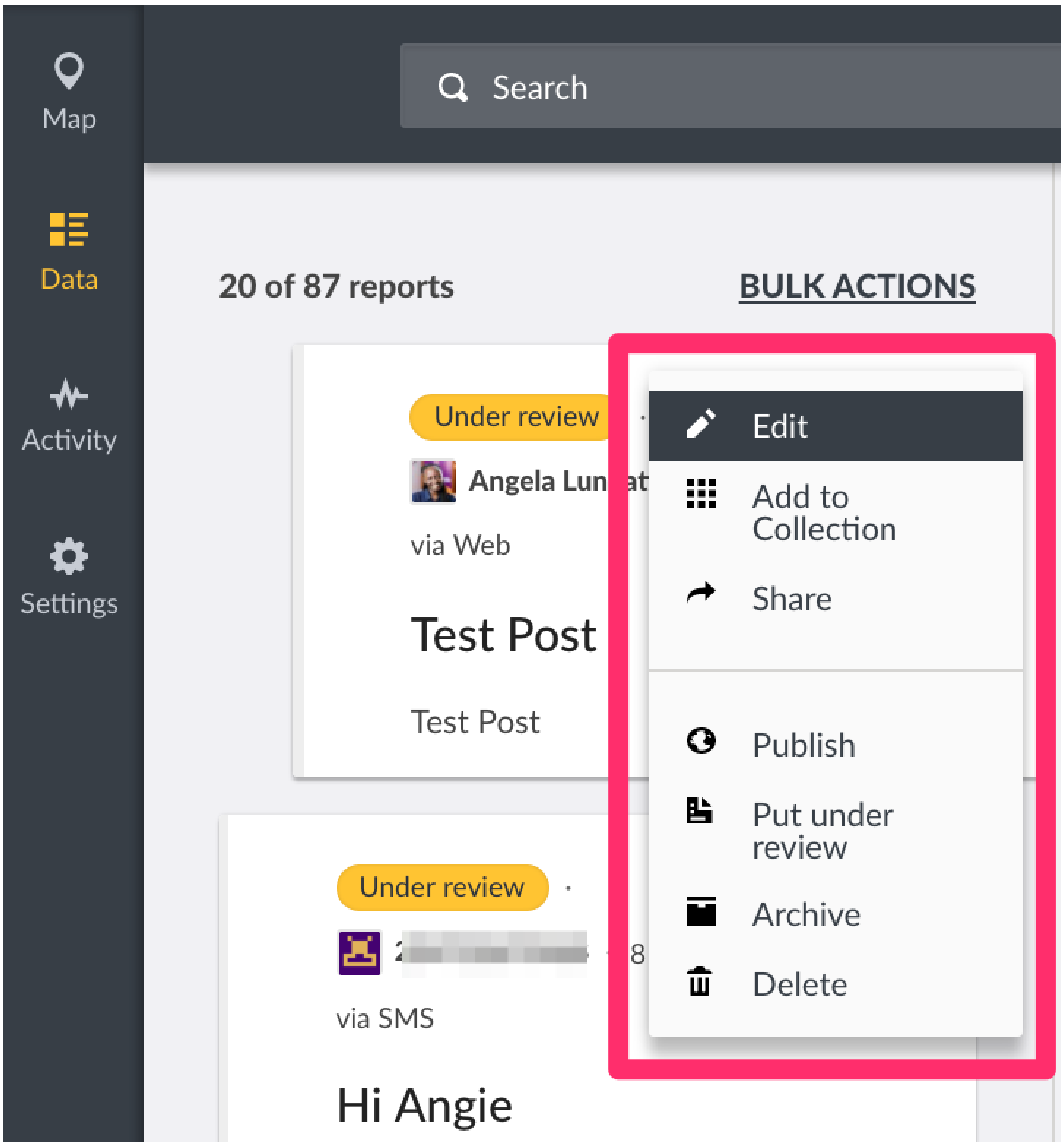
- Edit posts to either change existing structures or assign posts from Twitter, SMS and/or email to a survey



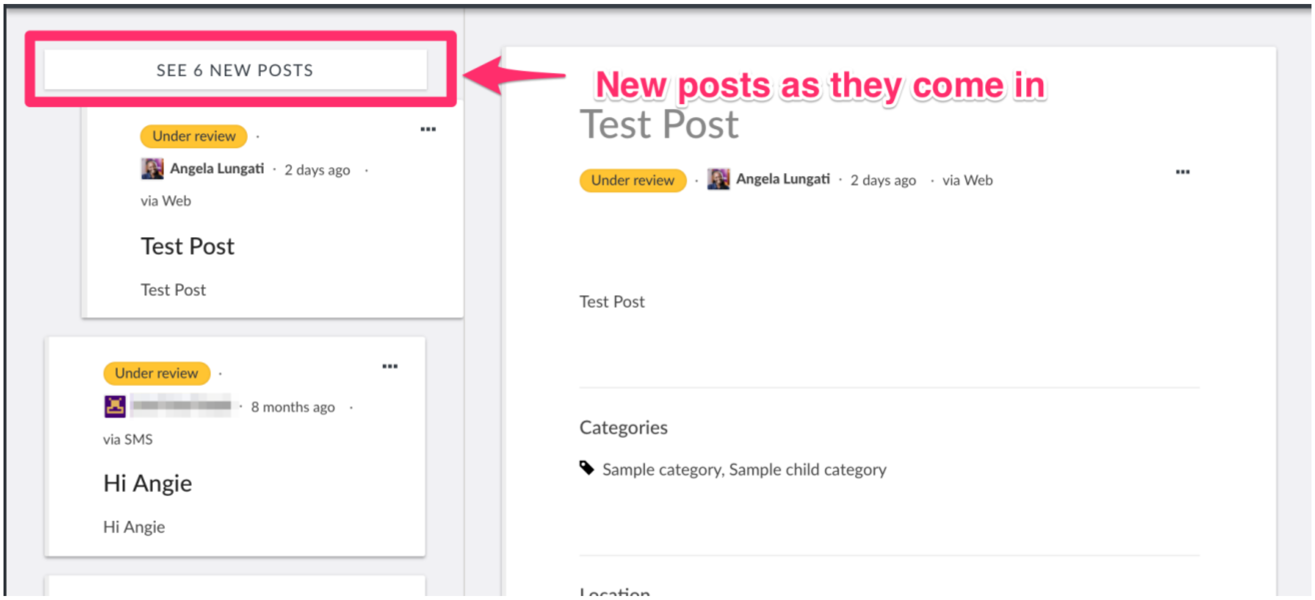
- You can also
  - Add posts to collections
  - Publish posts
  - Put posts under review
  - Archive posts
  - Share posts

- Delete posts

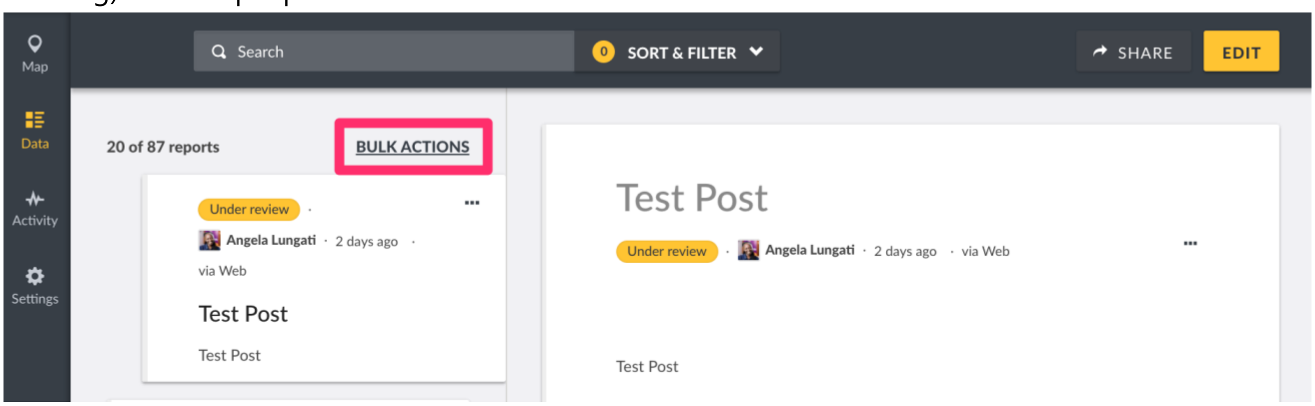


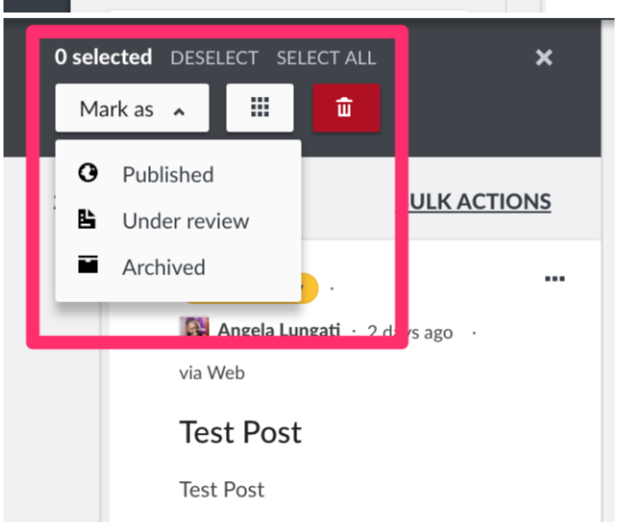


- Get notified when new posts arrive



- Perform bulk actions(publishing, putting under review, archiving, adding to collections and deleting) on multiple posts at a time

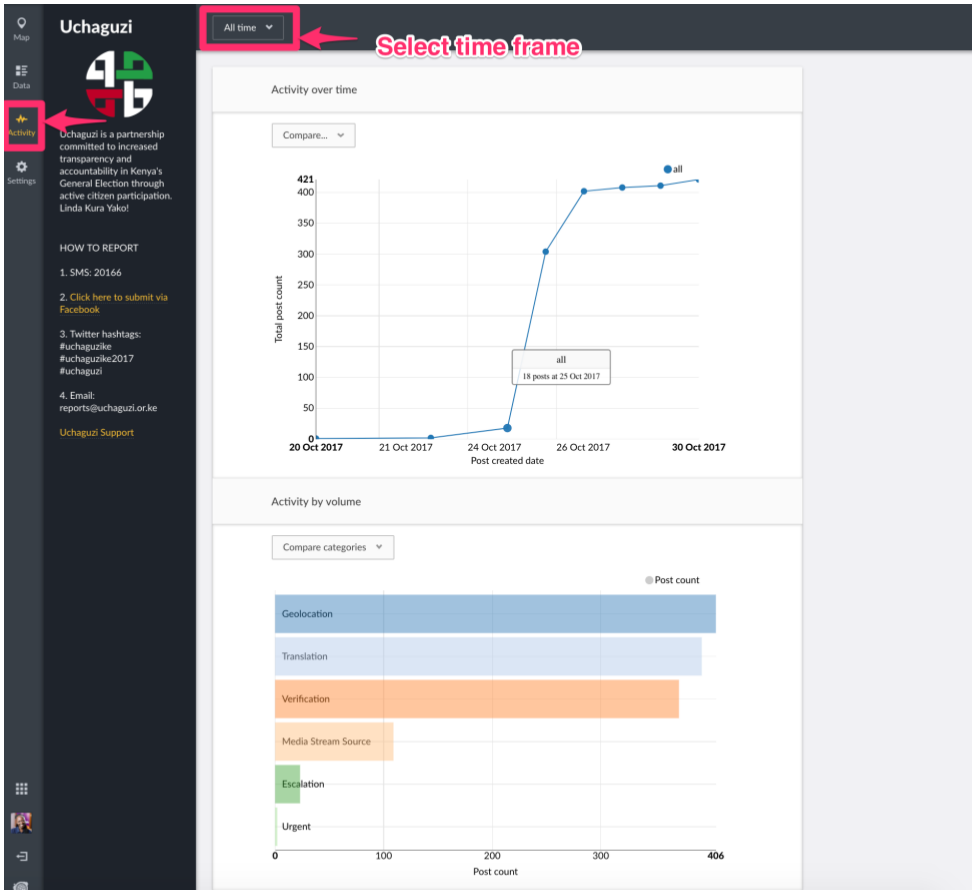


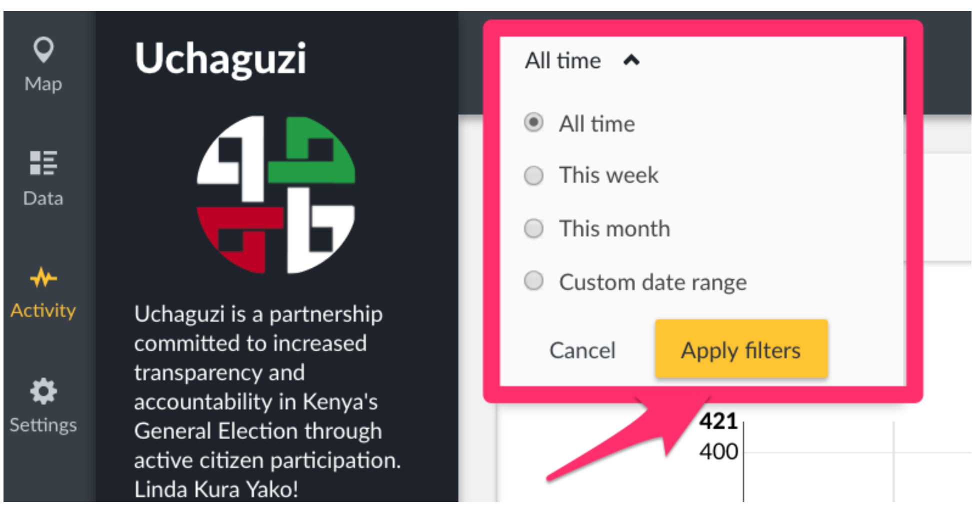


NB: Data displayed on this page is dependent on permissions granted to the user viewing this page

5.3 Activity Mode

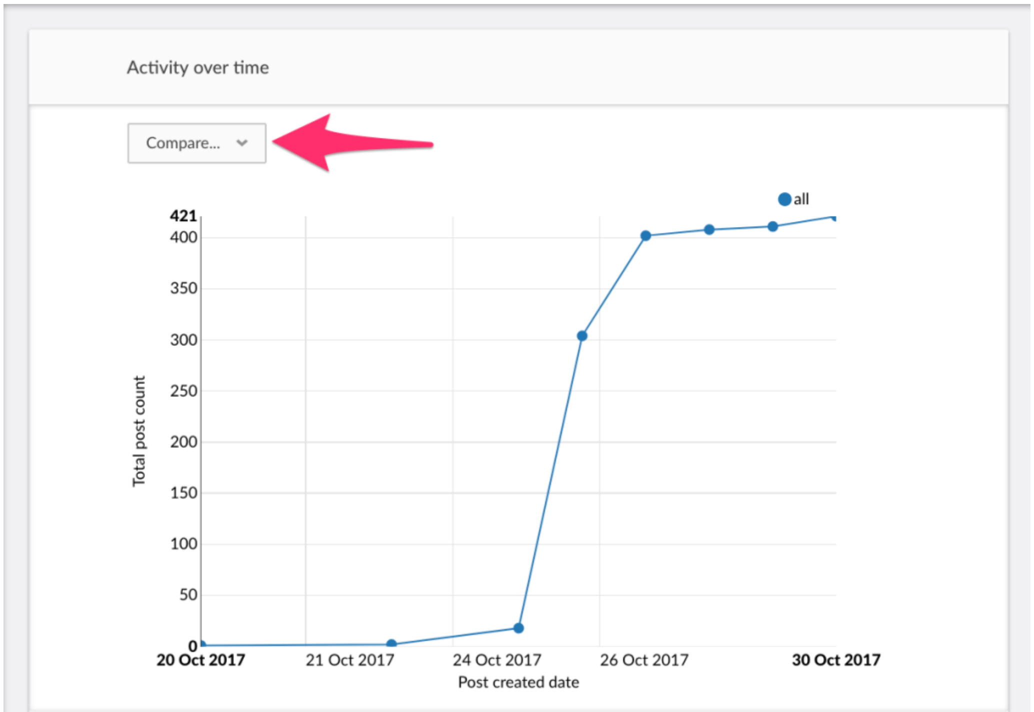
This mode gives you a summary of how people are interacting with your deployment over time.





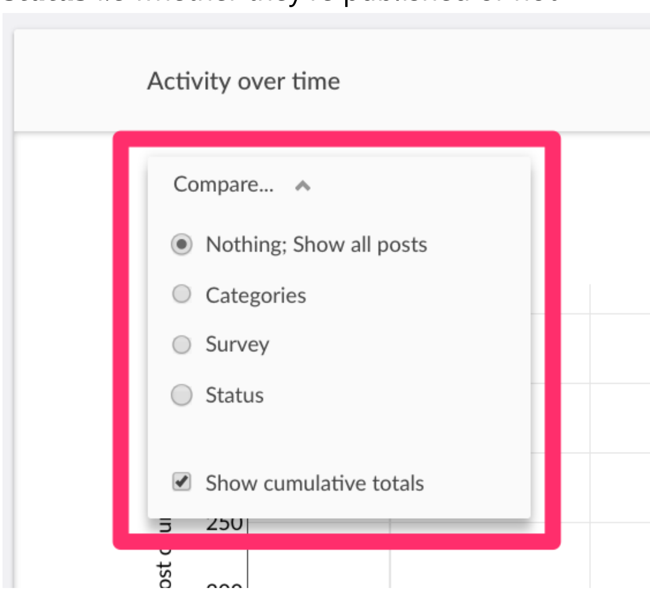
You can compare

- Activity over time



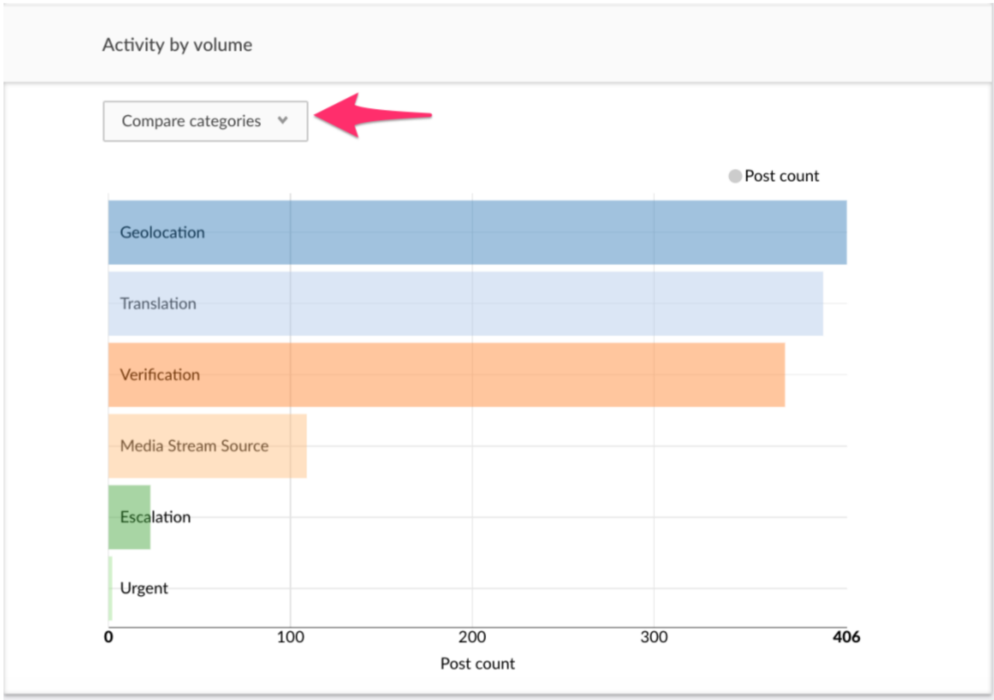
You can filter post count in a line chart over time by:-

- All posts
- ***Categories*** that the posts belong to
- ***Surveys*** that the posts were submitted to
- ***Status*** i.e whether they're published or not



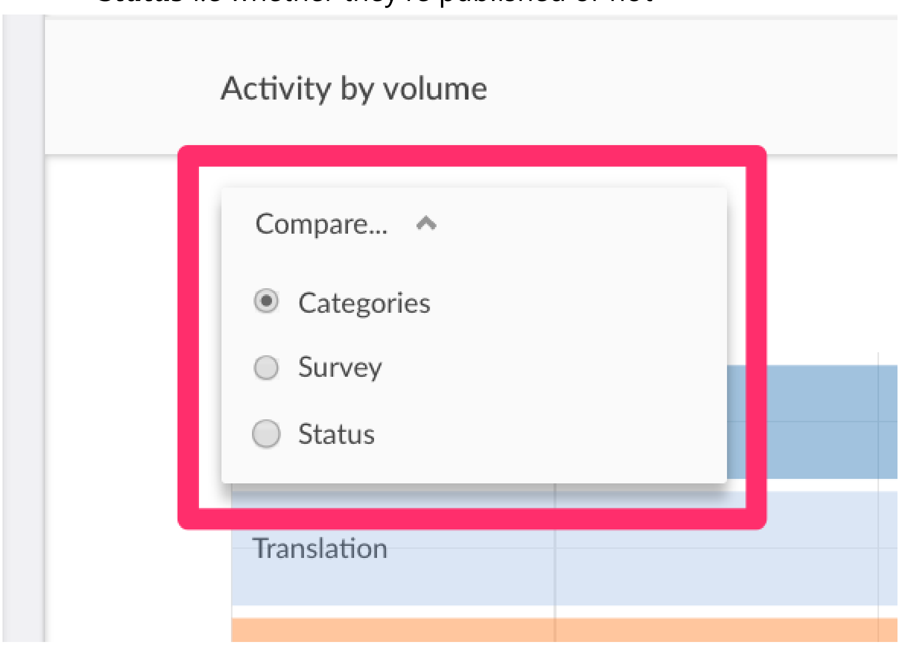
You can opt to view your post counts on the graph as cumulative totals.

- Activity by Volume



You can filter post count in a bar chart over time by:-

- ***Categories*** that the posts belong to
- ***Surveys*** that the posts were submitted to
- ***Status*** i.e whether they're published or not



6. Managing Data in your deployment

A post is a report of a single instance of something in the deployment. It can be made up of many fields, such as Title, Description, Date, Links, and/or location. Ushahidi allows for collection of posts via

- ***SMS***: These can be configured to come in via SMSSync, FrontlineSMS, Nexmo and Twilio.
- ***Twitter***: You can pull our tweets based on specific hashtags, search terms, and/or directly from specific accounts.
- ***Email***: You can configure your deployment to receive post from an email address
  NB: You can configure SMS, Twitter and Email as data sources as described in Section 3.4 of this manual
- ***Web(your deployment page online)***: Since Ushahidi is responsive, you can add a post from the web app from any device that can access the internet (a computer, tablet, or mobile phone).
- ***Smartphone apps***: Our native applications on Android and iOS are still a work in progress at the moment.

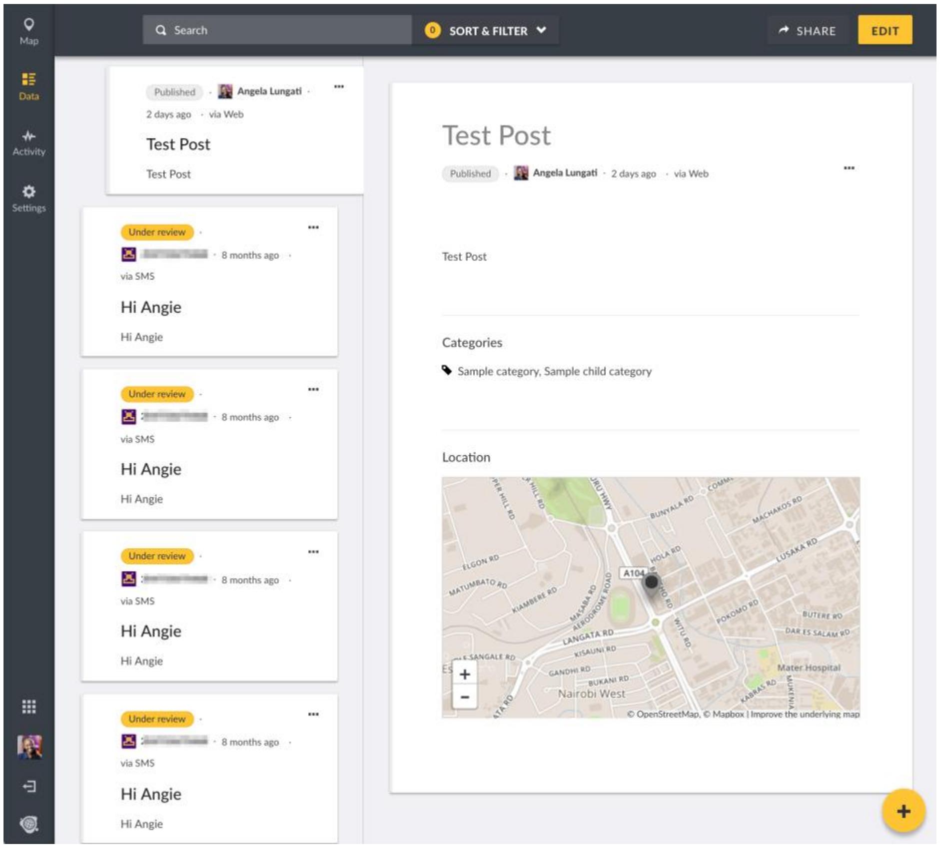
This chapter will describe how to manage data coming in from these different sources

6.1 Viewing Posts

Posts on your deployment can be categorised into two types of data:-

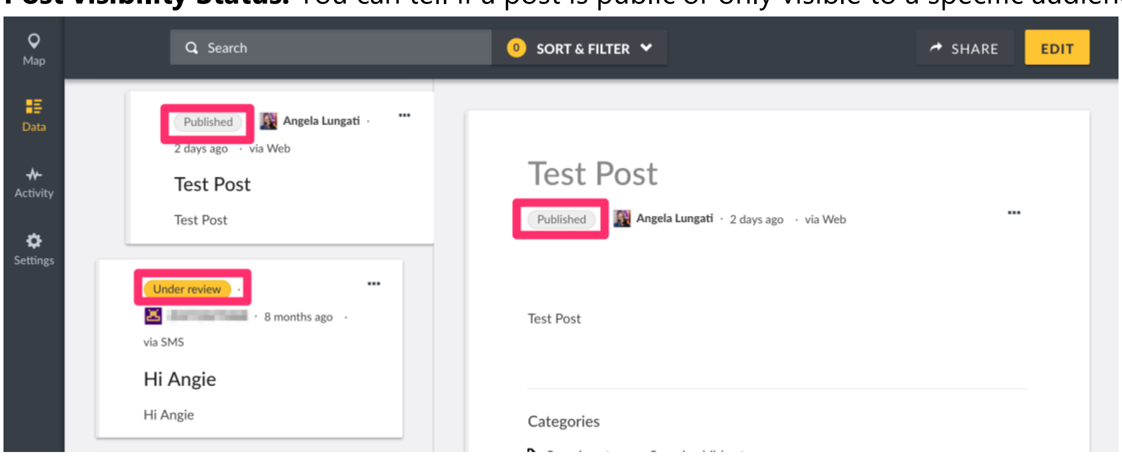
- ***Structured*:** Incoming posts from the web platform and smartphone applications are classified as structured posts, since they adhere to the structure of surveys created on your deployment.
- ***Unstructured/Unknown*:** Incoming messages from SMS, Twitter and Email are classified as unknown posts, since they do not adhere to the structure of surveys created on your deployment. This means that these messages come in their raw form, and have to be manually structured by admins/anyone with permissions to edit posts, to fit into the structure of your survey. E.g an SMS message “Hello, my name is Angela” will need to be broken down into a title, a description, properly categorised etc.

You can view posts in either Map, Data or Activity mode. We'd previously discussed each of these modes separately in [Chapter 5](#).

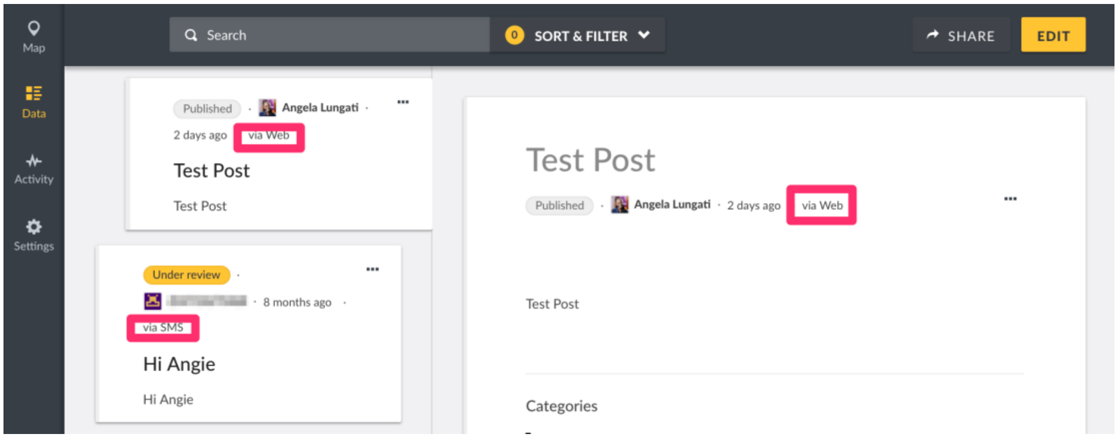


For purposes of managing your data, we recommend using Data Mode. From this page, You should be able to see the following:-

- A list of all posts in chronological order of when they were submitted into the platform. You can opt to change the order of the posts either through options provided in the search filter (we'll dive into filtering posts in the next section)
- **Post visibility Status:** You can tell if a post is public or only visible to a specific audience

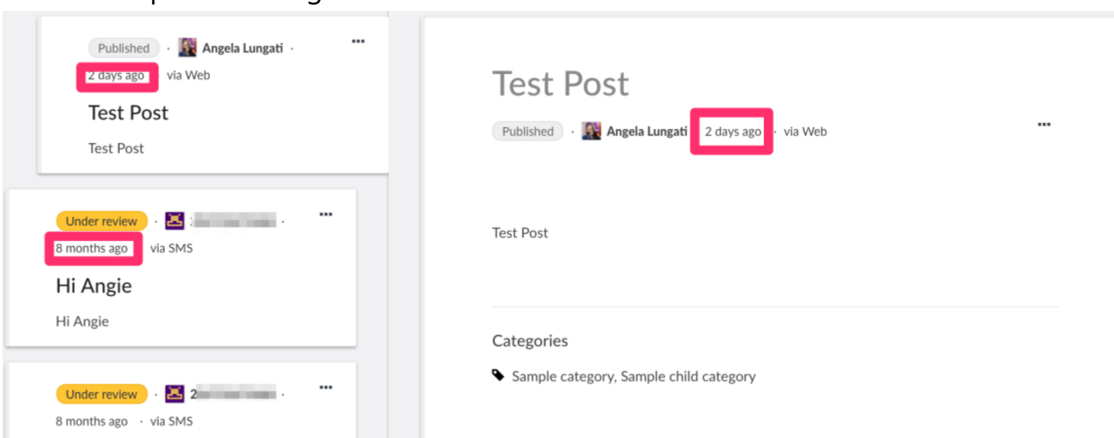


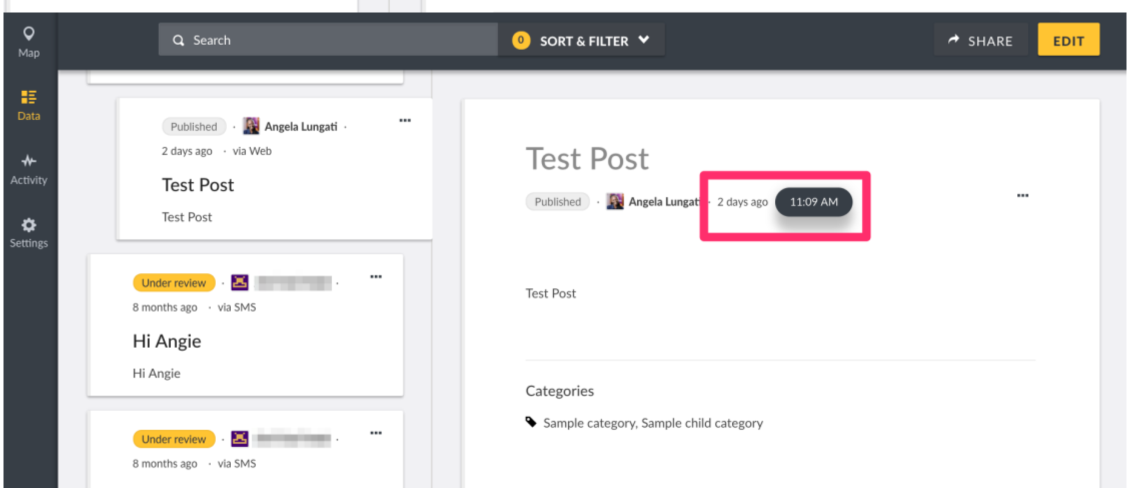
- **Post source** (is it from the Web, SMS, Email or Twitter?).



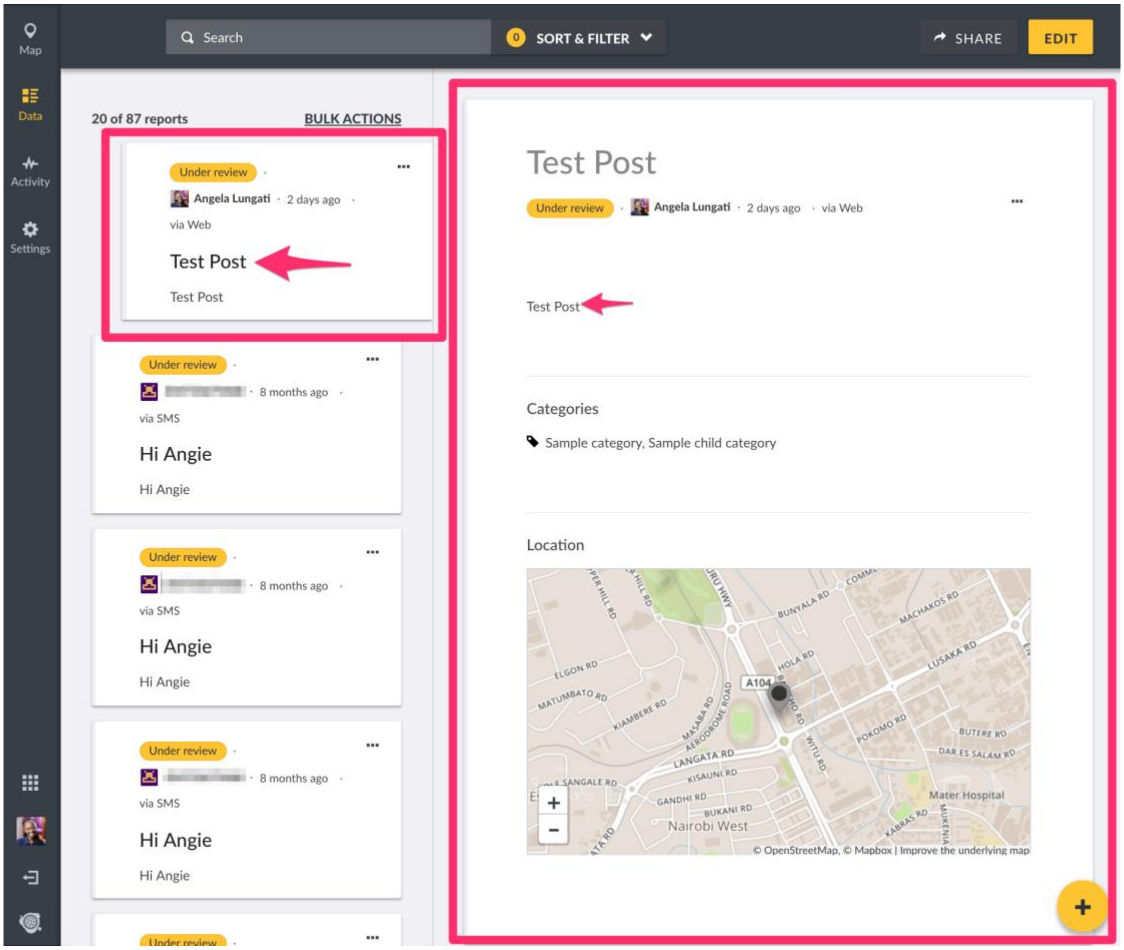
    - ***Structured posts*** via web/smartphones will have their respective source label on them.
    - ***Unstructured posts*** will have a label denoting their source, as seen below with this sample SMS message

- **When the post was submitted:** Hovering over the timestamp of the post will give additional details on specific timing as shown below.

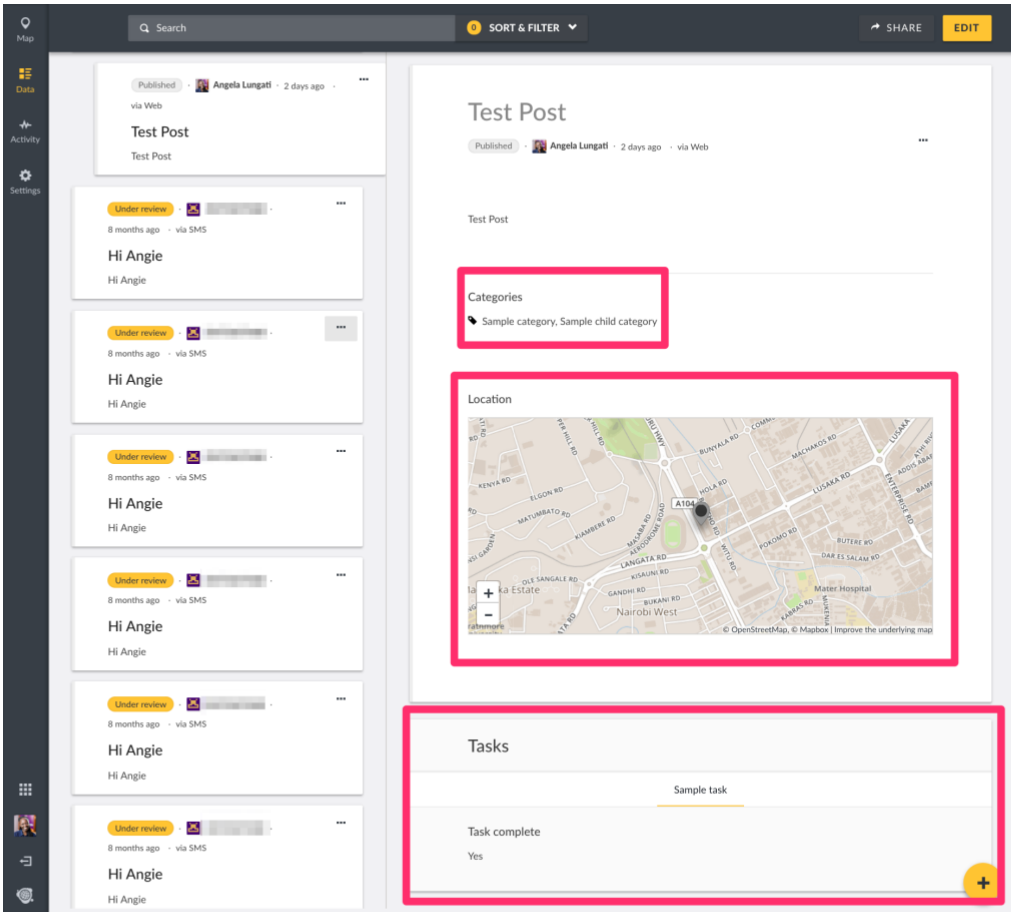




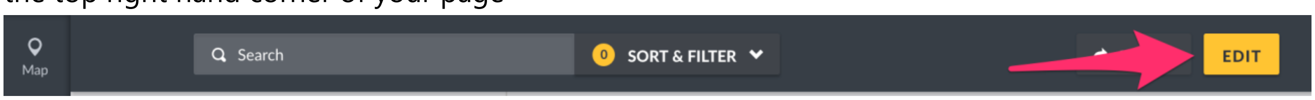
- Individual ***Post descriptions*** *on the left pane*, **and post details** on selection of a post card on the right pane



- When viewing post details on the right pane, you'll be able to see additional details such as location, categories, and tasks.



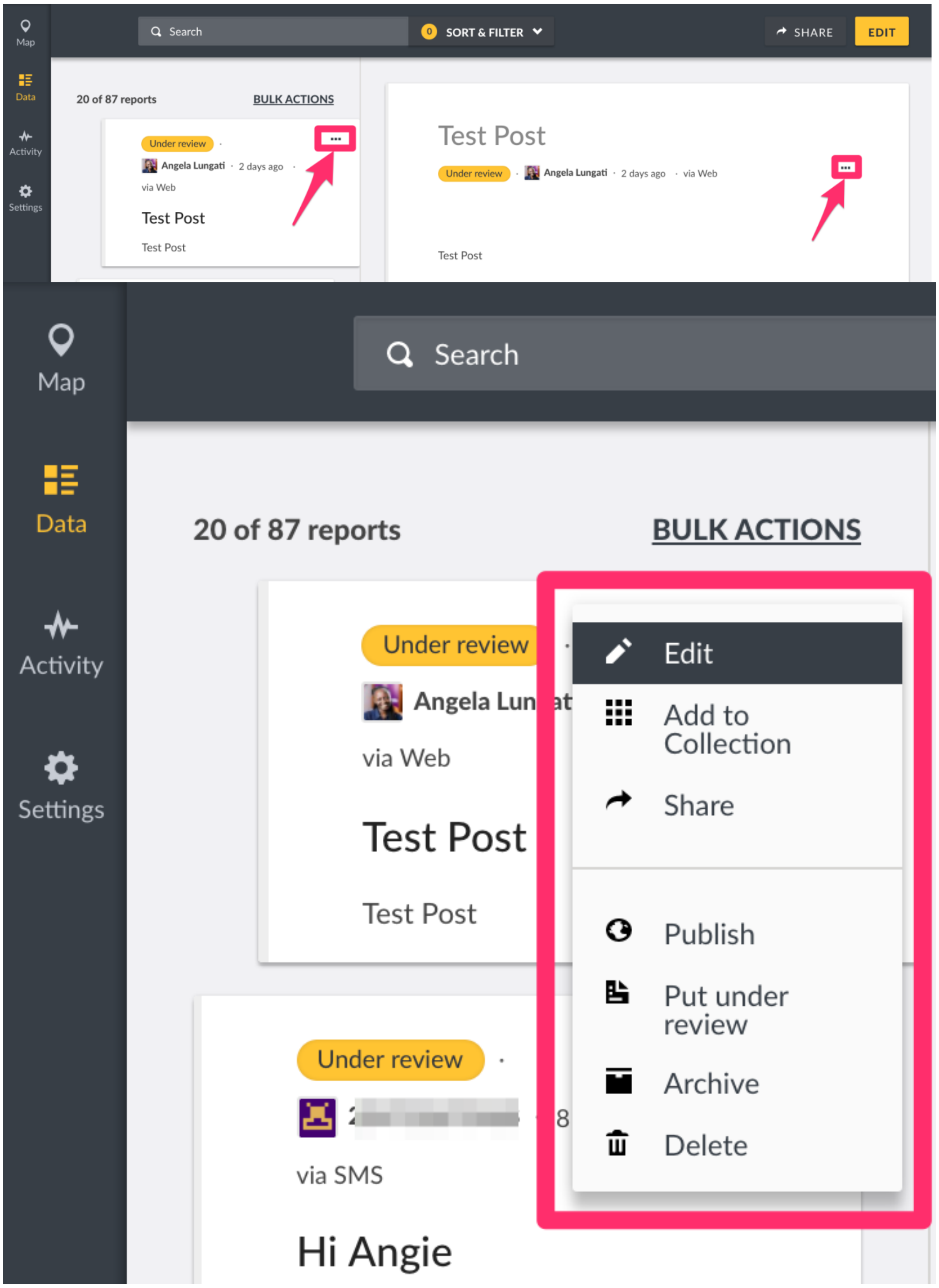
- If you're an admin/your user role permits, you'll should also be able to see the Edit button on the top right hand corner of your page



NB: Locked posts - The platform allows for post locking, to avoid duplication of efforts. If someone on your team is currently editing a post, it is locked and made unavailable for you to edit. In this case, the edit button will not be visible to you, despite having adequate permissions. We'll dive deeper into post locking in section 6.4.2 of this manual.

- Every post has a three dotted icon as shown below. Depending on what permissions are granted to the person viewing, this button allows you to
    - **Add your post to a collection** (*public*)
    - **Share this post** (*public*) via facebook, twitter, embed on another website or export it to a CSV file.
    - **Edit your post** (*limited by role*)

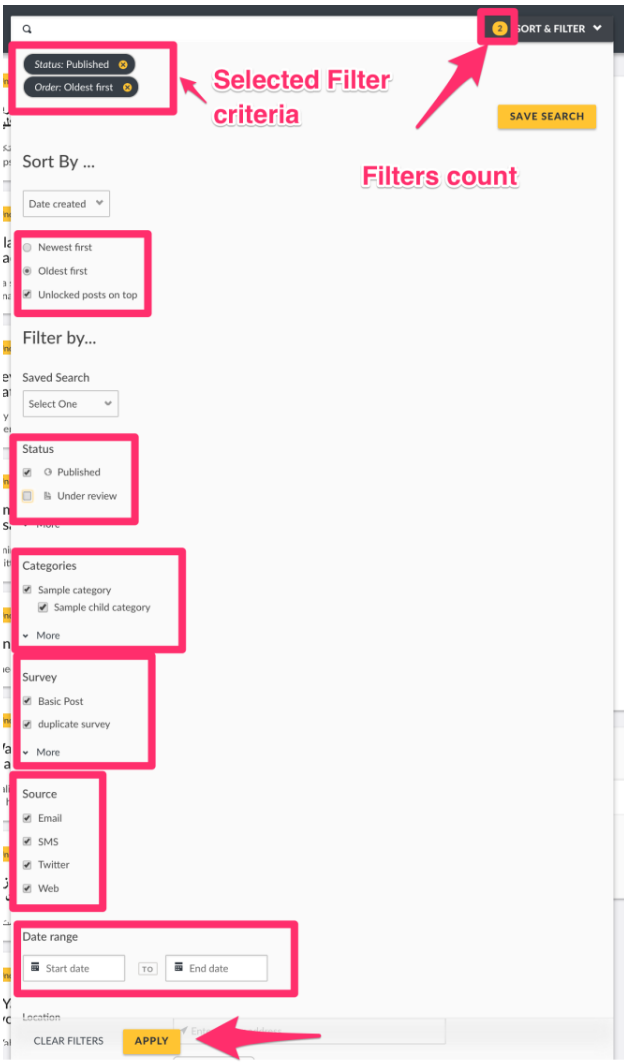
- **Publish your post** (*limited by role*)
- **Put your post under review**, setting visibility to only members of your team (limited by role)
- **Archive your post** (*limited by role*)
- **Delete your post** (*limited by role*)



- A ***search filter*** that allows you to
  - sort posts by

- Date of creation
- Post date i.e date when it was assigned to a survey
- Date updated

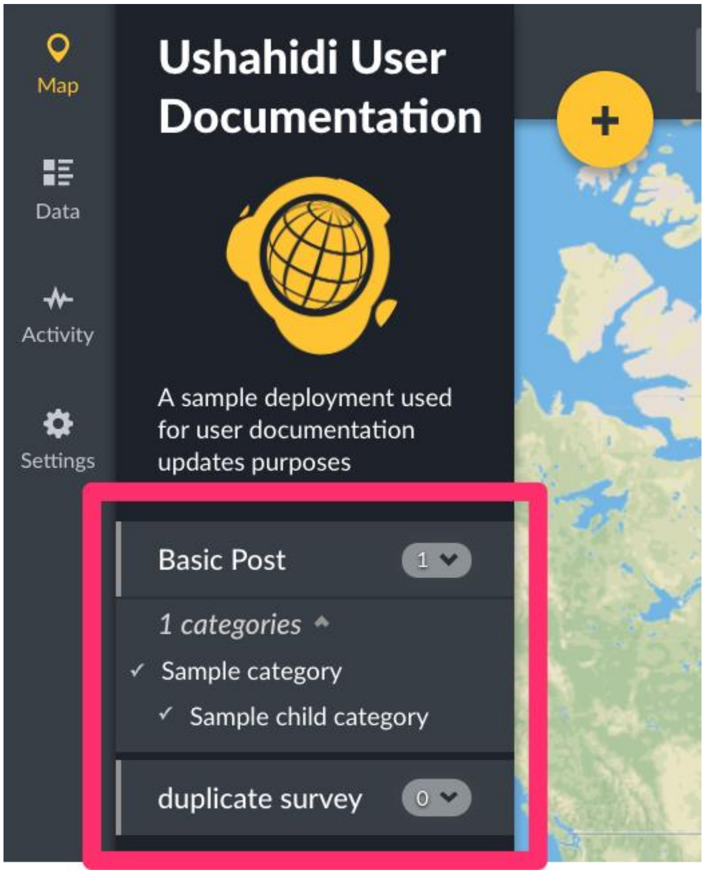
○ filter reports by ***Saved searches, Status,* Surveys, Categories, Data source, Date range, Location** or any other user determined parameters. [More on filters in section 6.2](#)



Please note that information displayed to users on each of these pages is dependent on permissions granted to registered/non registered users by the deployment administrator e.g ***Published posts****,* ***Unknown posts*** *and* ***My posts,*** and menu bars allowing for editing and deletion *are only visible to logged in users with necessary granted permissions(See more on Roles in* [*Section 4.1*](#) *of this manual)*

6.2 Filtering posts

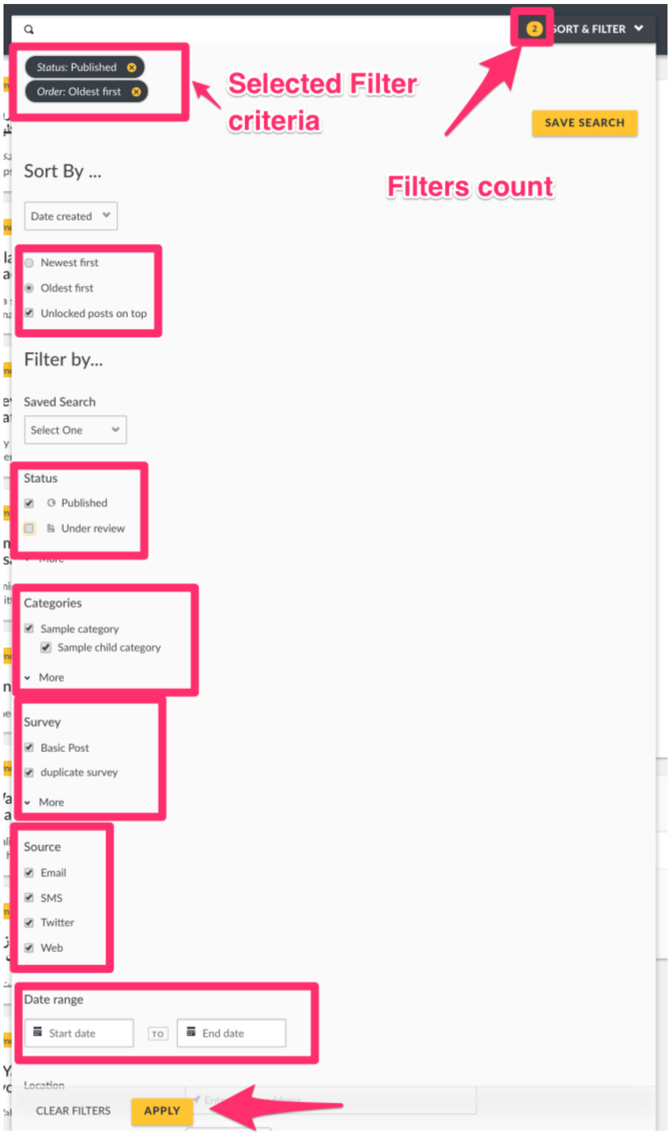
Filters can be applied to narrow down a large amount of data. You can filter posts by many types of parameters, for example: ***Surveys, Categories, Status, Date Ranges, and Location.***
Survey and Category filters are located on the left side context modal of your deployment.



All other filters(including survey and category) are located within the "Filters" modal on the top global search bar, which allows you to

- sort posts by
    - Date of creation
    - Post date i.e date when it was assigned to a survey
    - Date updated
- filter reports by
    - Saved searches
        - By default, every deployment has a set of three featured Saved Searches(read more in the Saved searches section of this manual) from which you can view posts on your deployment, from the search filter.These include:-

        - Published Posts: Lists all posts that have been made public on your deployment(i.e can be viewed by registered/non registered users on your deployment.
        - Unknown Posts: Lists all messages received from SMS, Email and Twitter, that have not been assigned to a survey i.e are unstructured
        - My posts: Lists all posts created by you as a user
    - Status
        - Published: Posts that can be seen by both logged in and non logged in users
        - Under review: Posts that can only be seen by logged in users with adequate permissions
        - Archived: Posts that have been deemed to be irrelevant and removed from your active view
    - Other filters include Surveys, Categories, Data source, Date range, Location or any other user determined parameters
    - Filters are additive, so you can apply as many as you would like. This search filter is available on all pages.

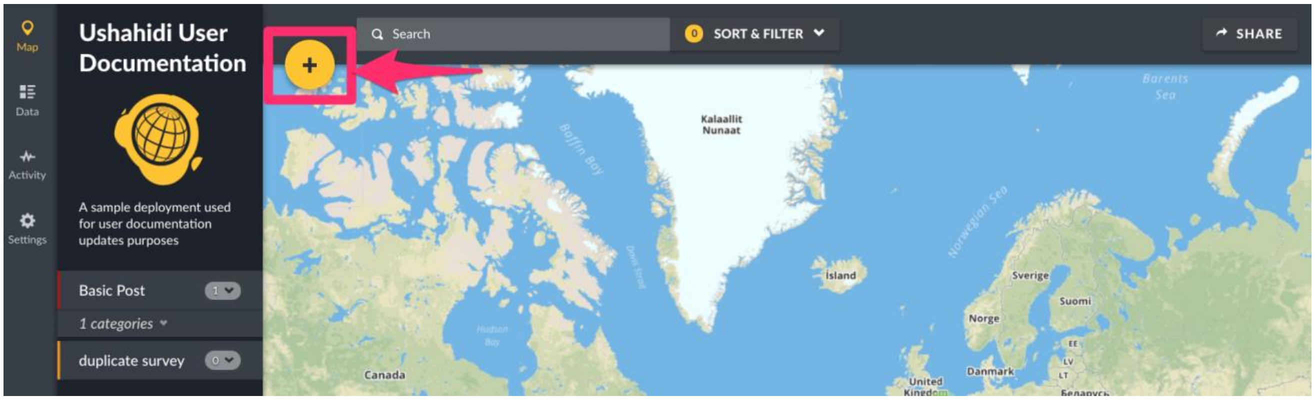


6.3 Adding Posts

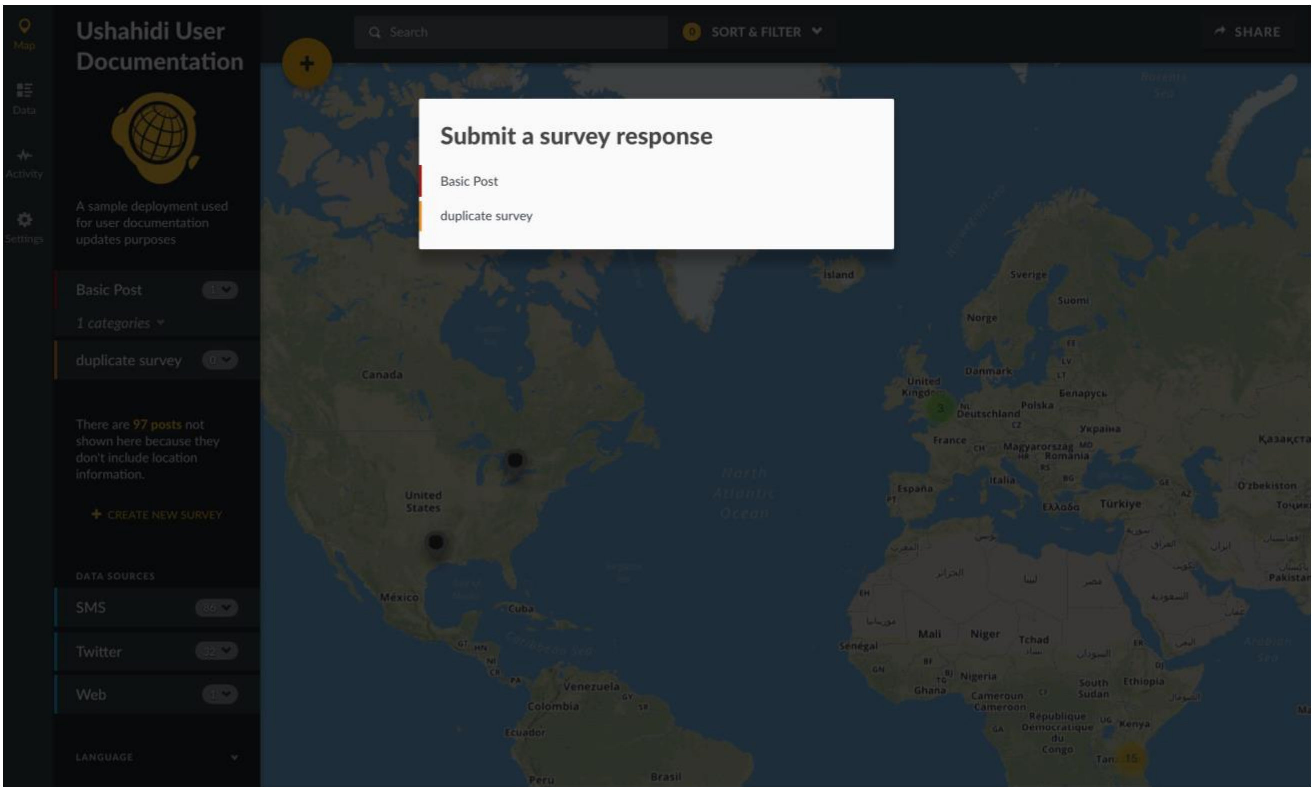
6.3.1 Directly from the Web

Registered/non registered users can create posts using the same process described below. For descriptive purposes, the post below has one tasks.
To create a post,

- Click on the yellow add icon as shown below on your homepage, or on the bottom left corner on the data mode page



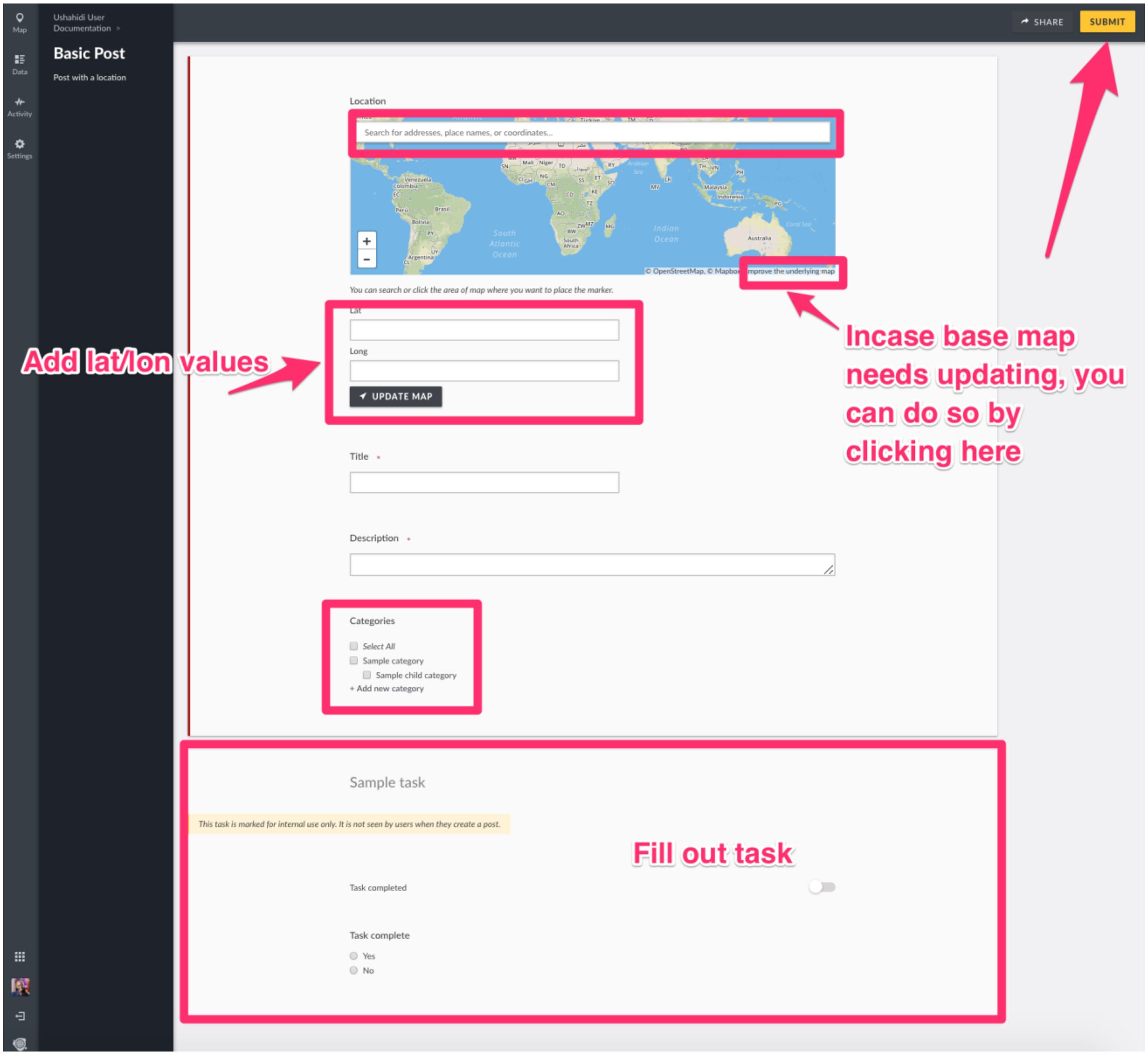
- In the event that you have multiple surveys on your deployment, you'll have to choose the survey from a list of all surveys available on your deployment.



- Make sure to fill out all fields with a red asterisk beside them, You will not be able to save or publish your post before these fields are filled out.
    - NB: [Users are now able to submit improvements to the OpenStreetMap Basemap, directly from the post submission page](). In some cases, base maps are not up to date. We highly encourage you to contribute to improving base maps in your locations of interest. For more details on how to improve OpenStreetMap, [visit the OSM wiki here.]()
- Make sure to fill out any tasks visible to you on this submission page as well.

NB: You can submit posts without filling out or completing tasks. However, in the event that your task is a requirement for publishing, this post will not be published unless the task is marked as complete.

- When you're done adding content for your post, click on ***Submit***



- Your post will be submitted to the deployment's admin for review before publishing.

6.3.2 Email

If email has been configured and enabled as a data source on your deployment, users will be able to send in posts directly by sending an email to the email address configured. These will appear in your data mode view, and available via the search filter. [See chapter 3.4 for more configuration details]

6.3.3 Twitter

If Twitter has been configured and enabled as a data source on your deployment, you will be able to pull in tweets corresponding to the hashtags you have indicated. These will appear in your data mode view, and available via the search filter. See chapter 3.4 for more configuration details

6.3.4 SMS

If SMS has been configured and enabled as a data source on your deployment, users will be able to send in text messages directly to a configured short code or sms number of your choice, which will be pulled in to your data view and available via the search filter. See chapter 3.4 for more configuration details

6.3.5 Smartphone apps

Users should be able to download the Ushahidi Mobile app for Android or iOS, search for your deployment, or add the URL directly. Once synced, they should be able to add posts directly onto your deployment in a similar manner to the web app.

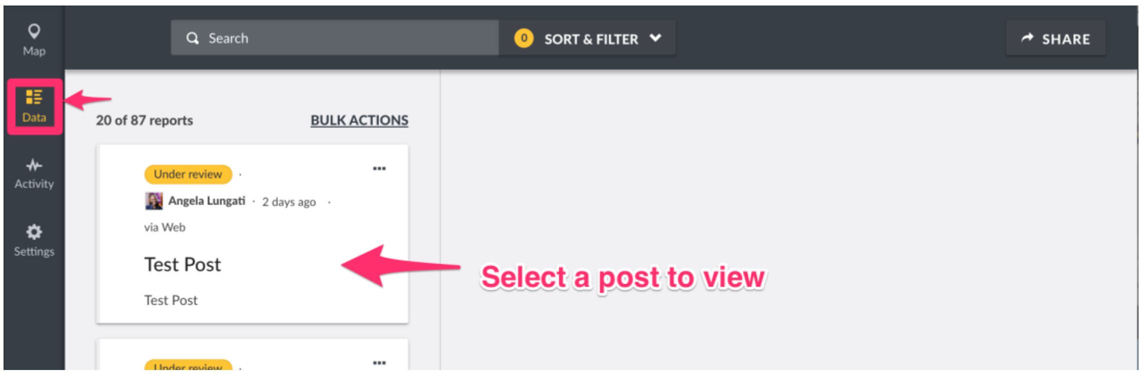
6.4 Editing Posts

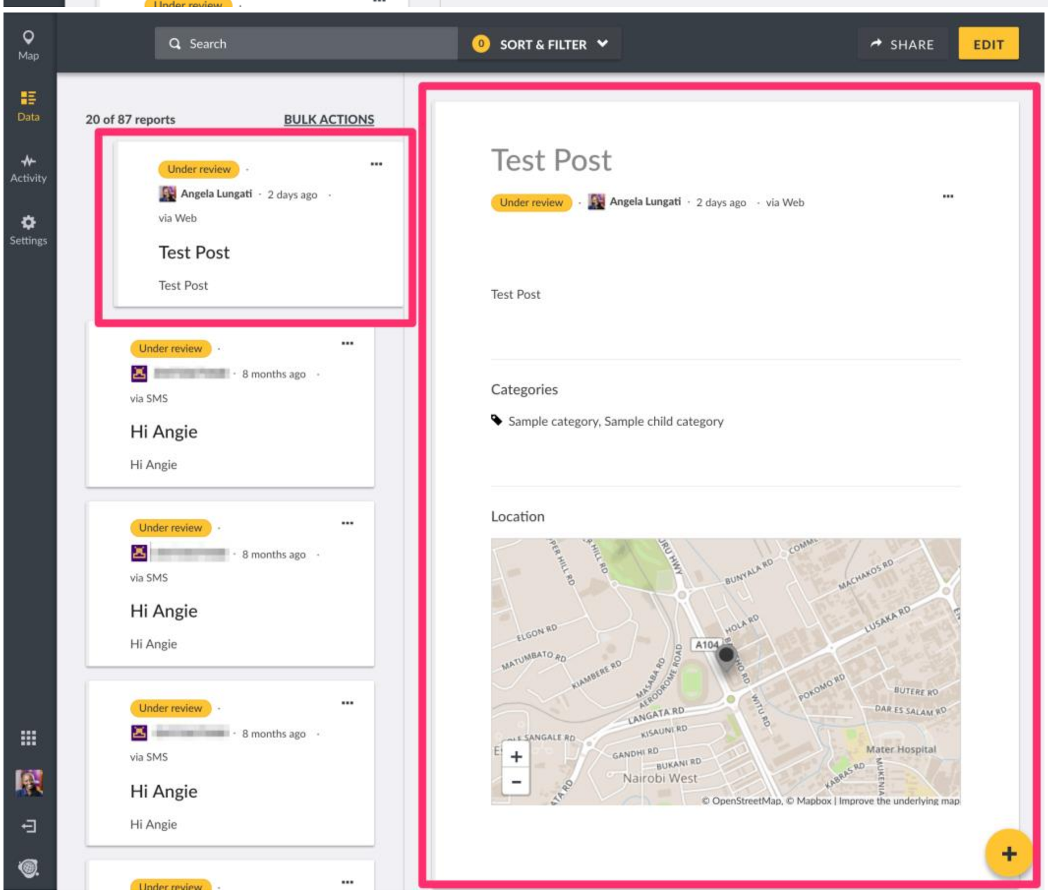
The post editing function is only available to admins or registered users with adequate permissions. This means that non registered users cannot edit posts.

This feature is particularly useful when creating posts out of unstructured posts (messages from SMS, Email, Twitter). We'll cover the structuring process in section 6.4.1 below.

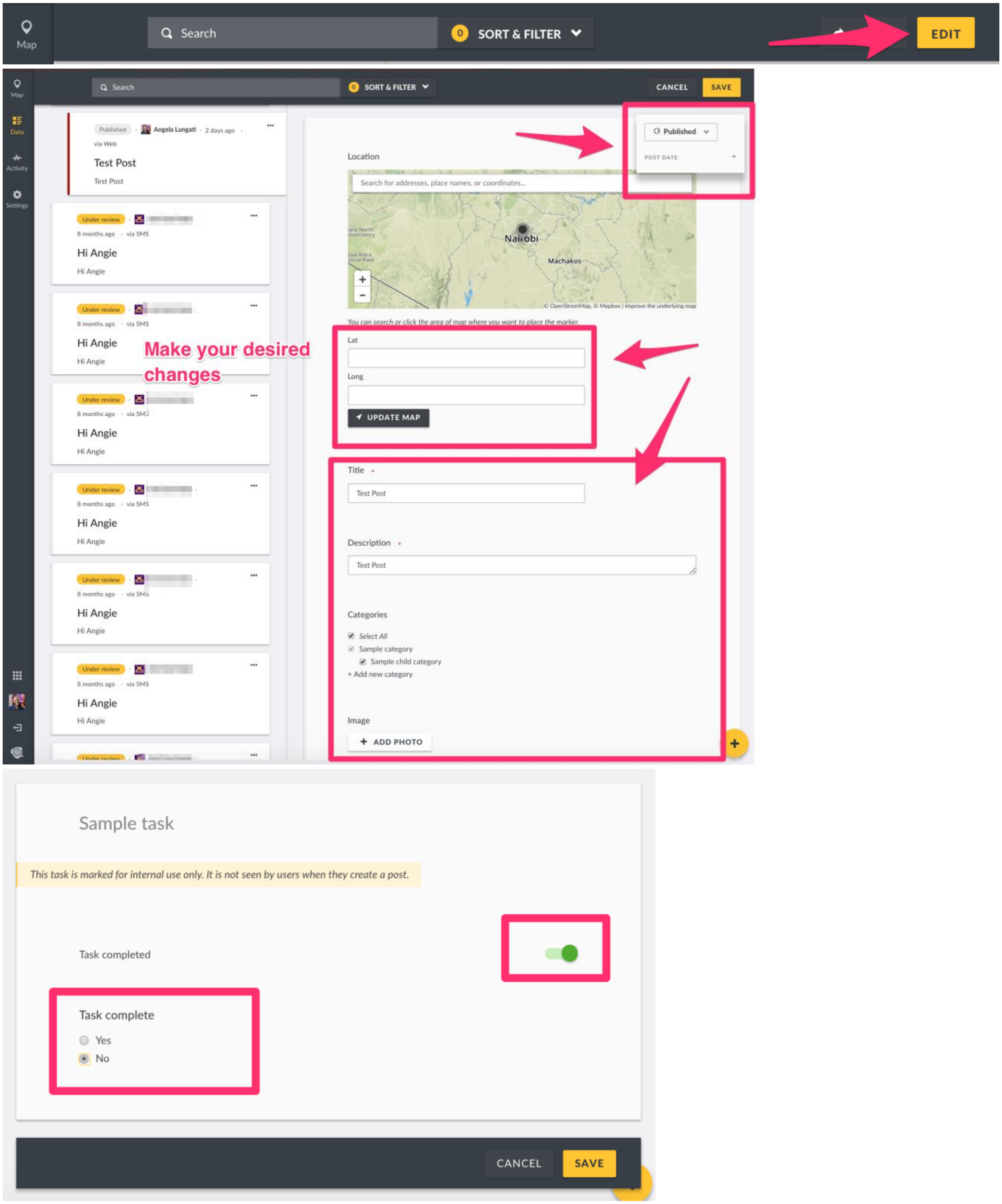
To edit a post,

- Select a post from your data view

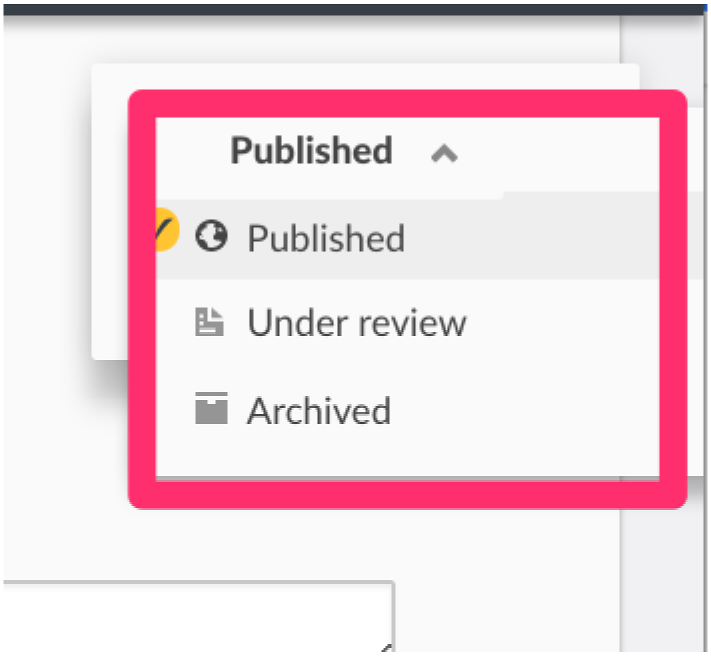




- Click on ***Edit***. This will load the post editor on the right pane of your page, where you'll be able to edit any of the content.



- If you're logged in and have adequate permissions you should also be able to change the status of your post.

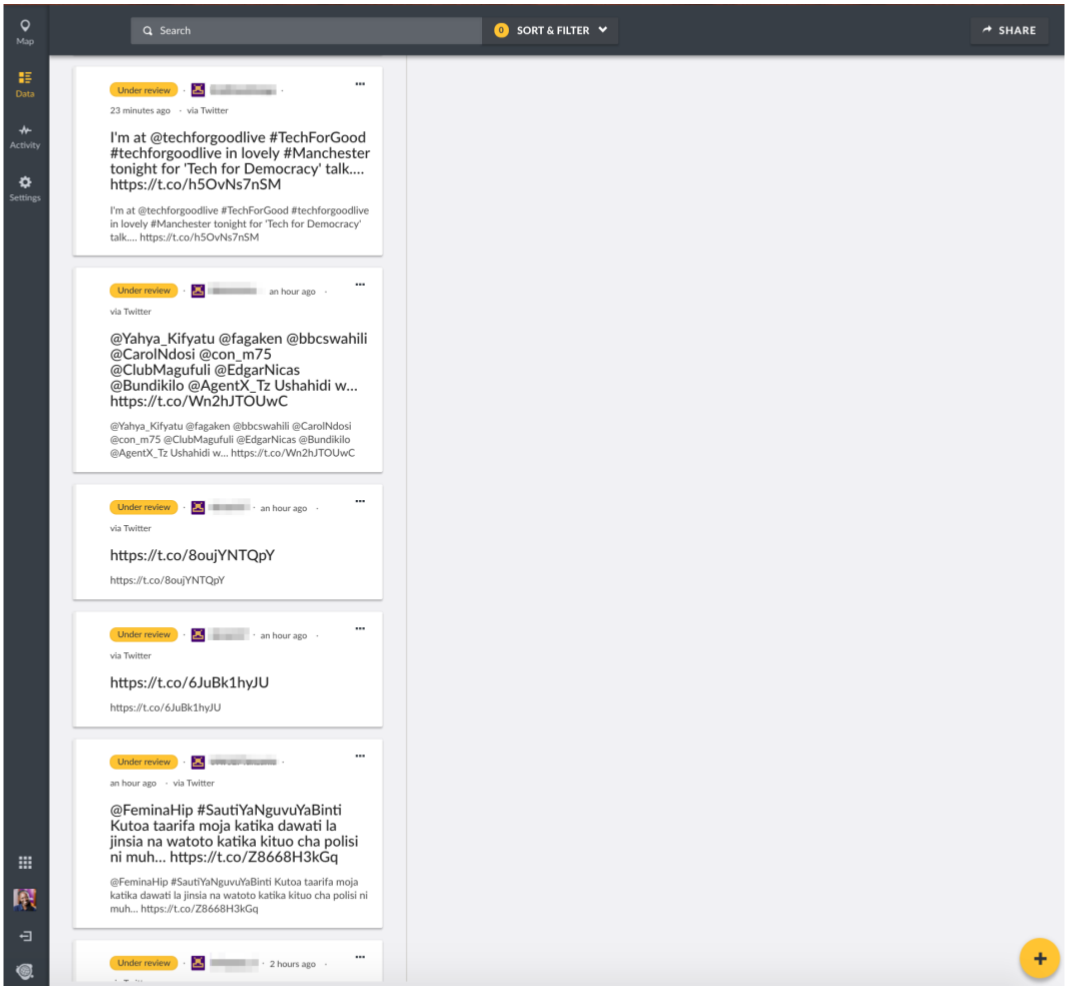


- When done making changes, click on ***Save***.

6.4.1 Structuring posts

Structuring is described as the process of converting messages from SMS, Email and Twitter into the format of existing surveys. To begin with the structuring process

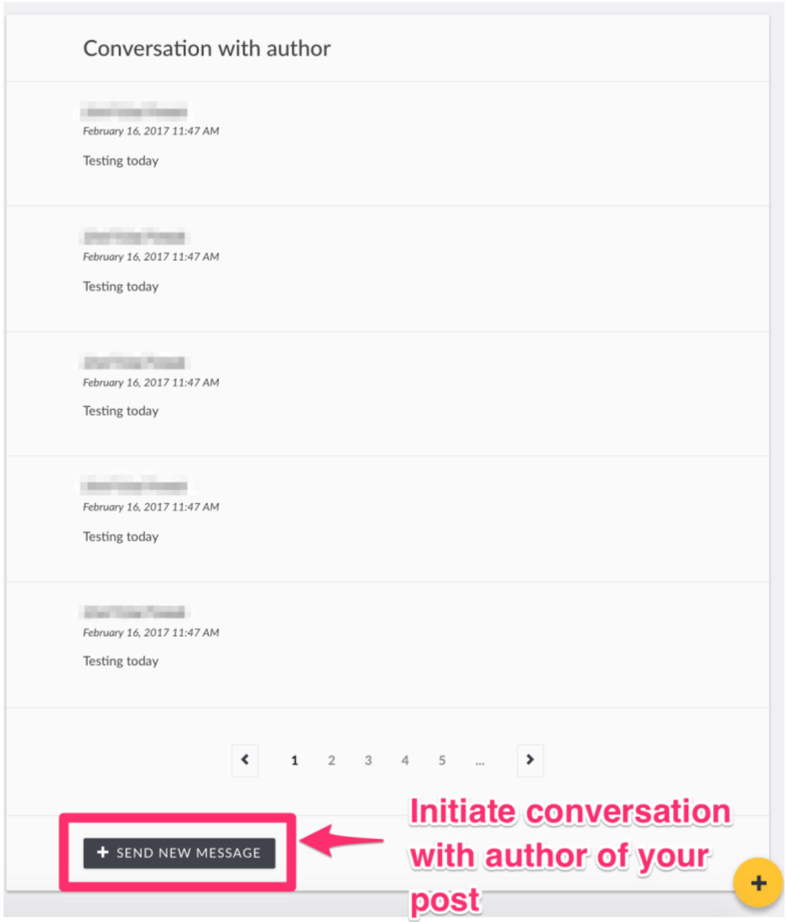
- Select a post to structure from your data view. Your post detail will pop up on the right hand side of your post card.

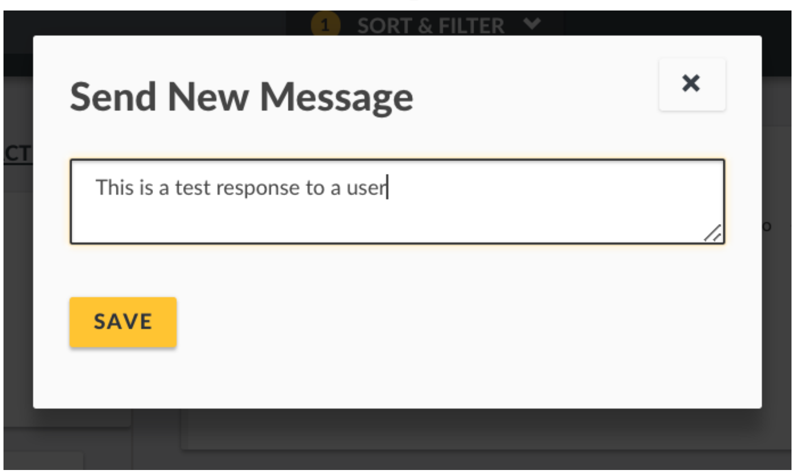


- If the post is being edited by someone else on your team, you will see a notice on the top of the post detail pane. You will not be able to edit the post again until the post has been saved and taken out of edit mode by your teammate.
  Please note: if you are an admin, you have the ability to override the edit lock. If you choose to override the lock, any changes being made by the person editing at that time will be lost if they have not saved them. Proceed with caution.

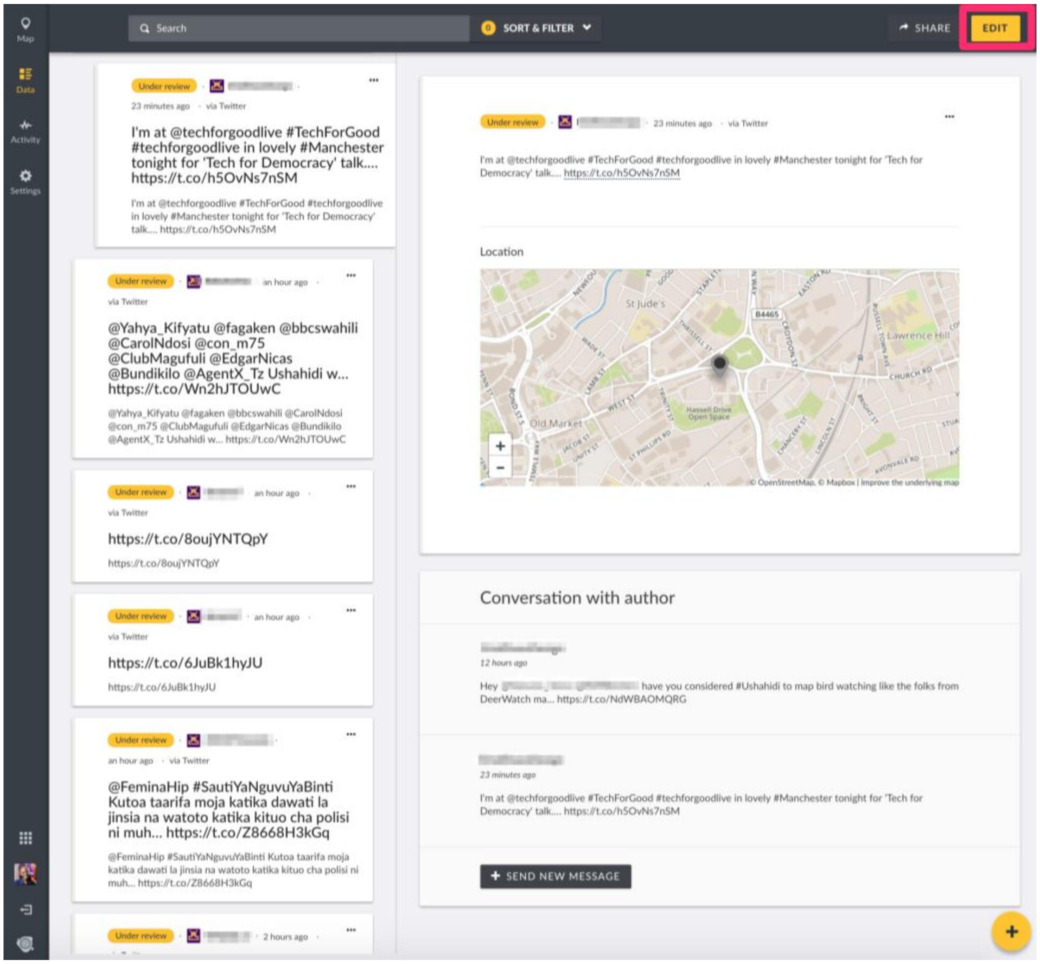
- Read the content of the post to determine the survey to which you should assign this post to.
  - If you require more information from the author of the post before you are able to assign or structure your post, you will be able to message the author, ONLY IF the

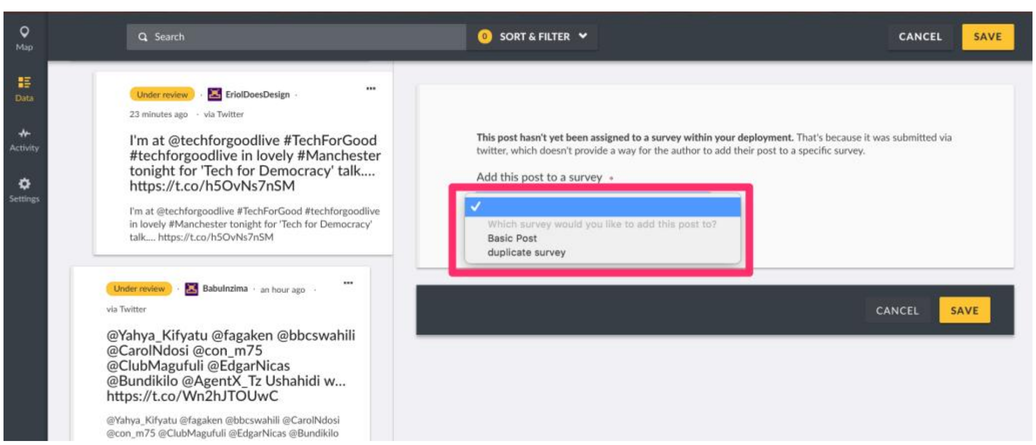
post was submitted via SMS or Email.





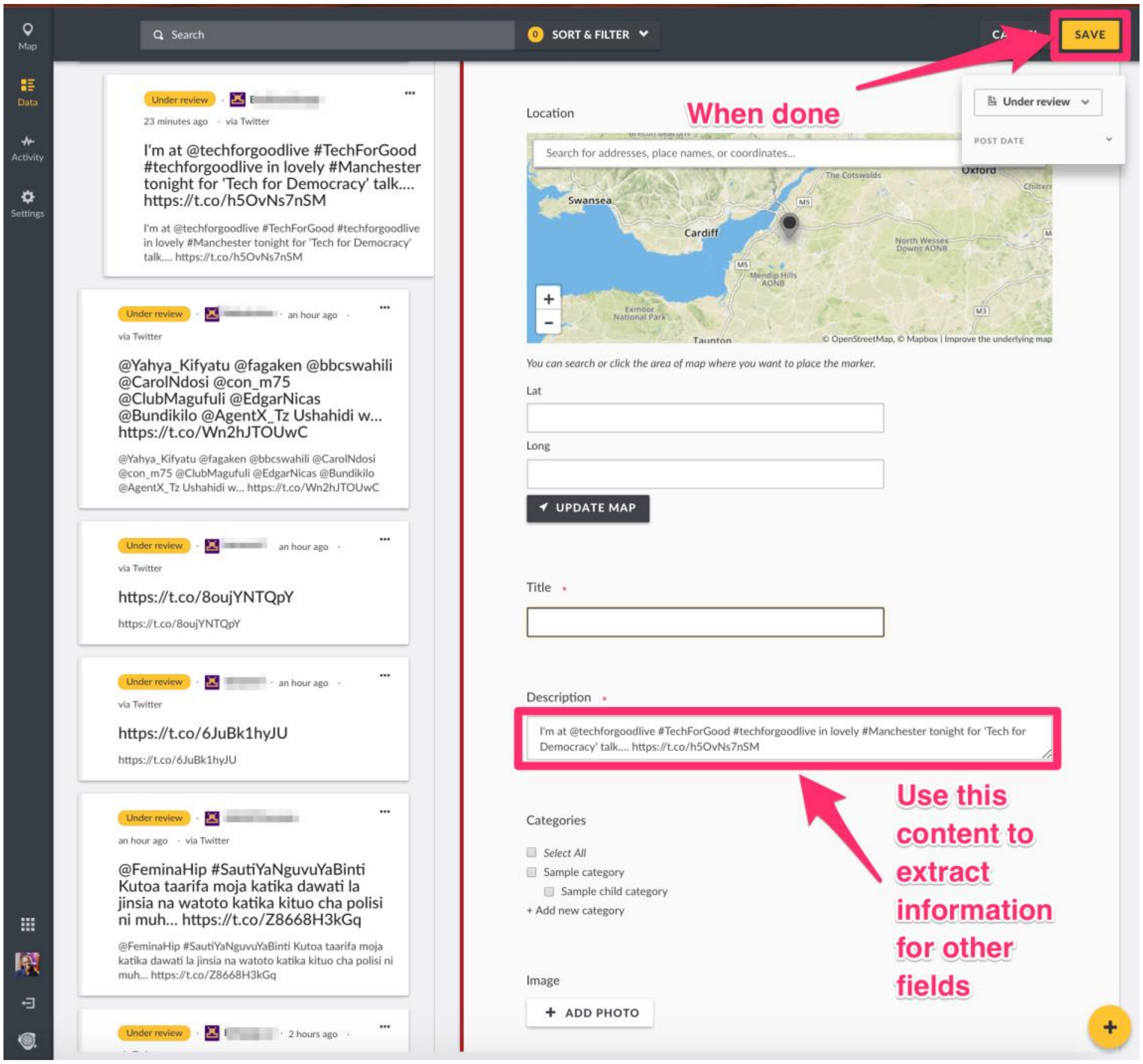
- Once you're very sure, Click on ***Edit***, and then select the appropriate survey to assign this post to.





- Add appropriate content to your post as you structure it. This will all be dependent on your survey structure, as this will give direction on what details you will be able to add
  - All content from your post will be automatically added into your Description field. It is from here that you will be able to extract information to assign to other fields in your survey.

○ Make sure to fill out all required fields.



- Once you've completed filling out all required details, click on **Save.**

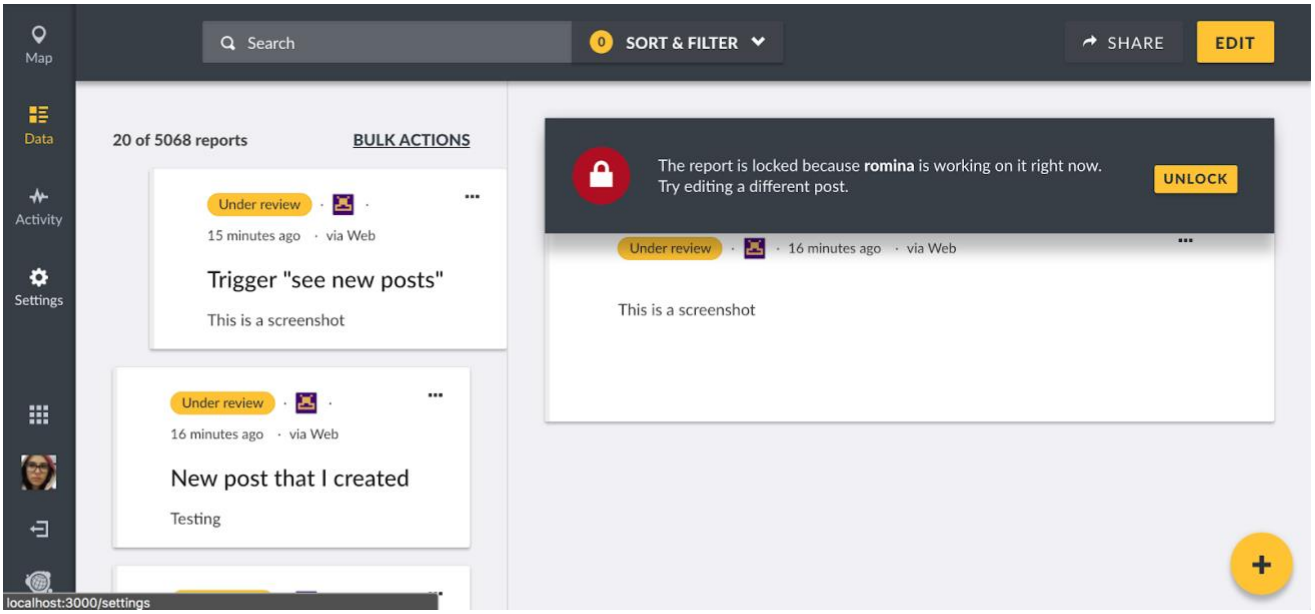
6.4.2 Locked posts

Data processing and analysis should be collaborative. When you start editing a Post, it will be locked and other users cannot edit, update, or accidentally interfere with your work. When you finish working and save or close the post, it is automatically unlocked again. Conversely, if you need to edit a Post that is currently locked you will be able to quickly find out which of your colleagues is working on it and coordinate changes with them.

To avoid issues with Posts remaining locked, we have introduced a set of safeguards to ensure that the Posts will always return to an unlocked state.

- Locks expire after 5 minutes, to avoid locking a post when someone is not actively working on it.

- When a user logs out, all of their locked posts will be unlocked.
- Administrators have the right to “break” a lock to ensure that a Post becomes available again in a time sensitive situation.
- Even when locked for edit, all users who have permission are able to view and review the Post.

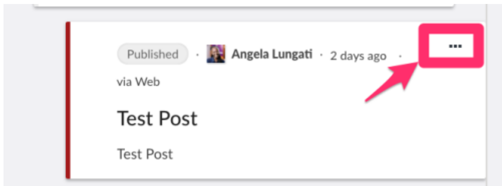


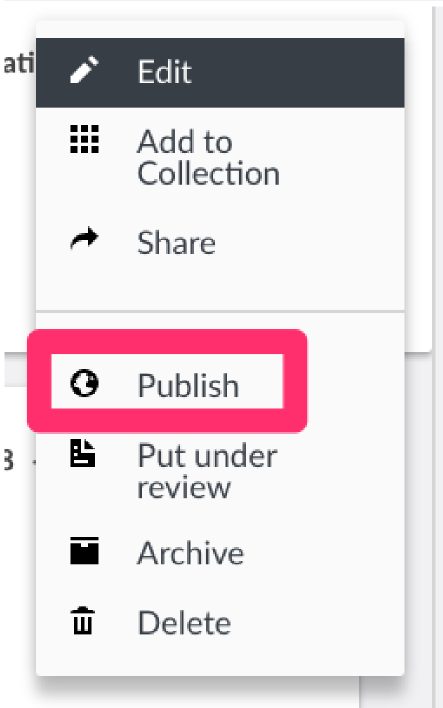
6.5 Publishing Posts

The ability to publish posts is only available to admins or registered users with adequate permissions. This means that non registered users cannot publish posts. Posts submitted by non registered users have to be moderated.

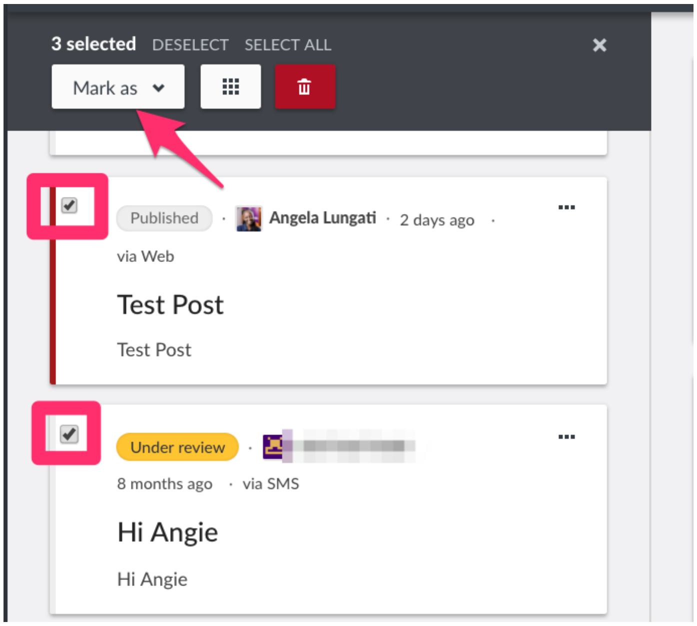
To publish a post, simply change the status to Published as shown below:

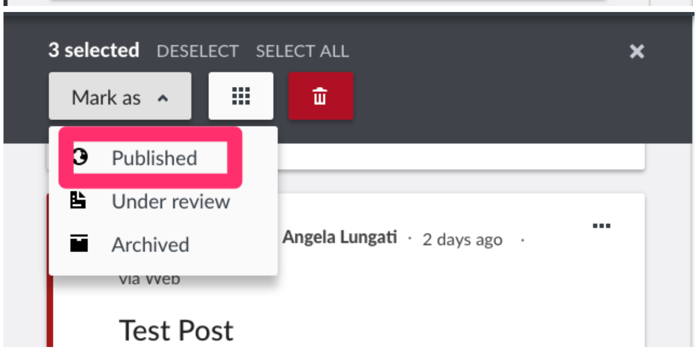
- From the data view page, either
    - Individually or



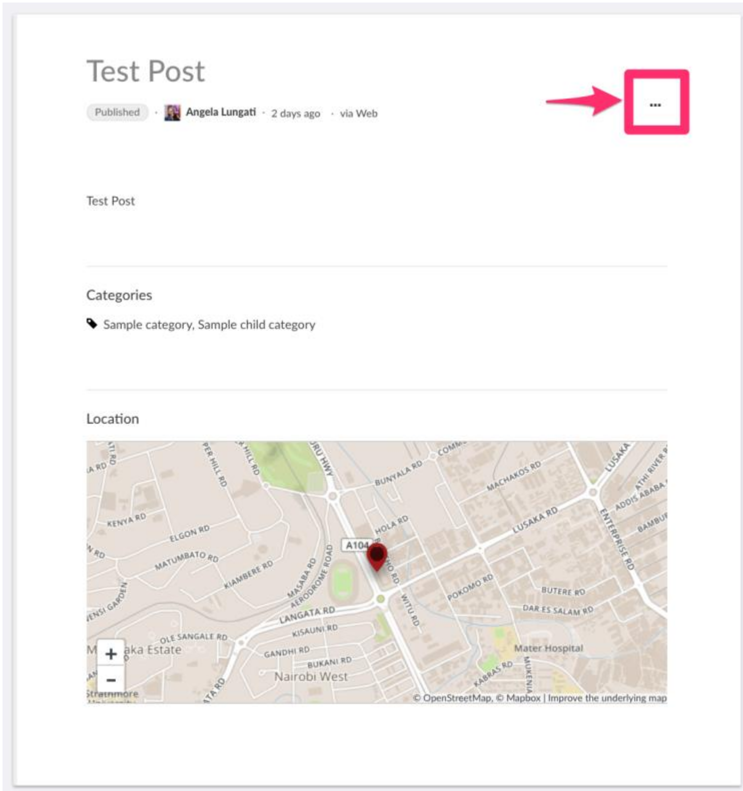


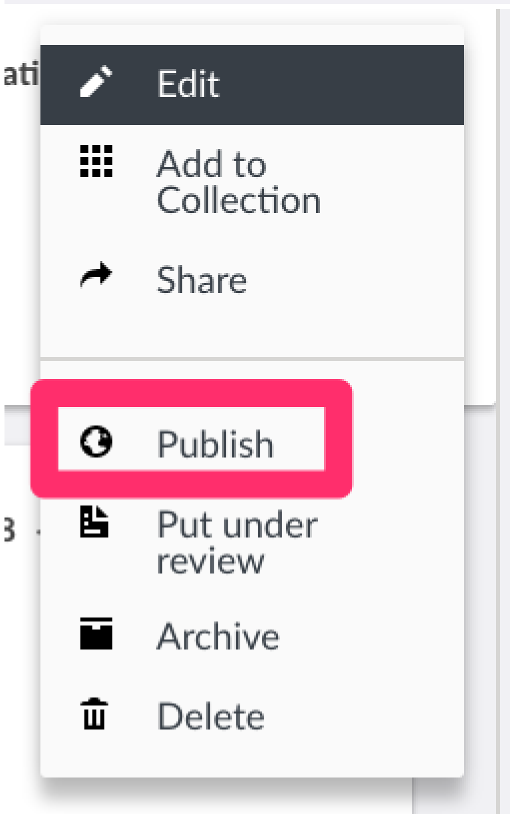
    - in Bulk



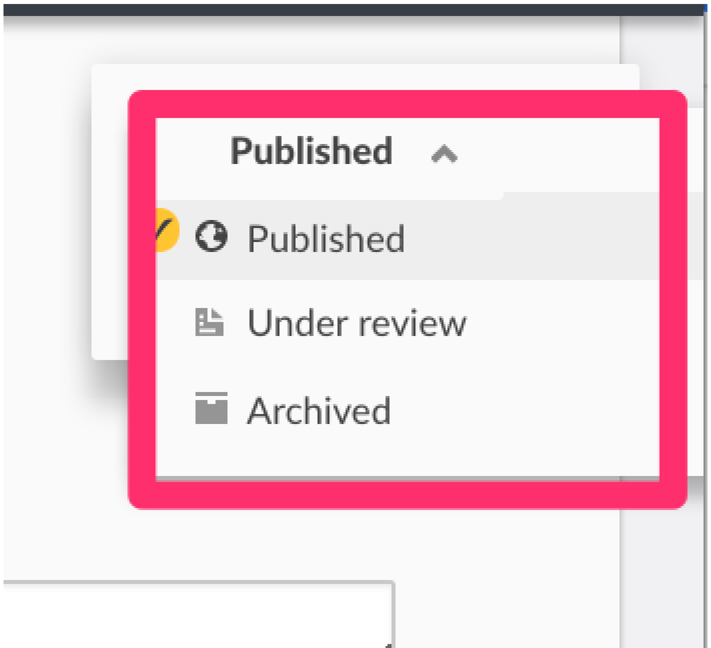


- From the post detail view





- While editing a post, then clicking save when done.



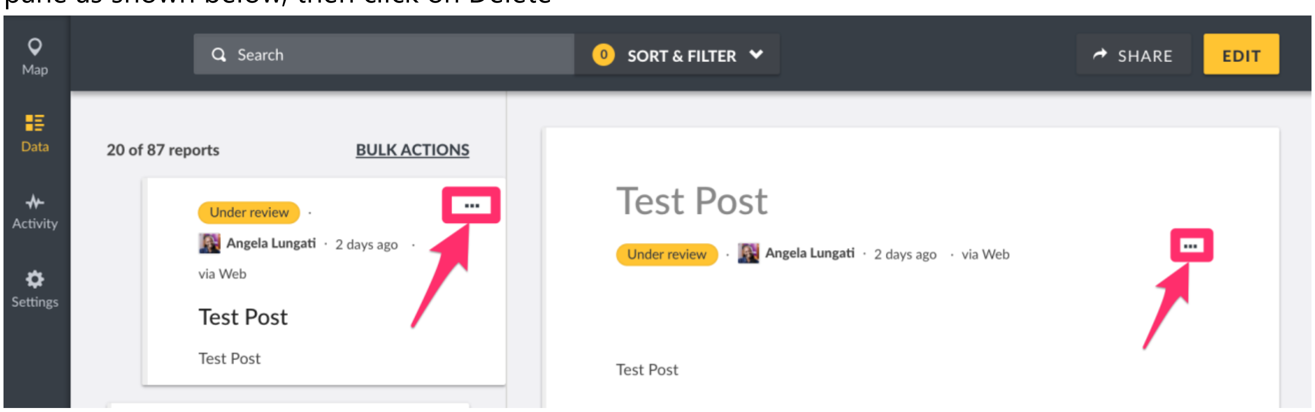
6.6 Deleting Posts

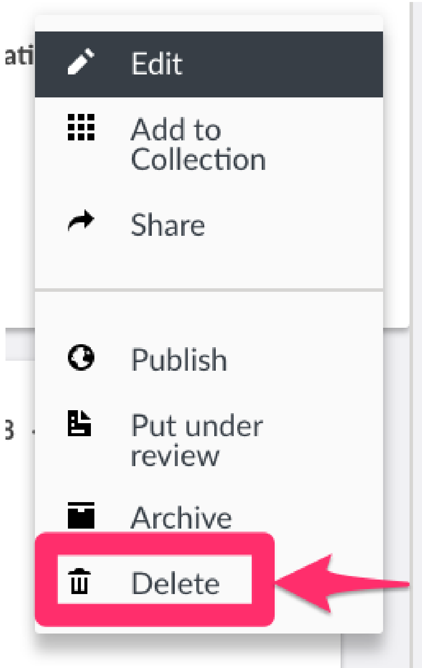
The ability to delete posts is only available to admins or registered users with adequate permissions. This means that non registered users cannot delete posts.

You can select multiple posts to delete at a time from the post list page, or delete individual posts from the list page, or individual post view page .

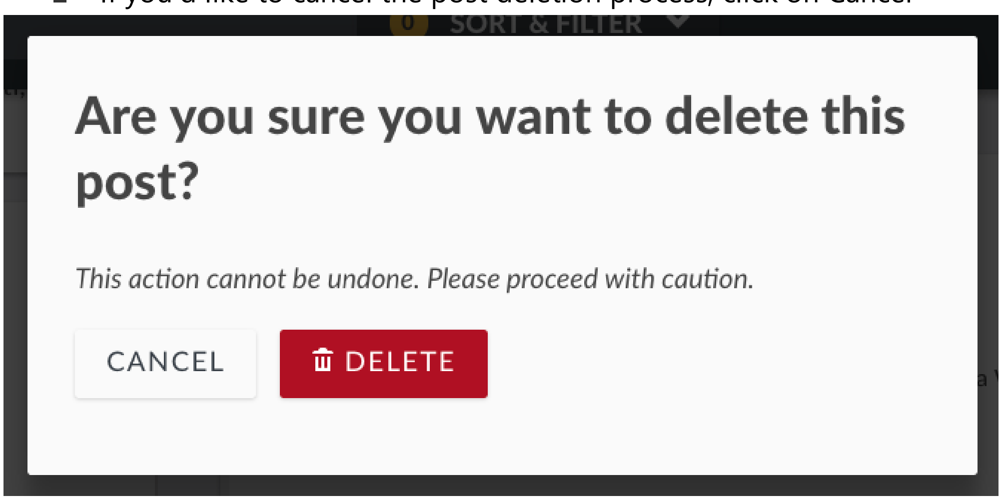
To delete

- An individual post from the data view, click on the three dotted icon from the list of detail pane as shown below, then click on Delete



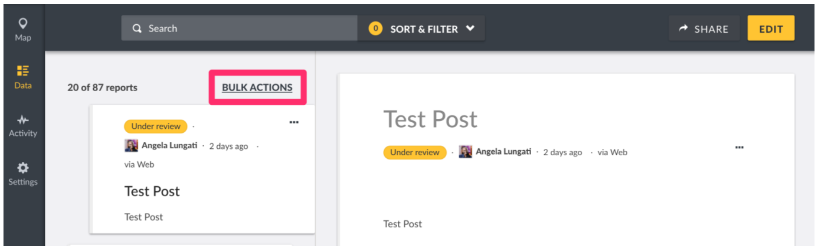


- A pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete your post
  - Click on Delete to delete your post
  - If you'd like to cancel the post deletion process, click on Cancel

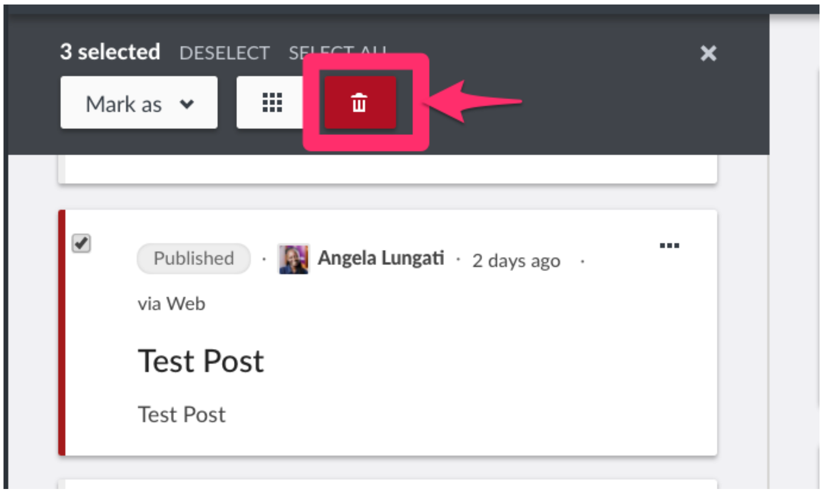


- Multiple posts from the post lists page
  - Click on bulk actions, then tick the checkbox on the left, adjacent to the post(s) you would like to delete from the posts list page. You can also click on Select All to grab

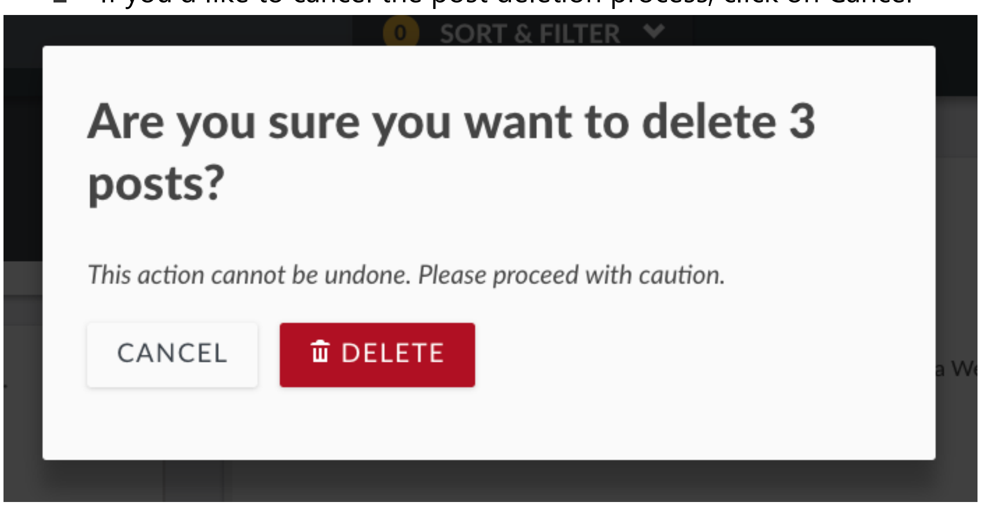
all posts listed on that page



- This action will activate the previously inactive Delete button on the grey menu bar. Click on it to initiate the deletion process



- A black pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete your post(s)
    - Click on Delete to delete your post(s)
    - If you'd like to cancel the post deletion process, click on Cancel



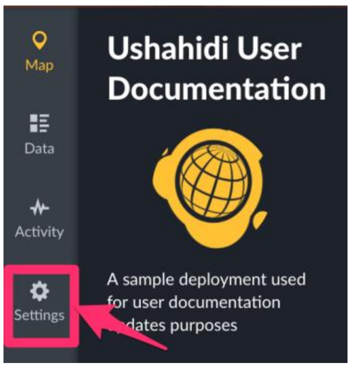
6.6 Importing Data

The ***Data Import*** feature allows you to import posts into the platform. It is particularly useful in cases where:-

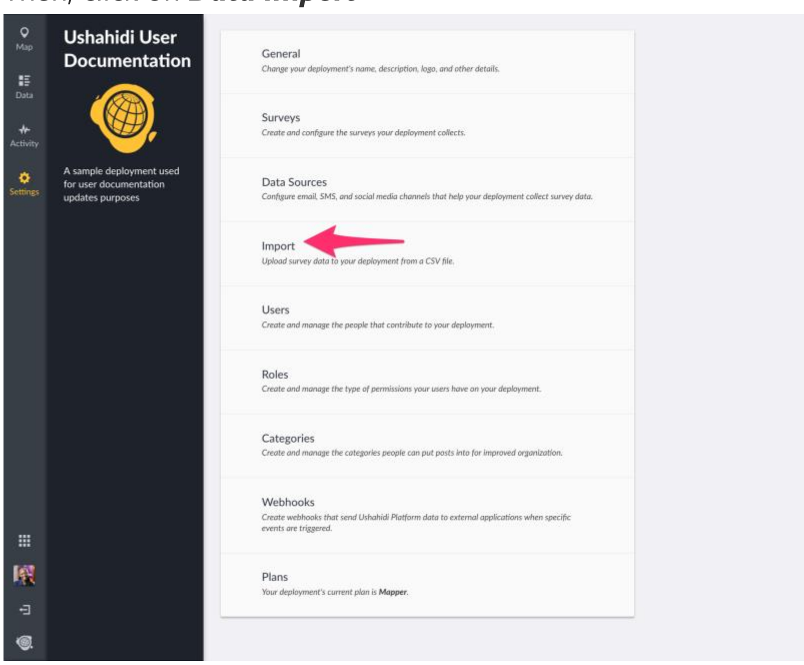
- You need to upload posts in bulk
- You need to upload posts that people can't send to you via email/phone but have the data available in CSV format
- (In future) You are transferring data from one platform to another

To import a CSV File,

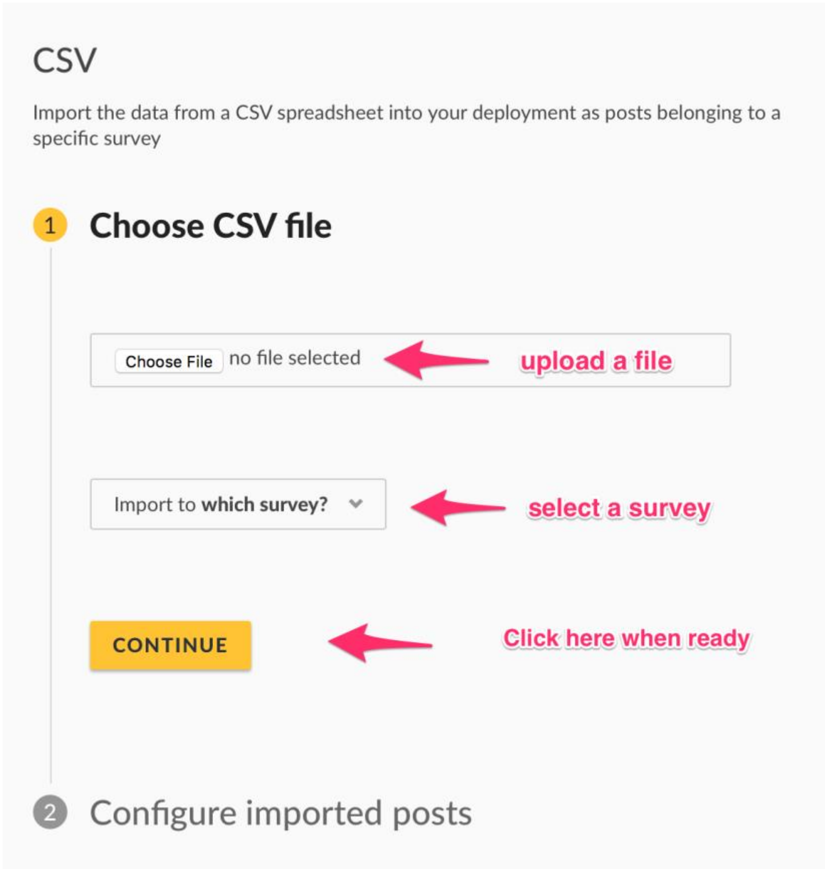
- On the left hand menu bar, click on ***Settings***



- Then, click on ***Data Import***



- You'll get redirected to the import page, as shown below.

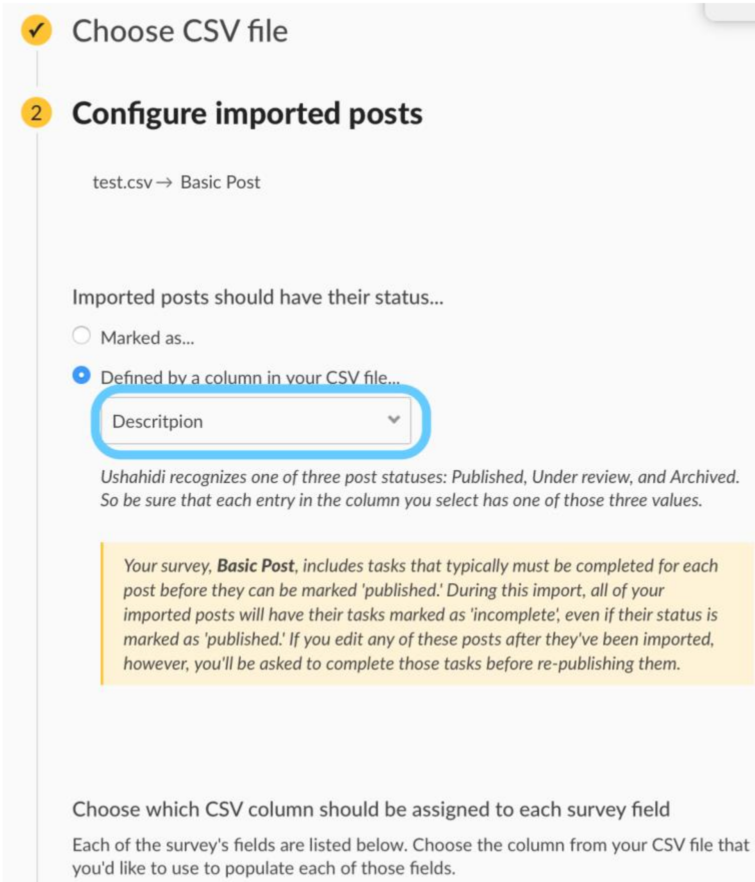


- Select a survey you'd like to match the data you're uploading to. This field is populated with a list of all existing surveys on your deployment.
- Choose the CSV file you would like to upload. Make sure that
    - You are uploading a file in CSV format. Any other file formats are not accepted
    - Your CSV file size does not exceed 2MB
    - Your CSV file has Column headers(these will be useful when mapping your CSV column to the survey fields)
    - Geographic location information is separated into two columns; one for Latitude, and the other for Longitude.

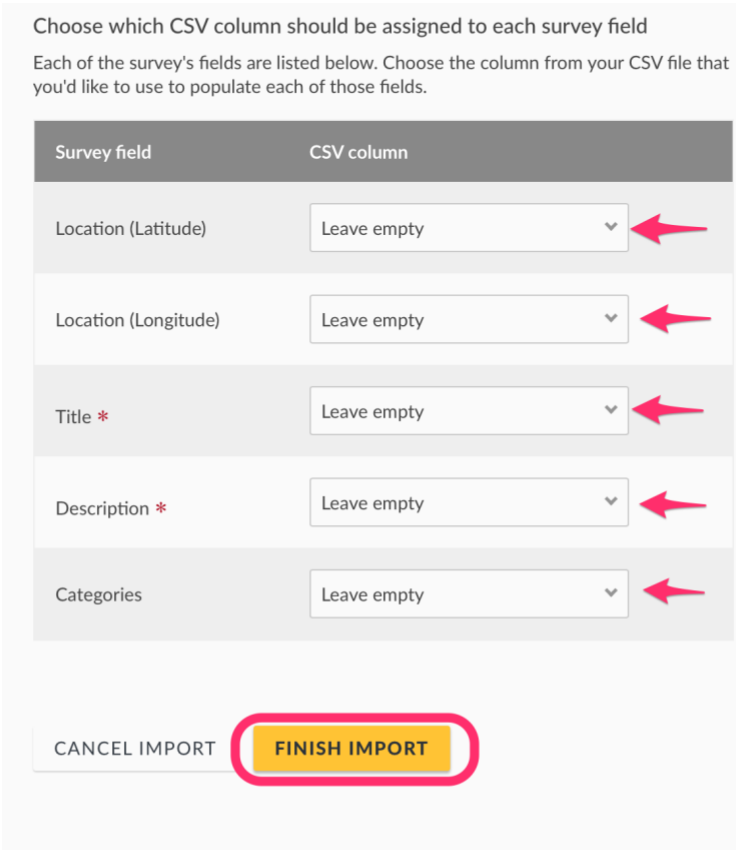
See below for a sample CSV file

Title	Description	Categories	Latitude	Longitude
Here is one more test	This is a test post for CSV Uploads	Fire reports	-7.007139,110.399578	-7.007139

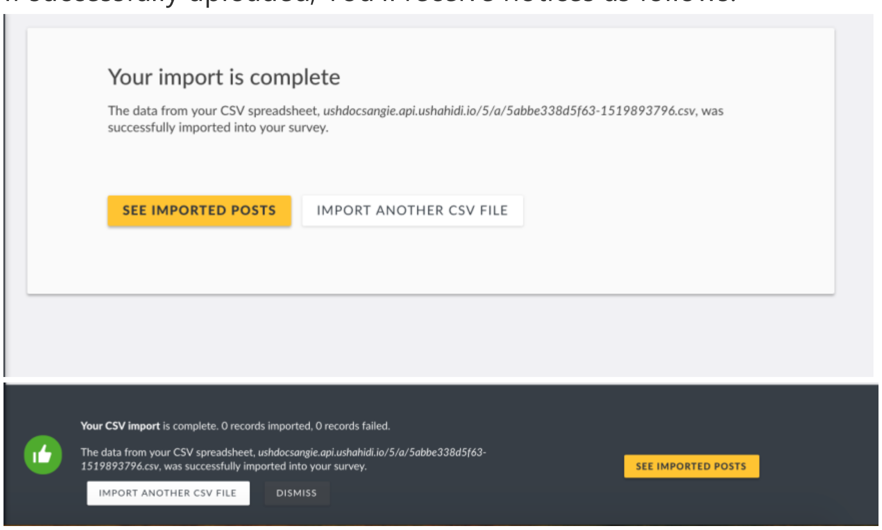
- Click on Continue and follow the instructions below.



- On successful file upload, you'll need to assign your CSV Columns to post fields, as illustrated below.
- Click on ***Finish Import***



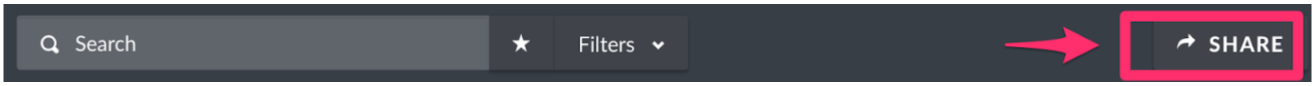
- If successfully uploaded, You'll receive notices as follows.



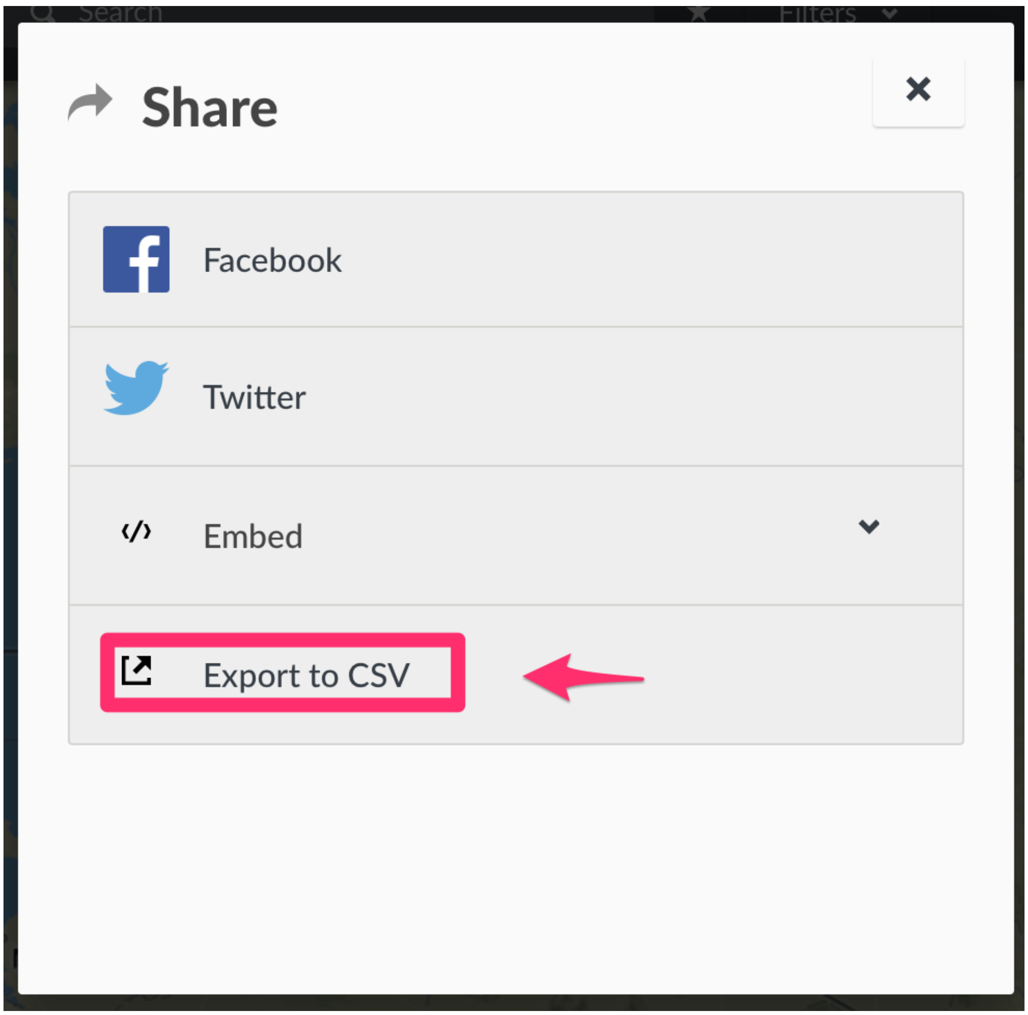
6.7 Exporting Data

The platform now allows for data export, enabling you to download posts from the platform in CSV format. You can download posts from your map mode, Data mode, [saved searches](#) and [collections](#) you have access to, or based on custom criteria([search filters](#) set by you as a user).

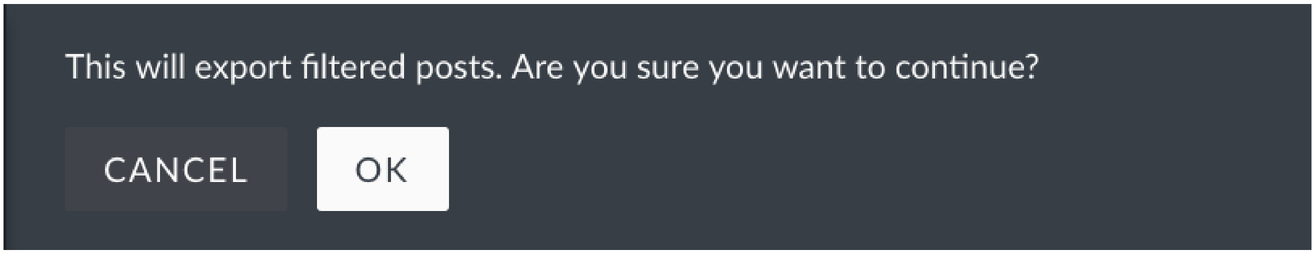
To export a CSV file,

- Click on saved search/collection you'd like to export data from.
    - You can also use the Search section on your header to filter posts you would like to export based on specific criteria
- Once done, click on the **Share** button on the right hand of your header menu
- 

Then click on Export to CSV as shown below:



- A small confirmation box will appear seeking confirmation on whether you would like to proceed with exporting your data.
    - Click on ***OK*** to export your CSV file
    - Click on ***Cancel*** if you would like to terminate the export process



- You should get a CSV file named after your deployment name in your downloads folder

7. Analysing Data on your deployment

7.1 Saved Searches

Saved searches are dynamic groupings of posts that match parameters chosen in filters.They are dynamic because as new posts are added that fit the search criteria, they will show in the saved search automatically, and without manual intervention.

Saved searches are particularly useful for managing workflows and teams on your deployment. They allow you to set filters for information that's relevant to each working group/team.

For example:-

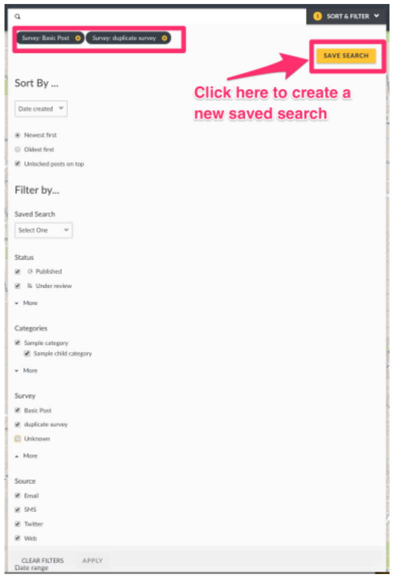
- It is useful for the structuring and publishing team to only see posts that are unstructured. Creating a saved search with these parameters will be useful
- A team tasked with publishing needs to only see posts that are yet to be published, so creating a saved search with these parameters will be useful.

Please note that only registered users can create Saved searches. Non registered users can only view public searches

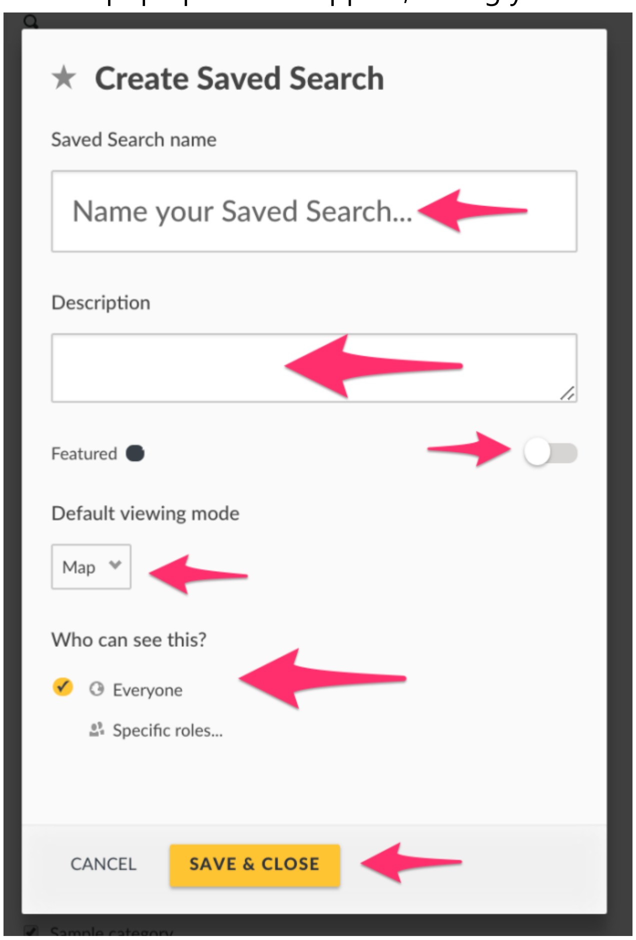
7.1.1 Creating a saved search

You can create a saved search from your homepage by:-

- Adding your search/filter parameters on the search bar as shown below.
    - A ***Save Search*** button will appear on the search and filter modal.
    - Click on it.



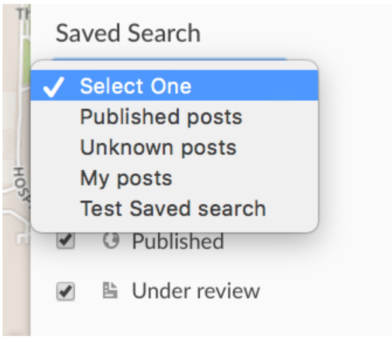
- A small pop up box will appear, asking you to fill in the following details:-



  - Assign a ***saved search name***
  - Provide a ***description***
  - Set the **audience** allowed to see this saved search

- Set the **default viewing mode** for this saved search(choosing between Map, Data or Activity). This is the view that a user will see when they first arrive at this saved search
- Determine if this saved search is **featured** or not. Setting this saved search as featured displays to all users on the saved search menu

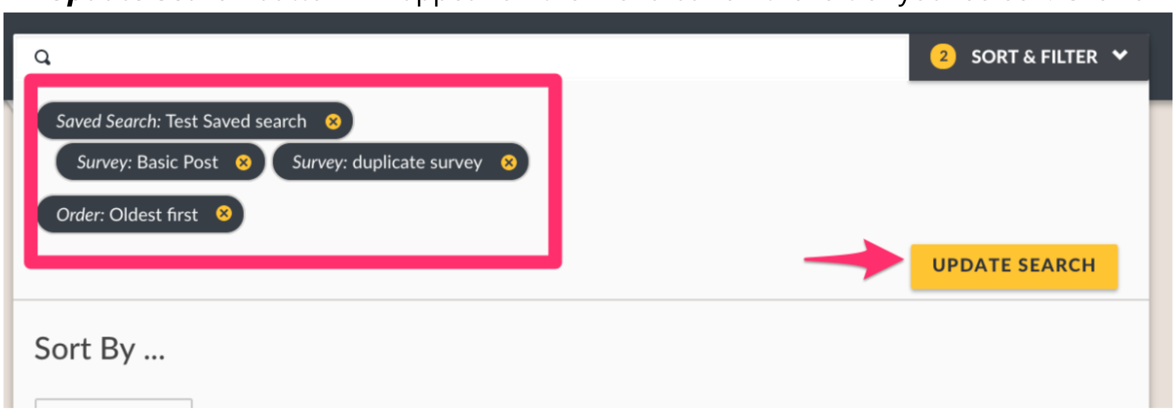
- Click on ***Save&Close*** when done.
- Your saved search should now appear on the ***Saved Searches*** menu bar on your search bar.



7.1.2 Updating a saved search

You can update a saved search at any time by adding/editing your filters/keywords, or turning off existing filters/keywords.

- Set your parameters on the search bar by either typing or selecting options from the search
- An ***Update Search*** button will appear on the menu bar on the left of your screen. Click on it.



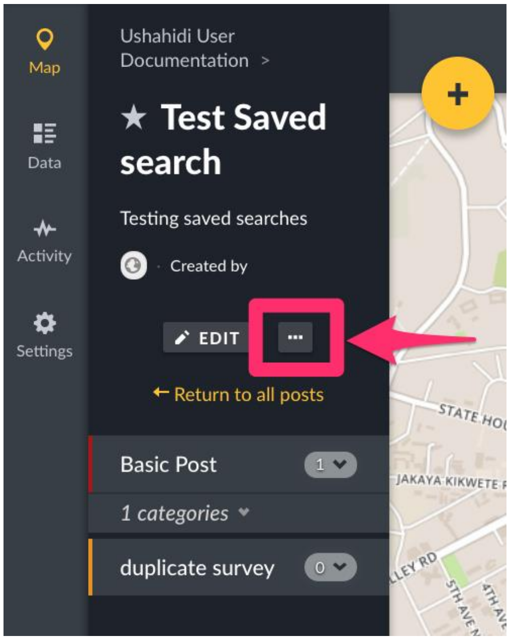
7.1.3 Adding a notification to a saved search

As a registered and logged in user, you can set up notifications on Saved Searches. This means that any time a post is added to a saved search, you will receive an email or phone notification.

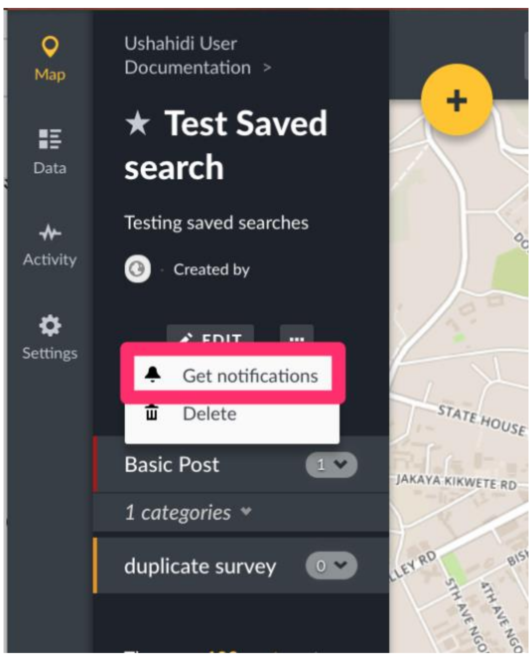
To add a notification,

- Select saved search you'd like to receive notifications for

- Click on the three dots button, right next to the ***Edit*** button.



- Click on ***Get Notifications***

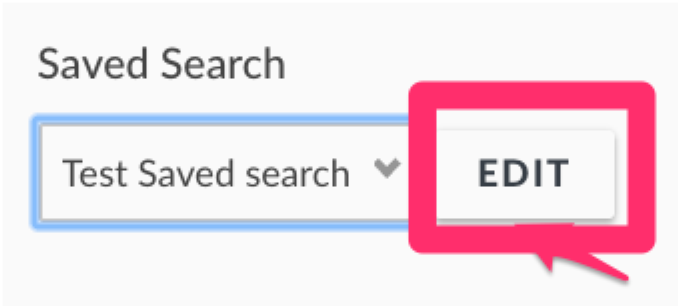


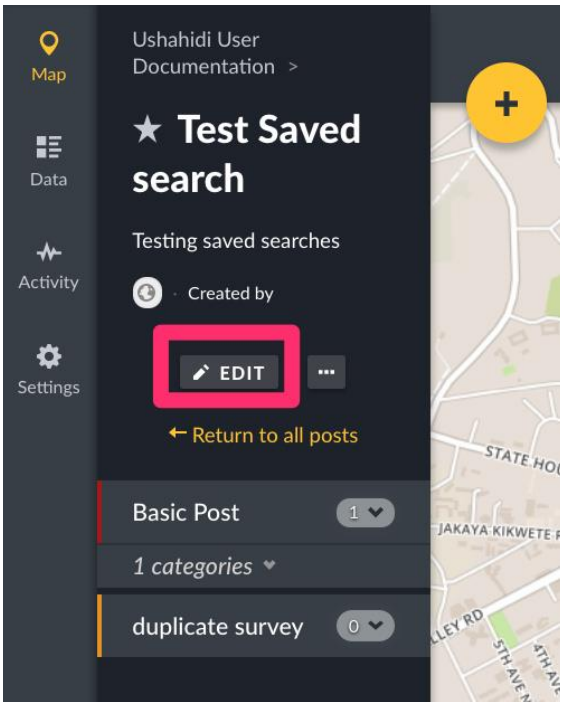
- You can turn off notifications for this saved search using the same process described above.

7.1.4 Editing a saved search

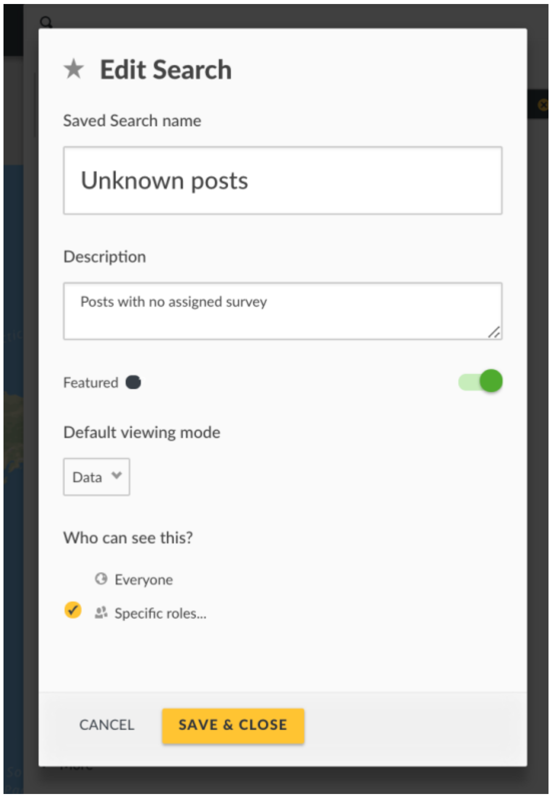
To edit a saved search,

- Select saved search you would like to edit from the search filter.
- Click on ***Edit*** as shown below





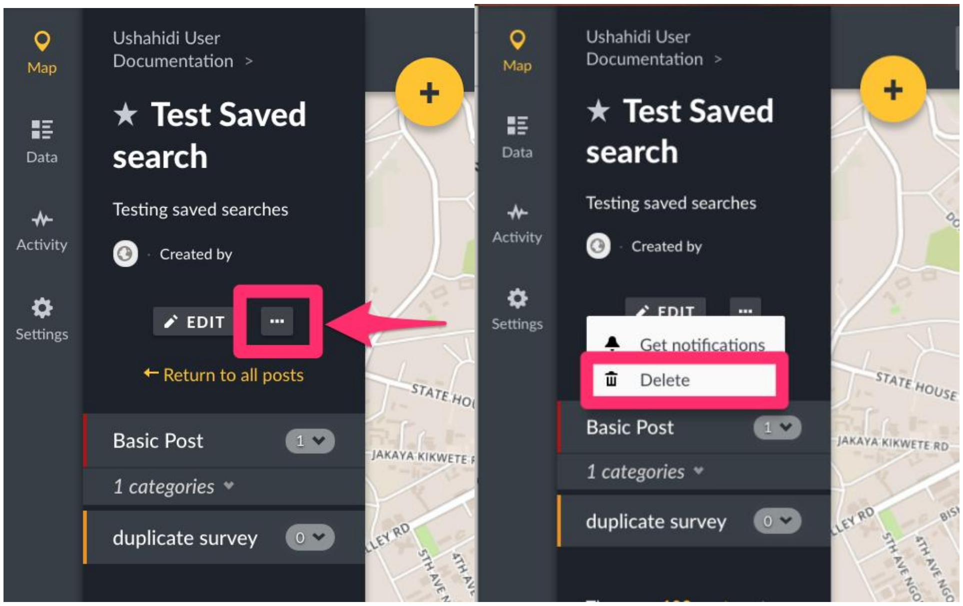
- Edit your saved search details, then click on ***Save&Close***


Edit Search
Saved Search name
Unknown posts
Description
Posts with no assigned survey
Featured
Default viewing mode
Data
Who can see this?
Everyone
Specific roles...
CANCEL
SAVE & CLOSE

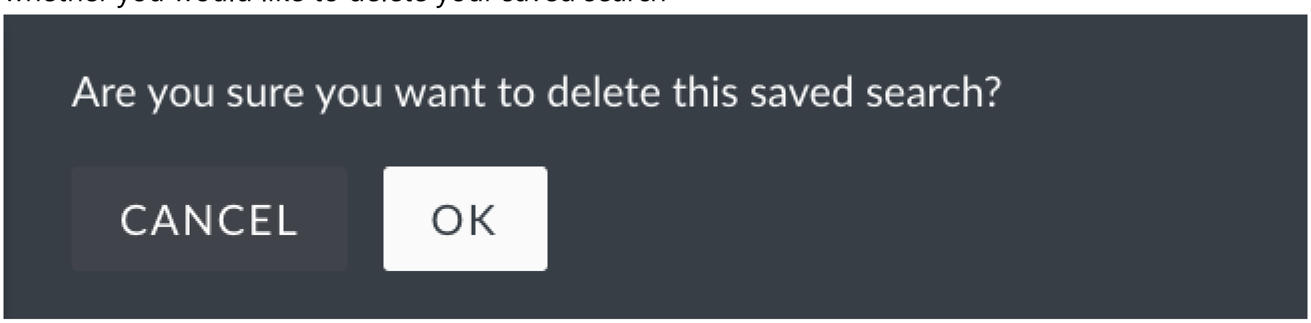
7.1.5 Deleting a saved search

To delete a saved search,

- Select saved search you would like to delete
- Click on the three dots button, right next to the ***Edit*** button.



- Click on ***Delete***. A pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete your saved search



  - Click on ***OK*** to delete your saved search
  - If you'd like to cancel the saved search deletion process, click on ***Cancel***

7.2 Collections

A "Collection" is a manually-curated grouping of posts. It is not dynamic, meaning the posts within it do not change unless a you manually update them.

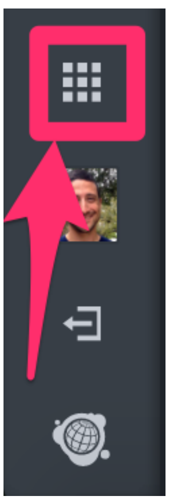
You may find collections useful in grouping posts that you would like to share with external partners . For example , you may find it useful to add all posts that require escalation to a collection and then export data in that collection in a CSV file that you can share with partners.

Please note that only registered users can create Collections. Non registered users can only view featured public collections

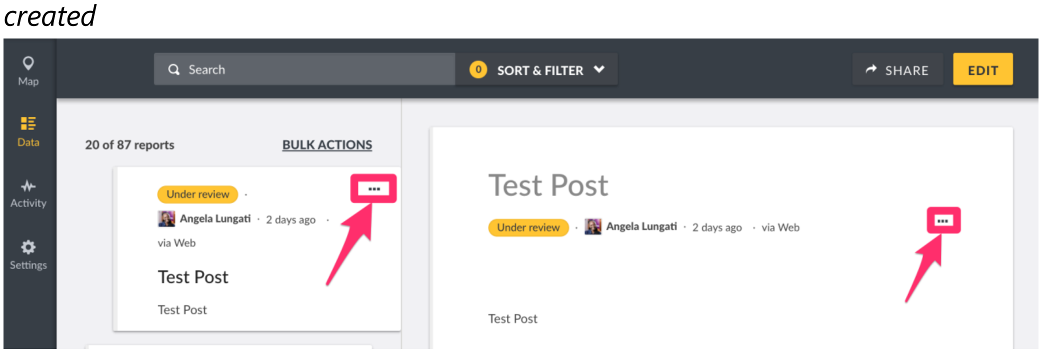
7.2.1 Creating new collections

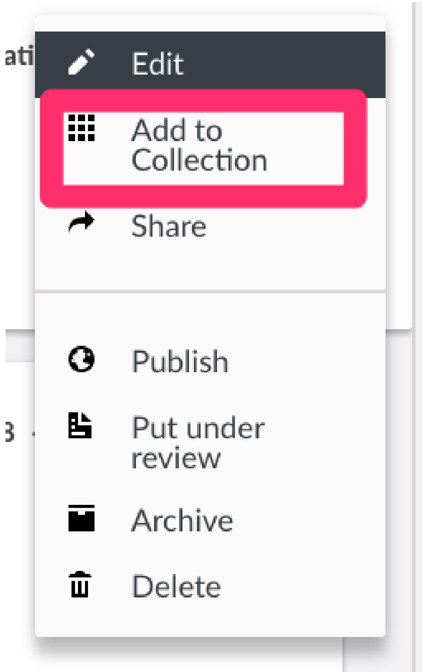
To create a new collection,

- Click on by clicking on:-
  - Collections icon on the bottom left hand corner of your deployment as illustrated below

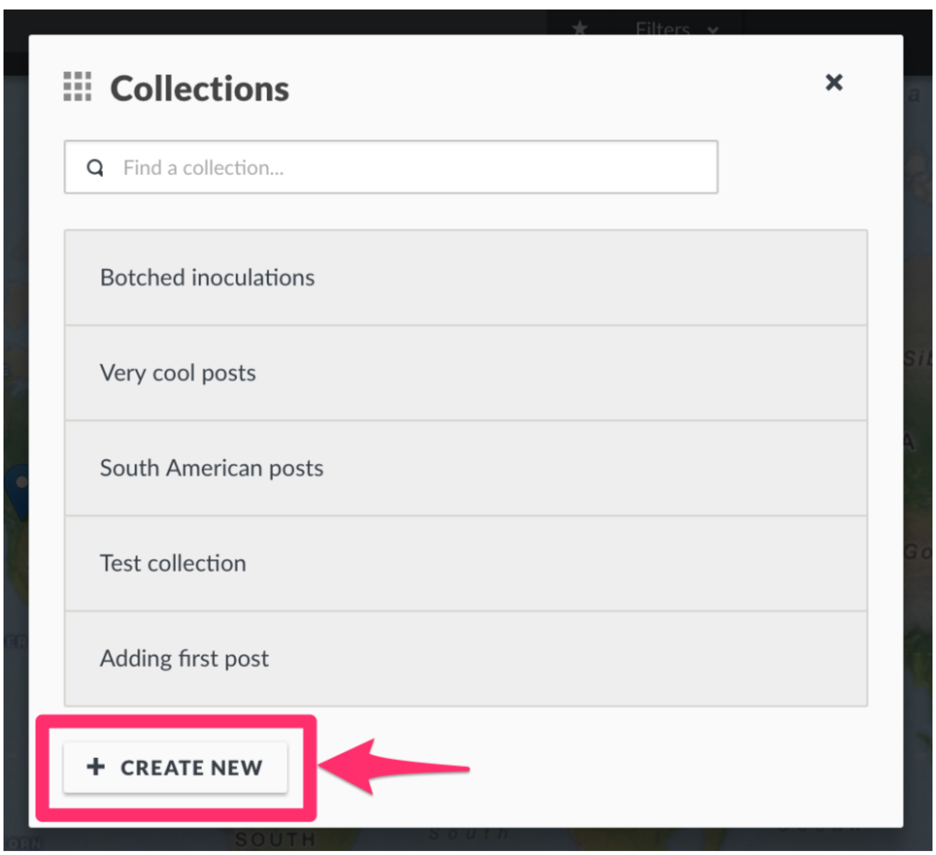


  - The three dotted icon on the data view page while viewing the list on the left and the detailed pane on the right. (*note that this will assign this post to the new collection created*

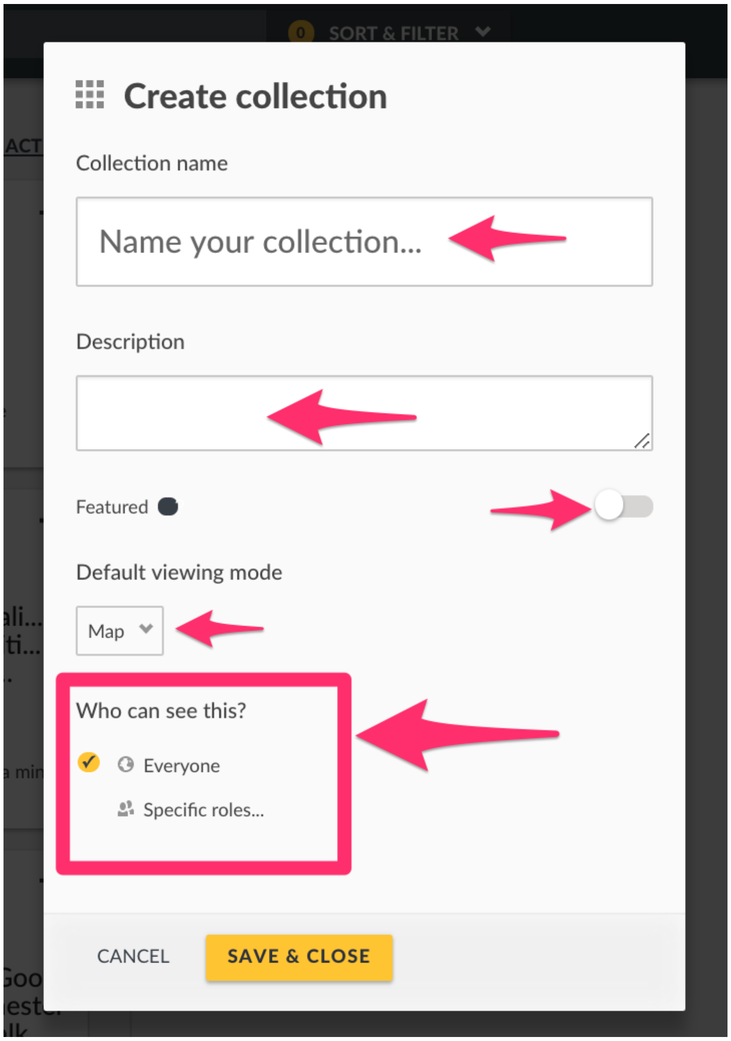




- A pop up box will appear, with a list of all existing collections, and a ***Create new*** button. Click on it.



- Then, fill in the following details:-

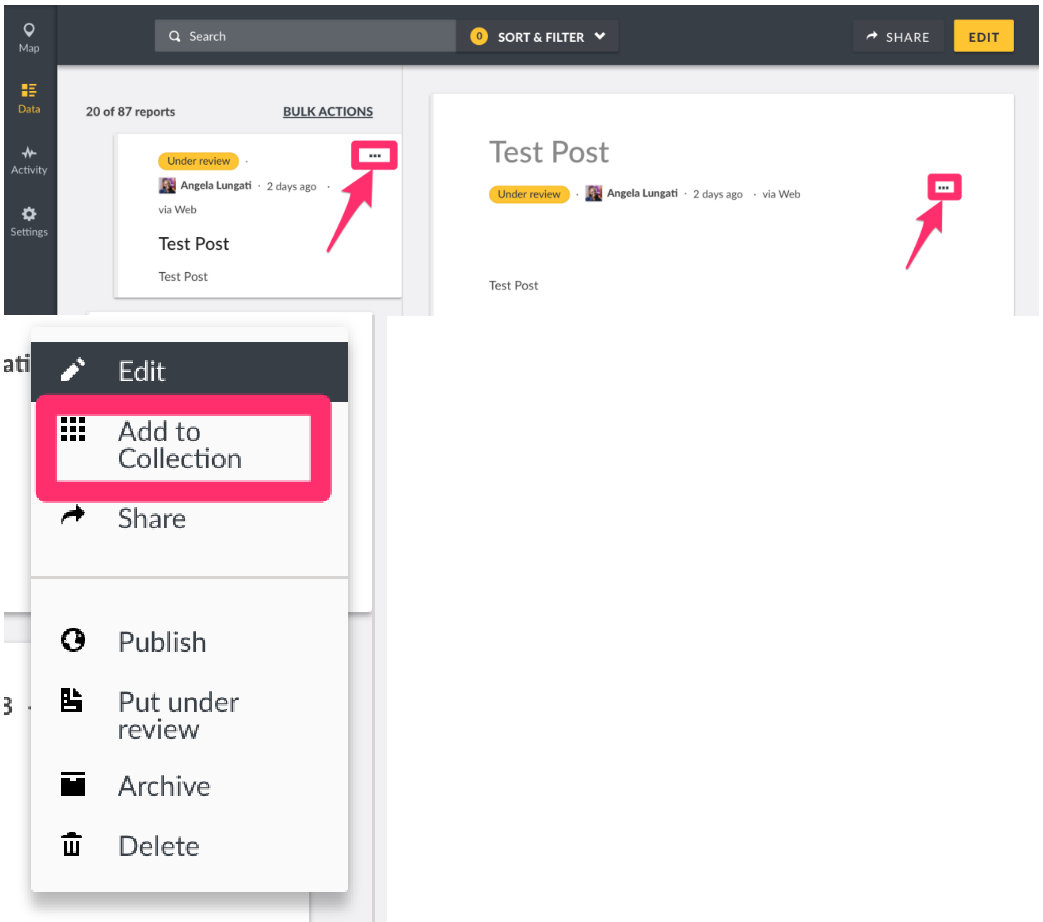


  - Assign a ***Collection name***
  - Provide a ***description***
  - Set the **audience** allowed to see this collection
  - Set the **default viewing mode** for this collection (choosing between Map, Activity, or Data). This is the view that a user will see when they first arrive at this collection
  - Determine if this collection is **featured** or not. Setting this collection as featured displays to all users on the collections menu
- Click on ***Save&Close*** when done.
- Your collection should now appear on the left menu bar under ***Collections***

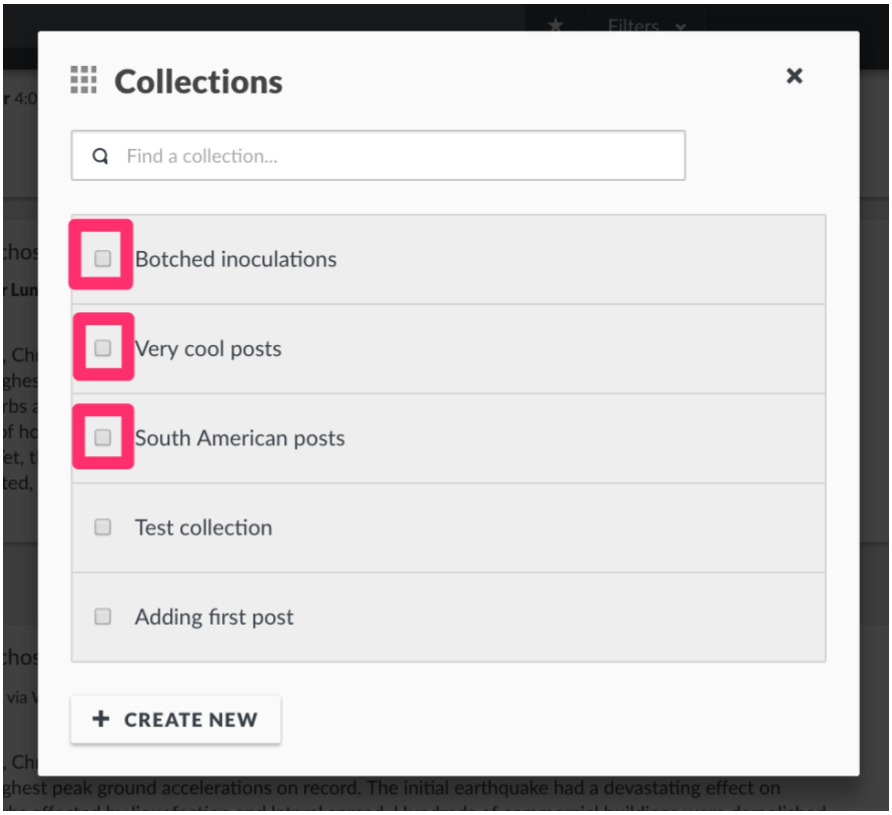
7.2.2 Adding Posts to collections

You can add a post to a collection from:-

- The three dotted icon on the data view page while viewing the list on the left and the detailed pane on the right.



- A pop up box will appear, with a list of all existing collections. Select the collection(s) you'd like to add the post to.



- You can add a post to multiple collection, so tick all checkboxes that apply.
- You can also create a new collection to add the post to from these two pages. Simply click on ***Create New*** from within this dropdown as described in the Creating new collections (section 7.2.1) of this manual

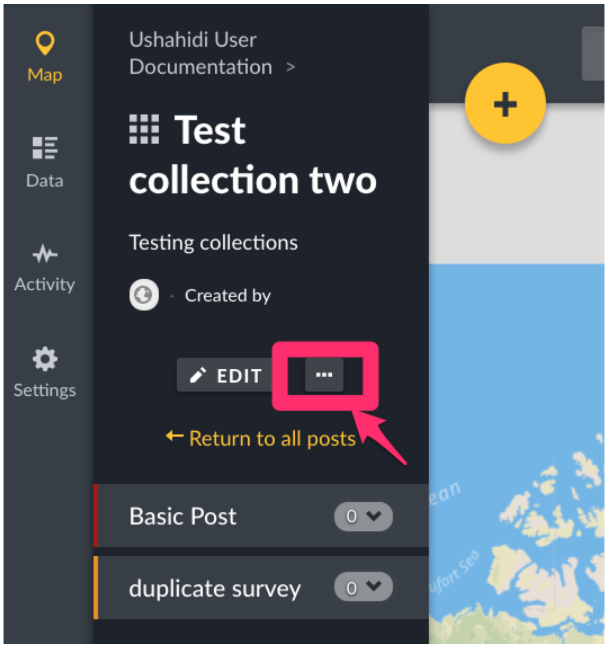
7.2.3 Adding notifications to collections

As a registered and logged in user, you can set up notifications on Collections. This means that any time a post is added to a collection, you will receive an email or phone notification.

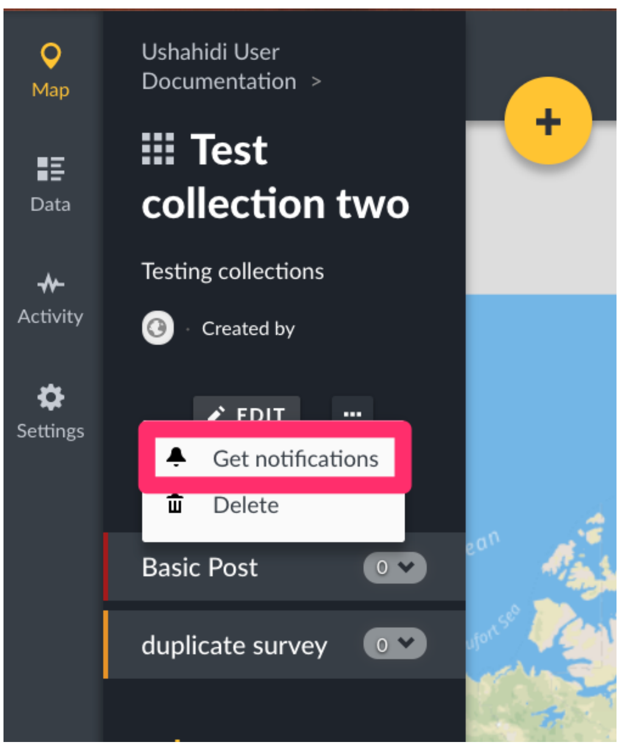
To add a notification,

- Click on the collection you'd like to receive notifications from.

- Click on the three dots button, right next to the ***Edit*** button.



- Click on ***Get Notifications***

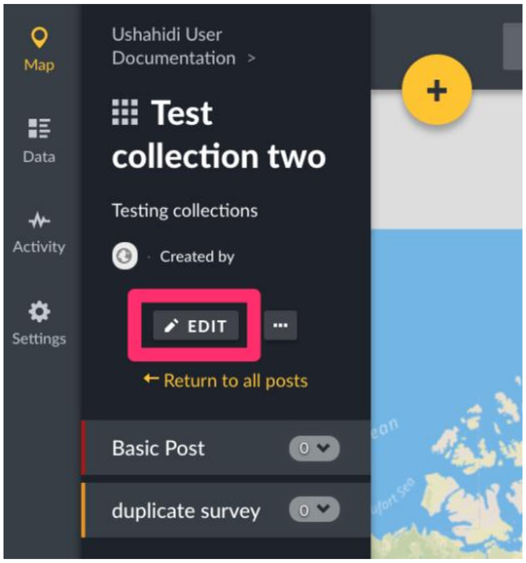


- You can turn off notifications for this collection using the same process described above.

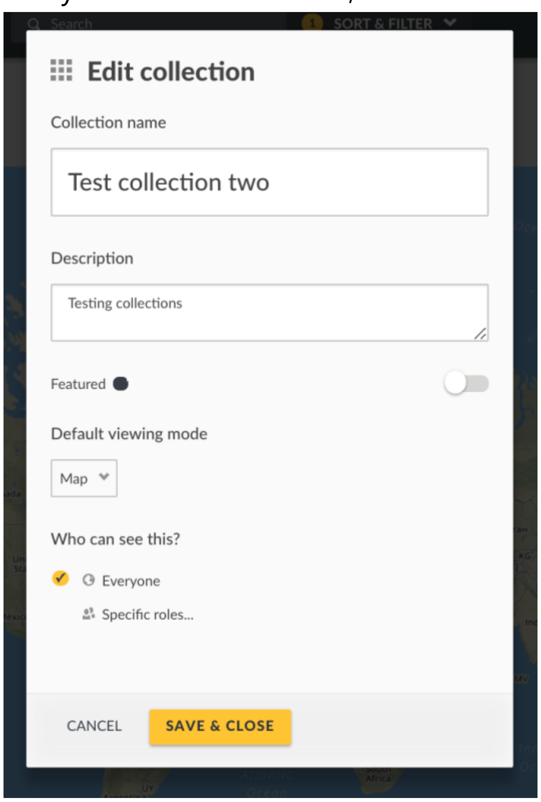
7.2.4 Editing Collections

To edit a Collection,

- Click on the collection you would like to edit
- Click on ***Edit*** as shown below



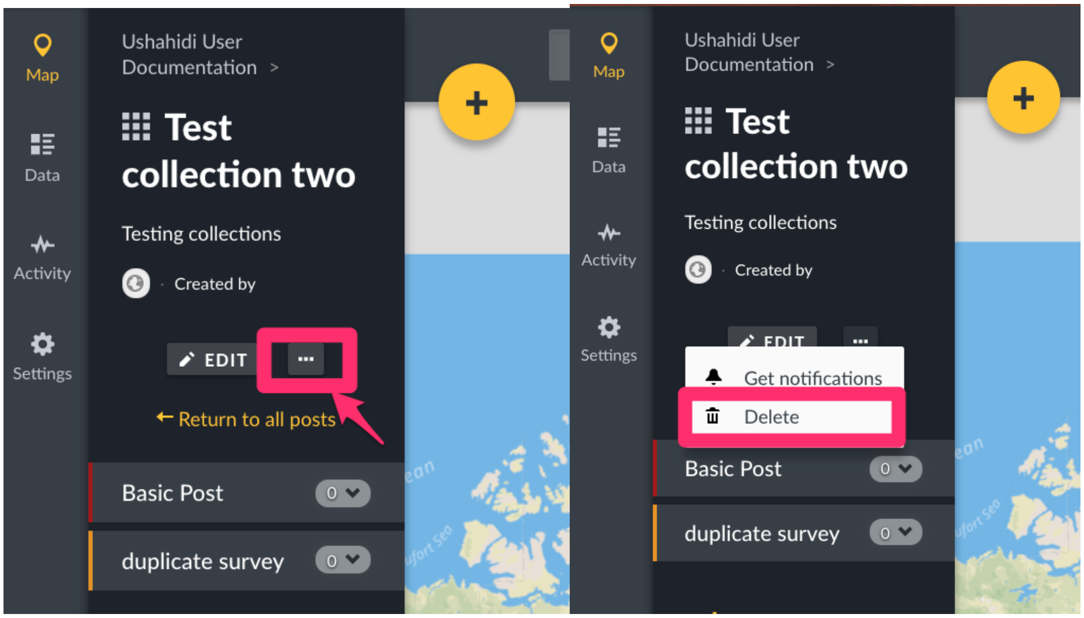
- Edit your Collection details, then click on ***Save&Close***



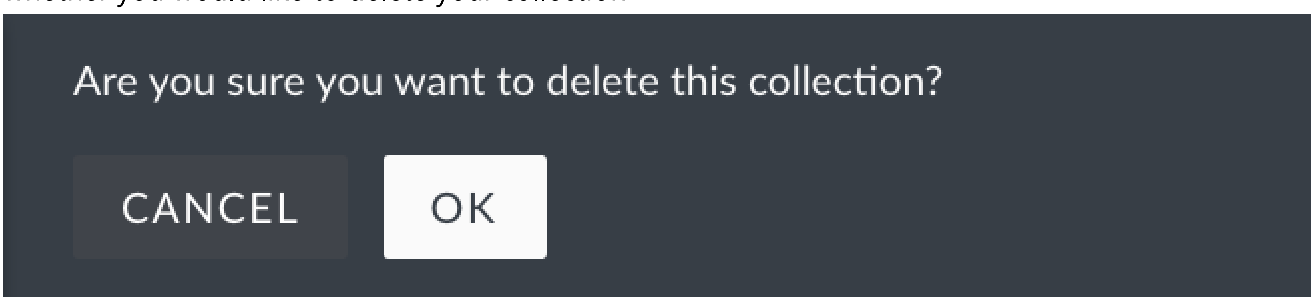
7.2.5 Deleting Collections

To delete a collection,

- Click on the collection you would like to delete
- Click on the three dots button, right next to the ***Edit*** button.



- Click on **Delete.** A pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete your collection

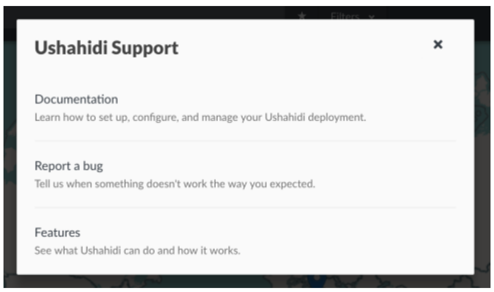


  - Click on ***OK*** to delete your collection
  - If you'd like to cancel the collection deletion process, click on ***Cancel***

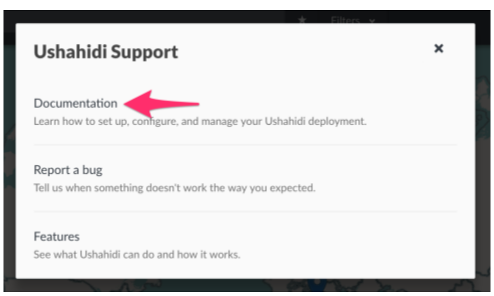
8. Additional Links

These additional links are available on the mode bar to the left of your deployment

Clicking on the Ushahidi logo icon displays a pop up as shown below.

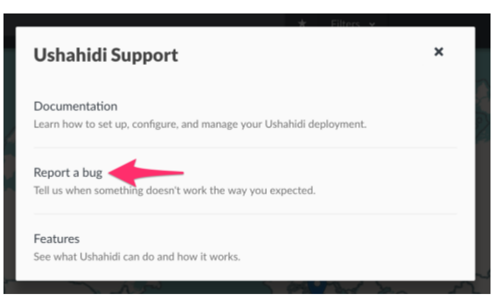


8.1 Documentation



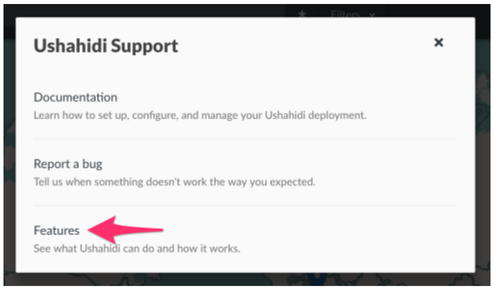
This link redirects you to our website's support section for access to documentation

8.2 Report a bug



This link redirects you to our github issues page to report a bug

8.3 Features



This link redirects you to the Ushahidi website's feature breakdown page.