USHAHIDI PLATFORM V3.4 MANUAL

[About Ushahidi]
[About this Manual]
[Overview of Ushahidi Platform v3.0]
- What does Ushahidi Do?
- Who is Ushahidi For?
- What's New in Version 3?
- Technical Specifications

1. Installing Ushahidi
- 1.1 Installing on Heroku
- 1.2 Installing with Vagrant + a NodeJS Dev server
  - 1.2.1 Installing the API
    - Getting the API Code
    - Prerequisites
    - Preparing the Server
  - 1.2.2 Installing the client
    - Getting the client code
    - Client Dependencies
    - Install, Build and run a local dev server
  - 1.2.3 Logging in the first time
- 1.3 Installing on Linux
  - 1.3.1 Installing the API
    - Getting the API code
    - System Requirements
    - Set up the database
    - Set up URL Rewrites
    - Enable writing to the logs, cache, and upload
  - directories 1.3.2 Installing dependencies
  - 1.3.3 Extra: Customizing configuration
  - 1.3.4 Installing the client
    - Getting the client code
    - Client dependencies
    - Building the client
  - 1.3.5 Configure nginx or apache
  - 1.3.6 Logging in the first time
- 1.4 Upgrading Ushahidi
  - 1.4.1 Updating the client
  - 1.4.2 Updating the API

2. Setting up a deployment
- 2.1 Upgrading/Downgrading your deployment plan

3. Configuring your deployment

- 3.1 Accessing your deployment
  - 3.1.1 Log in
  - 3.1.2 Create an account
    - 3.1.2.1 Your Account details
    - 3.1.2.2 Notifications
  - 3.1.3 Logging out
- 3.2 General Settings
- 3.3 Surveys
  - 3.3.1 Adding Surveys
    - 3.3.1.1 Adding Tasks
      - 3.3.1.1.1 Adding fields
      - 3.3.1.1.2 Editing fields
      - 3.3.1.1.3 Deleting fields
    - 3.3.1.2 Editing Tasks
    - 3.3.1.3 Deleting Tasks
  - 3.3.2 Editing surveys
  - 3.3.3 Deleting surveys
- 3.4 Data Sources
  - 3.4.1 Email
  - 3.4.2 FrontlineSMS {PENDING}
  - 3.4.3 Nexmo
  - 3.4.4 SMSSync
  - 3.4.5 Twilio
  - 3.4.6 Twitter
- 3.5 Categories
  - 3.5.1 Adding Categories
  - 3.5.2 Editing Categories
  - 3.5.3 Deleting Categories
- 3.6 Actors
  - 3.6.1 Adding Categories
  - 3.6.2 Editing Categories
  - 3.6.3 Deleting Categories
- 3.7 Sources
  - 3.7.1 Adding Categories
  - 3.7.2 Editing Categories
  - 3.7.3 Deleting Categories

4. Managing People on your deployment
   - 4.1 Roles
     - 4.1.1 Add Role
     - 4.1.2 Edit Role
     - 4.1.3 Delete Role
   - 4.2 Users
     - 4.2.1 Adding new users
     - 4.2.2 Editing users

        - 4.2.3 Changing User roles
        - 4.2.4 Deleting users

5. Managing Data in your deployment
    - 5.1 Viewing Posts
    - 5.2 Adding Posts
    - 5.3 Editing Posts
    - 5.4 Publishing Posts
    - 5.5 Deleting Posts
    - 5.6 Importing Data
    - 5.7 Exporting Data
6. Modes for visualizing and managing data on your deployment
    - 6.1 Map Mode
    - 6.2 Timeline Mode
    - 6.3 Activity Mode
7. Analysing Data on your deployment
    - 7.1 Filters
    - 7.2 Saved Searches
        - 7.2.1 Creating a saved search
        - 7.2.2 Updating a saved search
        - 7.2.3 Adding a notification to a saved search
        - 7.2.4 Editing a saved search
        - 7.2.5 Deleting a saved search
    - 7.3 Collections
        - 7.3.1 Creating new collections
        - 7.3.2 Adding Posts to collections
        - 7.3.3 Adding notifications to collections
        - 7.3.4 Editing Collections
        - 7.3.5 Deleting Collections
8. Additional Links
    - 8.1 Documentation
    - 8.2 Report a bug
    - 8.3 Features

About Ushahidi

Ushahidiis 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.comto 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 pagefor 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 timeline, 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 timeline. 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,MySQLor PostgreSQL
- Front-end: AngularJS,Javascript,Html,CSS.Built with NodeJSand Browserify.Using Leaflet for mapping, and a collection of other frontend libraries

1. Installing Ushahidi

Ushahidi can be installed on several operating systems. We have different instructions depending on what type of user you are.

Please note that we currently DO NOT RECOMMEND INSTALLATION ON WINDOWS OR MAC! Just trying it out

- Installing on Heroku
- Install with Vagrant + a NodeJS Development Server

Installing in Production

- Installing on Linux

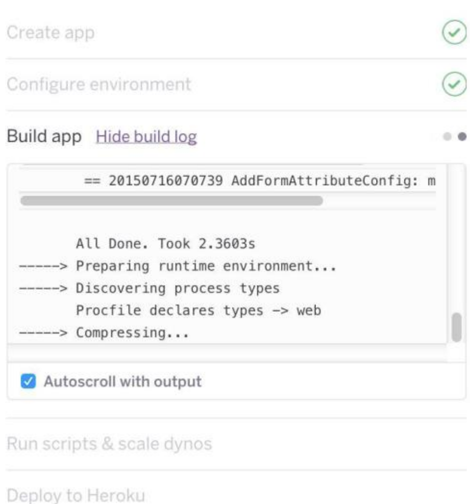
Getting set up for development

- Install with Vagrant + a NodeJS Development Server

1.1 Installing on Heroku

Deploying on[Heroku]isgood way to test out the platform quickly. Its also a viable option for running a production deployment (though this could be expensive depending on your traffic needs).

- First deploy the API with the[latest release]or the[latest development code].Ifyou haven't used heroku before, you'll be asked to sign up. Pick an App name for your deployment (or let heroku pick one for you), then hit Deploy for free. You will need to wait while it deploys.

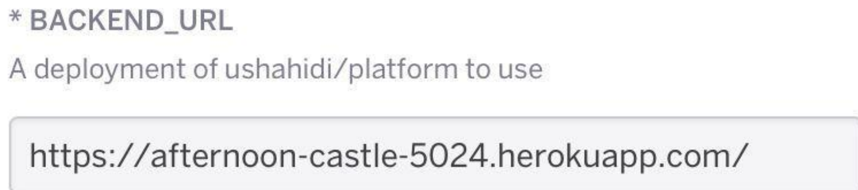


Confirm your deployment went ok by clicking "View". You should see a block of JSON something like:

```
{
    "now": "2015-08-10T00:03:44+00:00",
    "version": "2",
    "endpoints": [
        "collections",
        "collections/posts",
        "comments",
        "config",
        "dataproviders",
        "forms",
        "forms/attributes",
        "forms/stages",
        "layers",
        "media",
        "messages",
        "posts",
        "posts/export",
        "posts/geojson",
        "posts/revisions",
        "posts/translations",
        "posts/updates",
        "register",
        "savedsearches",
        "stats",
        "tags",
        "users"
    ],
    "user": {
        "id": null,
        "username": null
    }
}
```

Take note of the URL of the created app (ie: ~~https://afternoon-castle-5024.herokuapp.com/)~~

- Deploy the client with the latest release or the latest development code. Make sure you use the same version as you did for the API. Again, Pick an *App name* for your deployment. Set *Backend URL* to the URL of the API app you just created (ie: https://afternoon-castle-5024.herokuapp.com/)



****Important: make sure you don't include the trailing slash*

Leave other config as-is, and hit Deploy for free. You may need to wait (the client takes much longer to deploy). When it's finished, click View and check out your new deployment.

- Log in to your new deployment. By default there is a single user, username: admin & password: admin

1.2 Installing with Vagrant + a NodeJS Dev server

1.2.1 Installing the API

Getting the API Code

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

git clonehttps://github.com/ushahidi/platform.git

Note: if you're getting set up for development, you might want tofork the repositoryfirst. Once you have the code, the next step is to prepare a web server.

Prerequisites

- Vagrant
- Ruby

If you already use Vagrant, check the settings in theVagrantfileand make sure the IP addresswon't conflict with your existing VMs.

Preparing the Server

Before we run vagrant we need to get some puppet modules. We do this with librarian puppet:

gem install puppet librarian-puppet
librarian-puppet install

You'll need toget a github tokenthen replace XXXX below with that token
Then you can bring up the vagrant server and provision it:

export github_token = "XXXX"
vagrant up && vagrant provision

Note: If you encounter an error related to Puppet during the vagrant provision, you can run the following steps:

vagrant destroy -f

vagrant box update

vagrant up && vagrant provision

This should set up a server, and install all the dependencies too.

Go to192.168.33.110to check the API is up and running. You should see some JSON with an API version, endpoints and user info.

The vagrant set up uses a 64 bit VM so you may need to enable 64 bit virtualization on your host machine.

1.2.2 Installing the client

Getting the client code

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

git clonehttps://github.com/ushahidi/platform-client.git

README. If you have any trouble check those instructions first.

Client Dependencies

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

- nodejs v0.10 or v0.12 or io.js v1.2

Install, Build and run a local dev server

- Clone therepo
  git clonehttps://github.com/ushahidi/platform-client.git
  Note: if you're getting set up for development, you might want tofork the repositoryfirst.
- Navigate to project root
  cd platform-client
- Install Build Requirements
  npm install -g gulp
- Install Packages
  npm install
  This will install both NPM and Bower dependencies! No separatebower install command is required.
- Set up build options. Create a .envfile, you'll need to point BACKEND_URLat an instance of the platform api(Ifyou followed the vagrant instructions above that'll be: http://192.168.33.110)

  NODE_SERVER=true
  BACKEND_URL=http://192.168.33.110
- Run gulp
  gulp
- You should now have a local development server running onhttp://localhost:8080

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 Installing on Linux

1.3.1 Installing the API

Getting the API code

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

git clonehttps://github.com/ushahidi/platform.git

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

System Requirements

To install the platform on your computer/server, the target system must meet the following requirements:

- PHPversion 5.4.0 or greater
  - The following php extensions enabled: curl, gd, imap, json, mcrypt, mysqlnd (optional)
- Composer
- MySQLdatabase version 5.5 or greater (PostgreSQL support planned)
- Apache2.2+ or nginx

Set up the database

To create a database

- First login to MySQL as root.
  mysql -u root -p
  Using the `*-p*`is only required when your MySQL configuration requires it.
  You may need to use the `*-h*` option to specify `*localhost*`or `*127.0.0.1*`if you are unable to connect.
- Next, create a new user and database for Ushahidi. The username and database can be anything; we will use `ushahidi`for both in this example:
  CREATE DATABASE ushahidi_db;
  GRANT ALL ON ushahidi_db. to ushahidi_user@localhost IDENTIFIED BY 'ushahidi-db-password'; quit;*
- Now create a *.env*config file in the base of repository. Make sure that the database, username, and password match the database you just created.

DB_HOST=localhost
DB_NAME=ushahidi_db
DB_TYPE=MySQLi
DB_USER=ushahidi_user
DB_PASS=ushahidi-db-password

Set up URL Rewrites

Rename `httpdocs/template.htaccess` to `httpdocs/.htaccess` (for Apache) to enable rewriting of all non-existent files to `index.php`.

If you are unable to enable rewriting, then you'll need to customize the init settings.

- Copy the `application/config/init.php` file into `application/config/environments/development/` (create this directory if it doesn't exist).
- Edit init.php and set `index_file` to `"index.php"` to include index.php in your URLs

A NOTE ON URLS, DOCROOTS AND BASE_URL

Typically, Ushahidi is run under a separate virtual host / domain name. Be sure to make `platform/httpdocs/` the `DocumentRoot` (for Apache) or `root` (for nginx) setting in your virtual host. If you are running Ushahidi via http://localhost/ then the `base_url` will be http://localhost/platform/httpdocs/

Enable writing to the logs, cache, and upload directories

The webserver will need write access to logs, cache and upload directories. To do this run:

% chmod 0777 application/logs application/cache application/media/uploads

OR

% chown www-data 0777 application/logs application/cache application/media/uploads

It's generally better to use `chown` to set the owner of the directories to the user the web server runs as, rather than making them globally writable.

1.3.2 Installing dependencies

We use [Composer]to manage server side dependencies. Once you have installed composer, you can run the update script with:

bin/update

Whenever the repository is updated using git pull,run the update script to ensure that your installation stays updated!

If you are updating a production deployment, you will want to avoid installing developer dependencies (testing tools, etc) by using the "deploy" option:

bin/update --production

1.3.3 Extra: Customizing configuration

Base config files are in ***application/config/***.
You can add per-environment config overrides in `application/config/environments/`.
The environment is switched based on the `KOHANA_ENV` environment variable.

1.3.4 Installing the client

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*](https://github.com/ushahidi/platform-client.git)

Client dependencies

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

- nodejs v0.10 or v0.12 or io.js v1.2
  - We recommend using NodeJS builds from[NodeSource](NodeSource)or using[NVM](NVM)
- Build tools for building native addons from npm:
  - Debian users install the `build-essential` package
  - Fedora users install `gcc-c++` and `make`
- nginx or apache2

Building the client

- Clone the repo

  git clone[*https://github.com/ushahidi/platform-client.git*](https://github.com/ushahidi/platform-client.git)
  Note: if you're getting set up for development, you might want to fork the repositoryfirst.
- Navigate to project root

  cd platform-client
- Install Build Requirements

  npm install -g gulp
- Install Packages

  npm install

This will install both NPM and Bower dependencies! No separate `bower install` command is required.

- Set up build options. Create a `.env` file, you'll need to point BACKEND_URLat an instance of theplatform api

  BACKEND_URL=http://myapi.server/

- Run gulp

  gulp build

You should now have a client build in server/www.

1.3.5 Configure nginx or apache

- Nginx:
  - Copy the virtual host config from server/nginx-site.conf into your nginx conf dir (/etc/nginx or /etc/nginx/sites-enabled)
  - Edit the config:
    - Set server_nameto whatever domain you plan to use
    - Replace root /var/wwwwith the path to server/www ie. platform-client/server/www
  - Include the config in your nginx.conf (usually located in /etc/nginx.conf) by adding the following include /etc/nginx/ushahidi-site.conf
  - Restart nginx
  - Load the new vhost in a browser
- Apache2:
  - Copy server/rewrite.htaccess to server/www/.htaccess
  - Create a new apache vhost and point the docroot atserver/www
  - Restart apache
  - Load the new vhost in a browser

1.3.6 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.

1.4 Upgrading Ushahidi

1.4.1 Updating the client

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

git pull
npm install

1.4.2 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

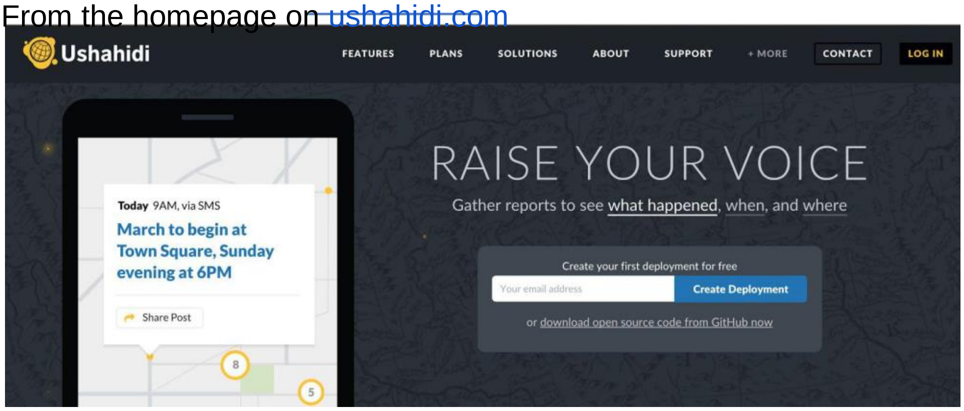
OR

bin/update --production

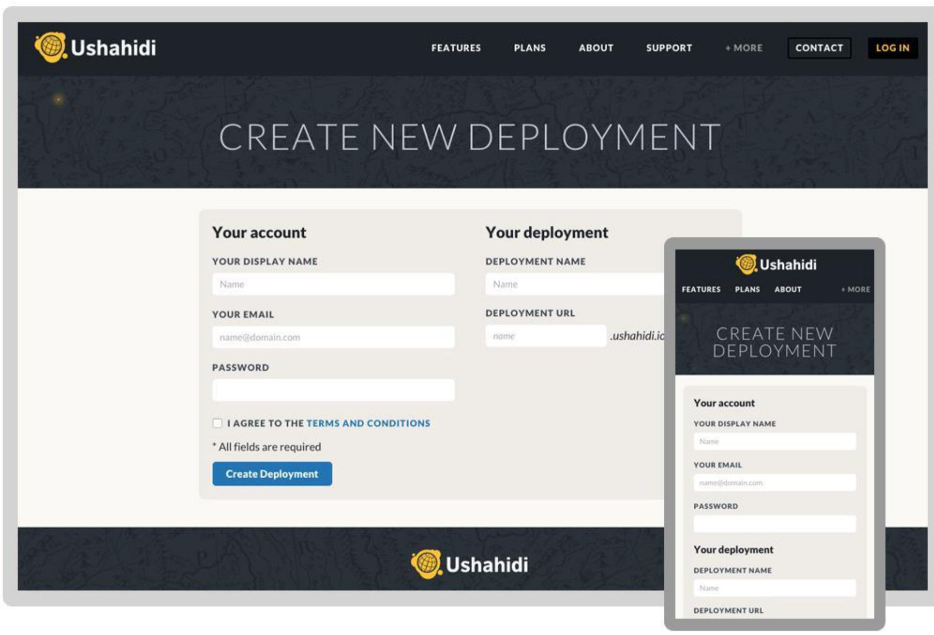
2. Setting up a deployment

You can create a new deployment in two ways:-

- From the homepage on ushahidi.com

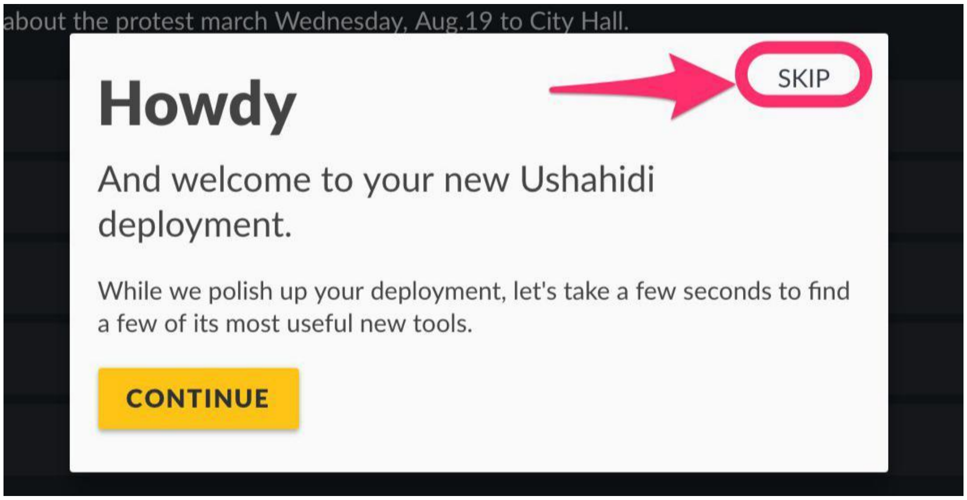


- Or at http://ushahidi.io/create

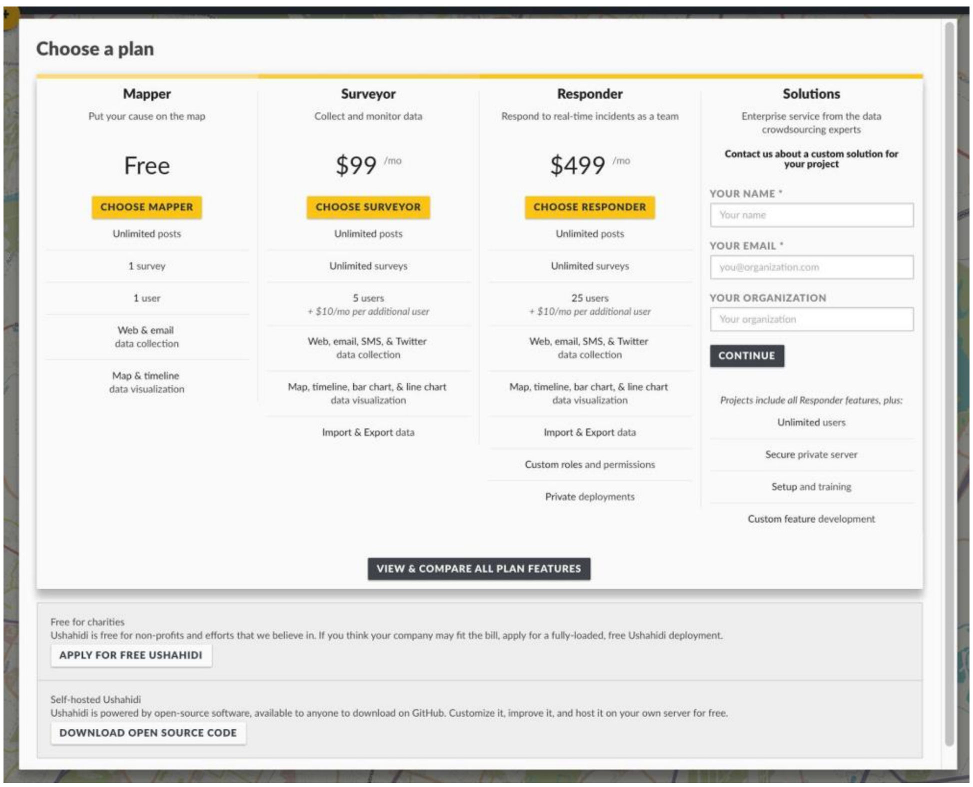


- **Fill out your account details:**Enter your Name, email address and set a secure password that will be used to access this deployment.
- **Fill out your deployment details**:-
  - **Deployment Name:**You can give your deployment any name
  - **Deployment URL:**Each deployment will have a unique web 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.
- 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.



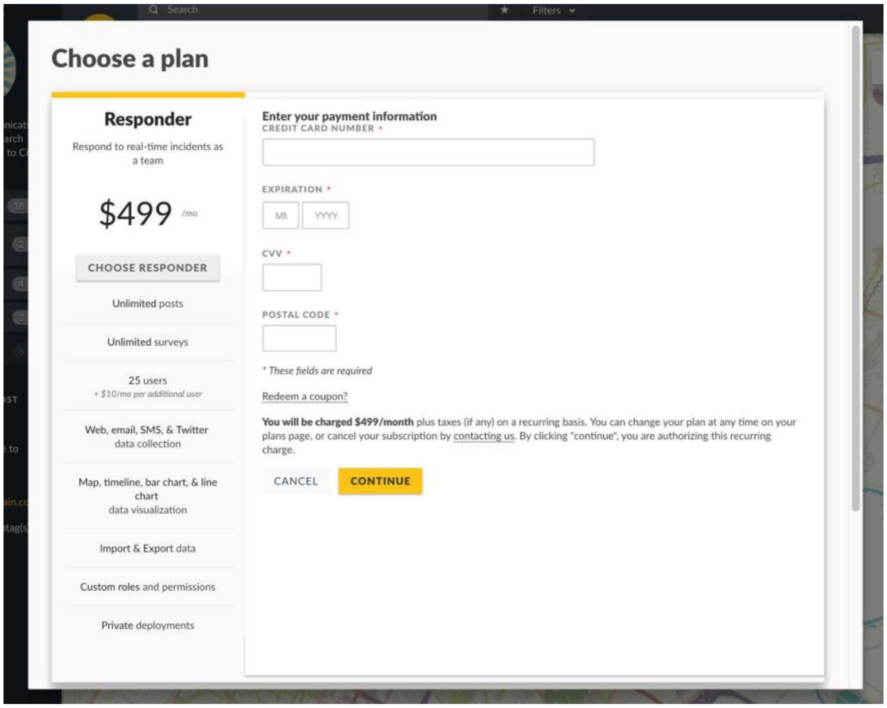
- After the tour, you will be prompted to choose a plan from a list. Select one of the options provided for you.



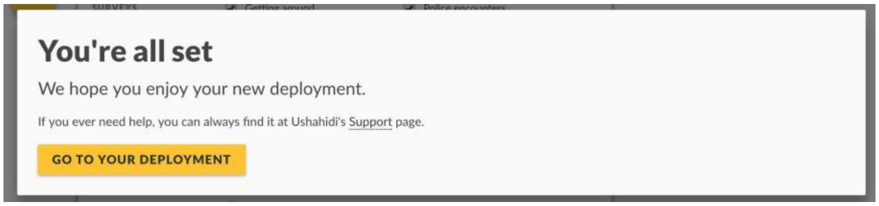
You can dive deeper into the [full list of plan features here](#)to help you choose a plan that will meet your needs. If you work for a grassroots organization that can't afford a paid plan, [apply for a free Responder plan here](#).

- 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.

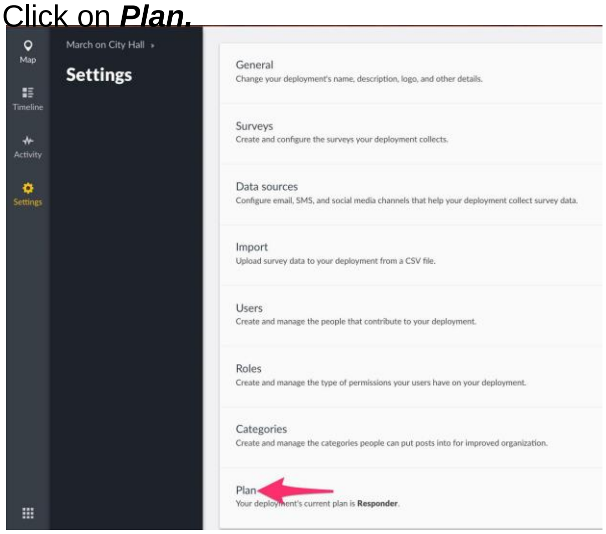


2.1 Upgrading/Downgrading your deployment plan

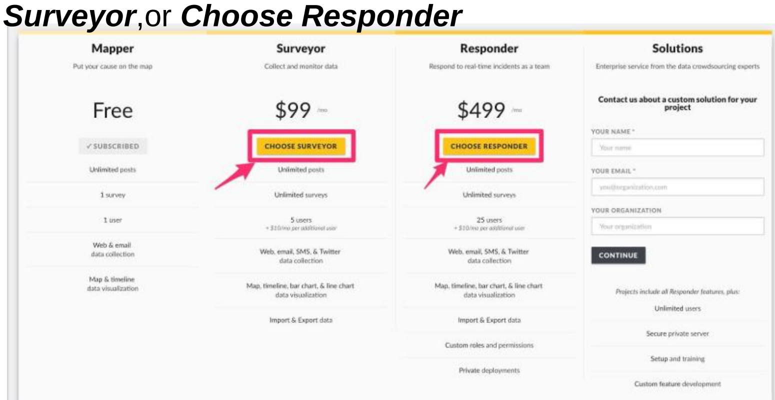
If you're subscribed to one of our plans on ushahidi and would like to upgrade to another available plan:-

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

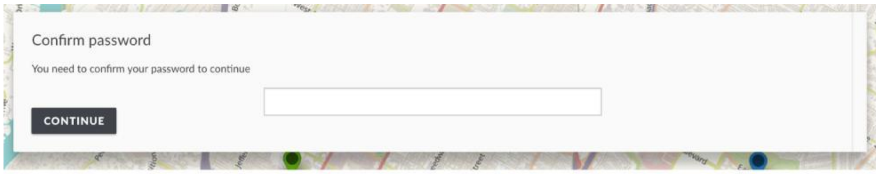
- Click on ***Plan.***



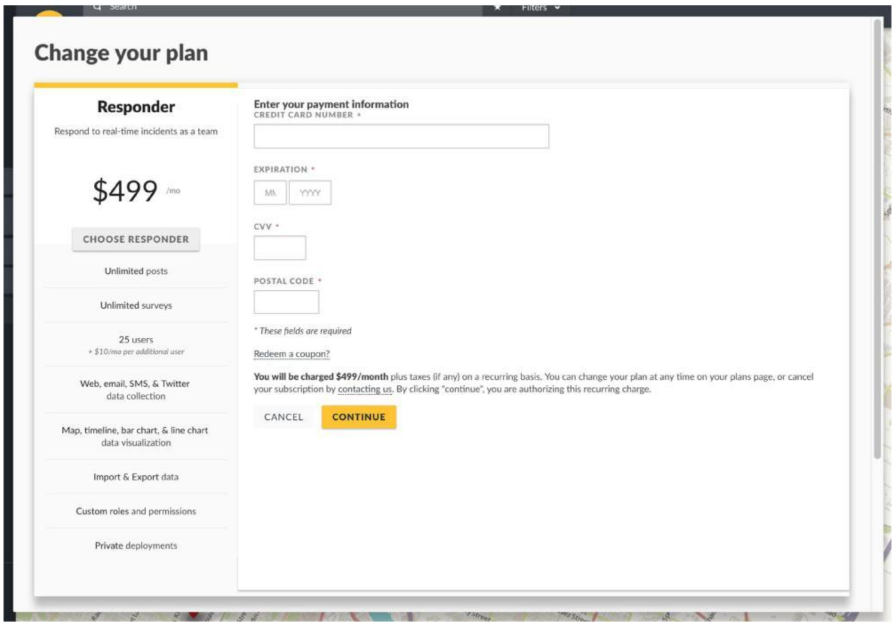
- On the list of all available plans, click on the one you would like to upgrade to e.g ***Choose Surveyor***,or ***Choose Responder***



- 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

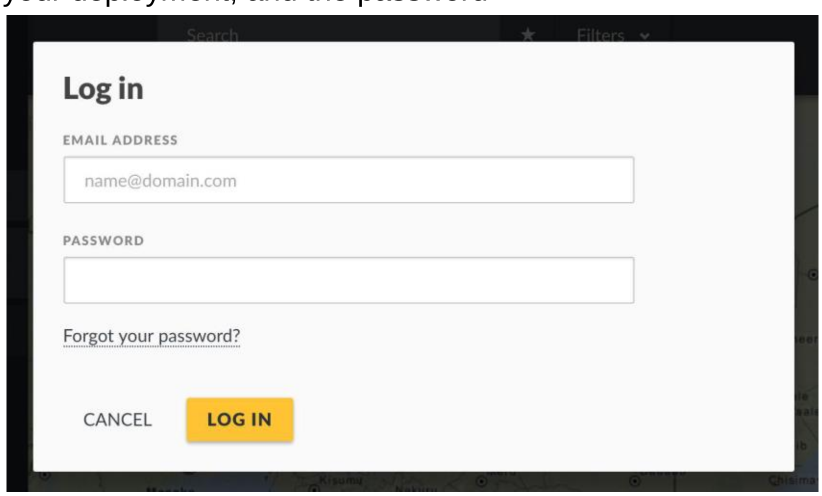
One of the first things you should do as the admin of your new deployment, is customize certain settings based on the project you're working on. This section describes how to change your general and map settings, as well as how to configure data sources, manage surveys and categories.

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.

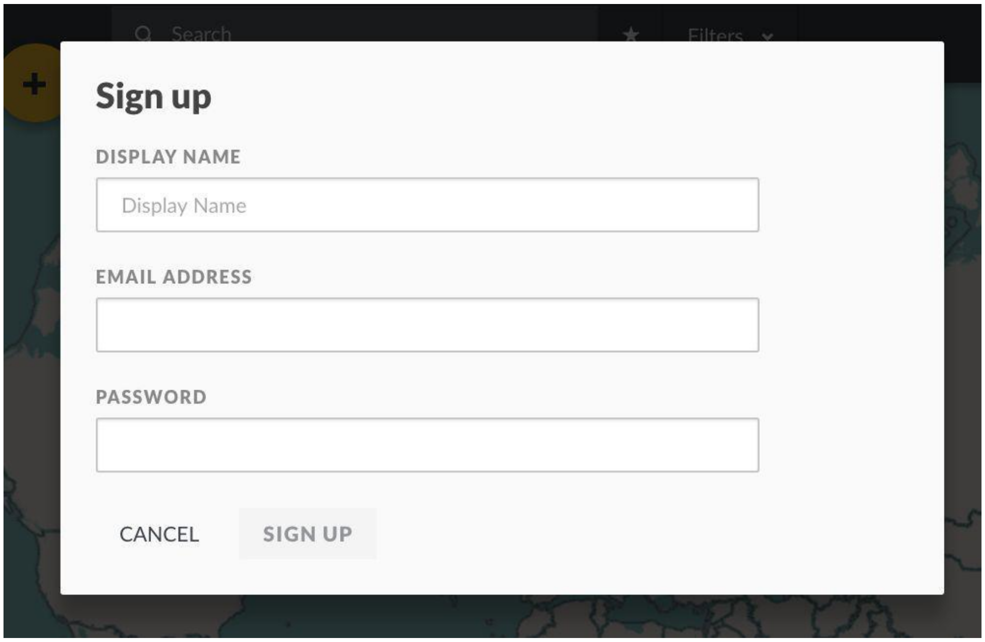
- For Open Source deployments, the default install will create a user admin, with password admin. Be sure to edit this user's password once you're logged in.
- For ushahidi.io deployments, enter the email address and password you used to register your deployment, and the password



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.

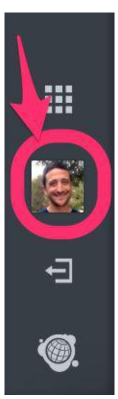


You’ll will be able to log in and perform basic actions on the platform, but won’t have much privilege within the platform until an administrator upgrades your access level.

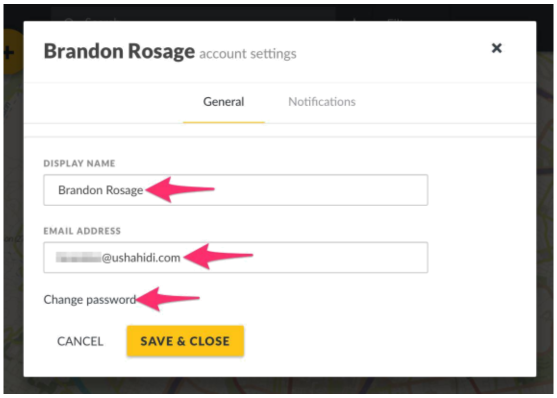
3.1.2.1 Your Account details

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***

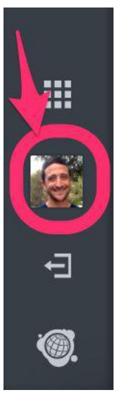


3.1.2.2 Notifications

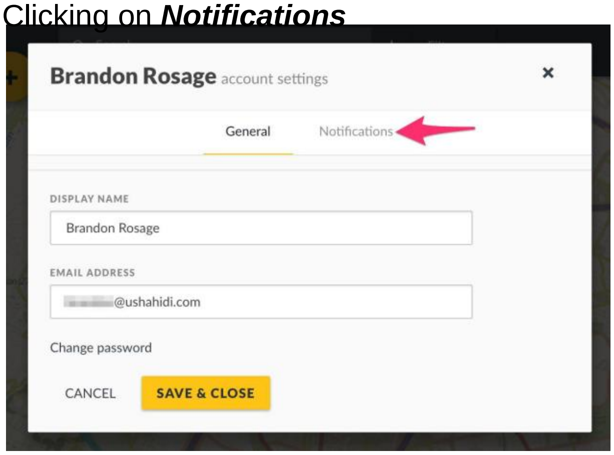
As a registered and logged in user, you can set up notifications on Saved Searches(Section 7.2of this manual) and Collections~~(Section 7~~.3of this manual). This means that any time a post is added to a saved search/collection, you will receive an email or phone notification.

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

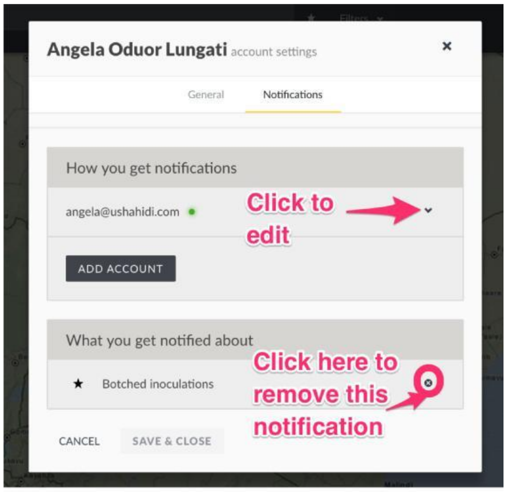
- Clicking on your account favicon at the bottom left hand corner of your deployment as illustrated below.

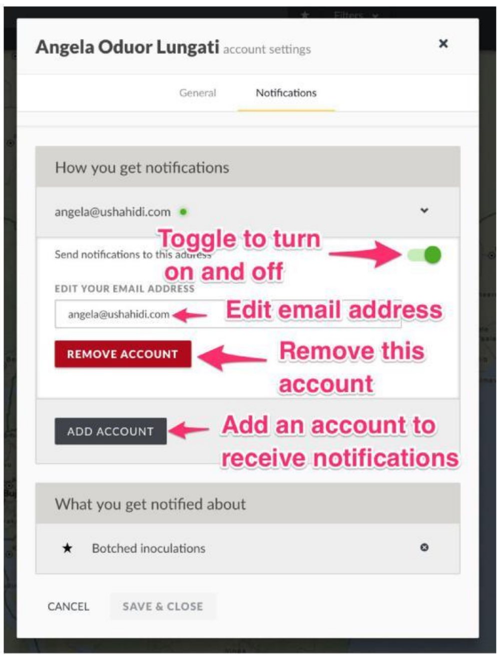


- Clicking on ***Notifications***

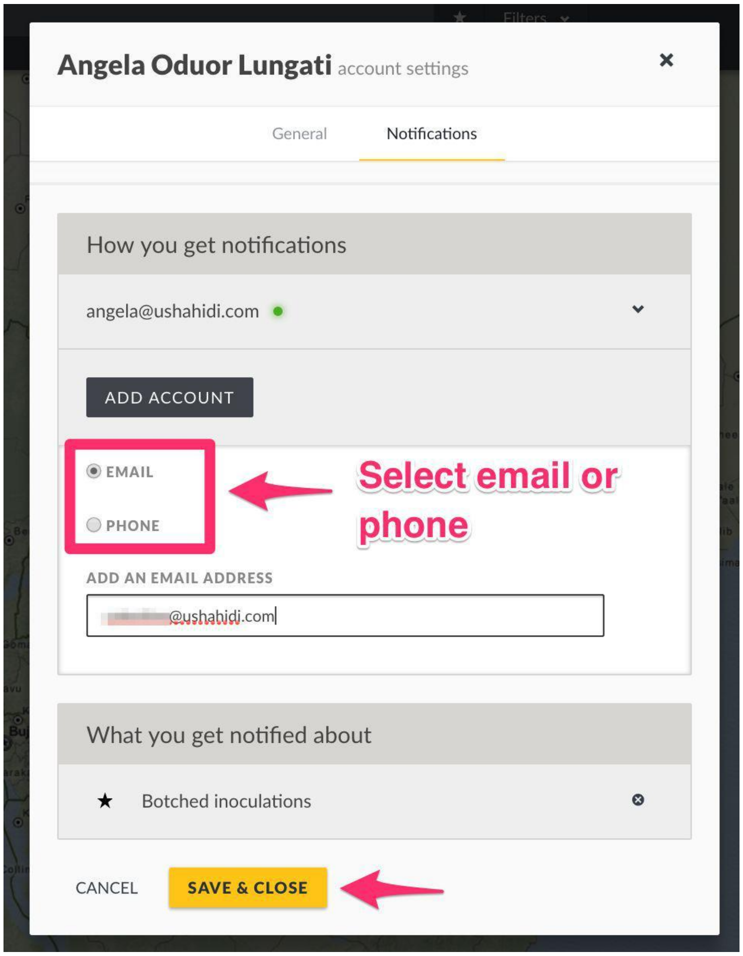


- A list of all notifications you've signed up for will appear, with the option of turning them on and off. You'll also be able to determine the email address or phone number through which you would like to receive notifications. You must have SMS configured to enable.





- 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.

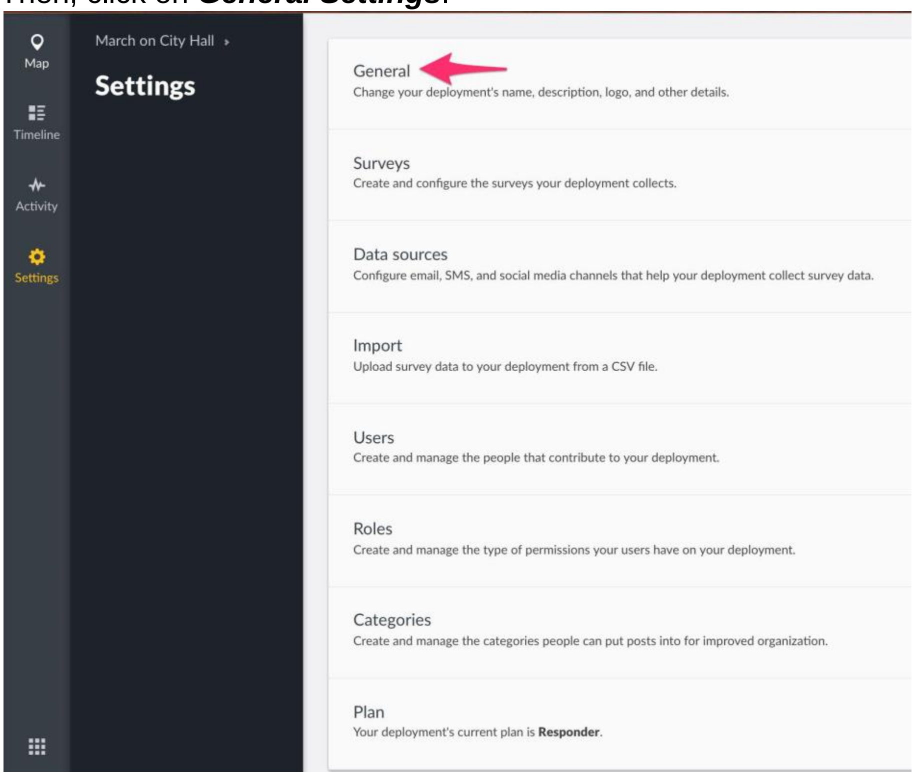
- You should be successfully logged out of your deployment, and redirected to the homepage.

3.2 General Settings

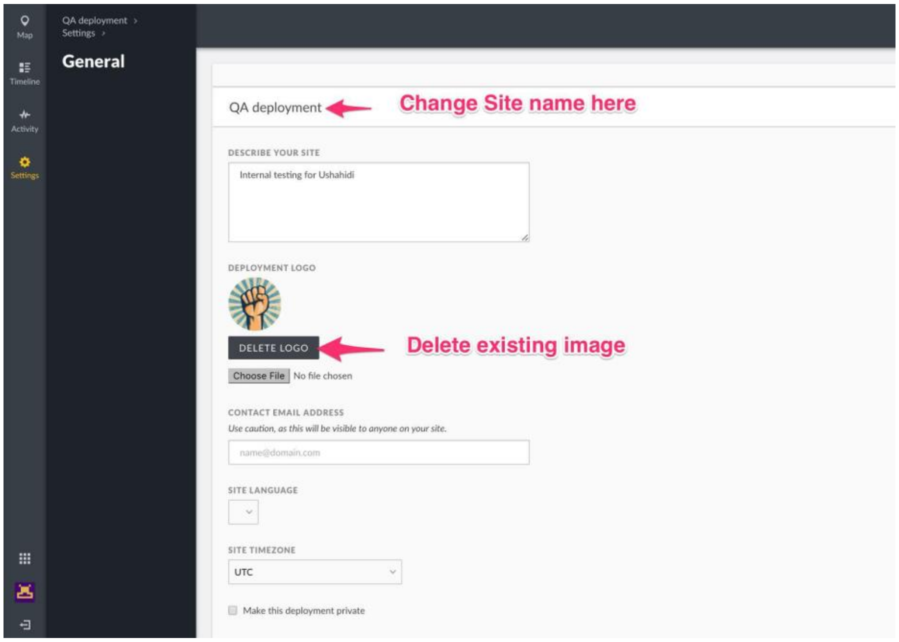
This page allows you to set the basic appearance of your deployment. To access General Settings:-

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

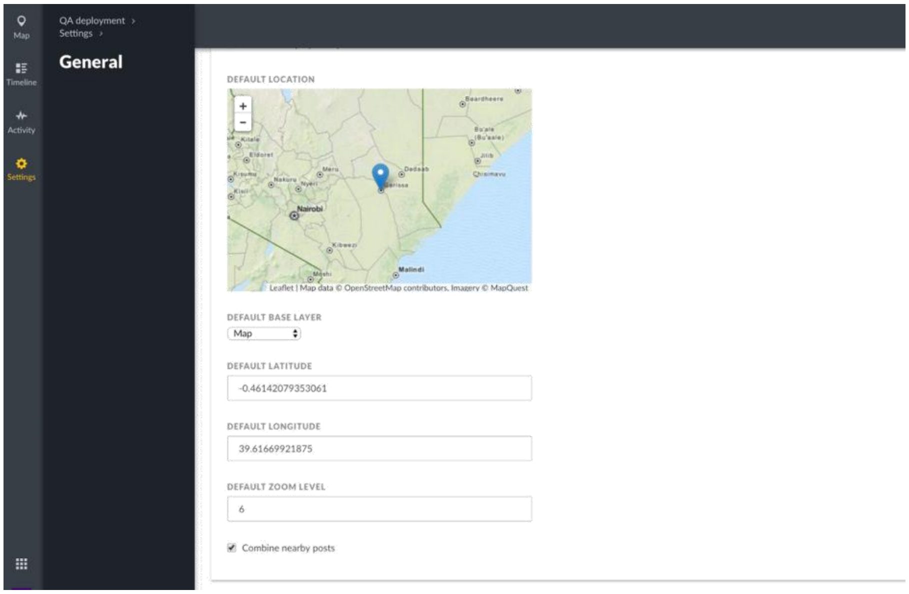
- Then, click on ***General Settings***.



- Add the following details



  - ***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 Timezone:*** This option allows you to set the default time zone your deployment spans, and will reflect on report time entries. The default timezone is UTC, but you can specify the timezone for 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. You should
  - ***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.

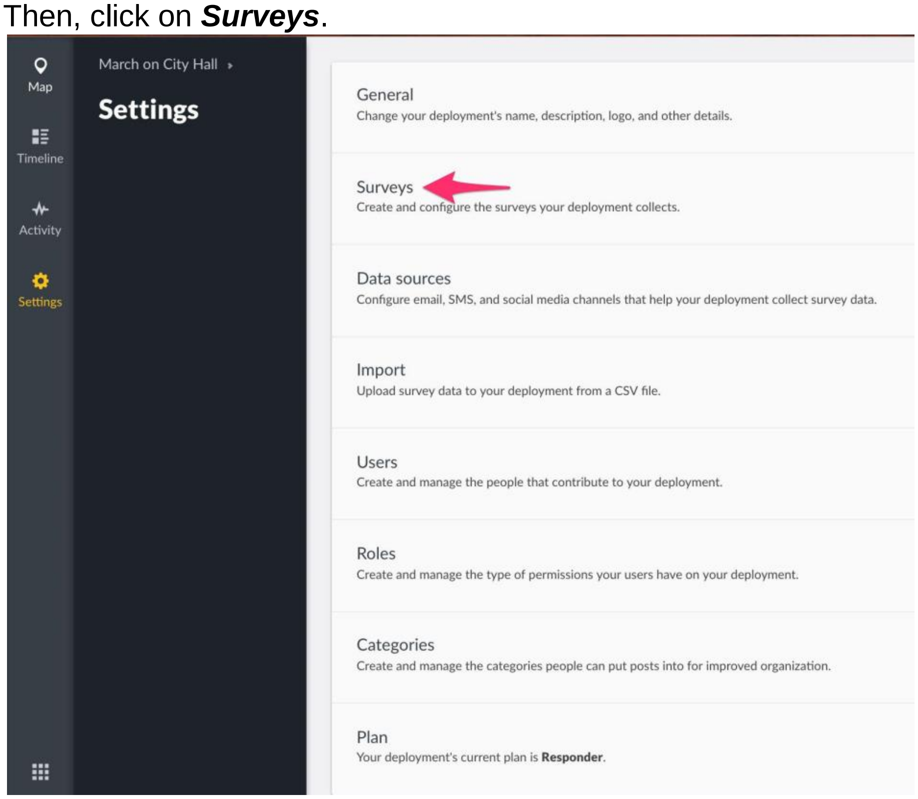
This section will show you how to create and manage surveys on your deployment.

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***

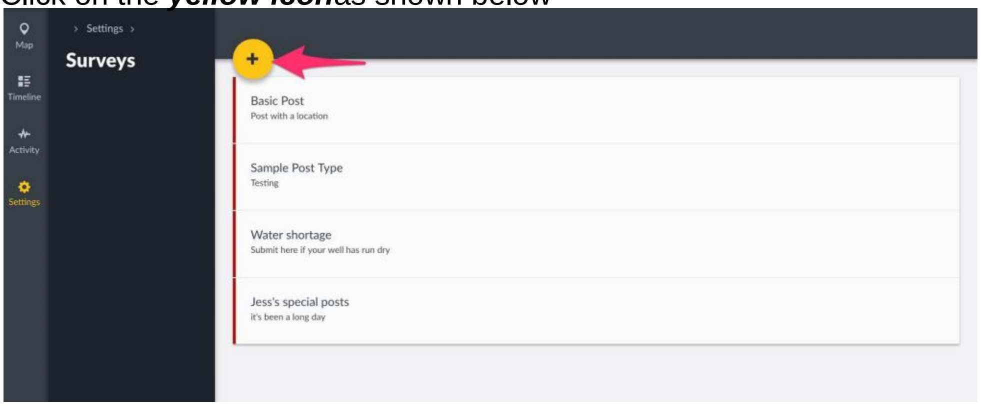
- Then, click on ***Surveys***.



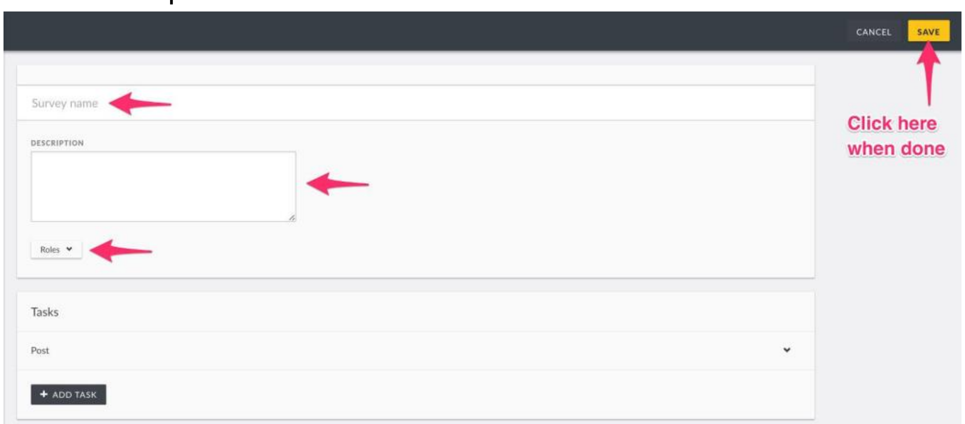
3.3.1 Adding Surveys

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
  - ***Roles:*** You can limit access to this survey to specific roles defined on your deployment
  - ***Tasks***:This section allows you to break out your survey into specific tasks with fields, as described in Section 3.3.1.1below.
- Click on ***Save*** when done.

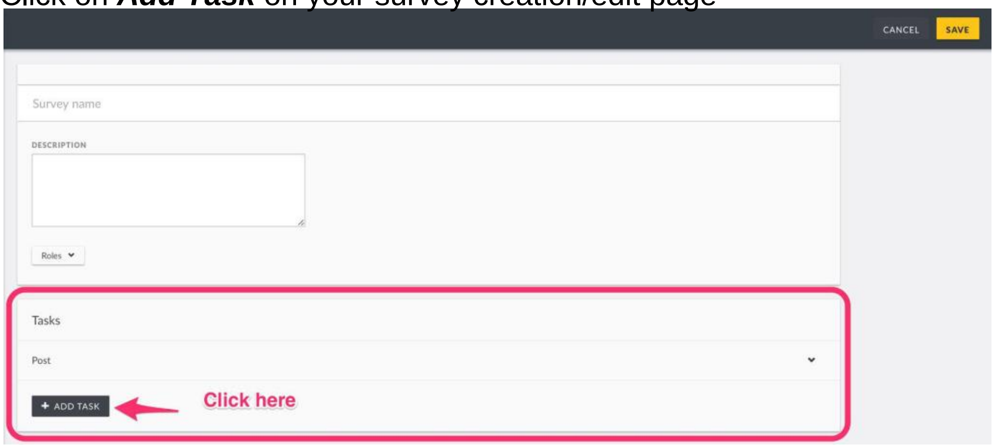
3.3.1.1 Adding Tasks

You can organize your survey into "Tasks", allowing a deployment to separate 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.

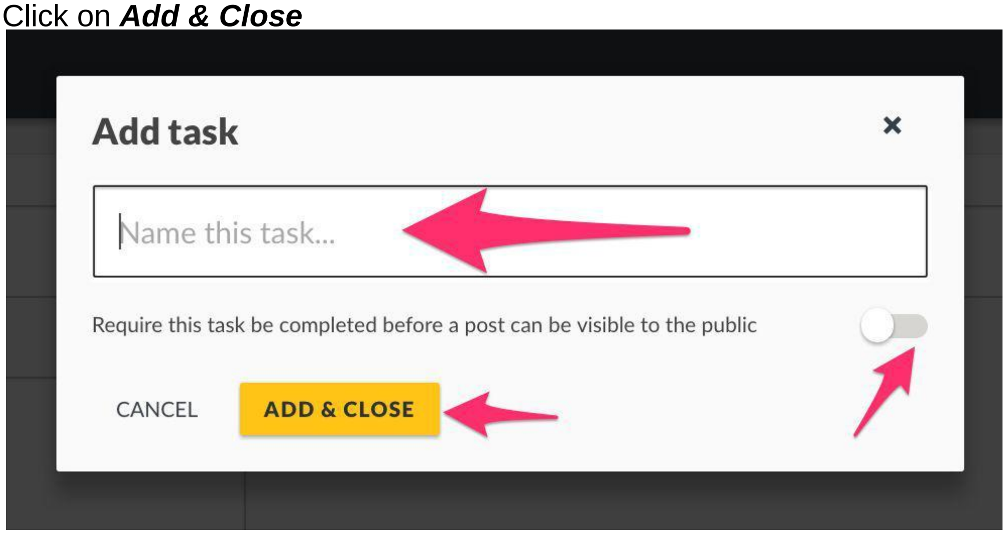
By default, each new survey has a “Post” task created on creation, which can be edited.

To add a new task,

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



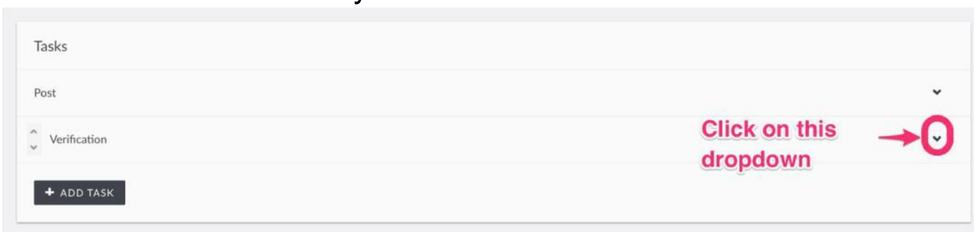
- A small pop up box will appear, prompting you to give your task a name
- If you’d like to make this task required before post submission, toggle the ***Require this task be completed before a post can be visible to the public*** button. This means that, a post will not be published until this task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



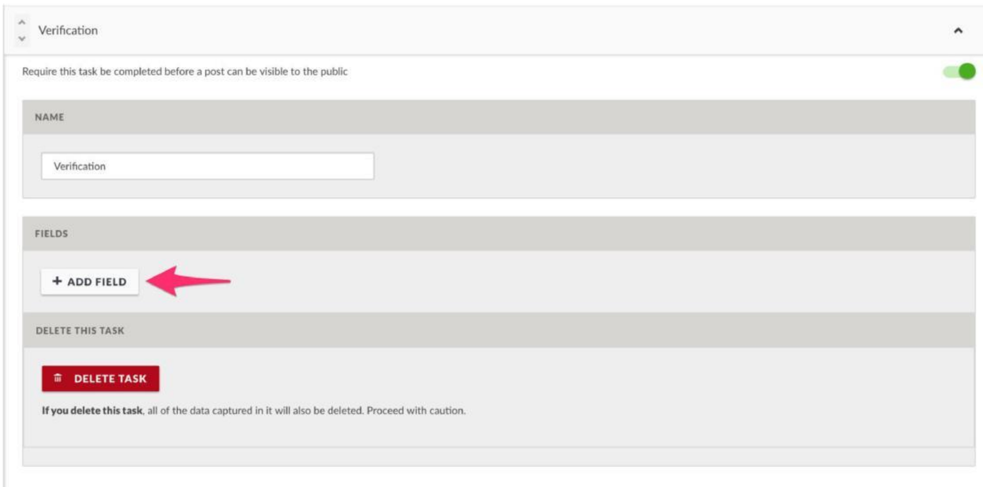
3.3.1.1.1 Adding fields

Each task can have custom fields within it. To add a new field,

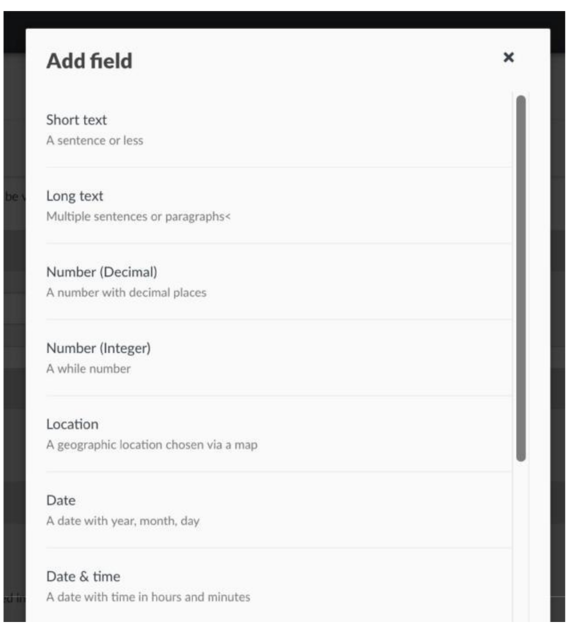
- Click on the task to which you'd like to add fields to as shown below.

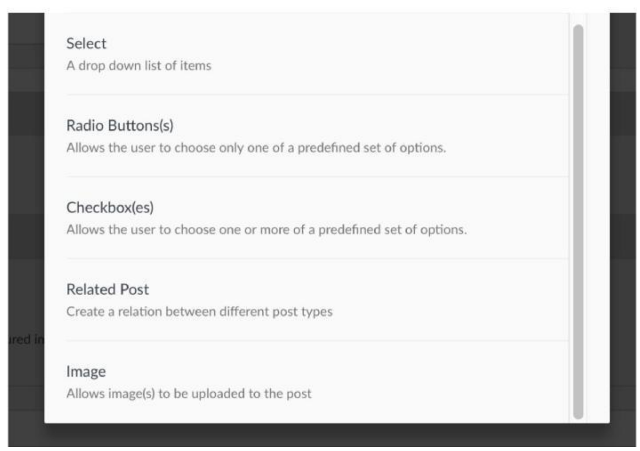


- Click on ***Add Field***

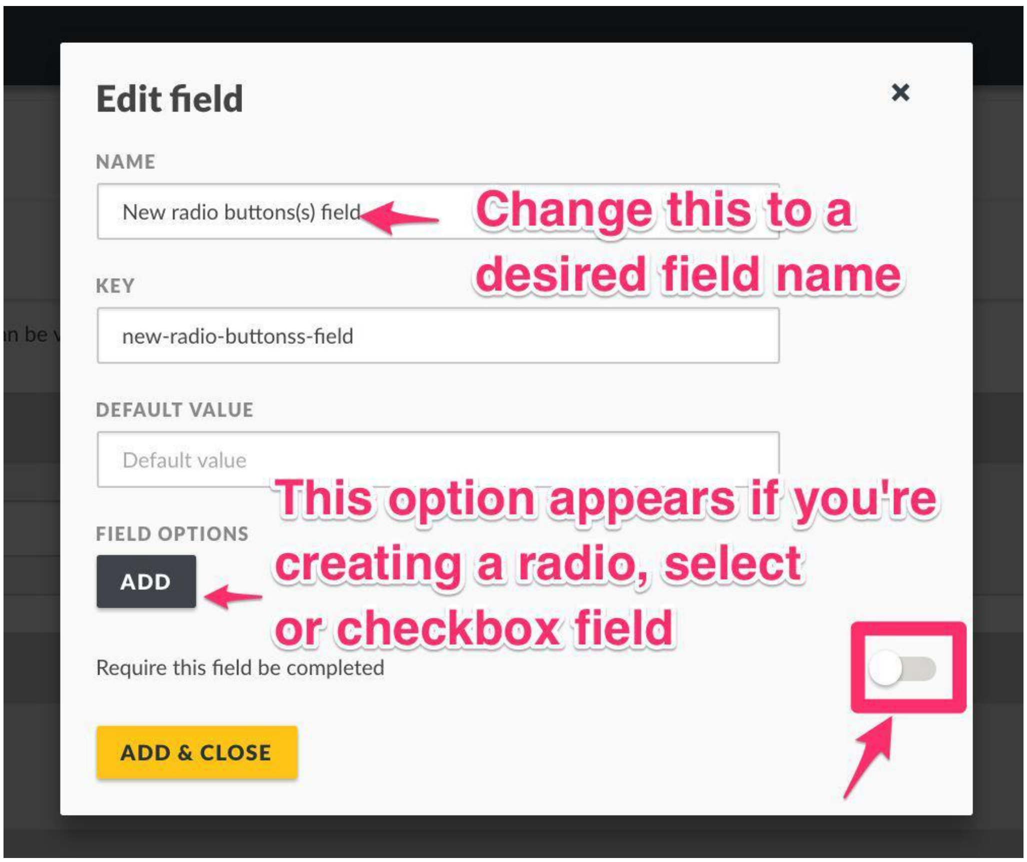


- A pop up box with a list of different field types will appear on your screen. Choose whichever one will work best for the type of data you are trying to capture.





- Add the following details
    - ***Name***:This is what is displayed as a label for your newly created field
    - ***Key***:This field determines how this field is labelled for collection of data within your database. As your field name is filled out, it gets automatically filled out. You can change the field key if you desire. It cannot include spaces, and must be unique from every other field key to ensure proper data storage and retrieval
    - ***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
    - ***Require this field be completed***:If set to yes by toggling the button, the task in which this field belongs to will not be able to be marked as complete until this field has been filled out.

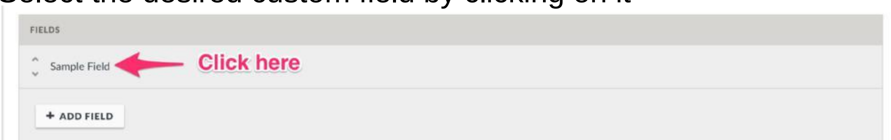


- Once you're done, click on ***Add&Close***.

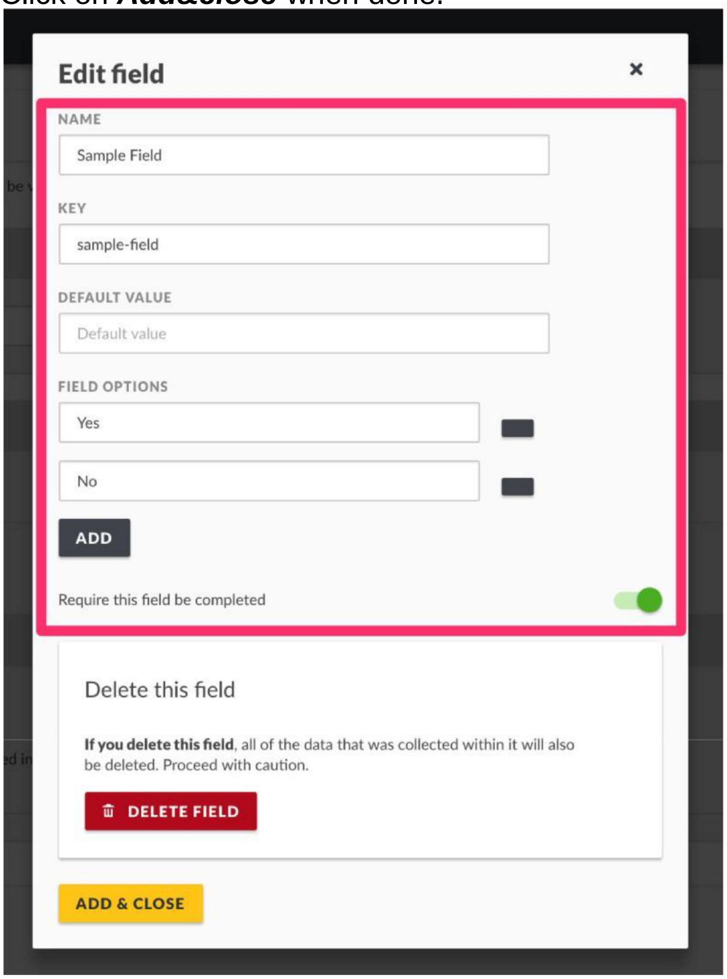
3.3.1.1.2 Editing fields

To edit an existing field,

- Select the desired custom field by clicking on it



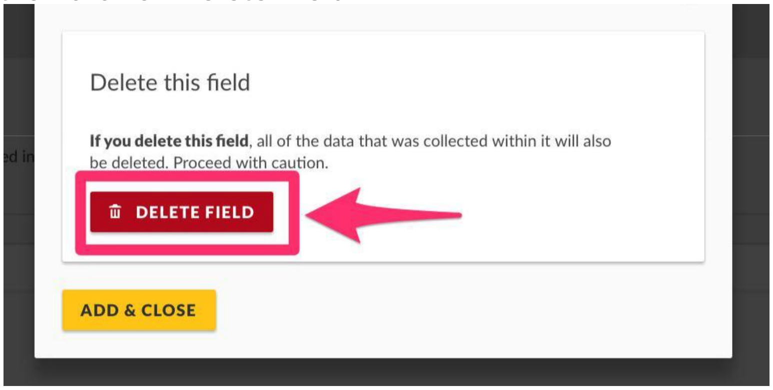
- Edit the fields(as described in the section above on Adding fields) as desired.
- Click on ***Add&close*** when done.



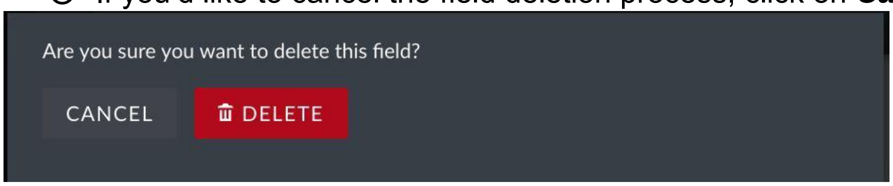
3.3.1.1.3 Deleting fields

To delete an existing field

- Click on the field you would like to delete(as you would when selecting a field to edit), then click on ***Delete Field***



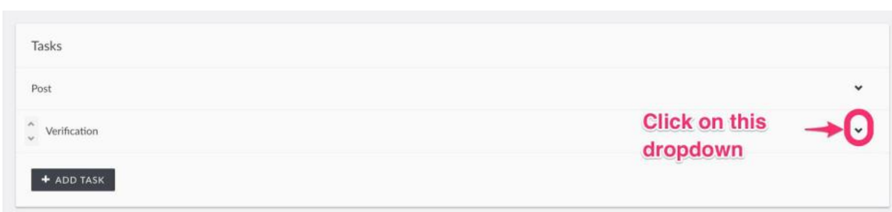
- A black pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete the field
  - Click on ***Delete***to delete the field
  - If you'd like to cancel the field deletion process, click on ***Cancel***



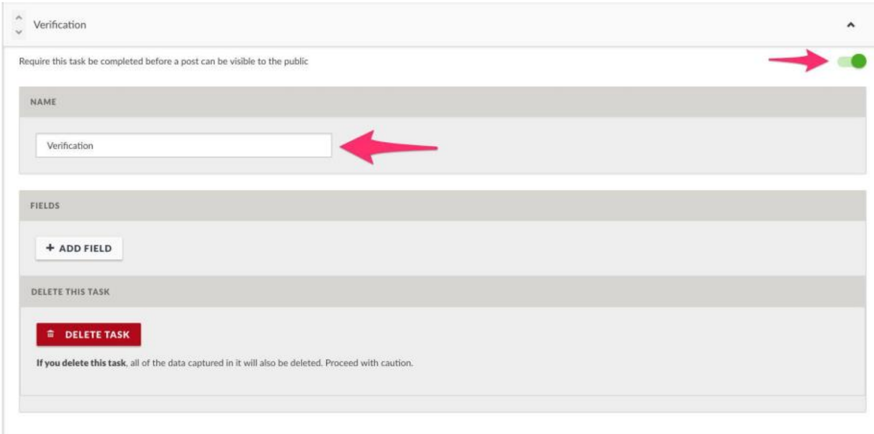
3.3.1.2 Editing Tasks

To edit an existing task,

- Select the desired task



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

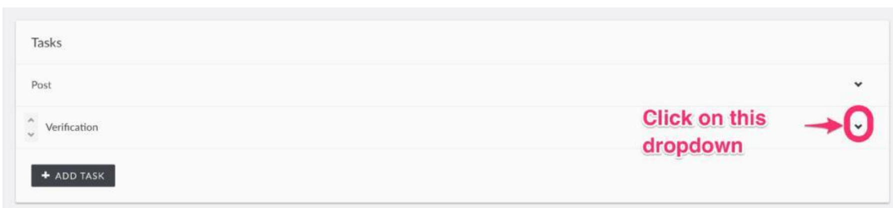


- When done, click on ***Save*** on the top of the page

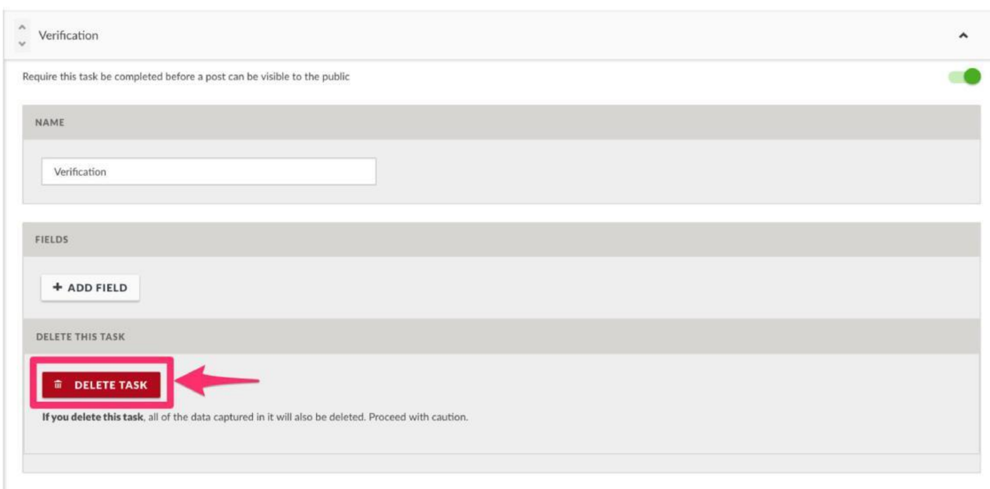
3.3.1.3 Deleting Tasks

To delete an existing task

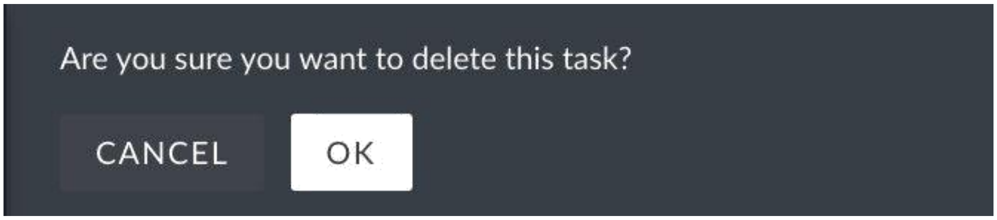
- Select the desired task



- Click on ***Delete Task***



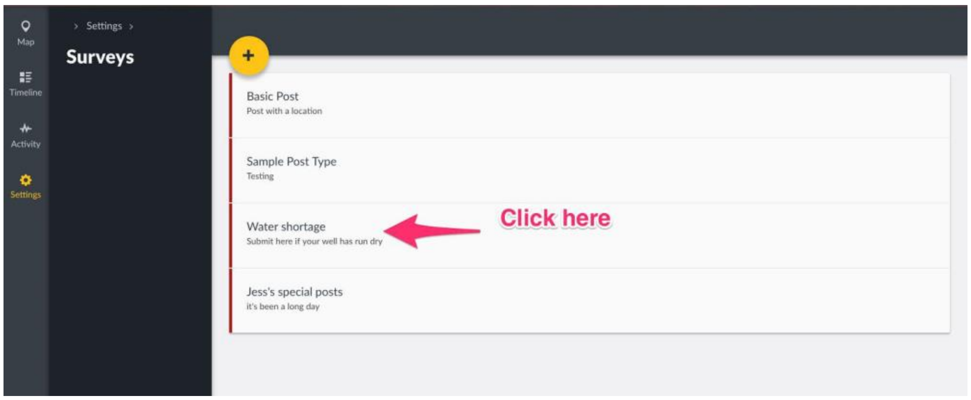
- A black pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete the task
  - Click on ***OK***to delete the task
  - If you'd like to cancel the task deletion process, click on ***Cancel***



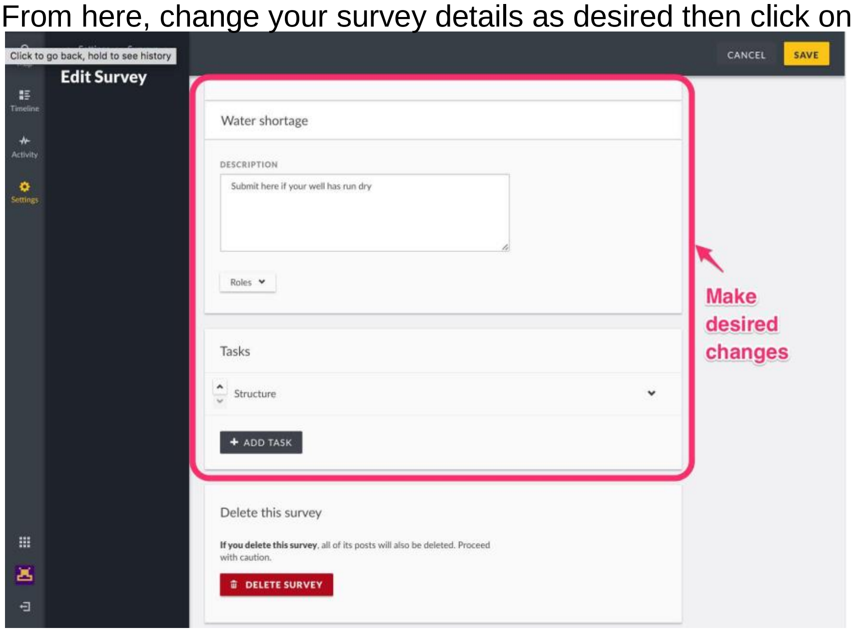
3.3.2 Editing surveys

To edit a survey

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



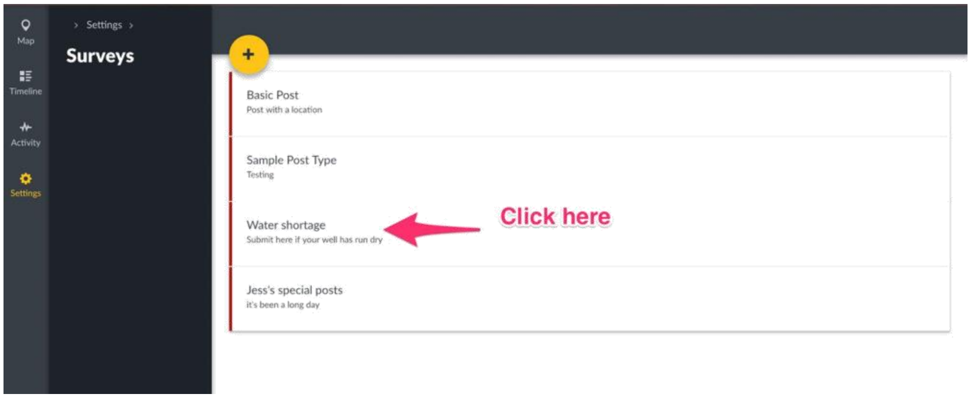
- From here, change your survey details as desired then click on ***Save***



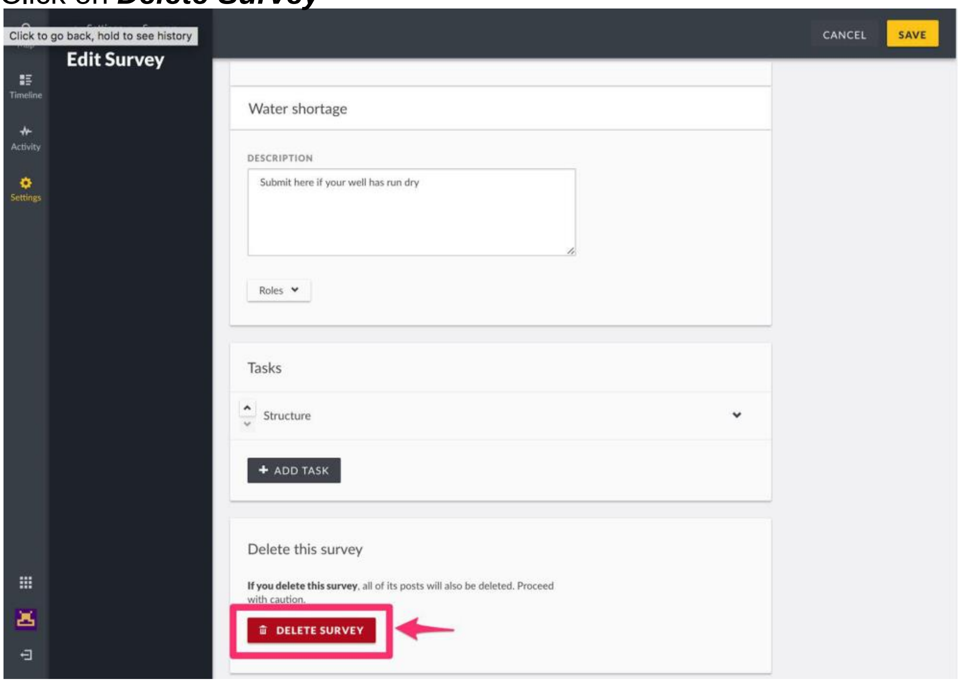
3.3.3 Deleting surveys

To delete a survey,

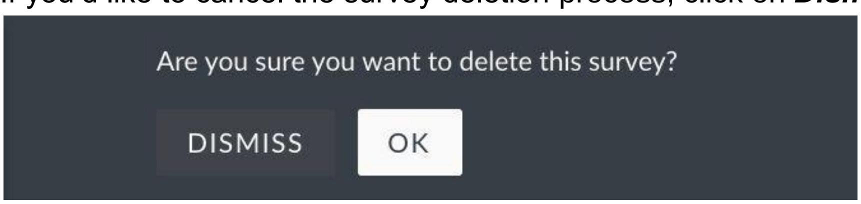
- Select the desired survey from the surveys list page



- Click on ***Delete Survey***



- A black 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 ***OK***to delete the survey
  - If you'd like to cancel the survey deletion process, click on ***Dismiss***



3.4 Data Sources

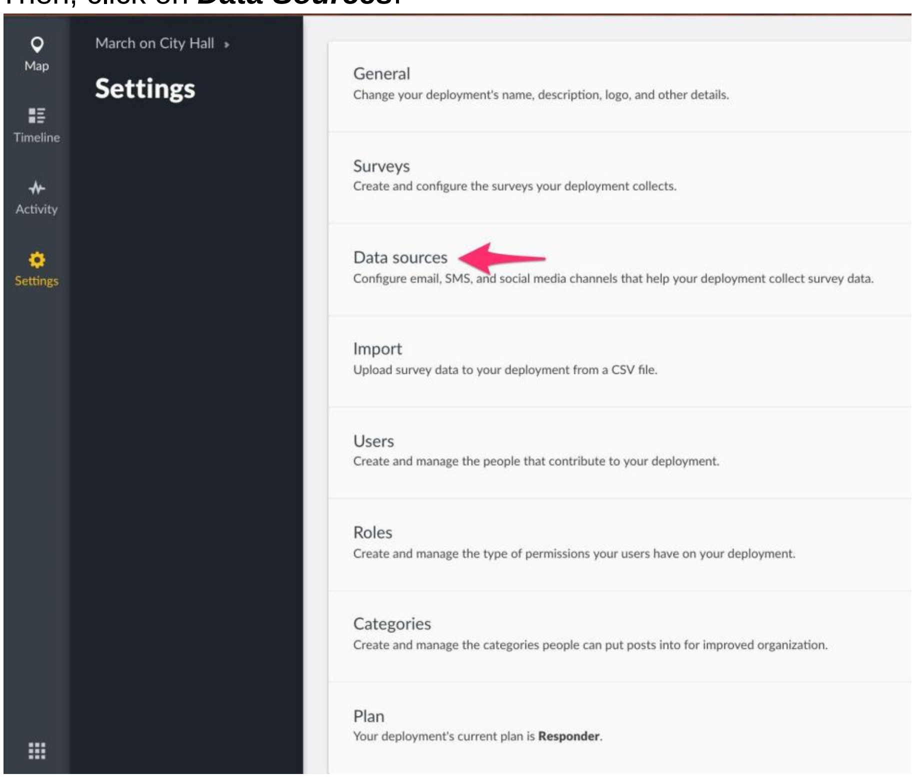
There are many ways to enter posts into your Ushahidi deployment other than from the deployment itself. This section shows you how to configure all the possible data source types.

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

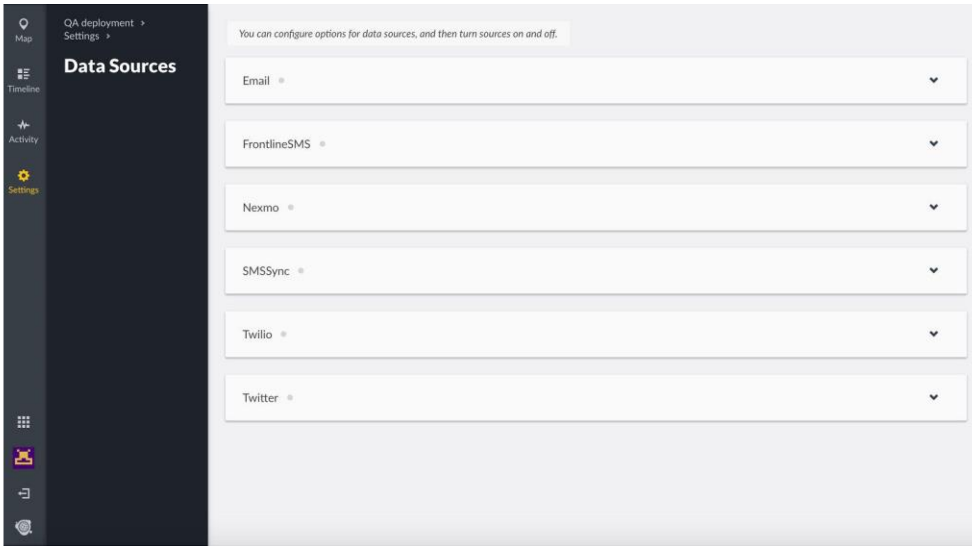
To access the data sources configuration page,

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

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



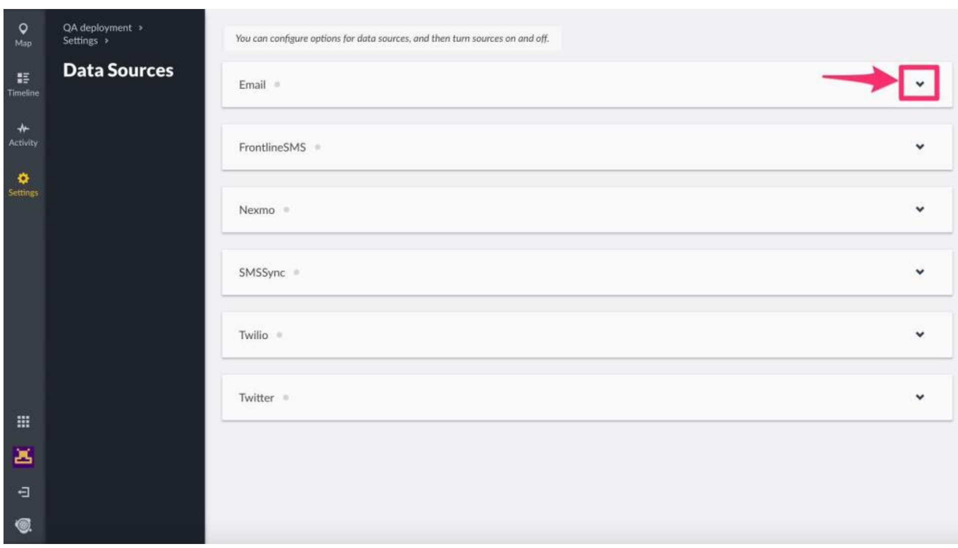
- You should get a full list of data sources as shown below



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

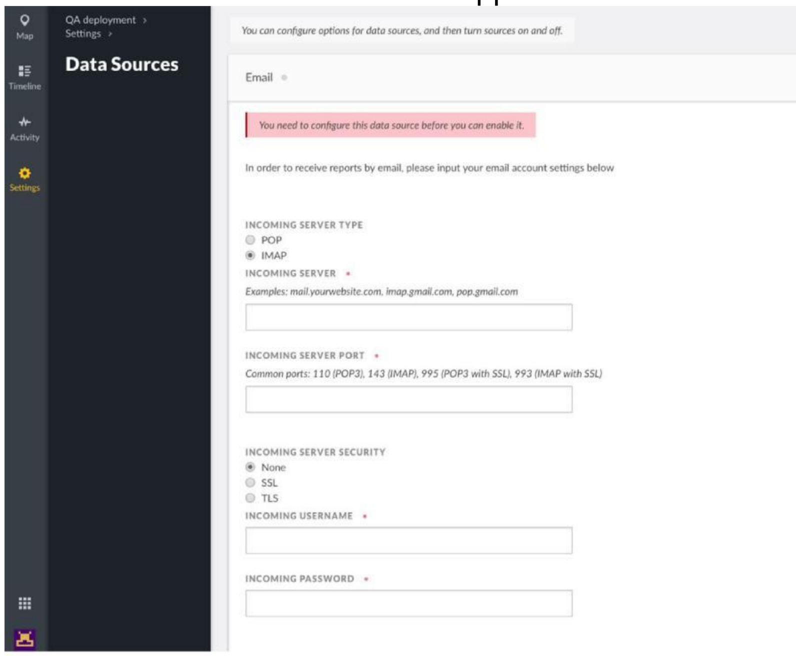


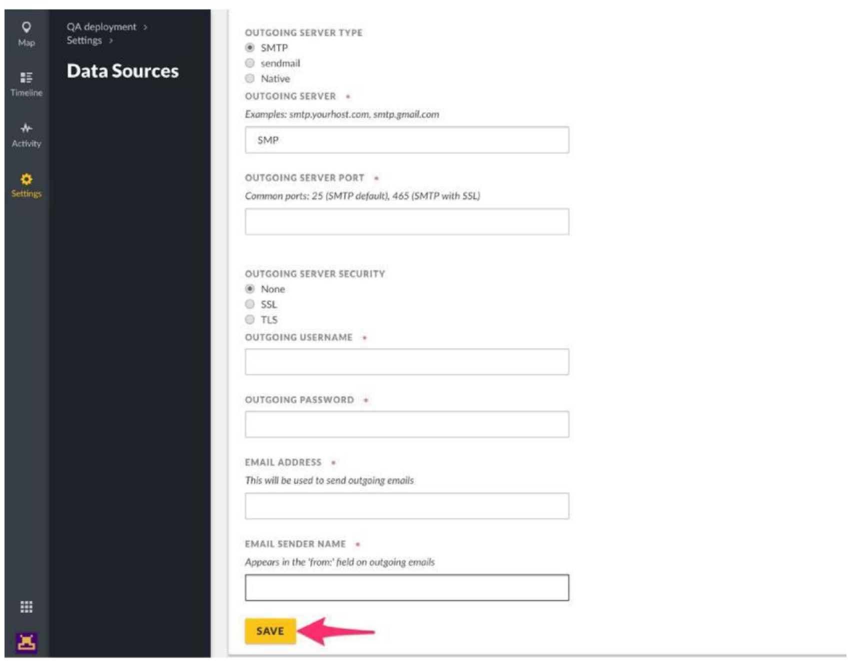
To get started with email set up,

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

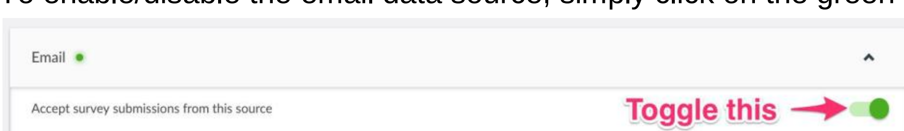
- ***Incoming server type***:You have two options to select from, ***POP***and ***IMAP***.We recommend using IMAP if possible because it’s the best way to make sure you can see all your mail at any time on all of your devices
- ***Incoming server***:Enter the address of the server where your email services 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 pageand make your changes.

3.4.2 FrontlineSMS {PENDING}

3.4.3 Nexmo

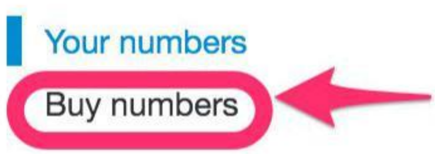
Nexmo is a cloud-based SMS API that lets you send and receive a high volume of messages to mobile phones in any country at wholesale rates.

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

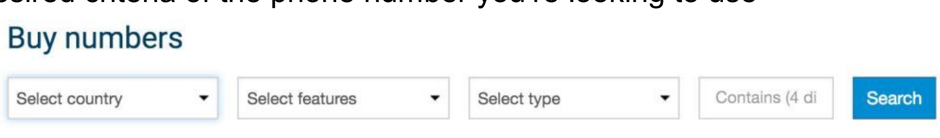
To get started with Nexmo set up,

- 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



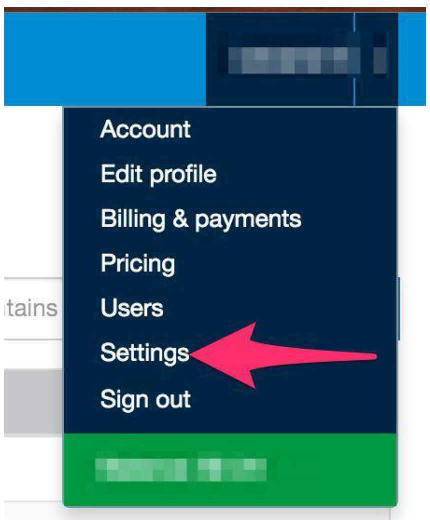
    - Select the country in which the SMS Number will likely be operating in
    - Select the features of this phone number(SMS only, Voice only or SMS & Voice)
    - Select the type of phone number it will be (Mobile, Landline, Toll free)

- Click on***Search***.A list of available numbers based on the criteria set above will appear.

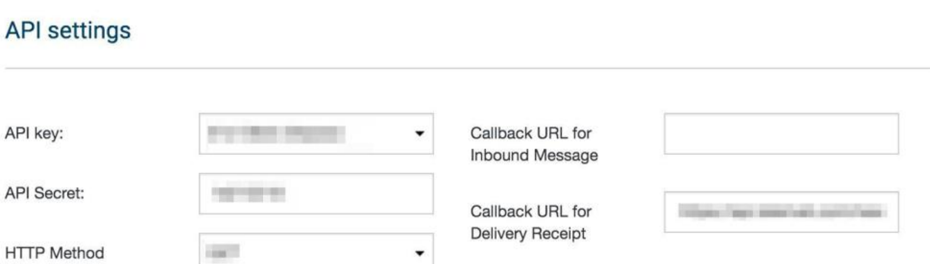
Numbers	Features	Type	Cost (€)/per month	
[illegible]	VOICE, SMS	Mobile	3.00	Buy
[illegible]	VOICE, SMS	Mobile	3.00	Buy
[illegible]	VOICE, SMS	Mobile	3.00	Buy
[illegible]	VOICE, SMS	Mobile	3.00	Buy
[illegible]	VOICE, SMS	Mobile	3.00	Buy
[illegible]	VOICE, SMS	Mobile	3.00	Buy
[illegible]	VOICE, SMS	Mobile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

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

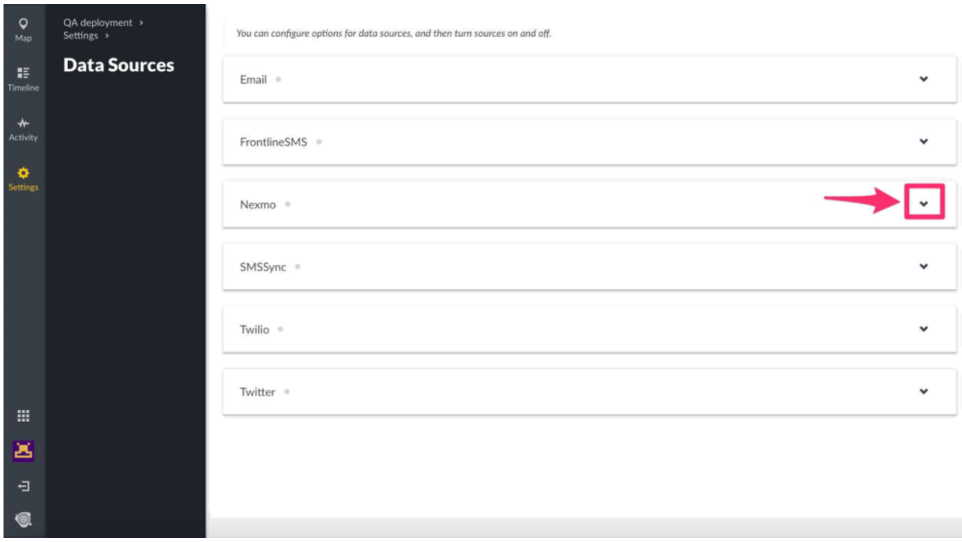
- Once you have a phone number, note it down as you'll need it to configure your data source later on.
- You'll need to grab your API credentials from your nexmo settings page.



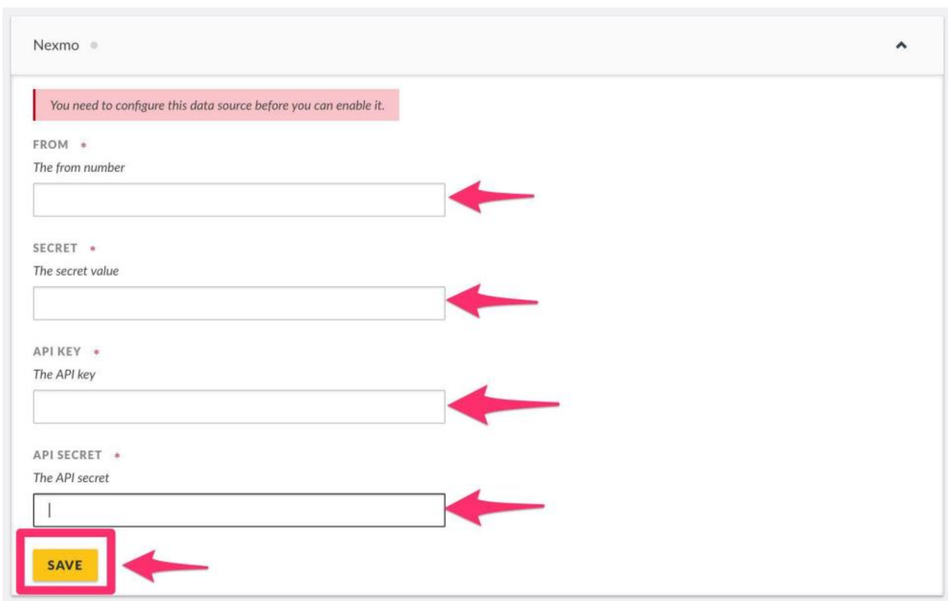
- Pick your *API KEY*and *API SECRET*from the ***API Settings***section.



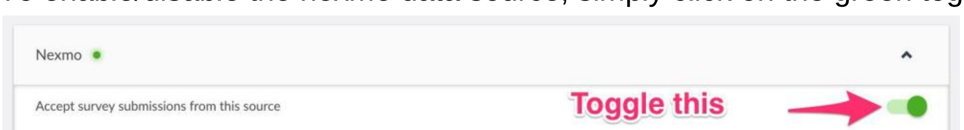
- Go back to your Data source settings page on your deployment
- Click on ***the drop down icon on the right to get to your Nexmo configuration page***



- 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.



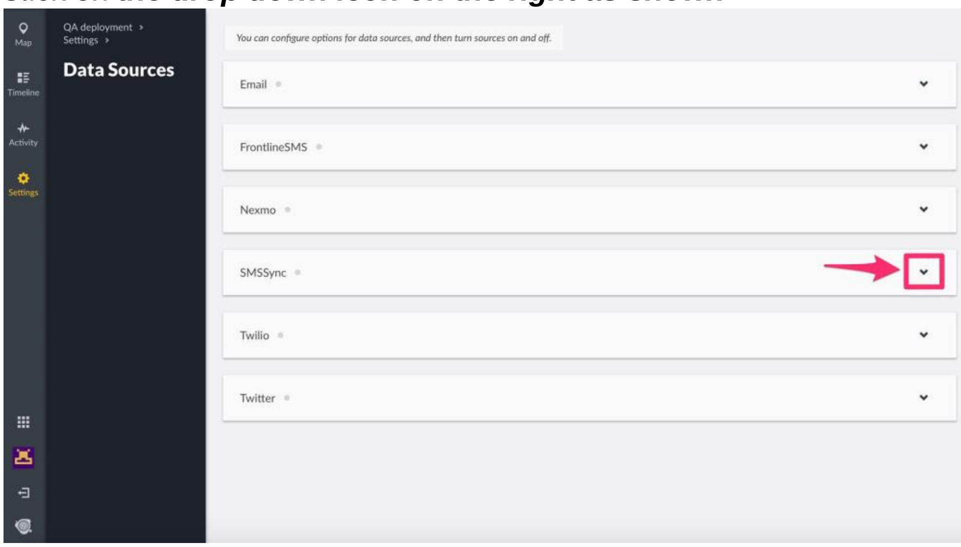
- If you’d like to edit your nexmo configuration, simply click on the drop down icon on the right while on the data sources list pageand make your changes.

3.4.4 SMSSync

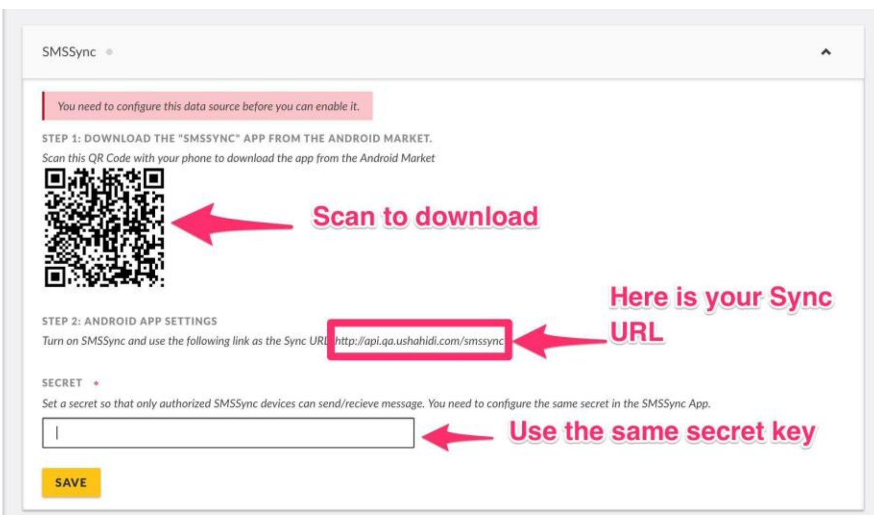
SMSsync is a simple, yet powerful SMS to HTTP sync utility that turns any Android phone into a local SMS gateway by sending incoming messages (SMS) to a configured URL (web service).

To get started with SMSSync set up,

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



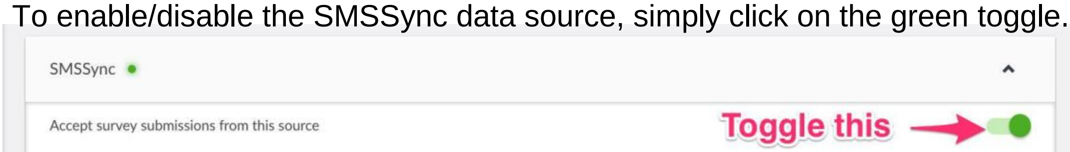
- Follow the instructions given to you below.



  - 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 pageand make your changes.

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

3.4.5 Twilio

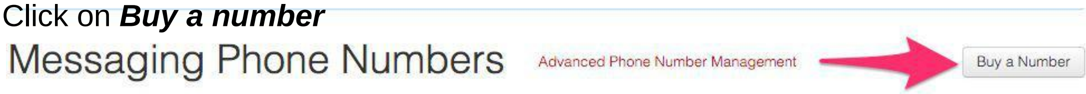
Twilio allows you to programmatically make and receive phone calls and send and receive text messages using its web service APIs.

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

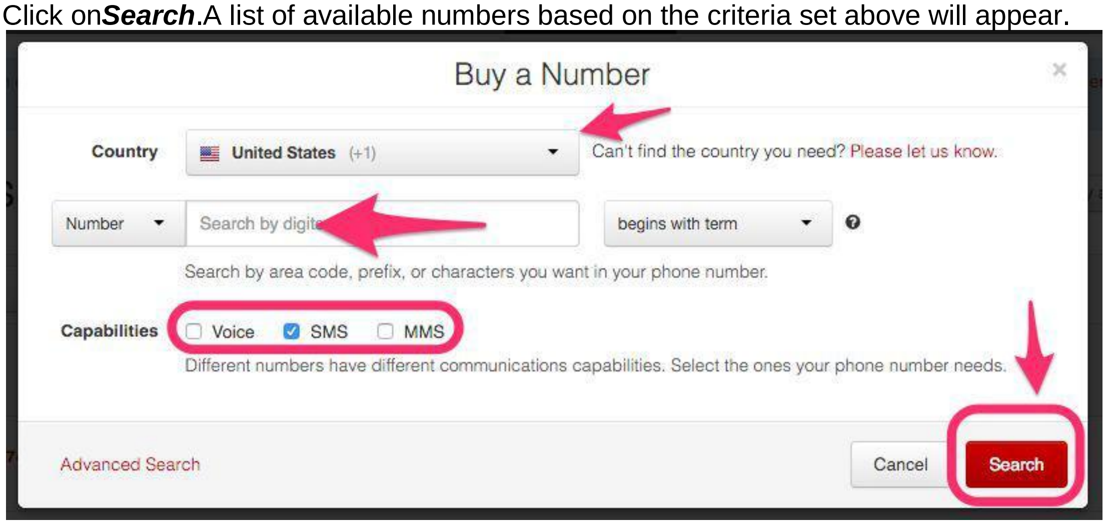
To get started with Twilio set up,

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

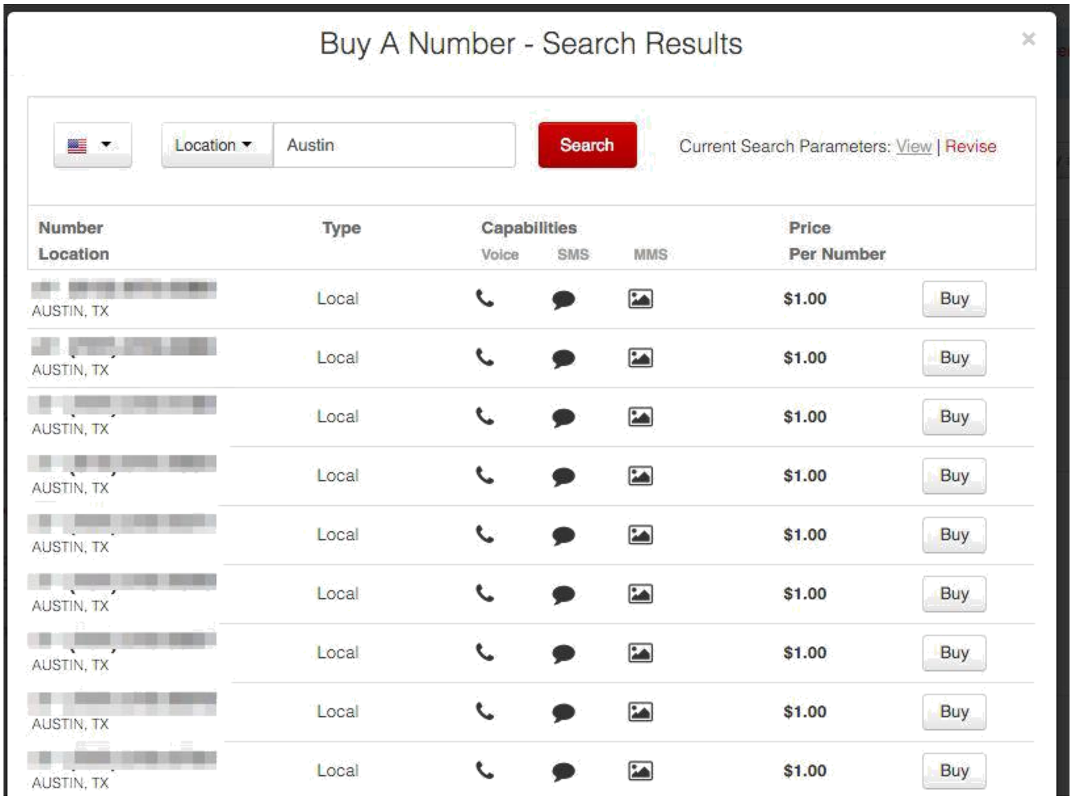
- Click on ***Buy a number***



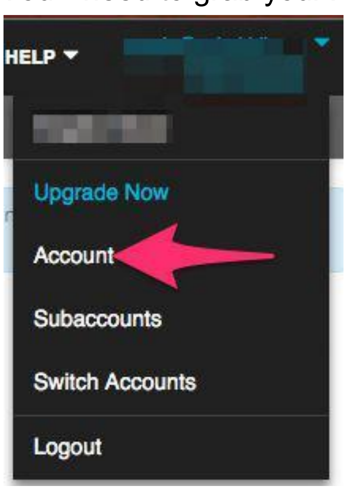
- Select the desired criteria for your phone number
  - Country
  - Location/Number
  - Capabilities (Voice, SMS, MMS)
- Click on ***Search***. A list of available numbers based on the criteria set above will appear.



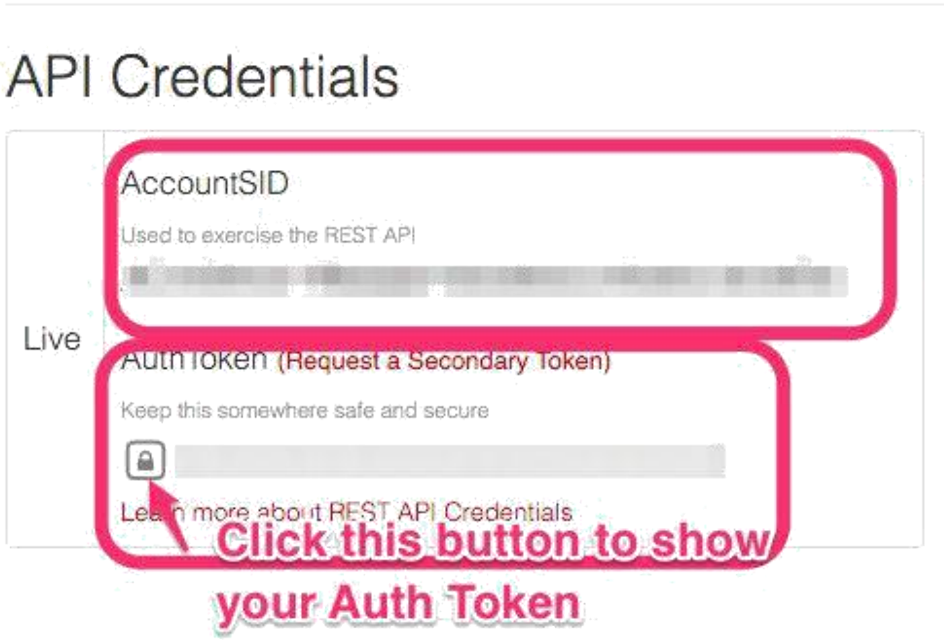
- Click ***Buy*** on the number you'd like to use.



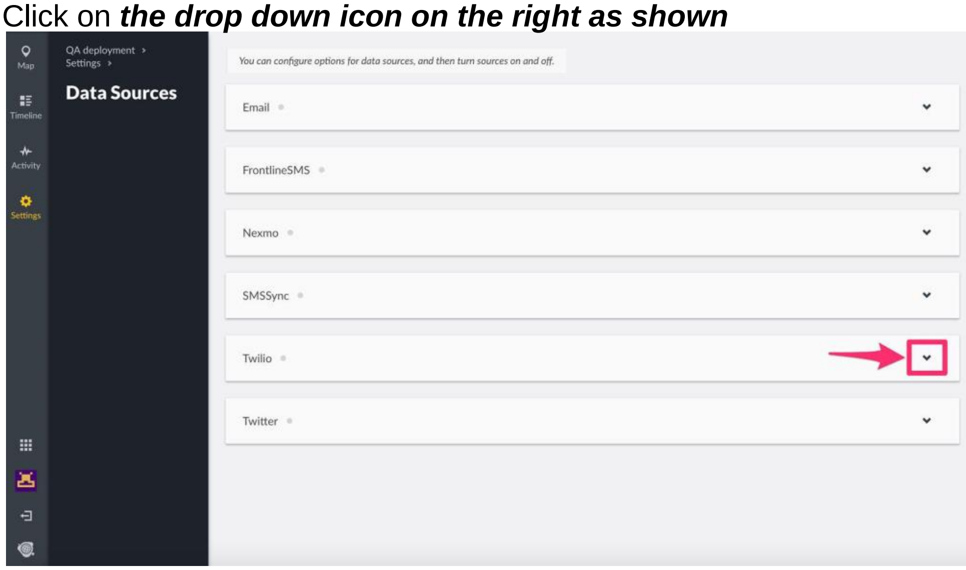
- Once you have a phone number, note it down as you'll need it to configure your data source later on.
- You'll need to grab your API credentials from your Twilio Account settings page.



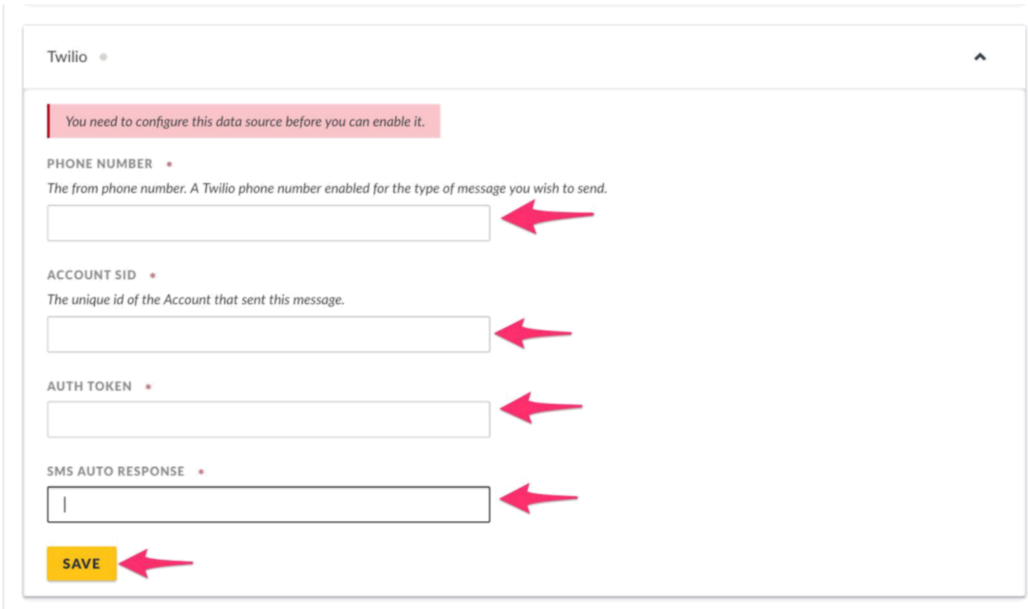
- Pick your *ACCOUNT SID*and *AUTH TOKEN*from the ***API Credentials***section.



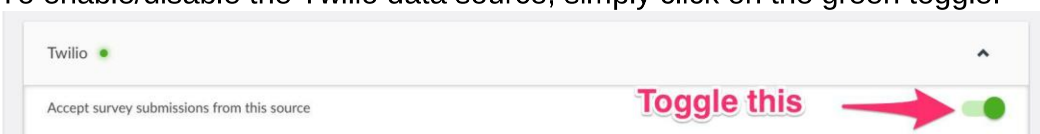
- Go back to your Data source settings page on your deployment
- Click on ***the drop down icon on the right as shown***



- 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.



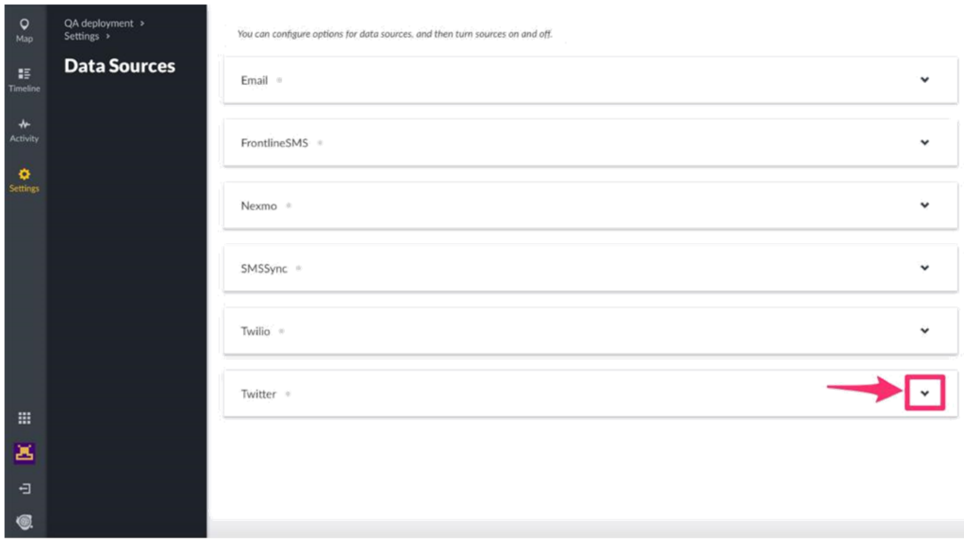
- If you'd like to edit your Twilio configuration, simply click on the drop down icon on the right while on the data sources list pageand make your changes.

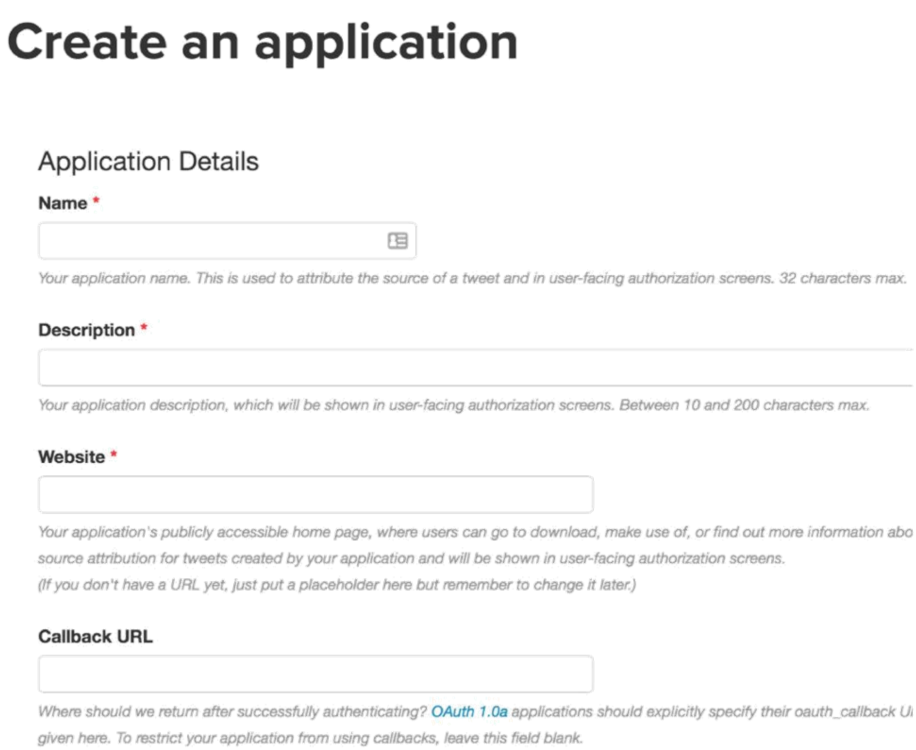
3.4.6 Twitter

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,

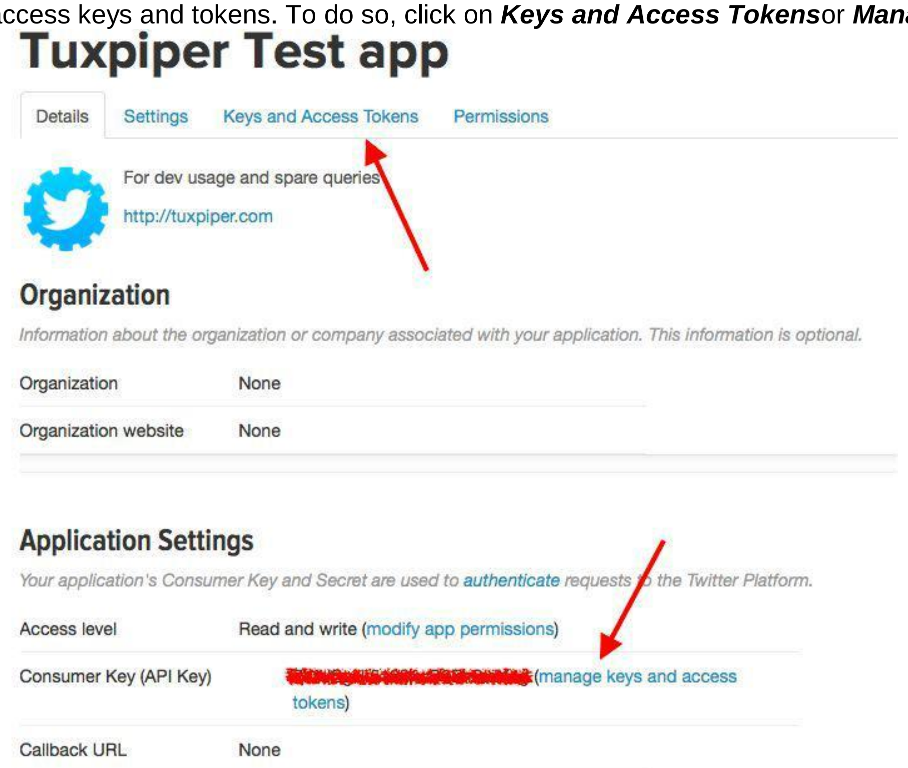
- Click on ***the drop down icon on the right as shown***
- Click on Create a new twitter application. This will redirect you to https://apps.twitter.com
- Sign into https://apps.twitter.comusing your twitter username and password
- Click on "Create New App"



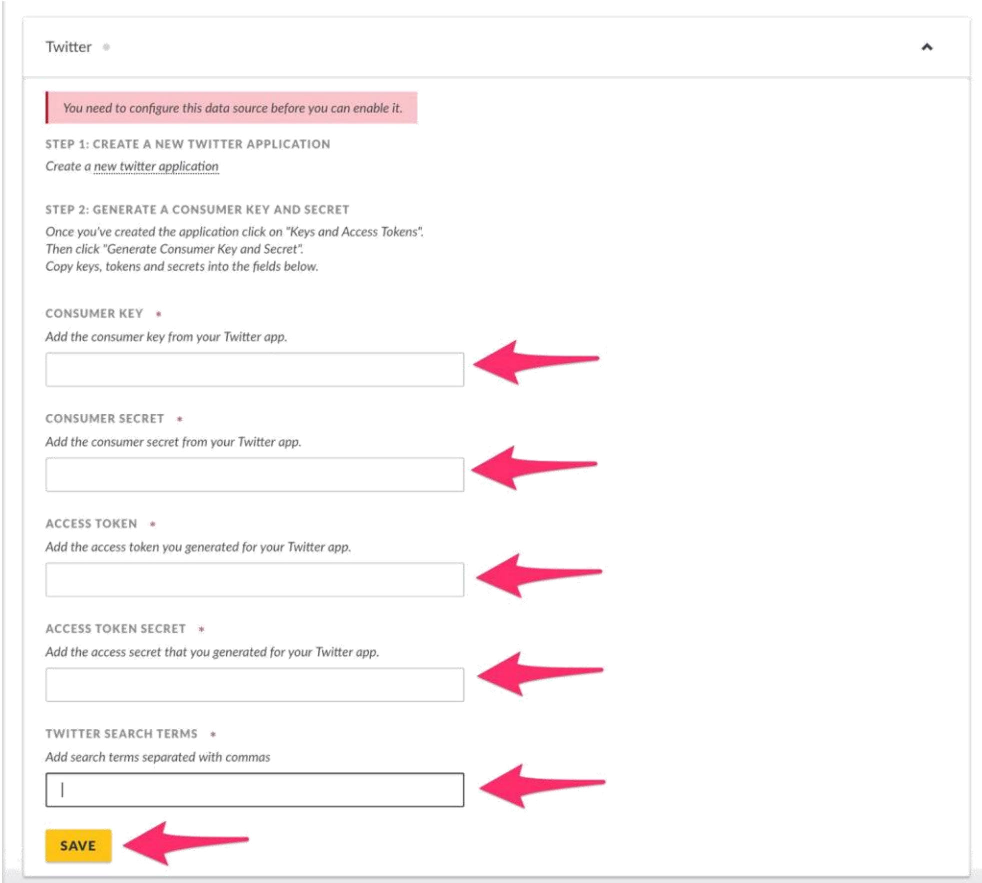


- Fill in the application details
    - Name – this can be your deployment/site name e.g Uchaguzi
    - Description – this is your deployment/site description – what your deployment does
    - Website – this is your deployment url/link i.e http://yourdeployment
    - Callback url – Leave this blank.
    - Agree to the terms and conditions then click on ***Create your twitter*** application

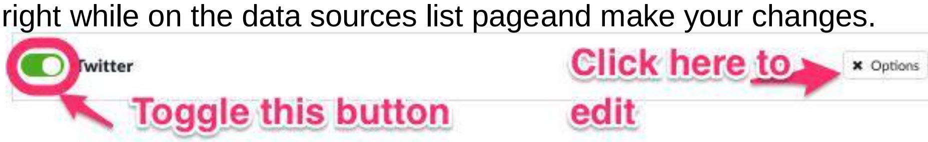
- Once your application has been successfully created, you should now be able to access your access keys and tokens. To do so, click on ***Keys and Access Tokens*** or ***Manage Keys and Access***



- 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 pageand make your changes.

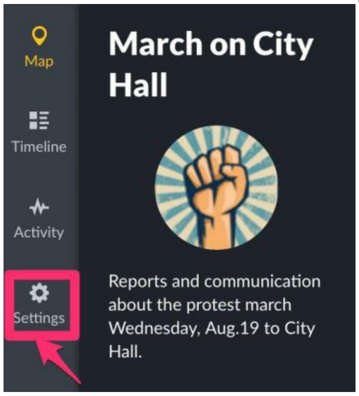


3.5 Categories

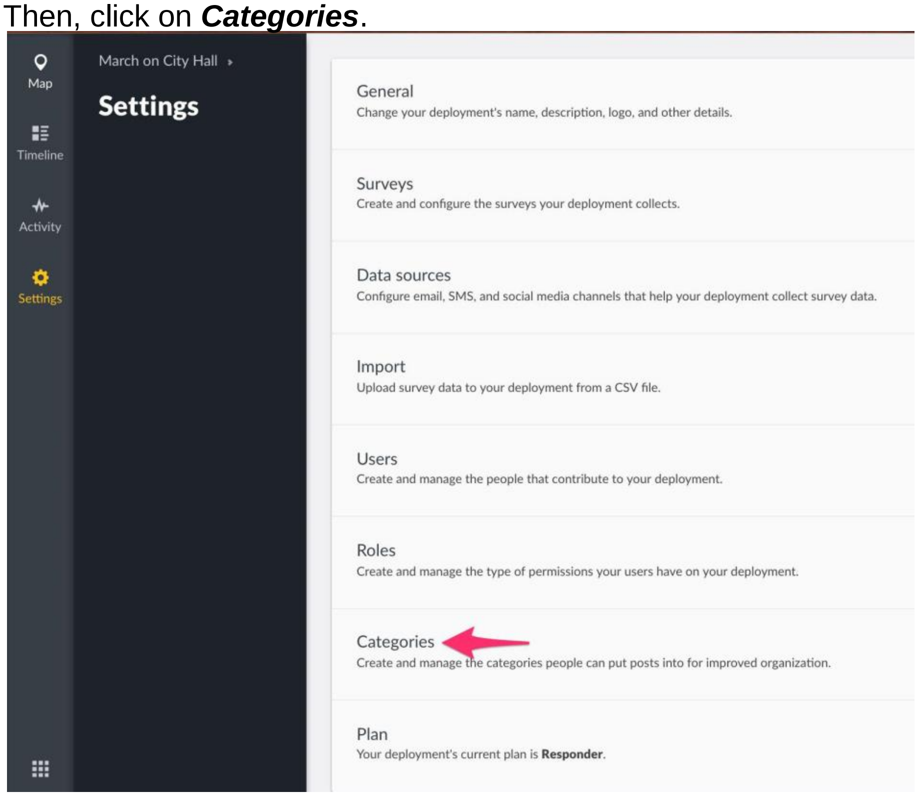
Categories are a way of grouping your posts based on their content across many different surveys.

To access the Categories configuration page,

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



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



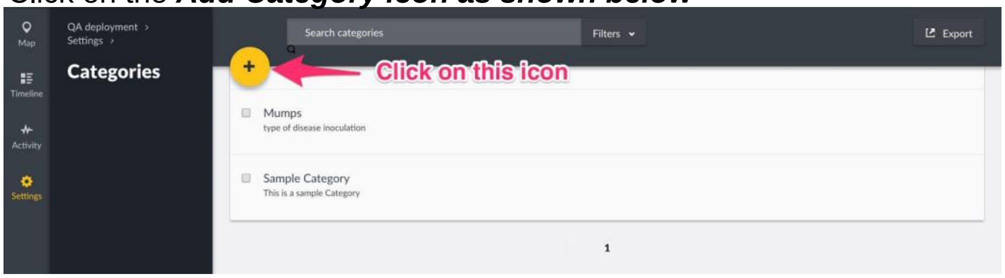
- You'll be redirected to a page where you can manage categories on your deployment

3.5.1 Adding Categories

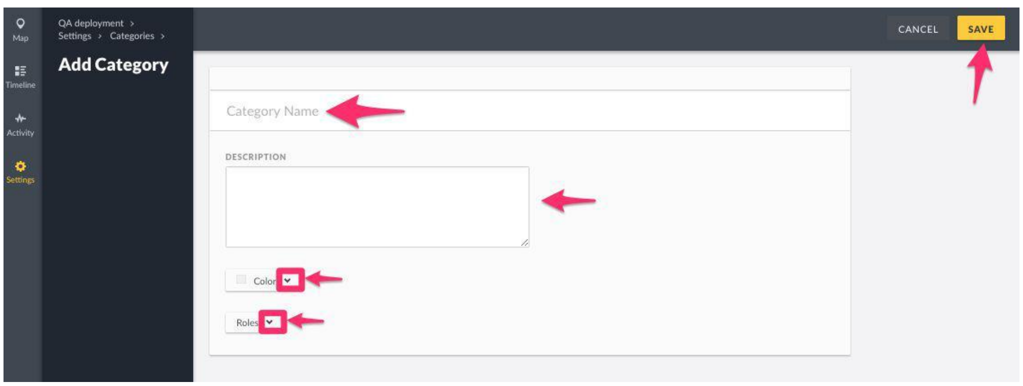
Your deployment come with pre installed/set-up categories. If yoy need to create additional categories, follow the next steps.

To create a new category,

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



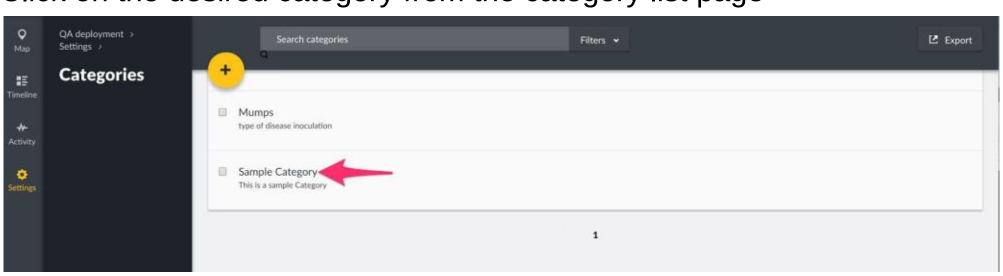
- Add the following details
  - ***Category Name:*** Give your category a name that will appear on your homepage and when users are creating new posts.
  - ***Description:*** You can provide a brief description of what kind of information you will fall under this category
  - ***Color***:You can select a color to help visually separate categories from each other.
  - ***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 section 4.1of this manual
- Click on ***Save***to create one.



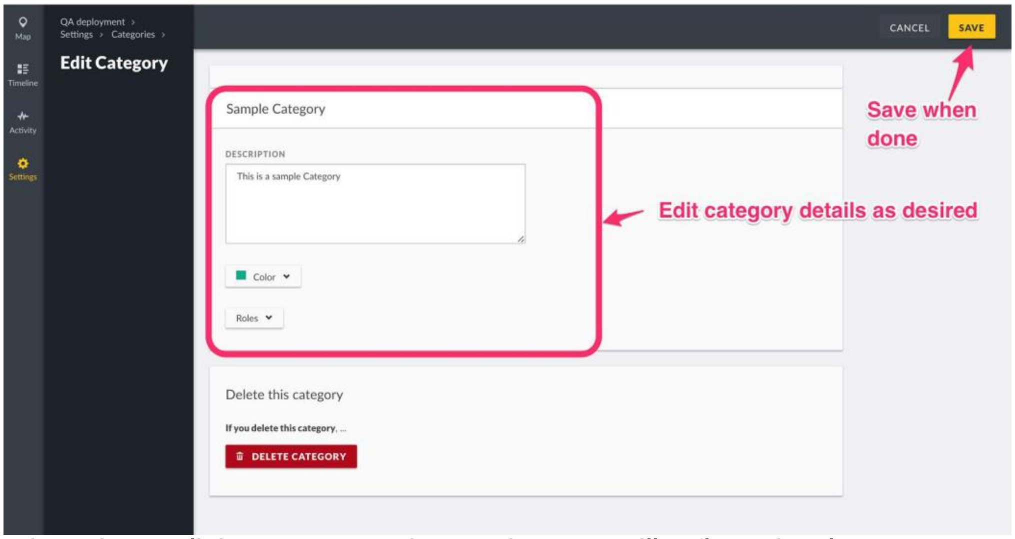
3.5.2 Editing Categories

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 section 3.5.1 above.



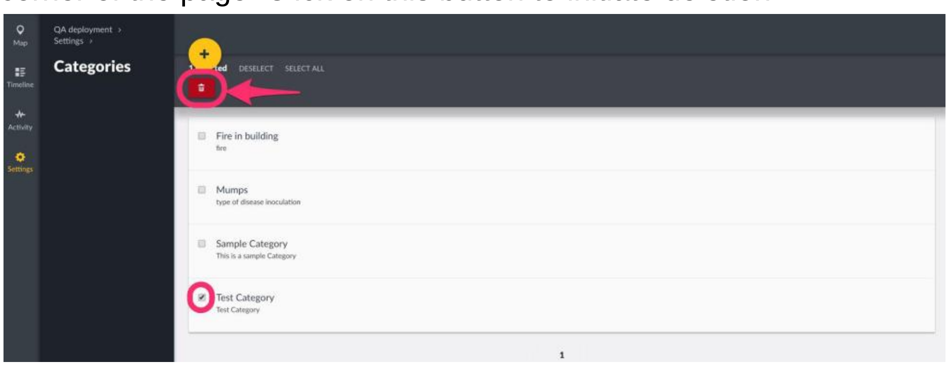
- When done, click on ***Save***, and your changes will reflect shortly.

3.5.3 Deleting Categories

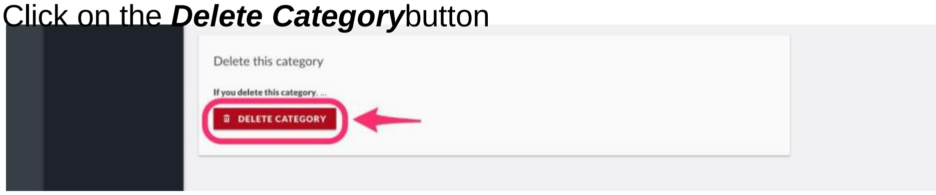
You can delete one or multiple categories at a time.

To delete a category,

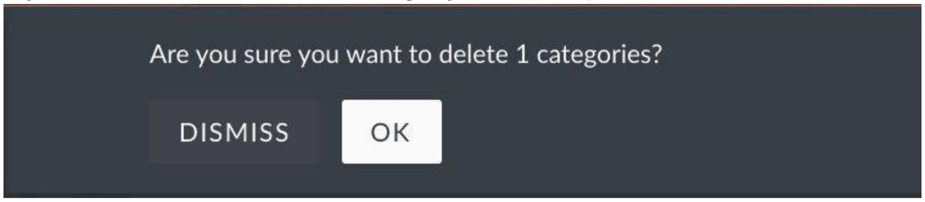
- From the category list page,
  - Tick the checkbox on the left, adjacent to the category/categories you would like to delete from the category list page
  - This action will activate the previously inactive ***Delete*** button on top left hand corner of the page. Click on this button to initiate deletion.



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



- A black 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 ***OK***to delete your category/categories
  - If you'd like to cancel the category deletion process, click on ***Dismiss***

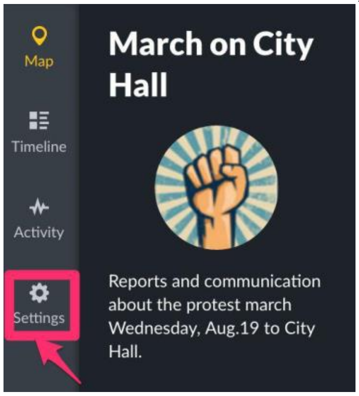


3.6 Actors

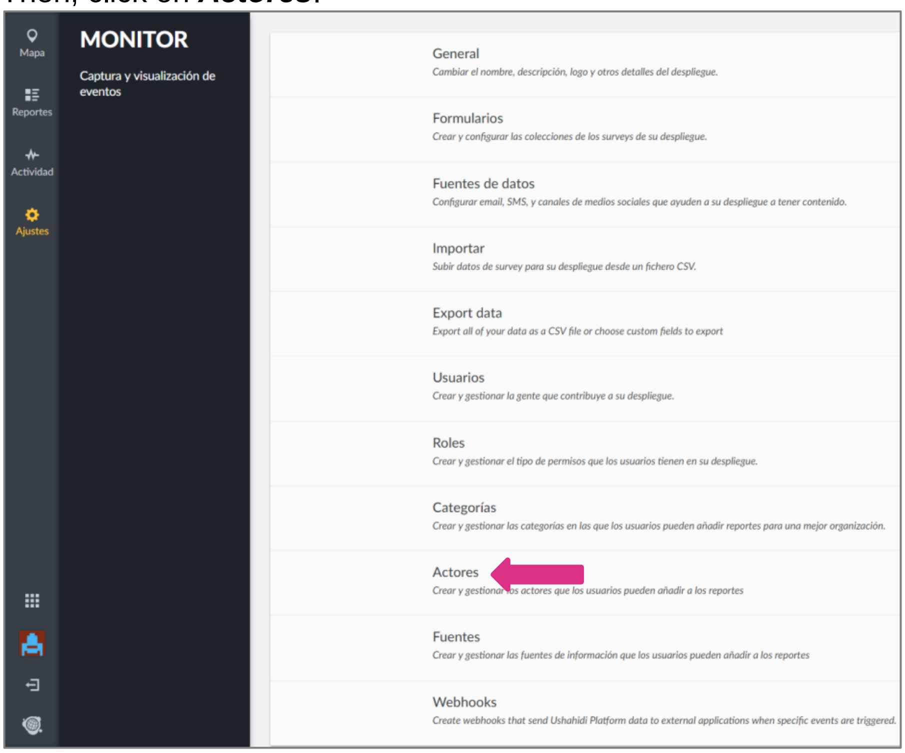
Actors are an entity in your posts, givind additional information in the report, inside the survey depends on the categories selected.

To access the Actors configuration page,

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



- Then, click on ***Actores***.



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

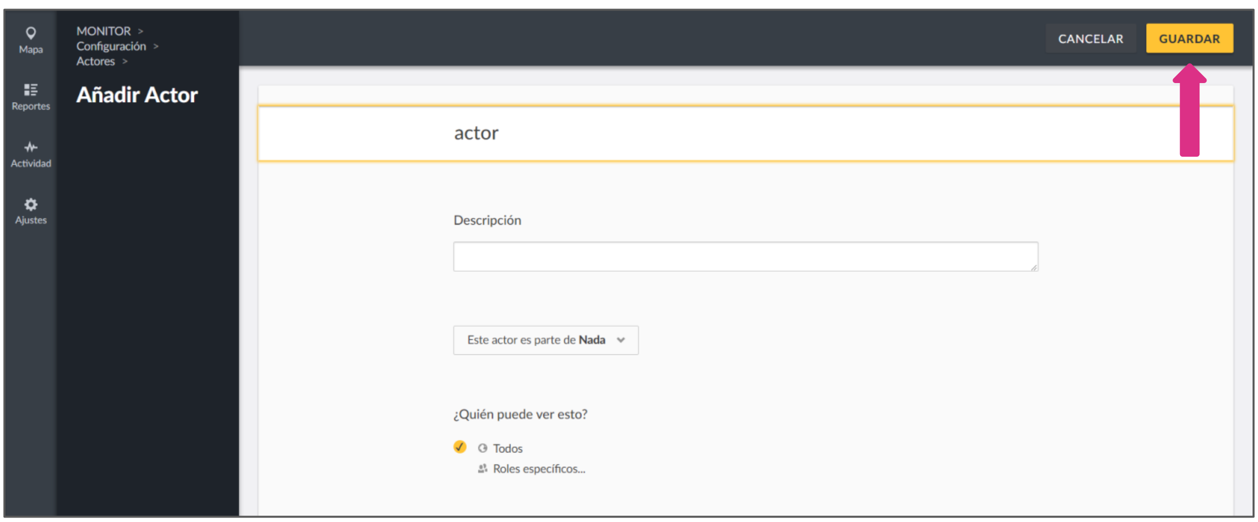
3.6.1 Adding Actors

Your deployment come with pre installed/set-up Actors. If you need to create additional Actors follow the next steps.

To create a new actor,

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

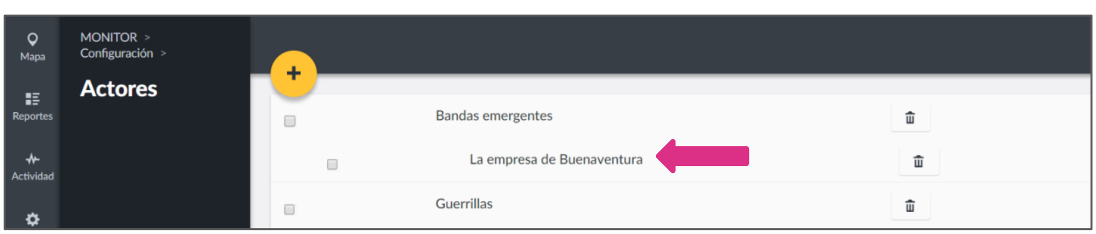
- Add the following details
    - ***Actor Name:*** Give your actor a name that will appear when users are creating new posts.
    - ***Description:*** You can provide a brief description of what kind of information you will fall under this actor
    - ***Parent:*** You can choose from a list of actors already created, if the actual actor is a child of one of them.
    - ***Roles***:You can opt to set your actor as visible to specific user roles on your deployment here. This list is populated based on custom roles created. More on Roles in section 4.1of this manual
- Click on ***GUARDAR*** to create one.



3.6.2 Editing Actors

To edit an Actor,

- Click on the desired actor from the actor list page



- You'll get redirected to the ***Edit Actor*** page, where you should be able to add/edit details as described in section 3.6.1above.

- When done, click on ***Save***,and your changes will reflect shortly.

3.6.3 Deleting Actors

To delete an actor,

- From the actor list page,
  - Tick the checkbox on the left, adjacent to the actor/actors you would like to delete from the actor 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.
  - Click on trash button on the right of each actor listed to delete the actor.

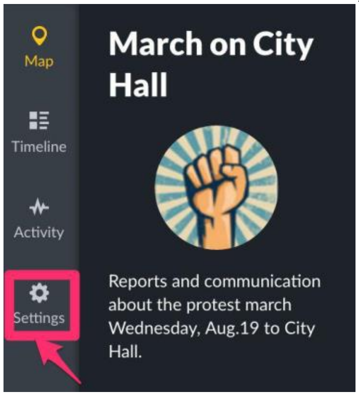
- A black pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete the actor/actors
    - Click on ***BORRAR*** to delete your actor/actors
    - If you'd like to cancel the actor deletion process, click on ***CANCEL***

3.7 Sources(Fuentes)

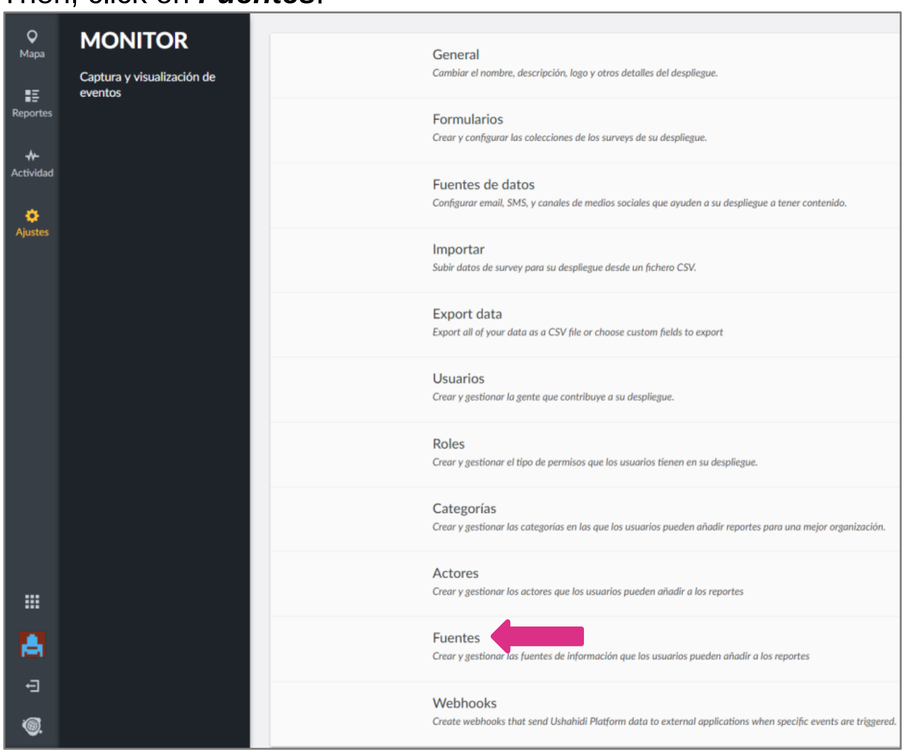
Sources are an entity in your posts, you can select in their respective fields to give additional information to the report.

To access the Sources configuration page,

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



- Then, click on ***Fuentes***.



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

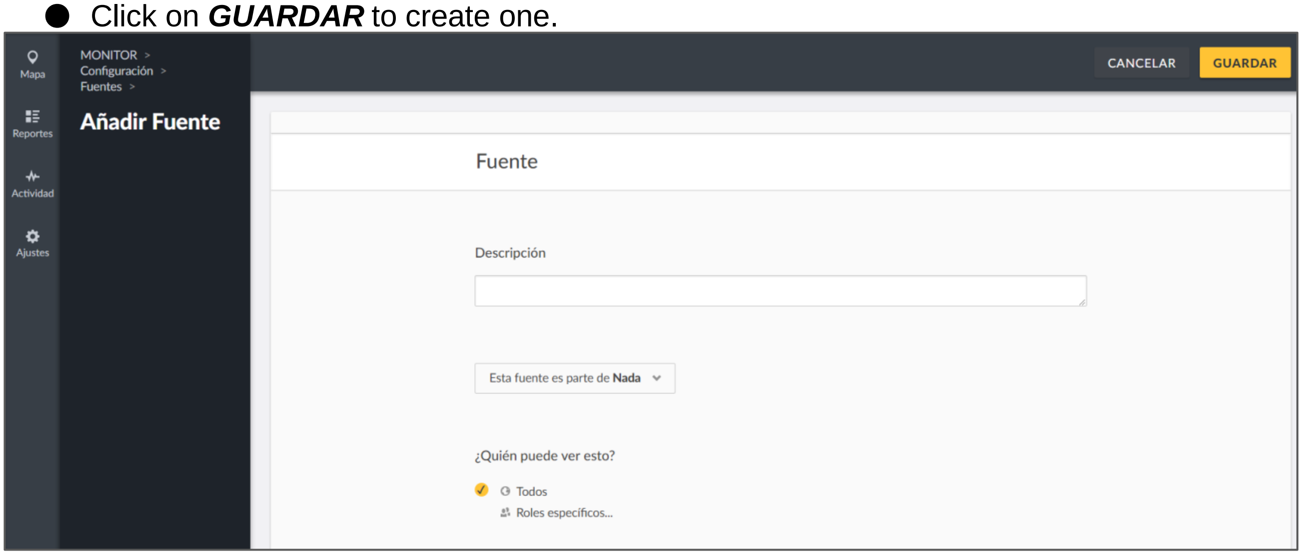
3.7.1 Adding Sources

Your deployment come with pre installed/set-up Sources. If you need to create additional Sources follow the next steps.

To create a new actor,

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

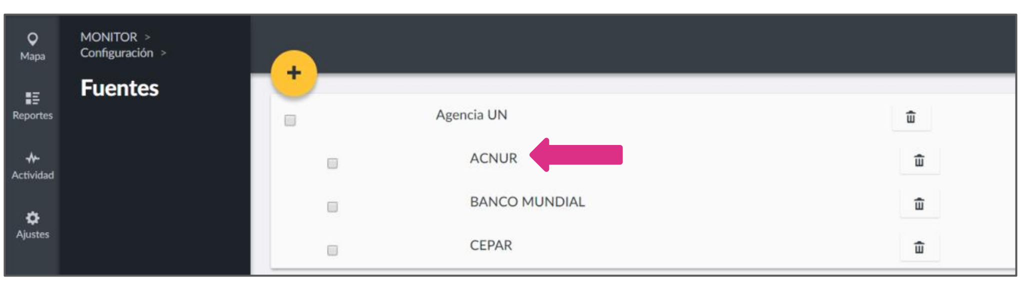
- Add the following details
  - ***Source Name:*** Give your source a name that will appear in the respective list when users are creating new posts.
  - ***Description:*** You can provide a brief description of what kind of information you will fall under this source
  - ***Parent:*** You can choose from a list of sources already created, if the actual source is a child of one of them.
  - ***Roles***:You can opt to set your source as visible to specific user roles on your deployment here. This list is populated based on custom roles created. More on Roles in section 4.1of this manual
- Click on ***GUARDAR*** to create one.



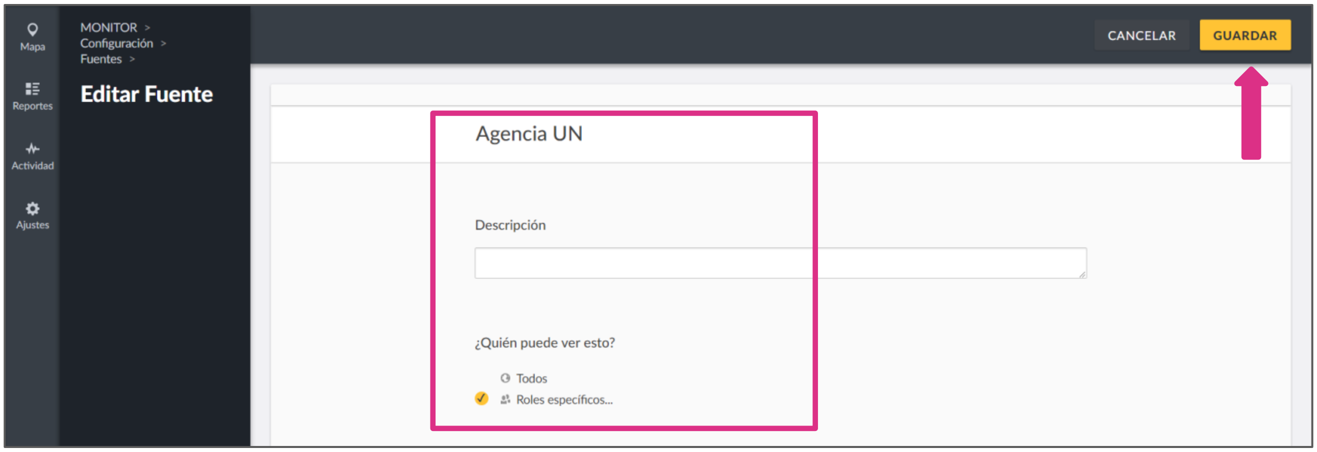
3.7.2 Editing Sources

To edit a source,

- Click on the desired source from the source list page



- You'll get redirected to the ***Edit Source*** page, where you should be able to add/edit details as described in section 3.7.1above.



- When done, click on ***Save***,and your changes will reflect shortly.

3.7.3 Deleting Sources

To delete a source,

- From the source list page,
  - Tick the checkbox on the left, adjacent to the source/sources you would like to delete from the source 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.
  - Or, click on the trash button at the right of each source listed to delete the source.

- A black pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete the source/sources
  - Click on ***BORRAR*** to delete your source/sources
  - If you'd like to cancel the source 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.

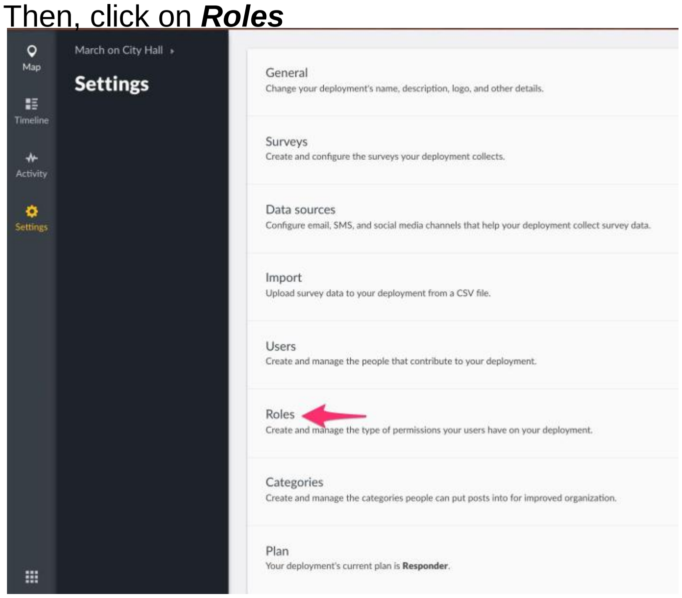
4.1 Roles

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” role**,which cannot be deleted, but can be edited. This **default “Admin” role** allows for full control over ALL functionality on your deployment.

To access the roles management page,

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

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

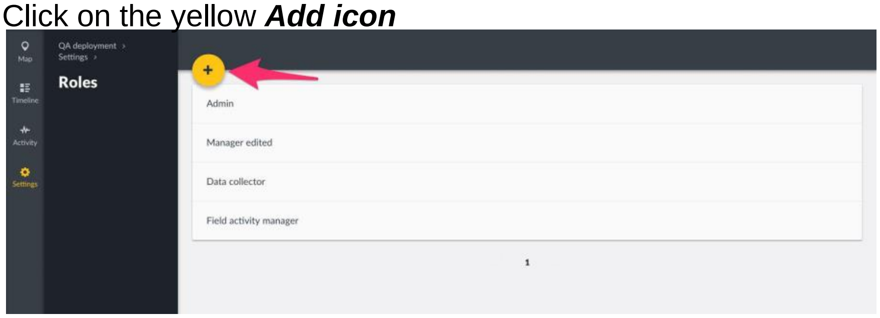


- You’ll be redirected to a page with a list of all existing roles - default & custom roles (created by admins if any exist).

4.1.1 Add Role

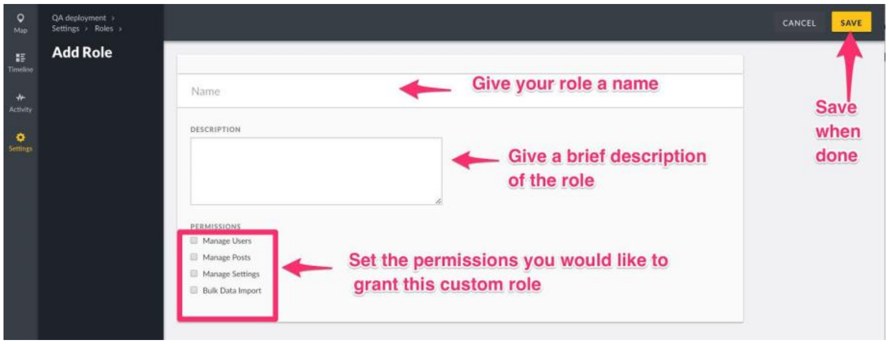
To add a custom user role,

- 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

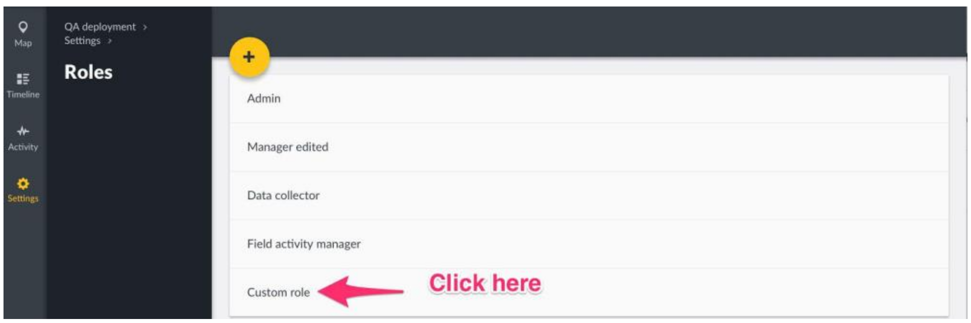
- Click on ***Save.***
  See the illustration below



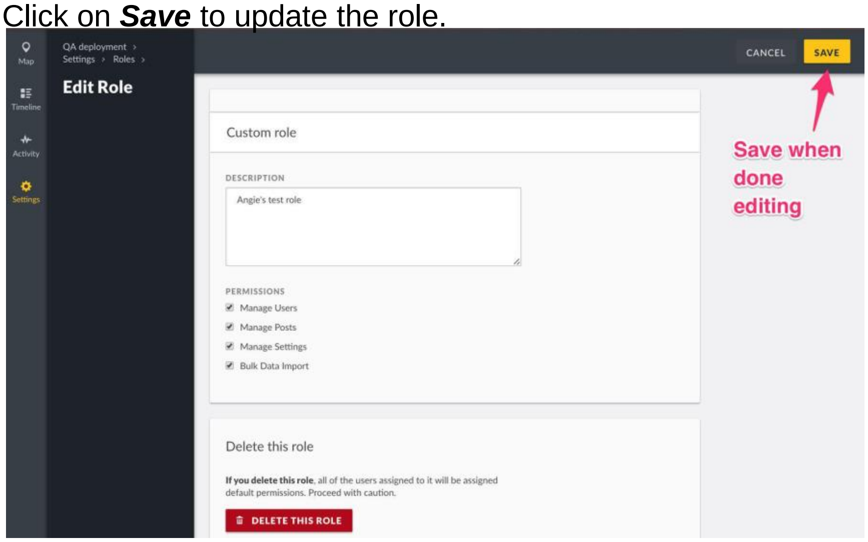
4.1.2 Edit Role

To edit a role

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



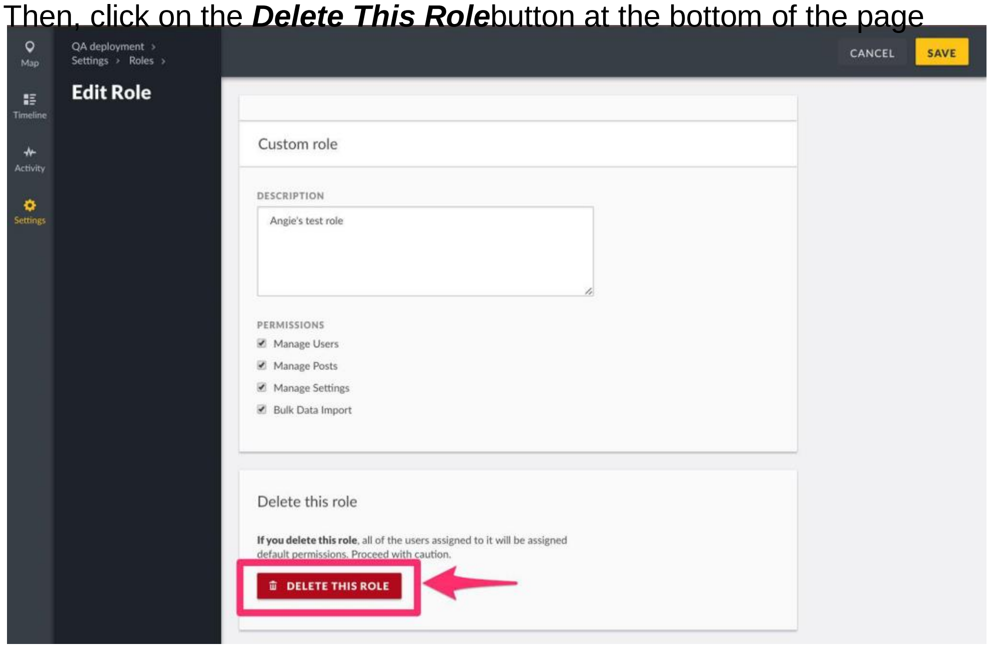
- On redirection to the edit page, make your desired changes to the role (i.e fill out details as directed in the***Add Role***section)
- Click on ***Save*** to update the role.



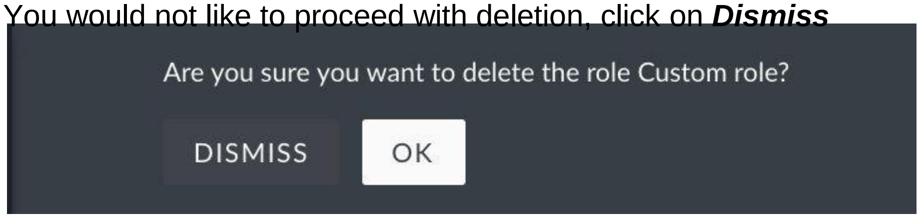
4.1.3 Delete Role

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 black 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 ***OK***.
  - You would not like to proceed with deletion, click on ***Dismiss***

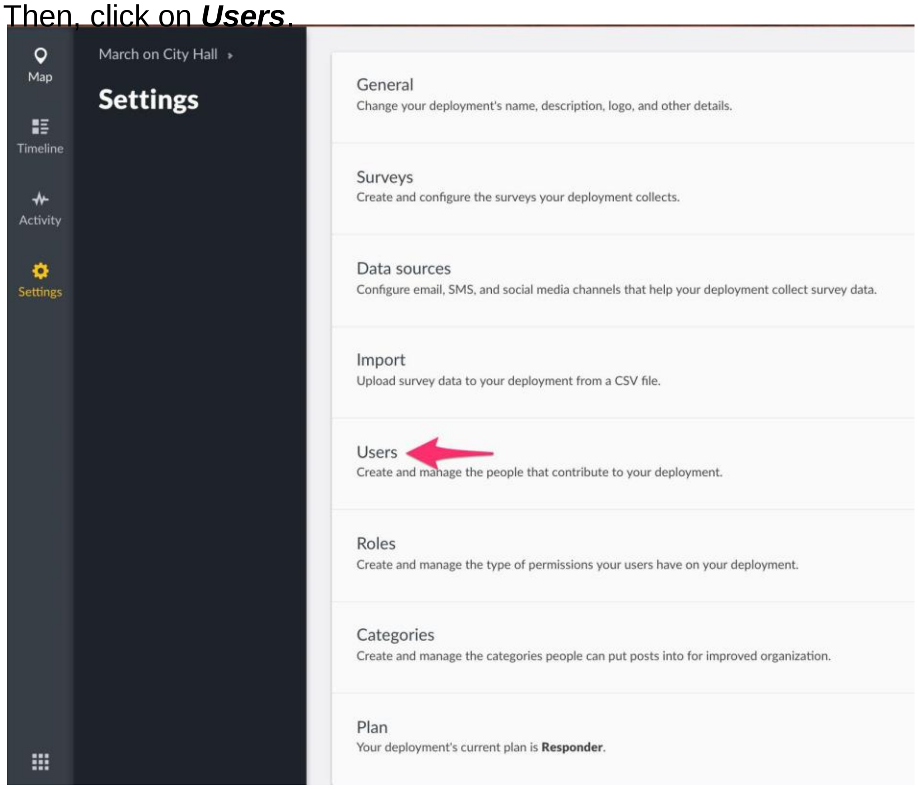


4.2 Users

To access the User management page,

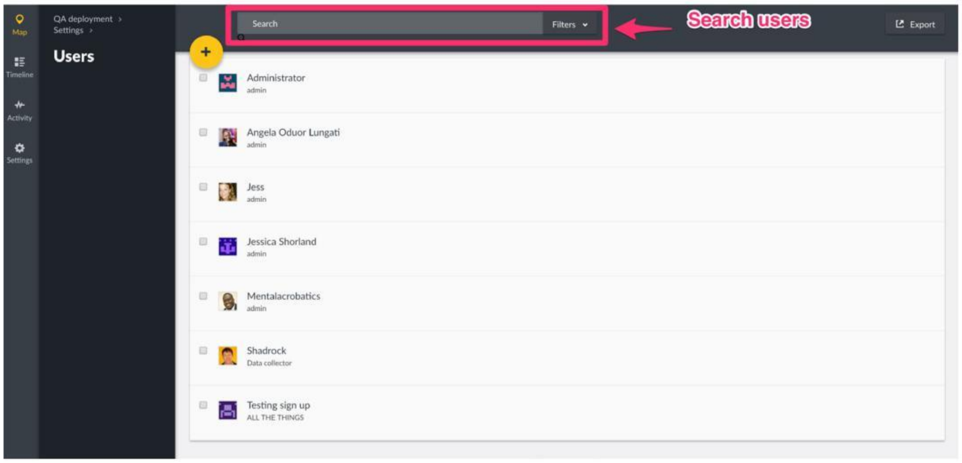
- On the left hand menu bar, click on ***Settings***

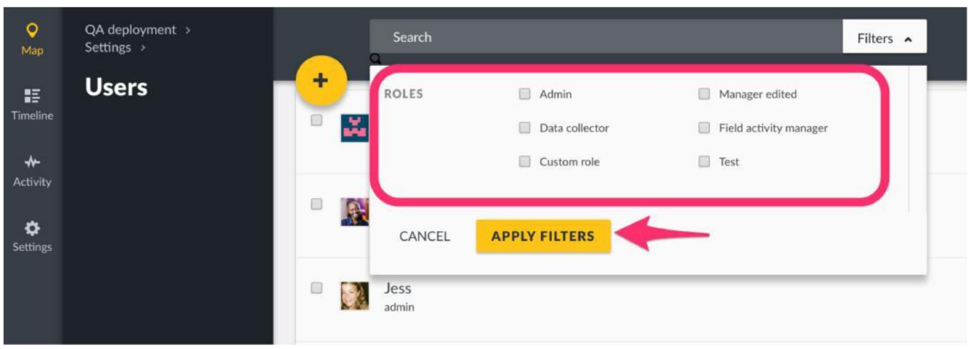
- Then, click on ***Users***.



- 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

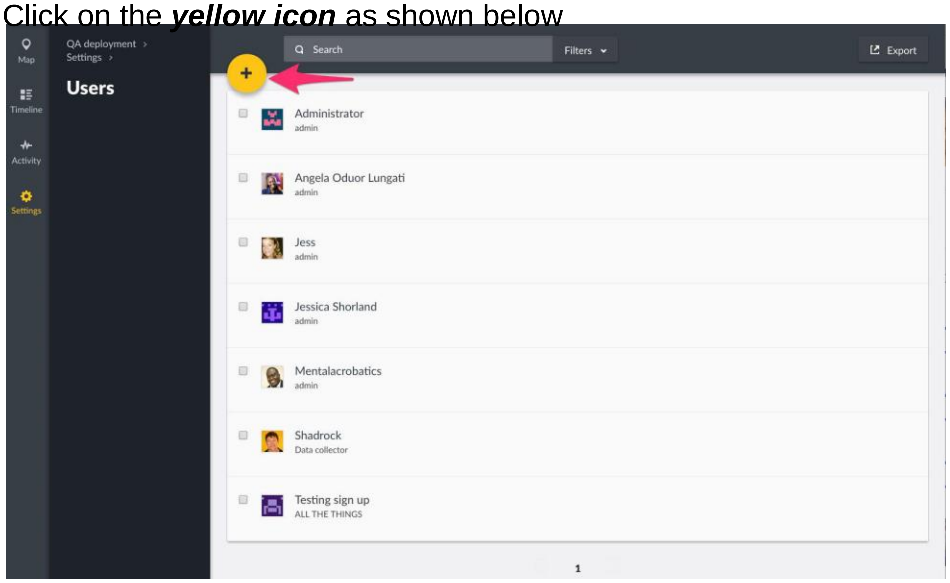




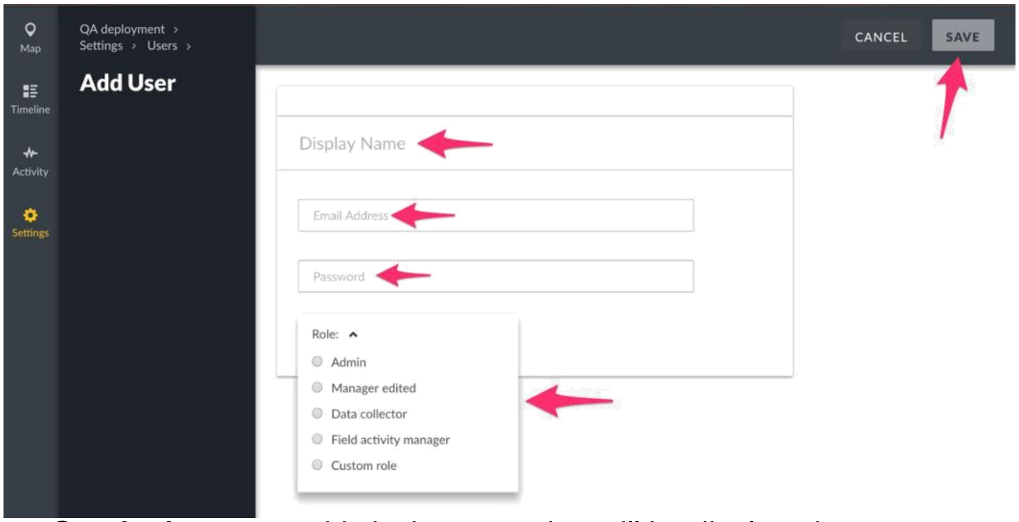
4.2.1 Adding new users

To add a new user,

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



- Fill out the details below



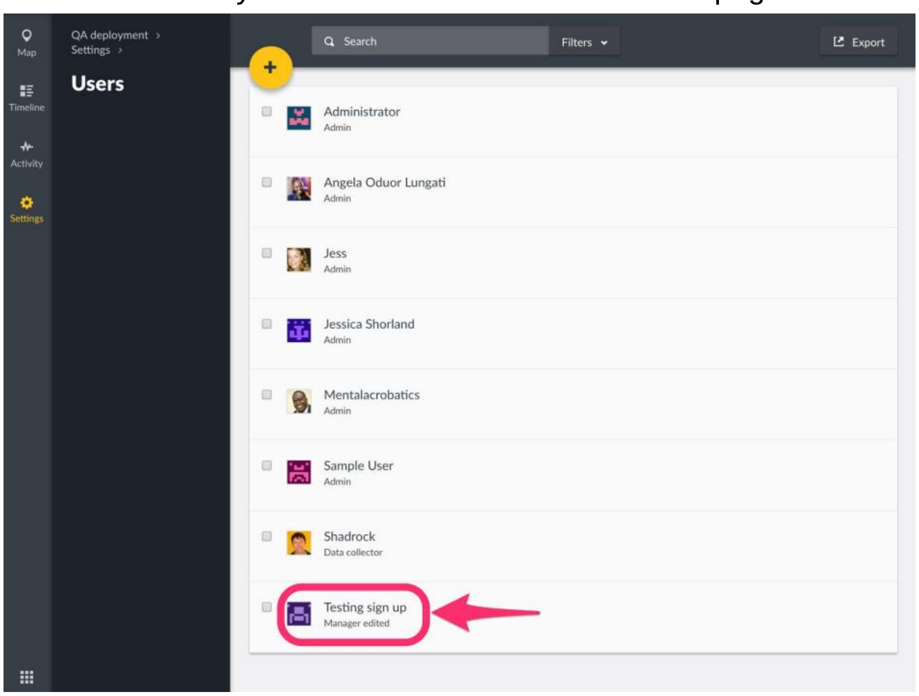
- ○ ***Display Name***:This is the name that will be displayed
- ○ ***Email address:*** This is the email address that will be tied to this new user's account, and will be used to log in.
- ○ ***Password:*** Set a strong and secure password for your new user. Each password must have at least 7 characters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

- Click on ***Save*** to create one.

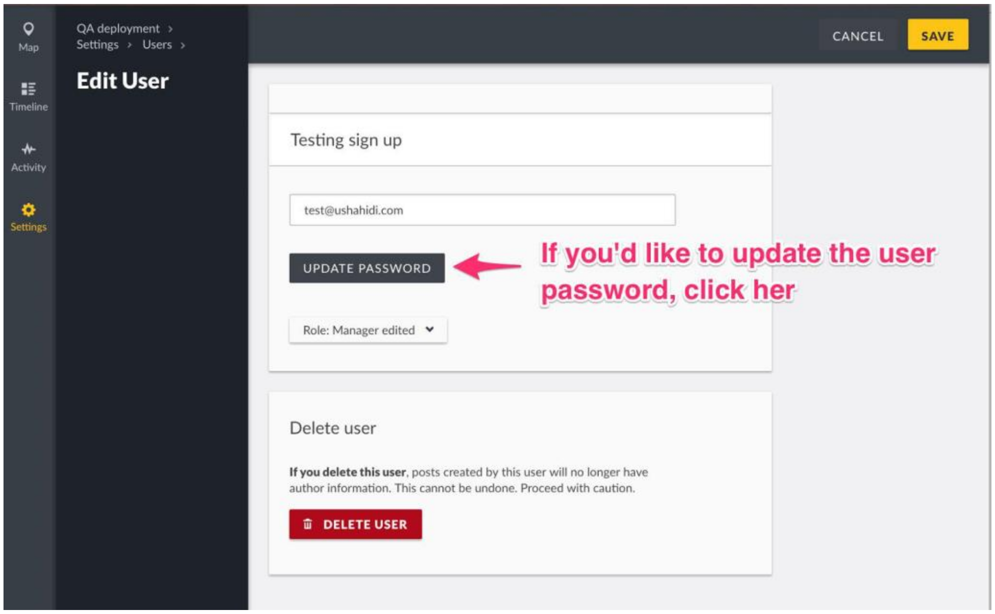
4.2.2 Editing users

To edit a user,

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



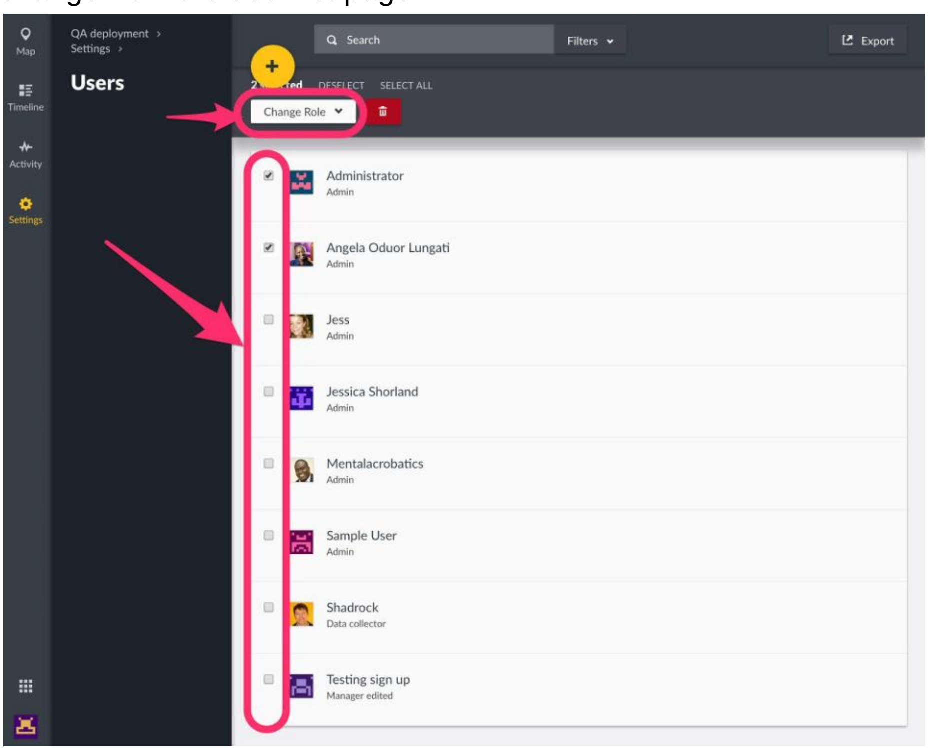
- You should be able to edit the user's display name, email address, password and user role from this page.
- Click on save when done.



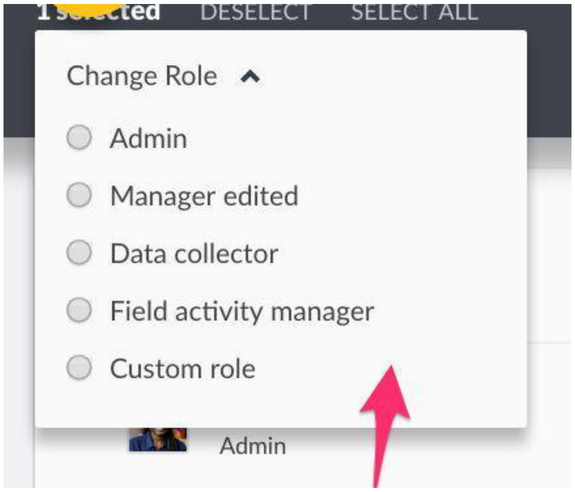
4.2.3 Changing User roles

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

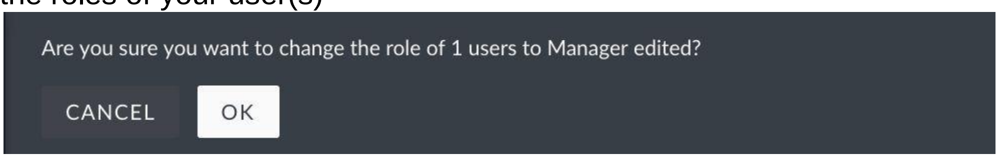
- Tick the checkbox on the left, adjacent to the user(s) whose role you would like to change from the user list page



- 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***

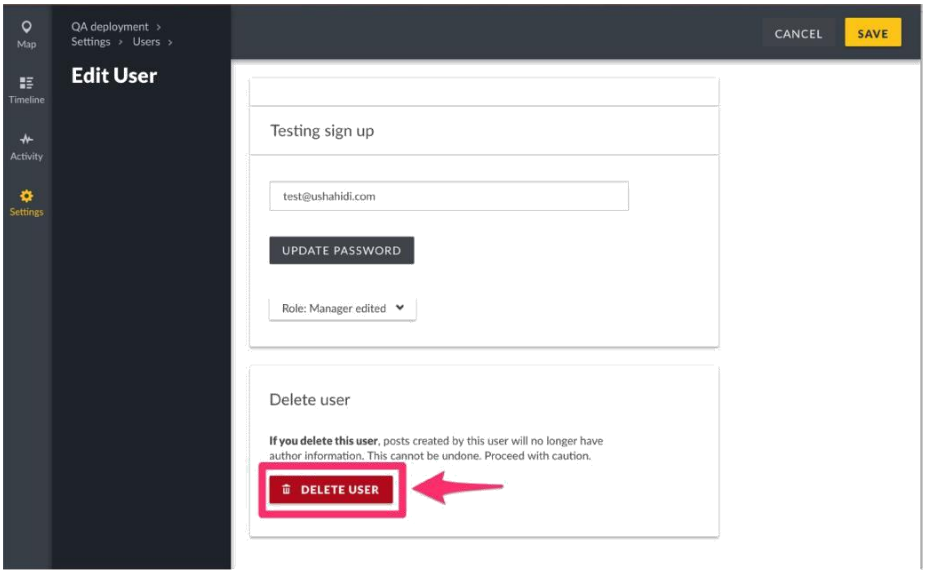
4.2.4 Deleting users

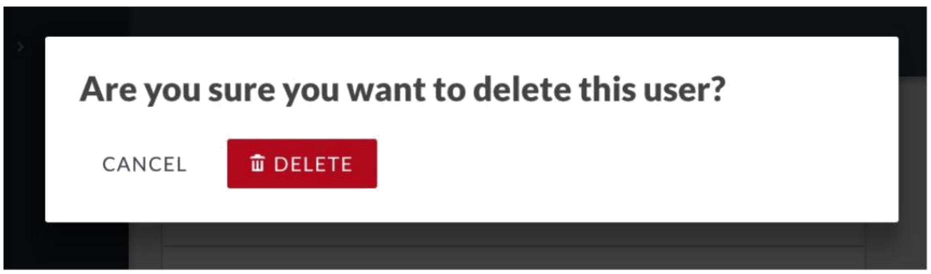
Similarly, you can delete multiple users at once from the user management page, or from the individual user edit page.

To delete a user

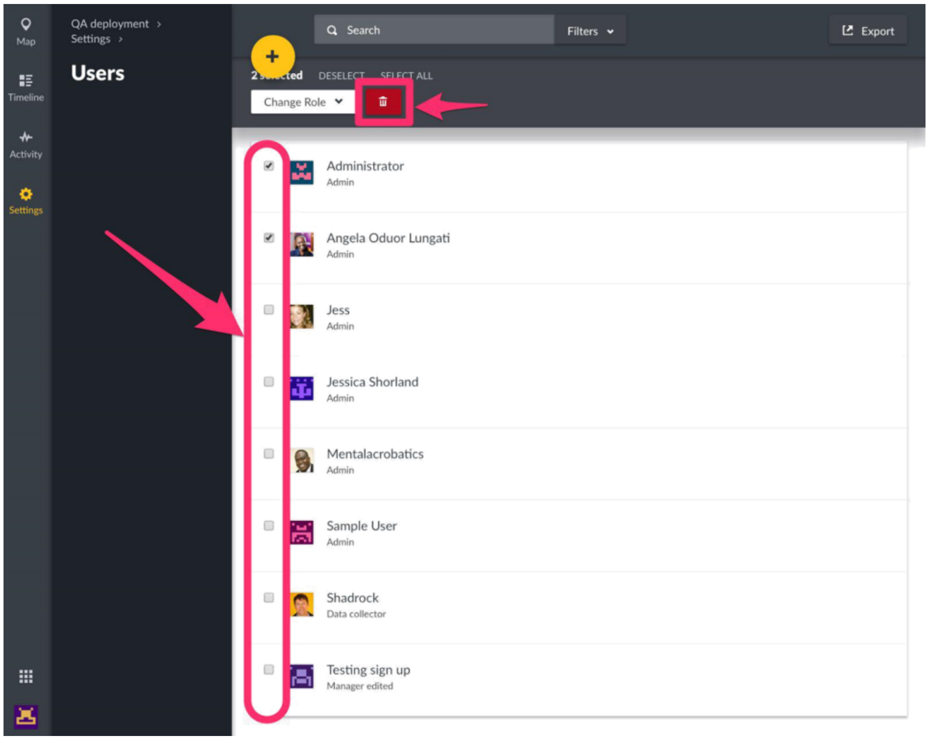
- From the individual user edit page
  - Click on the user you intend to edit from the user list page

  - Click on ***Delete User***
  - A black 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 ***OK***to delete your user(s)
    - If you'd like to cancel the user deletion process, click on Dismiss

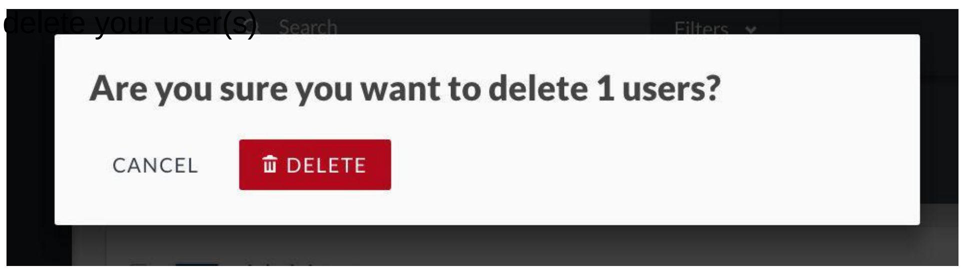




- From the User management page
    - Tick the checkbox on the left, adjacent to the user(s) you would like to delete from the user list page



- 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. 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

5.1 Viewing Posts

Posts on your deployment can be categorised into two:-

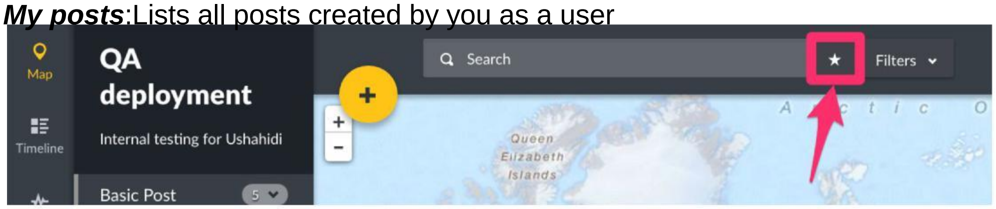
- ***Structured*:**Incoming posts from the web platform and smartphone applications are classified as structured posts, since they adhere to the structure of surveys created on your deployment.
- ***Unknown*:**Incoming messages from SMS, Twitter and Email are classified as unknown posts, since they do 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.

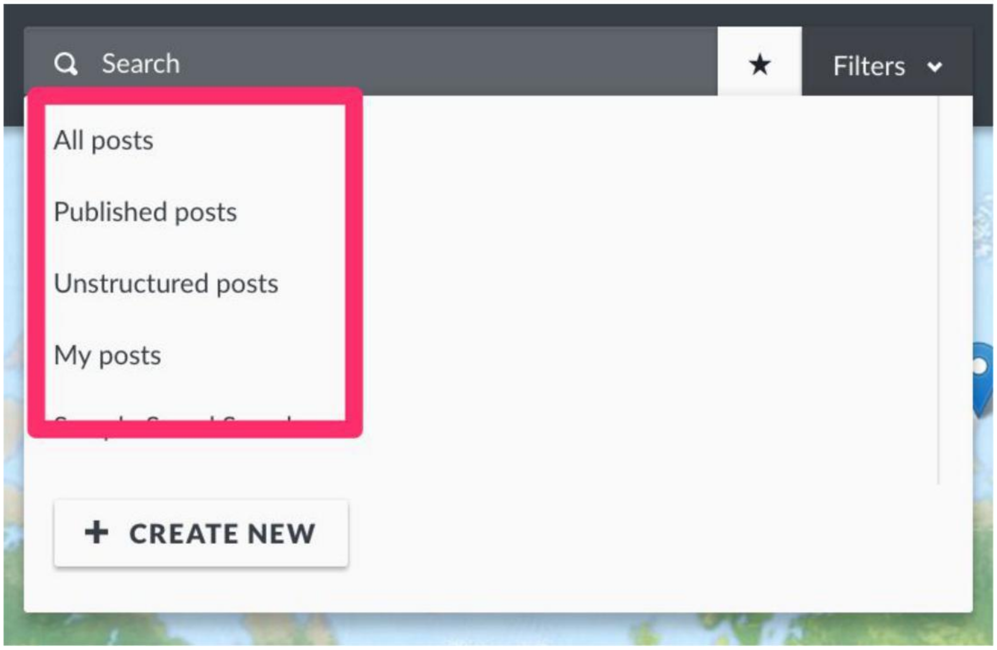
By default, every deployment has a set of four featured Saved Searches(read more in section 7.2 ~~of~~ this manual) from which you can view posts on your deployment, on the top menu bar.

These include:-

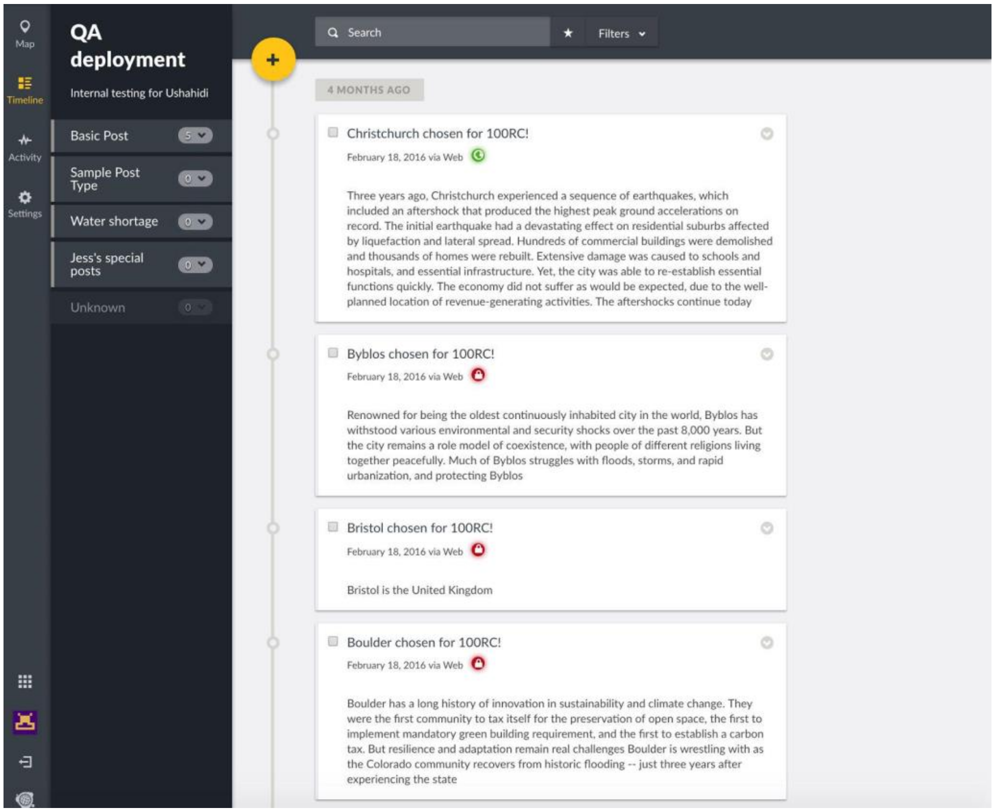
- ***All posts***:Lists all posts(structured and unstructured) that have come into your deployment
- ***Published Posts***:Lists all posts that have been made public on your deployment(i.e can be viewed by registered/non registered users on your deployment.
- ***Unknown Posts***:Lists all messages received from SMS, Email and Twitter

- ***My posts***:Lists all posts created by you as a user

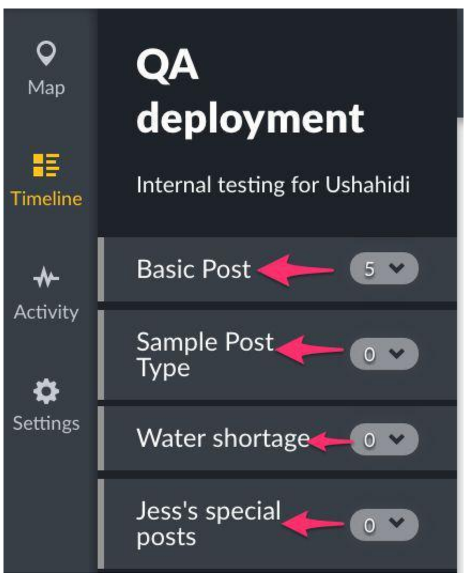




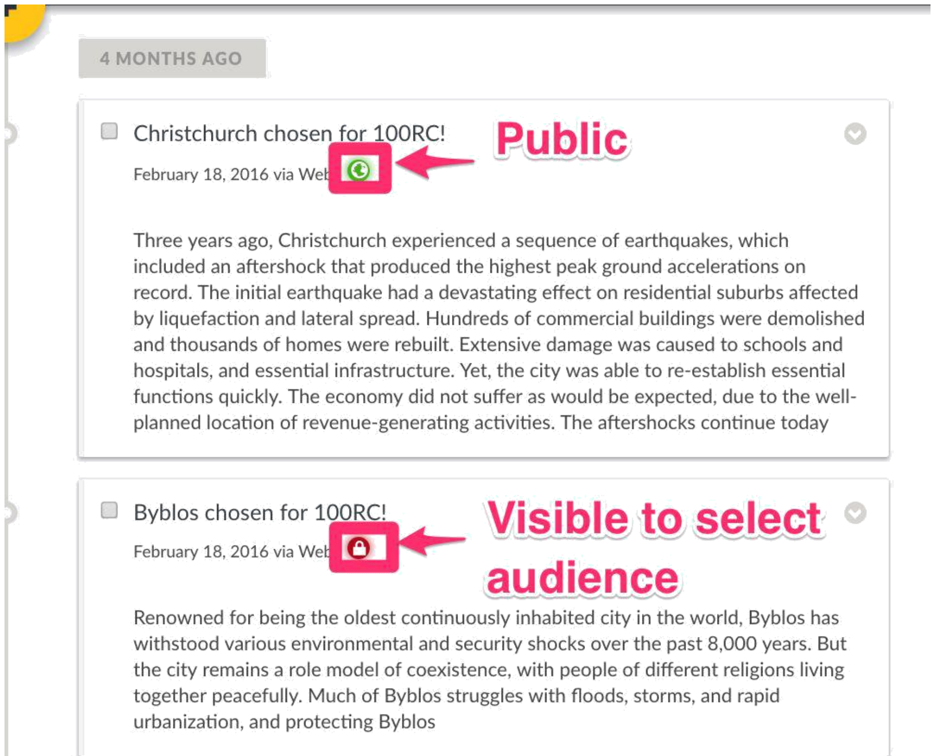
From this post list page, you should be able to see the following:-



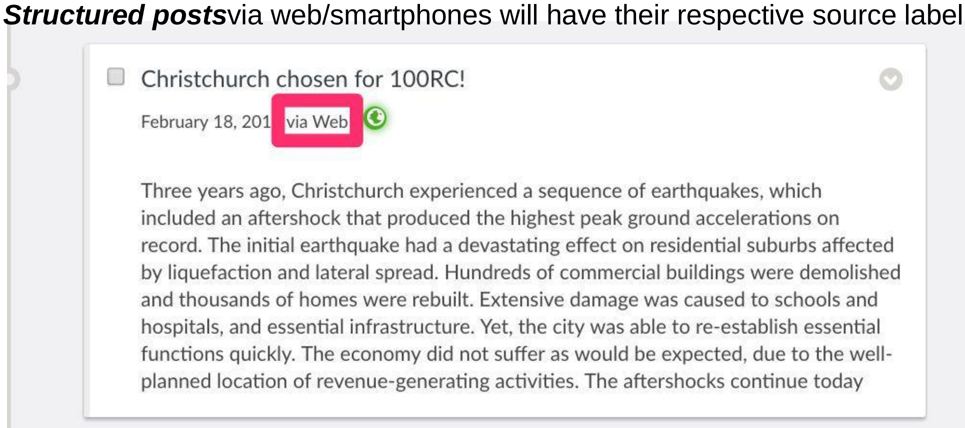
- A menu bar on the left with different survey types to filter the list from.



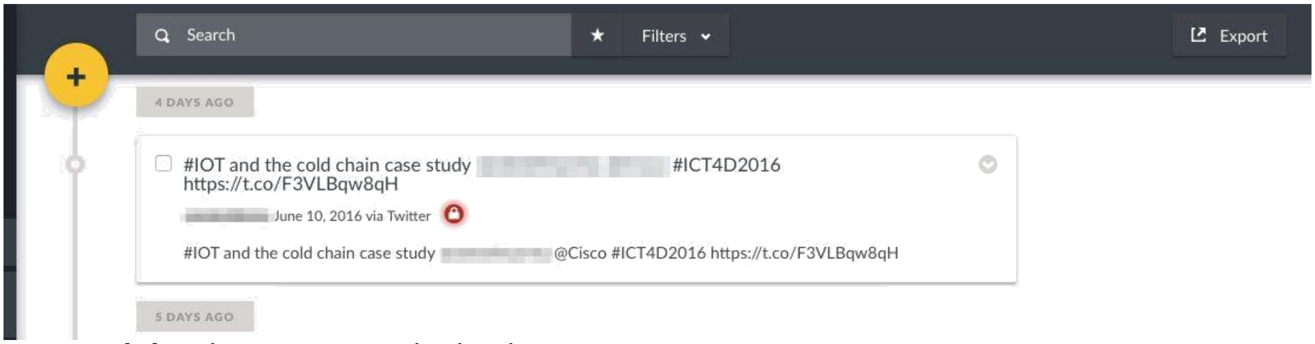
- **Post visibility Status:** You can tell if a post is public or only visible to a specific audience



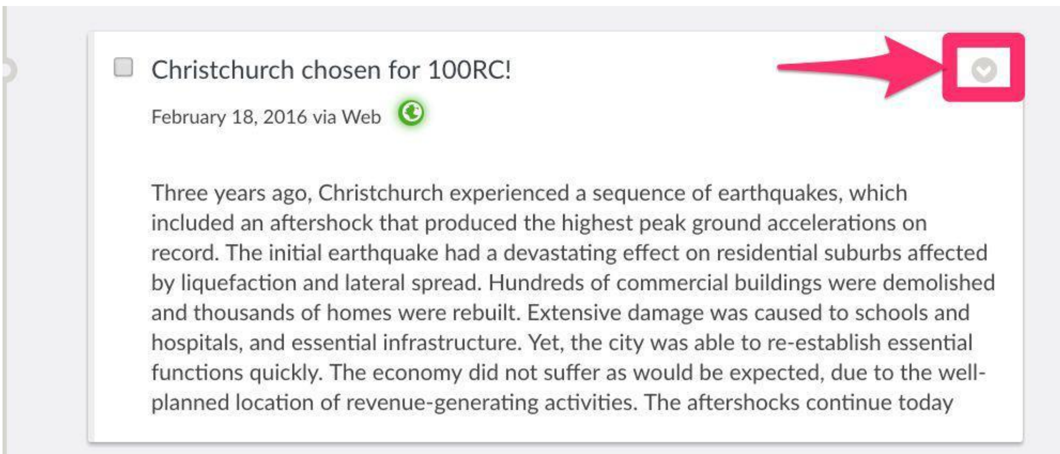
- **Post source** (is it from the Web, SMS, Email or Twitter?).
  - ***Structured posts***via web/smartphones will have their respective source label on them.



  - ***Unstructured posts***will have a label denoting their source, as seen below with this sample SMS message

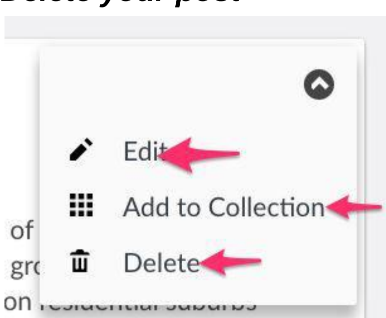


- ***Date and time*** the post was submitted
- ***Post description***
- If you're an admin/your user role permits, you'll should also see a small dropdown icon on the right hand corner of every post.

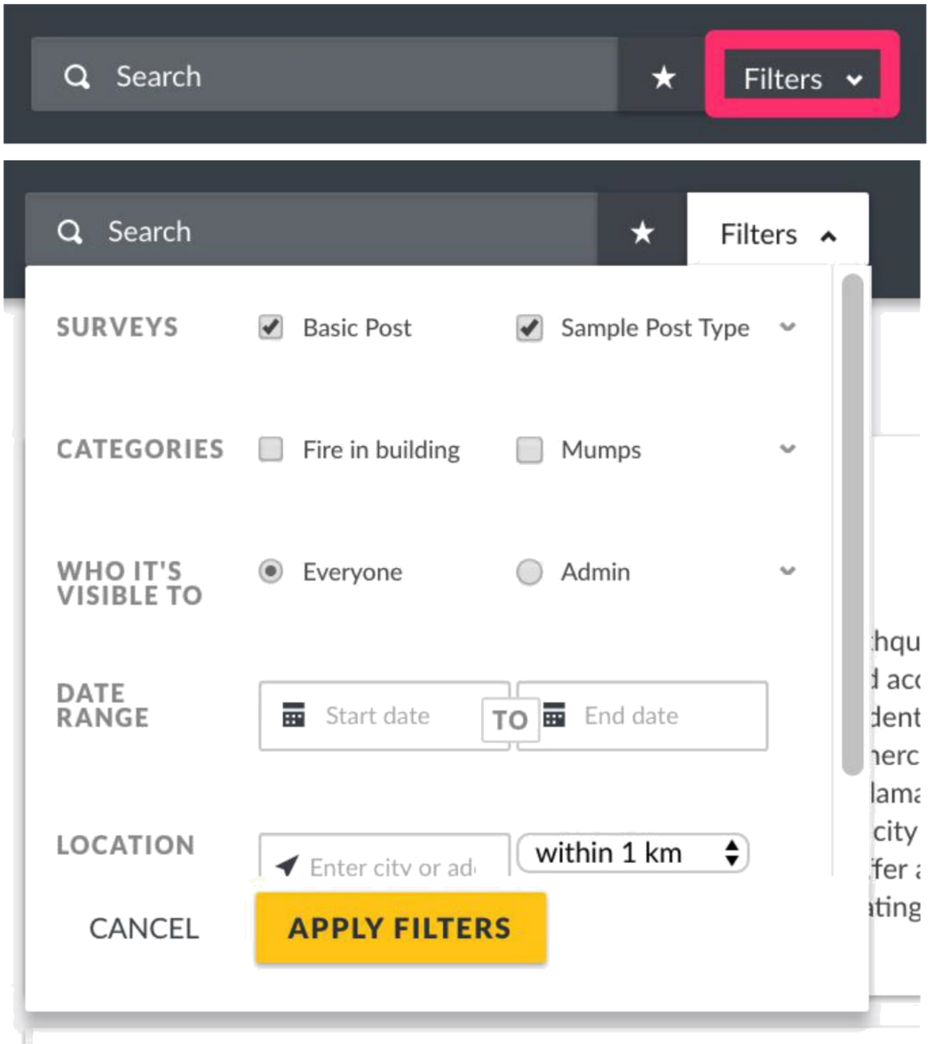


Clicking on it presents you with options to:-

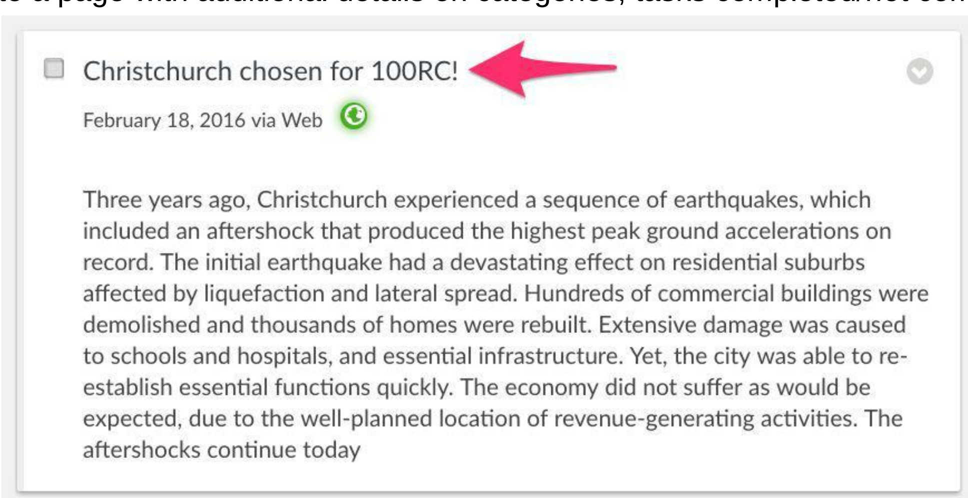
  - ***Edit your post***
  - ***Add your post to a collection*** (more on collections in Section 7.3 of this manual)
  - ***Delete your post***



- A ***search filter*** that allows you to filter reports by surveys, categories, who posts are visible to, date range, location, or user determined parameters

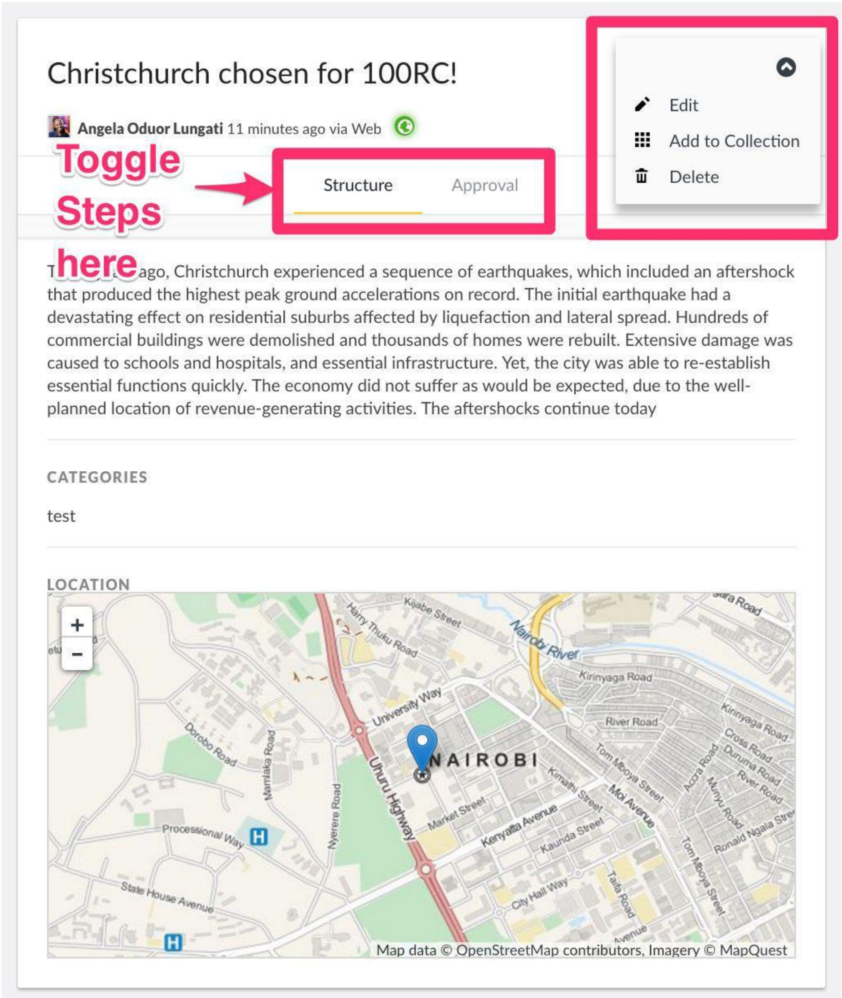


You can view individual report details by clicking on the Post Title link, which will redirect you to a page with additional details on categories, tasks completed/not completed for this post.



You can also opt to do the following from the individual report page.

- Edit the post
- Add the post to a collection
- Delete the post

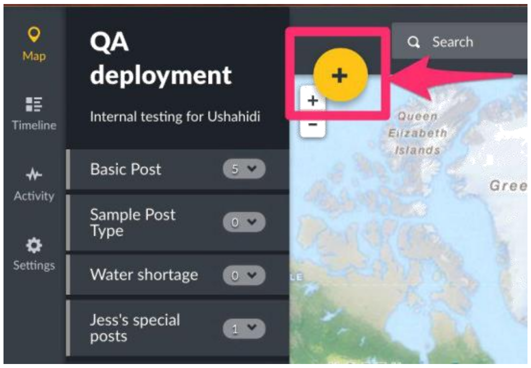


*Please note that information displayed to users on each of these pages is dependent on permissions granted to registered/non registered users by the deployment administrator e.g**Published posts**,**Unstructured posts** and **My posts,*** and menu bars allowing for editing and deletion*are only visible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

5.2 Adding Posts

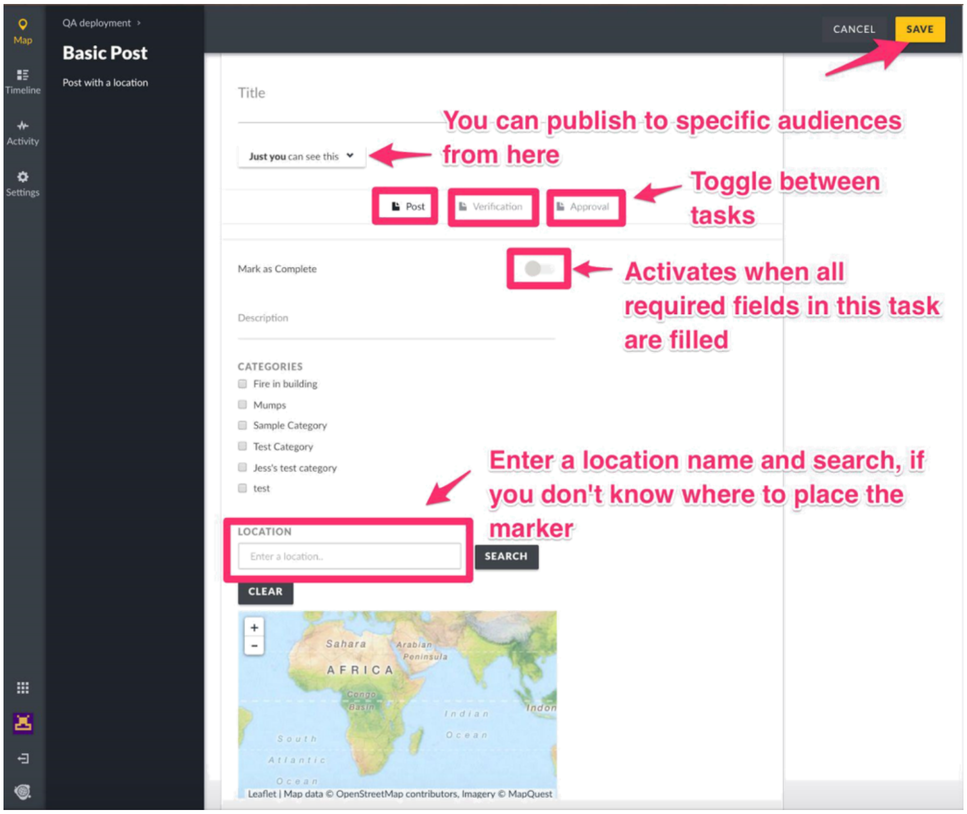
Registered/non registered users can create posts using the same process described below. For descriptive purposes, the post below has three tasks. To create a post,

- Click on the yellow add icon as shown below on your homepage**.**Ifyou're viewing any other page on this deployment, this ison will appear on the top left hand corner, just as on the homepage.

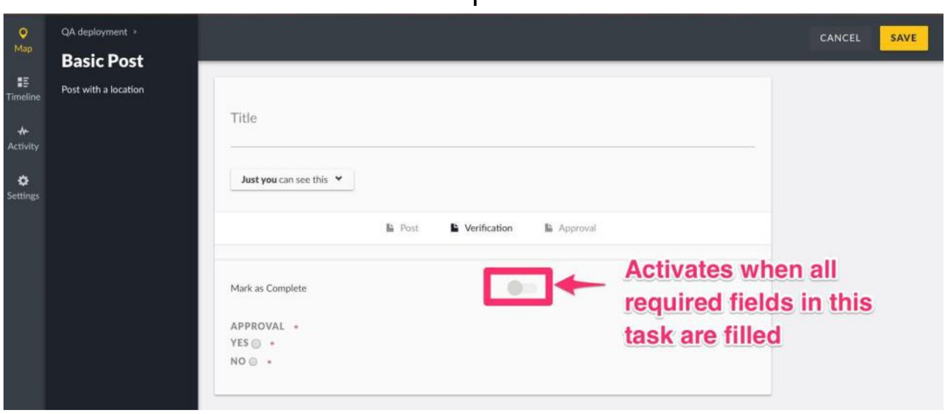


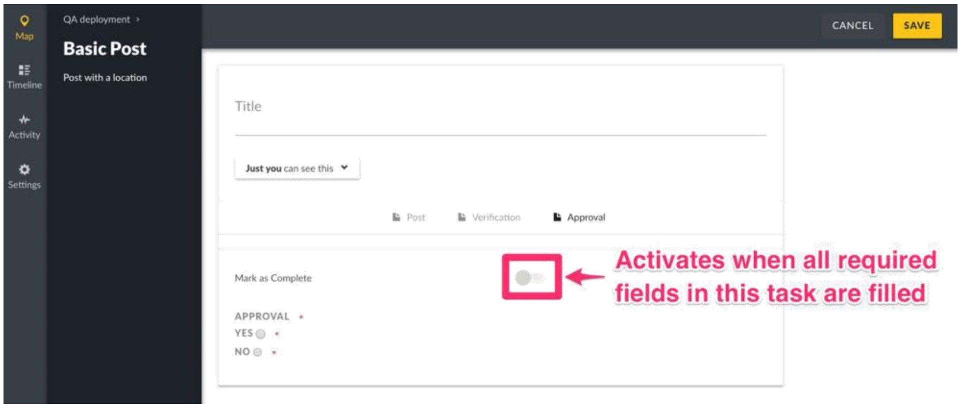
- In the event that you have multiple surveys on your deployment, you'll have to choose the survey from a list of all surveys available on your deployment.

- The survey chosen determines which fields will be filled out in each task(if multiple tasks exist). Make sure to fill out all fields with a red asterisk beside them in each task. You will not be able to save or publish your post before these fields are filled out.

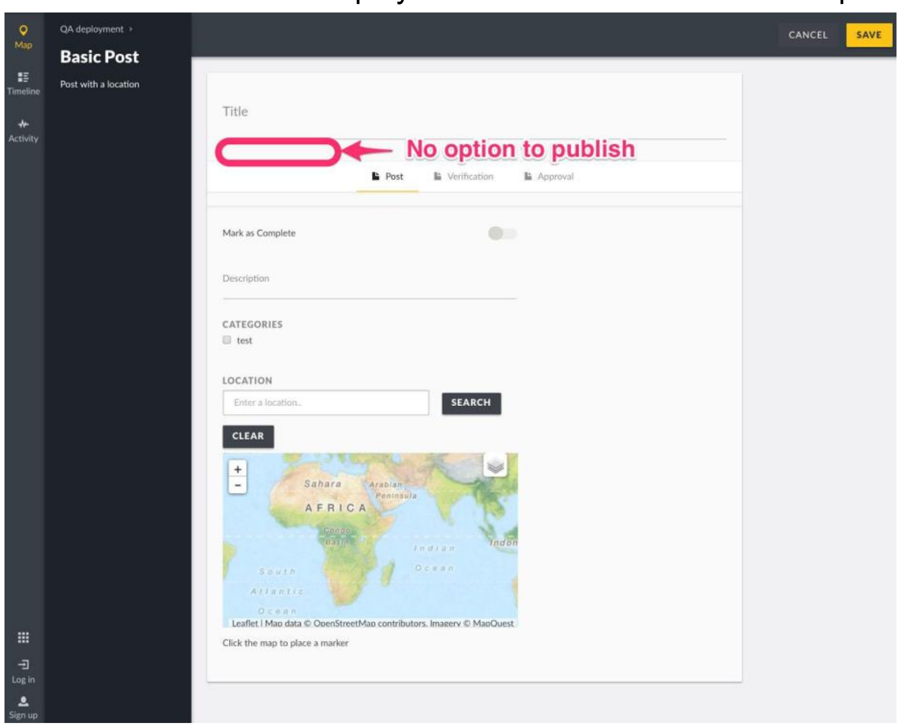


- Once you're done filling all required fields in a task, make sure to ***Mark as complete***. You'll notice that this option is disabled until all required fields in the task are complete. You should also note that you won't be able to save the post if there are required tasks that have not been marked as complete.





- If you're an admin, you should be able to set permissions on who will be able to view this post. The ***Just you can see this*** dropdown has a list of all custom roles created on your deployment to choose from, as well as the option to leave the post viewable by just you. Setting this option to "Everyone" will publish your post.
- When you're done adding content and completing tasks that are required, click on ***Save.***
    - If you're a non registered user or a user without publish permissions, your post will be submitted to the deployment's admin for review before publishing.



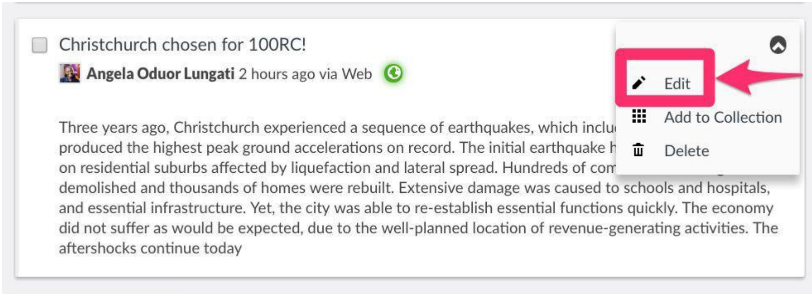
5.3 Editing Posts

The post editing function is only available to admins or registered users with adequate permissions.

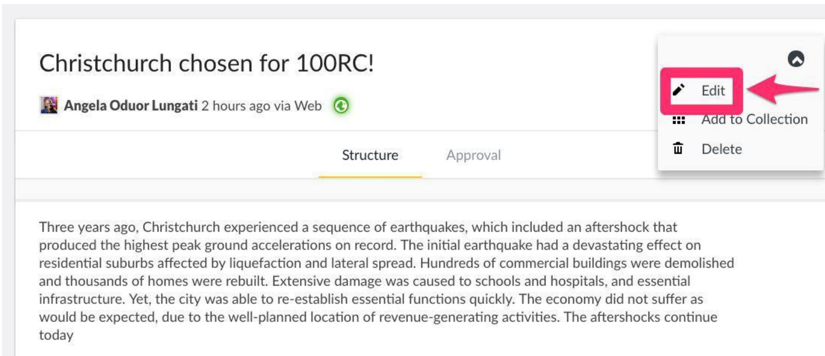
This means that non registered users cannot edit posts.
This feature is particularly useful when creating posts out of ***unstructured posts*** (messages from SMS, Email, Twitter)

To edit a post,

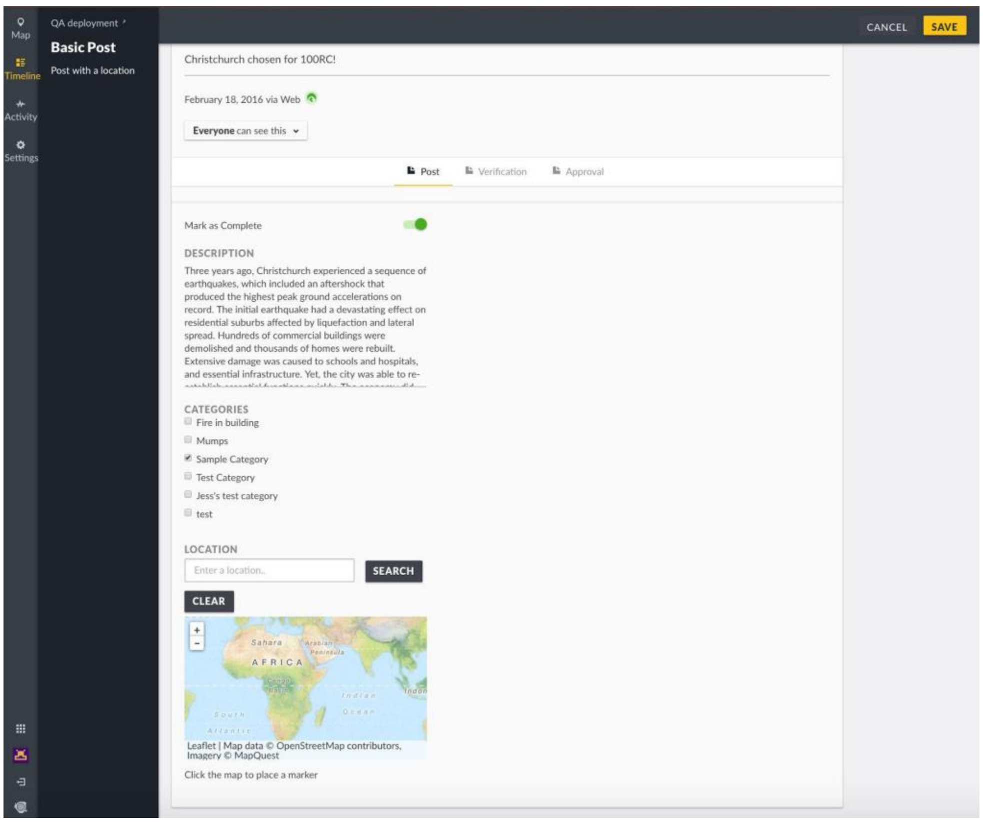
- Click on ***Edit*** from:-
  - The Posts List page



  - An individual post's view page



- This will take you to the post creation page, where you'll be able to edit any of the content.



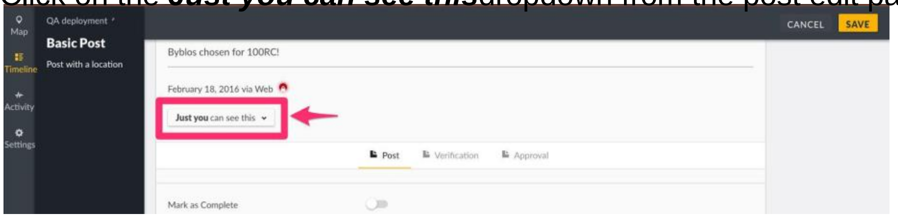
● When done making changes, click on ***Save***.

5.4 Publishing Posts

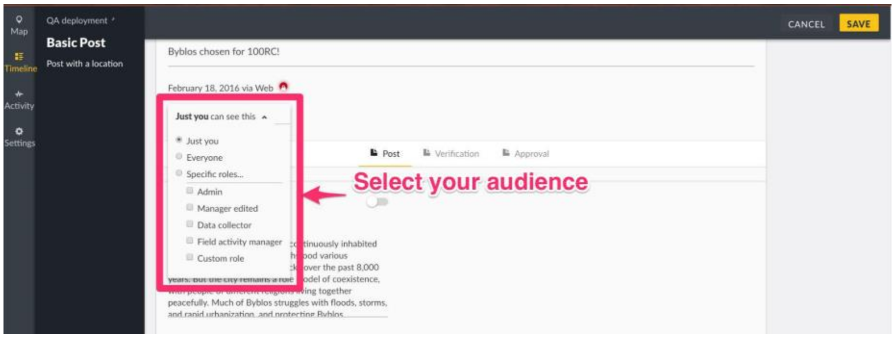
The ability to publish posts is only available to admins or registered users with adequate permissions. This means that non registered users cannot publish posts. Posts submitted by non registered users have to be moderated.

To publish a post,

● Click on the ***Just you can see this*** dropdown from the post edit page



● Select the audience you would like to publish this post to. You can choose to leave it viewable by just you, or to custom roles as defined on your deployment. Selecting Everyone sets this post as viewable to the entire public.



● Then, click on ***Save***.

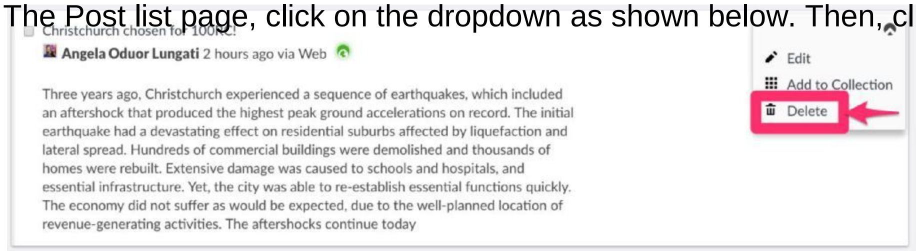
5.5 Deleting Posts

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.

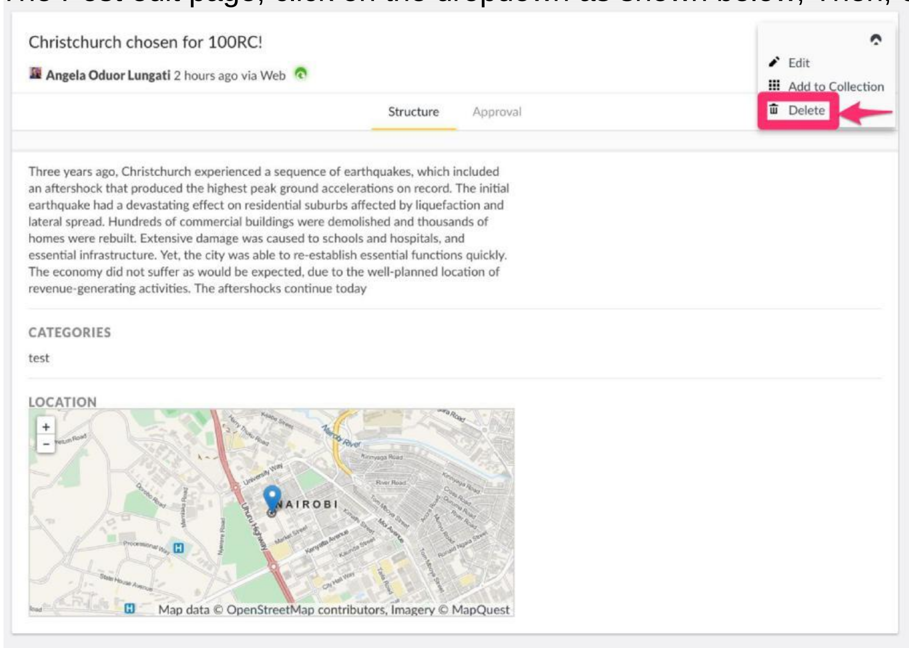
You can select multiple posts to delete at a time from the post list page, or delete individual posts from the list page, or individual post view page .

To delete

- An individual post from
    - The Post list page, click on the dropdown as shown below. Then, click on ***Delete***

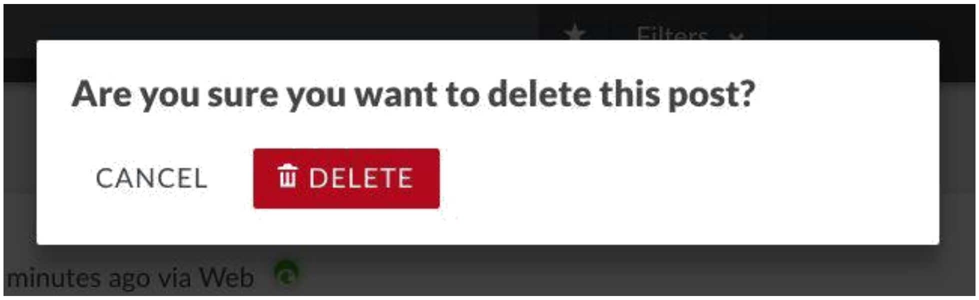


    - The Post edit page, click on the dropdown as shown below, Then, click on ***Delete***

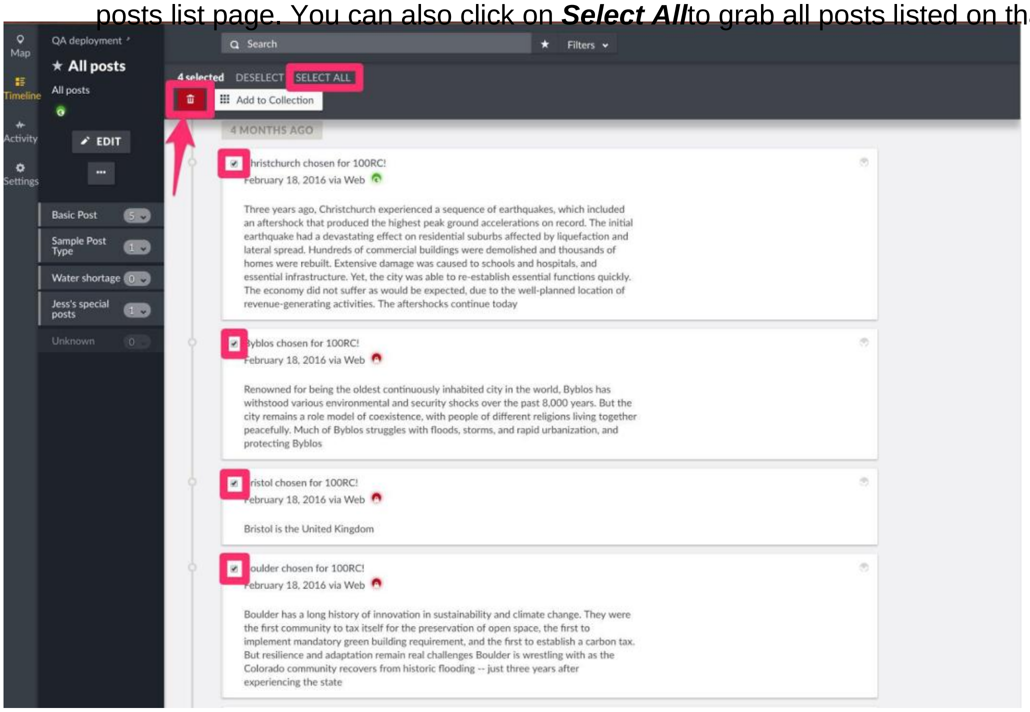


A pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete your post(s)

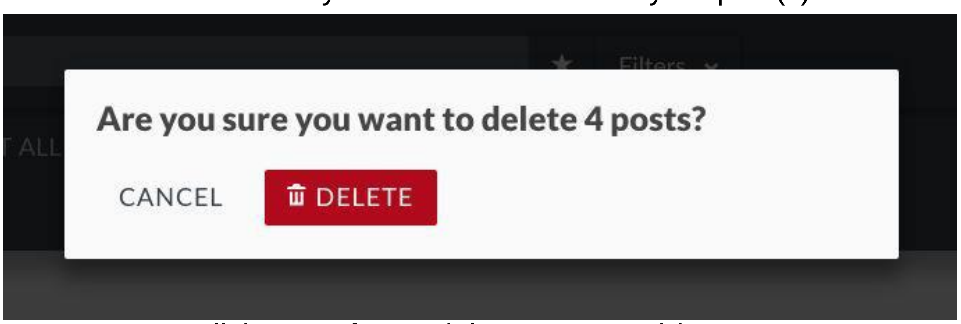
- Click on ***Delete***to delete your post(s)
- If you'd like to cancel the post deletion process, click on ***Cancel***



- Multiple posts from the post lists page
  - 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***

5.6 Importing Data

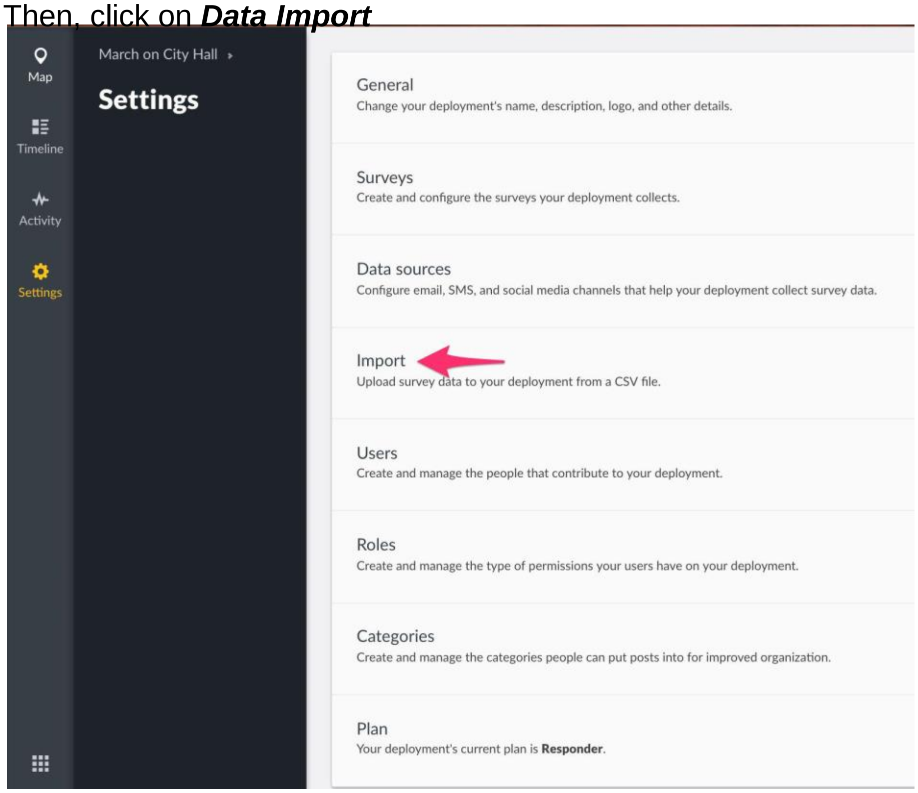
The ***Data Import*** feature allows you to import posts into the platform. It is particularly useful in cases where:-

- 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

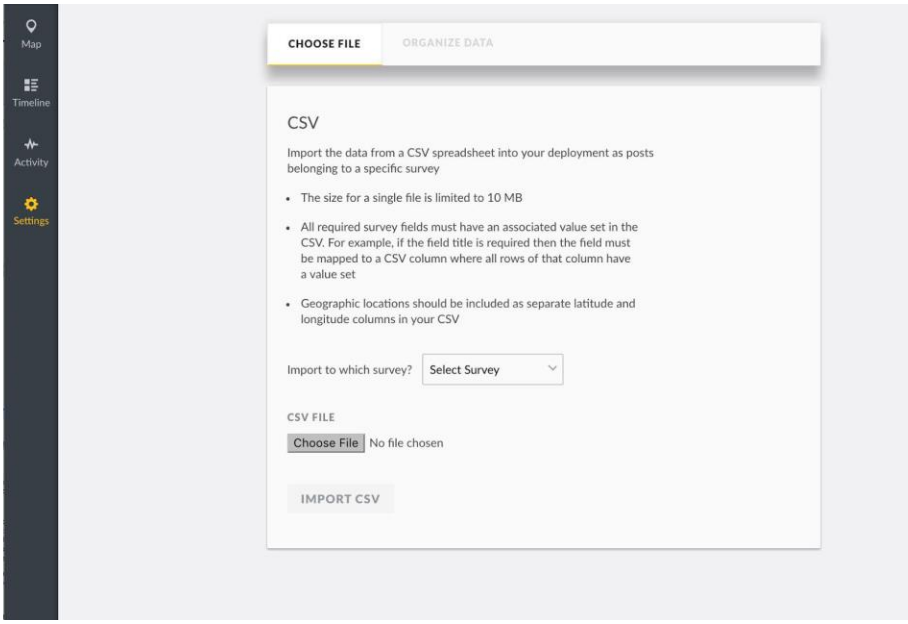
To import a CSV File,

- 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.

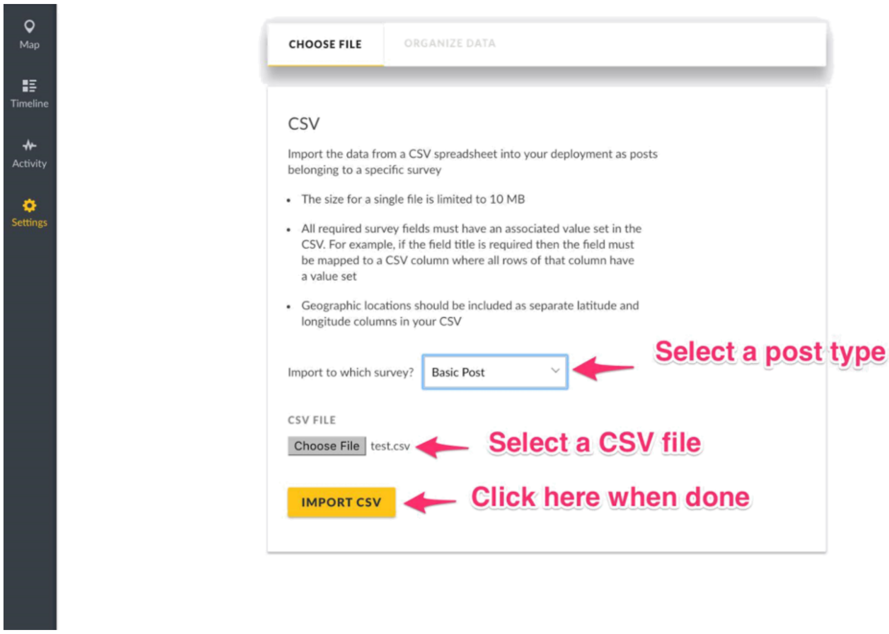


- Select a survey you’d like to match the data you’re uploading to. This field is populated with a list of all existing surveys on your deployment.
- Choose the CSV file you would like to upload. **Make sure that**
  - You are uploading a file in CSV format. Any other file formats are not accepted
  - 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.

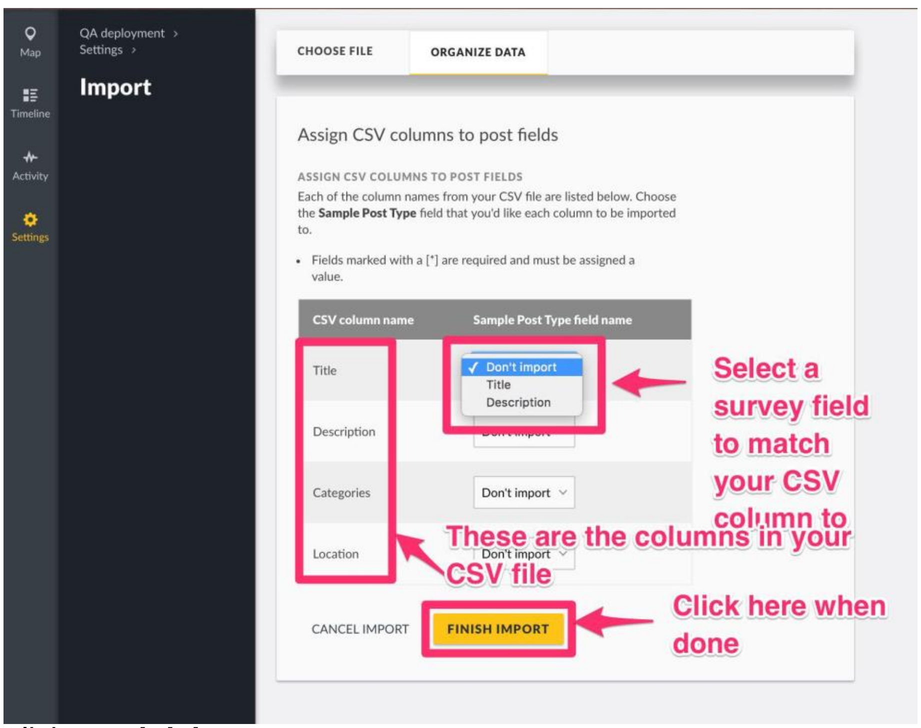
    See below for a sample CSV file

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 ***Import CSV***.



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



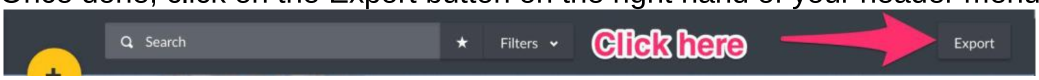
- Click on ***Finish Import.***
- If successfully uploaded, You'll be redirected to the ***All posts***page, with your newly uploaded posts added to the list of previously existing posts.
- To publish your newly imported posts, make sure to mark the any tasks that are required complete on each individual post as listed.

5.7 Exporting Data

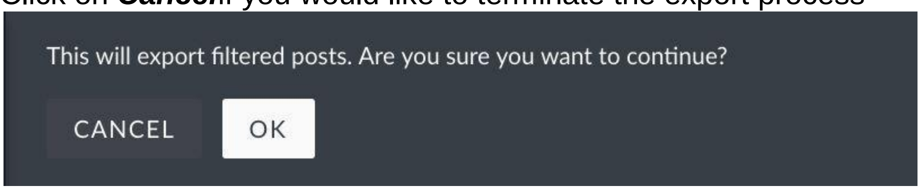
The platform now allows for data export, enabling you to download posts from the platform in CSV format. You can download posts from your map mode, timeline mode, saved searches and collections you have access to, or based on custom criteria(search filters set by you as a user).

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 Export button on the right hand of your header menu



- 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

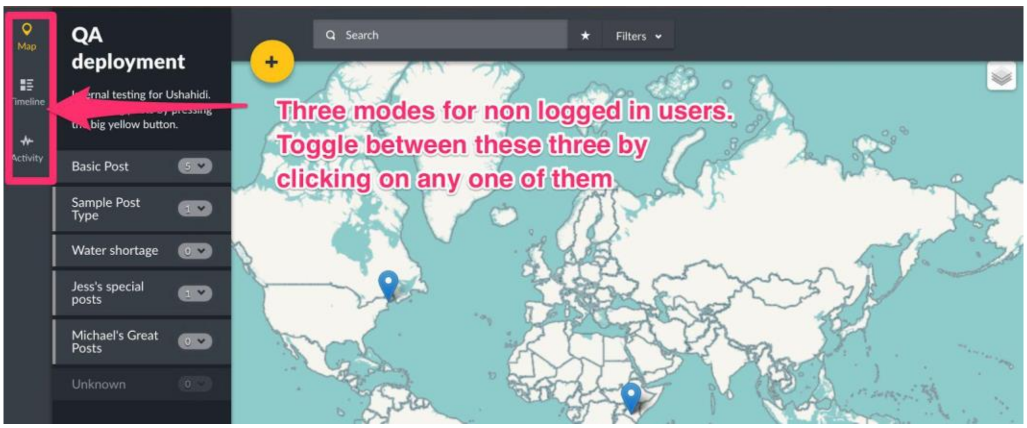
6. Modes for visualizing and managing data on your deployment

The Ushahidi platform provides you to 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.

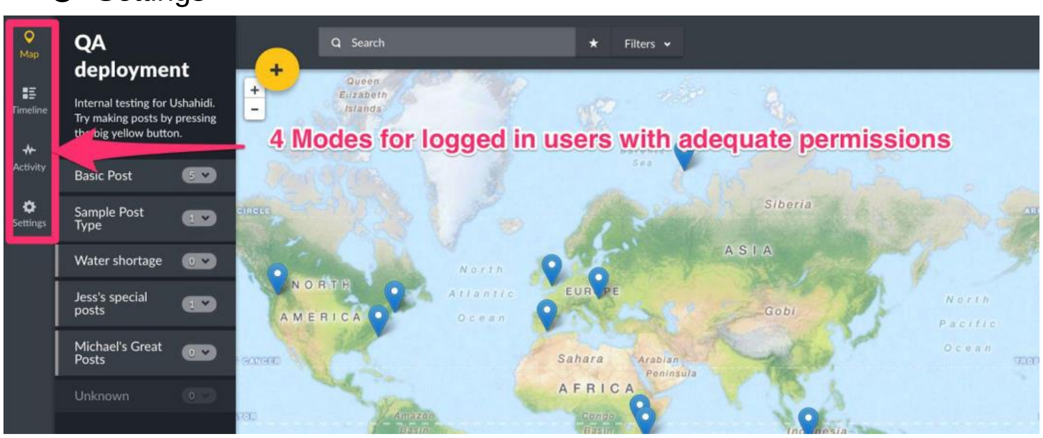
Ordinary viewers of a deployment can access three different modes as shown below:-

- Map
- Timeline
- Activity



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

- Map
- Timeline
- Activity
- Settings

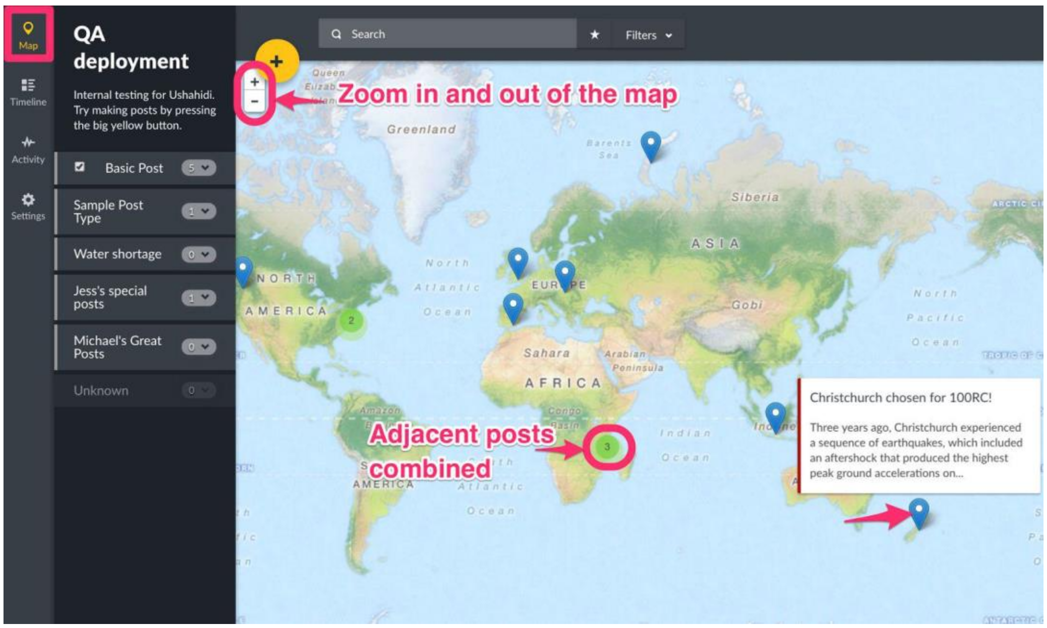


Your ushahidi deployment defaults to the map mode for anyone who visits your homepage(as illustrated above). To change your current mode, select any of the options provided to you from the menu on your left.

6.1 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 (Section 3.3of 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.

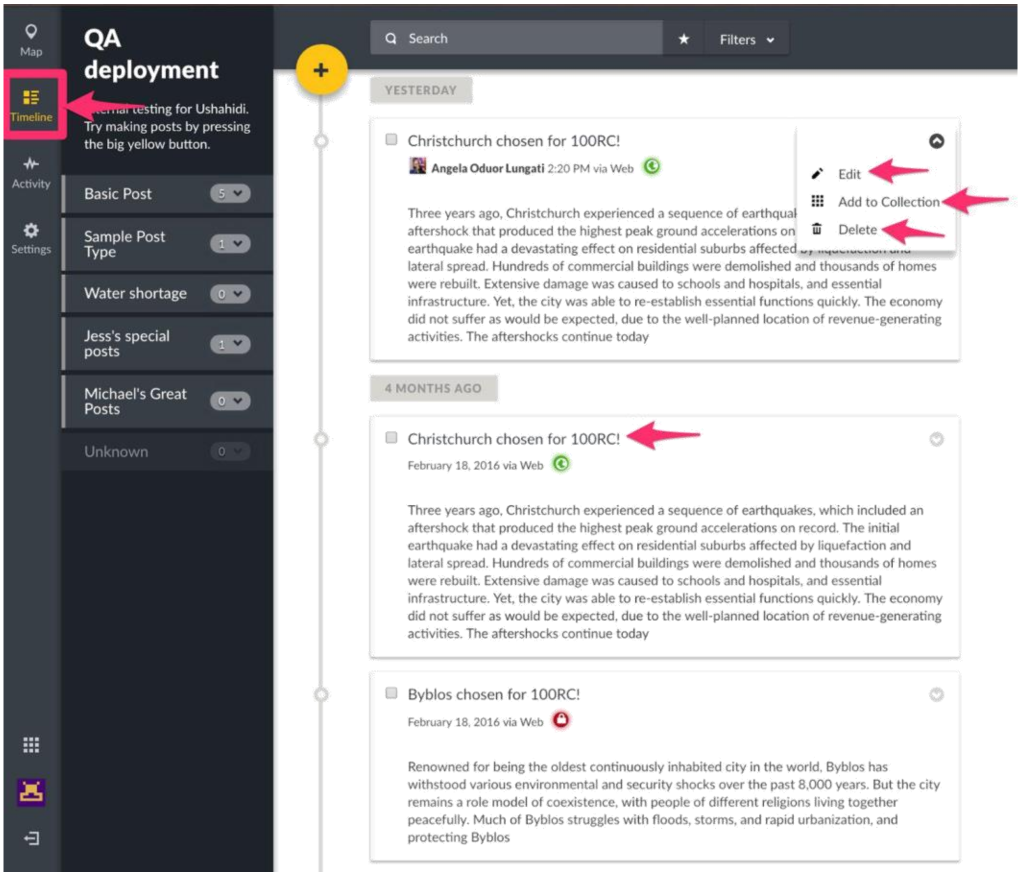


6.2 Timeline Mode

This mode allows you to view posts coming into your deployment as a chronological list of events over time.

To access this mode,

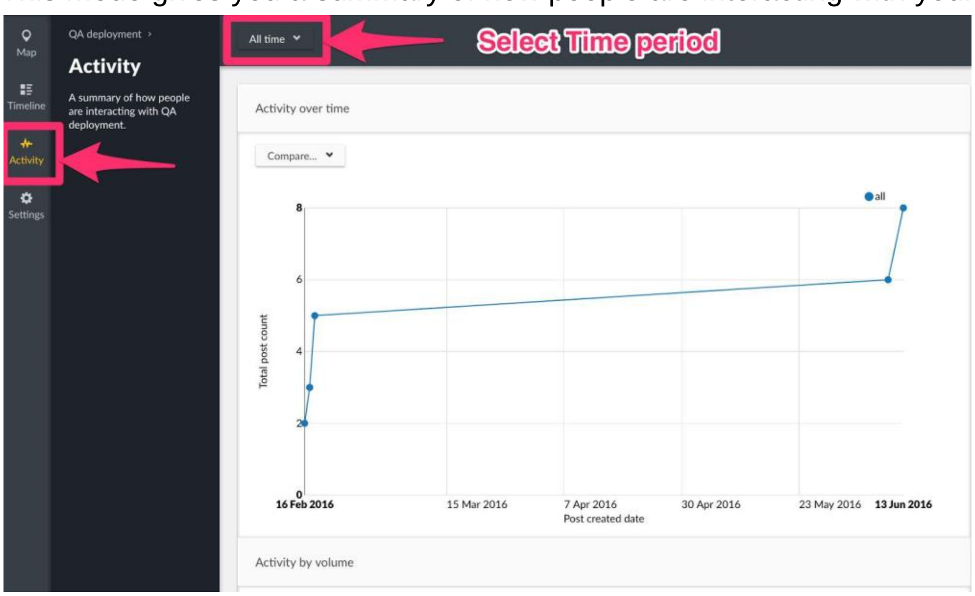
- Click on ***Timeline***
- From here, you should be able to:-
  - Edit posts
  - Add posts to collections
  - Delete posts
  - Navigate to view individual posts

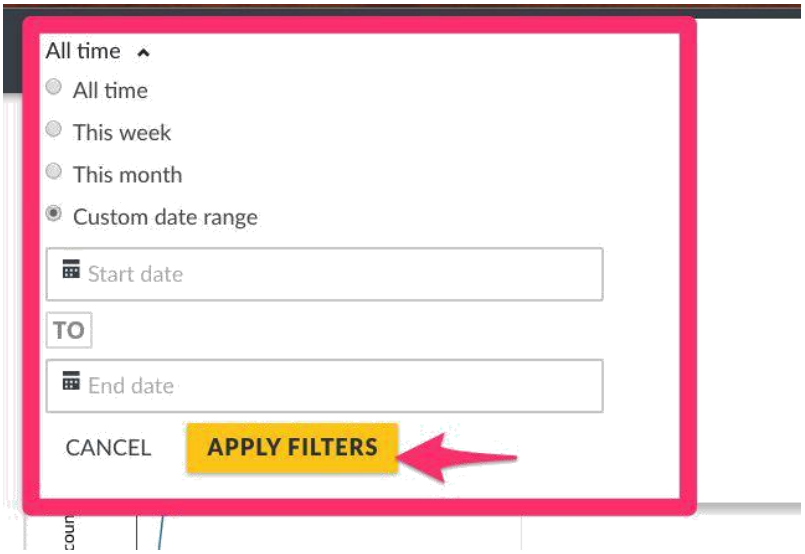


NB: Data displayed on this page is dependent on permissions granted to the user viewing this page

6.3 Activity Mode

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





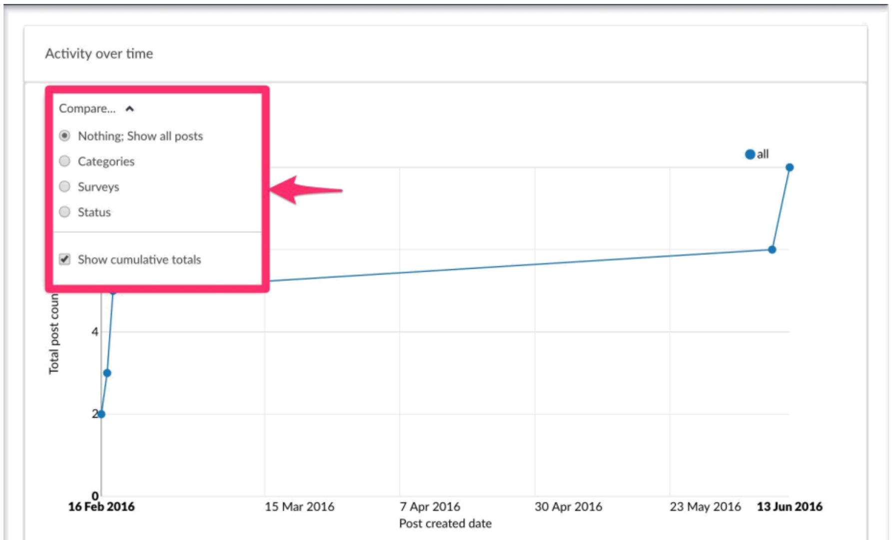
You can compare

- ***Activity over time***

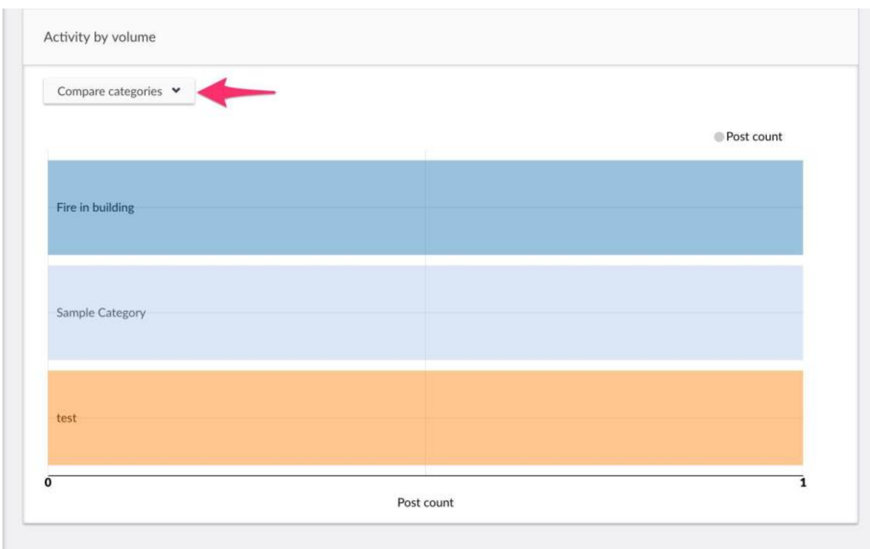
You can filter post count in a line chart over time by:-

- ***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.

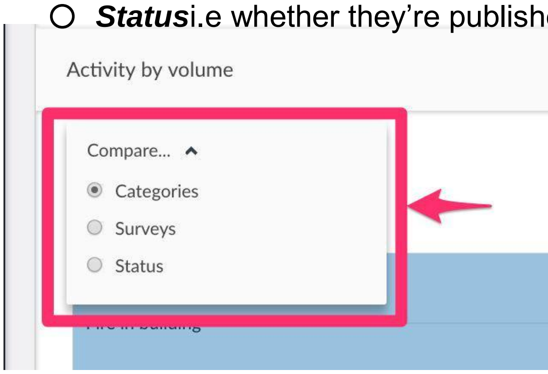


- ***Activity by Volume***



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

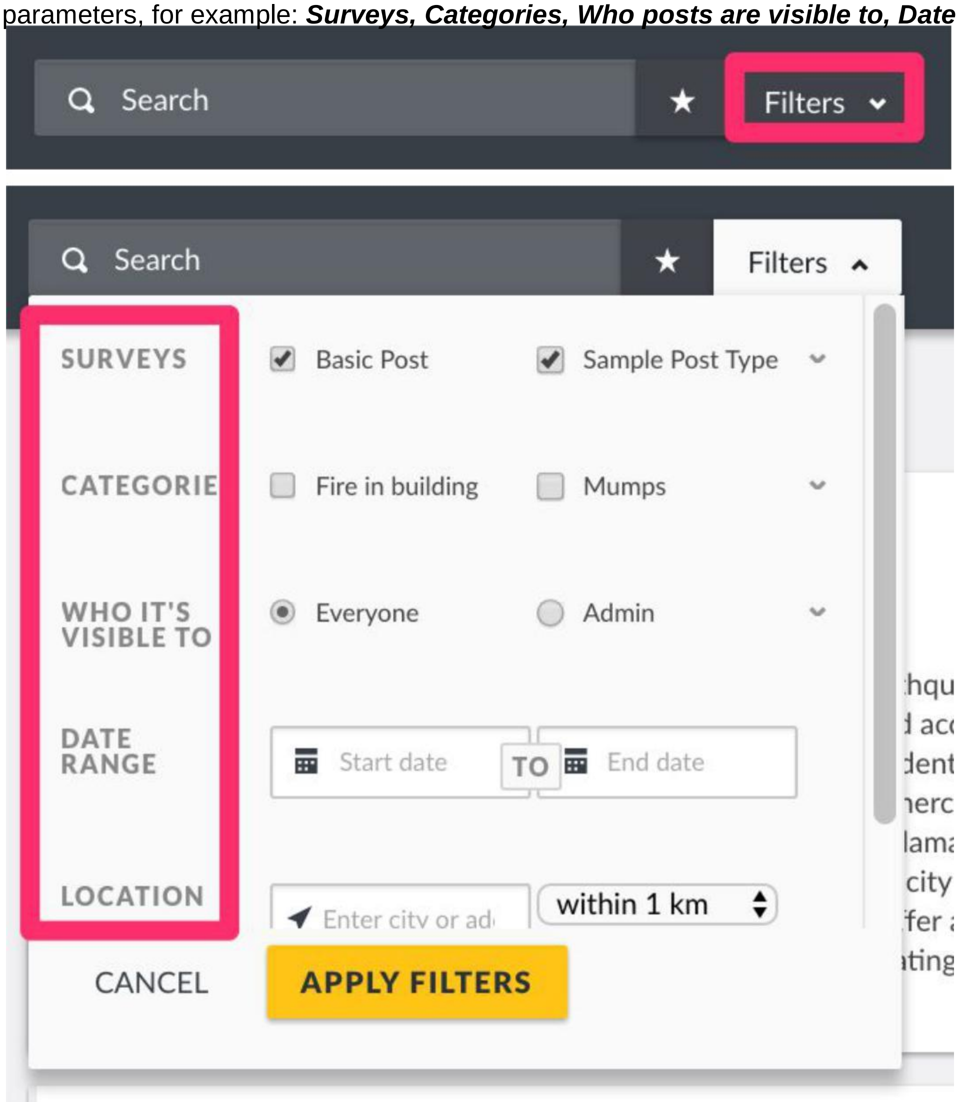
- ***Categories*** that the posts belong to
- ***Surveys*** that the posts were submitted to
- ***Status*** i.e whether they're published or not



7. Analysing Data on your deployment

7.1 Filters

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, Who posts are visible to, Date Ranges, and Location.***



Filters are additive, so you can apply as many as you would like. This search filter is available on all pages.

7.2 Saved Searches

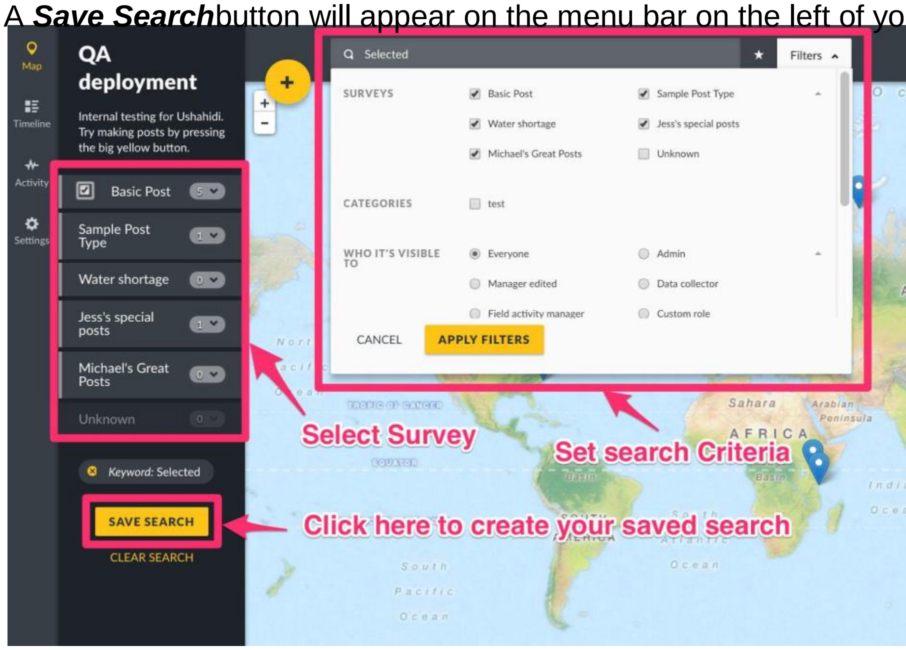
Saved searches are dynamic groupings of posts that match parameters chosen in filters. Saved searches are dynamic because as new posts are added that fit the search criteria, they will show in the saved search.

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

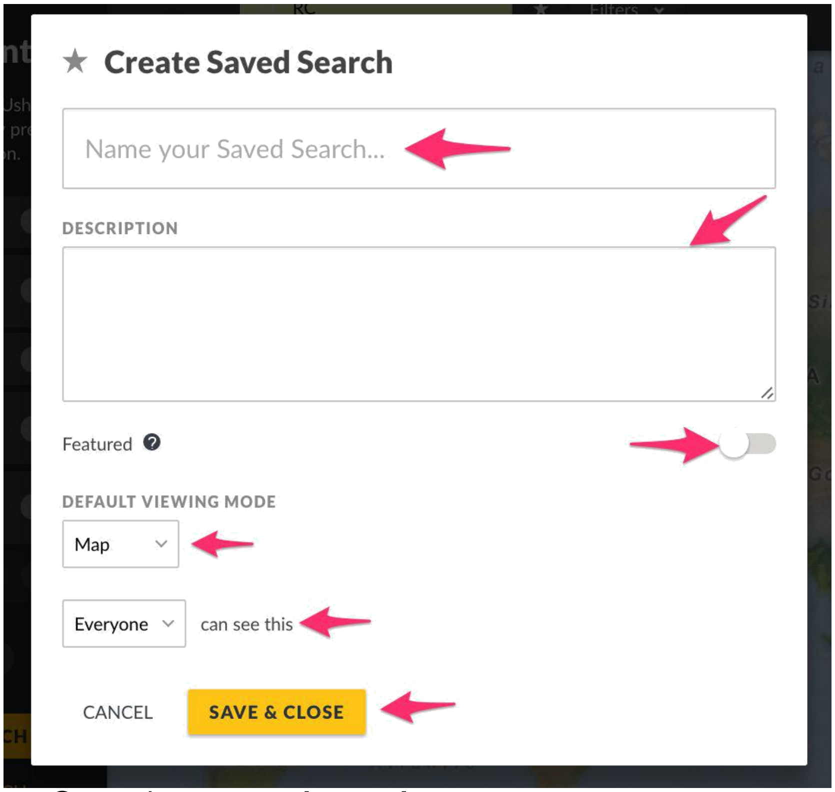
7.2.1 Creating a saved search

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 menu bar on the left of your screen.



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



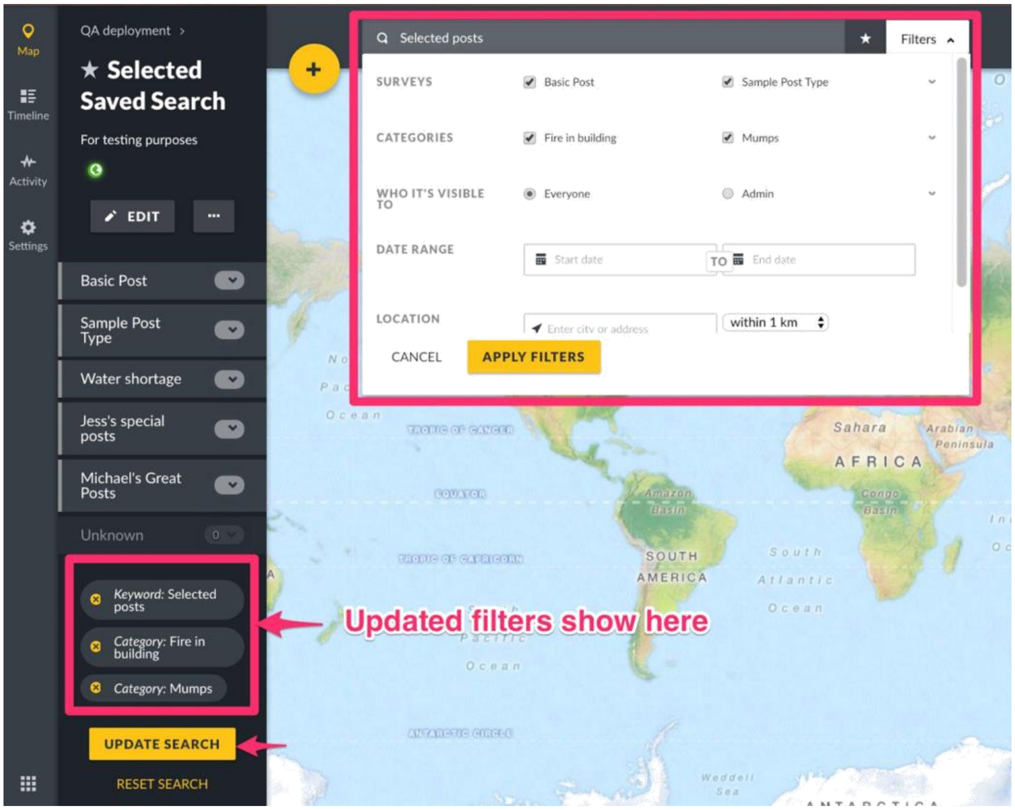
- Assign a ***saved search name***
- Provide a ***description***
- Set the **audience**allowed to see this saved search
- Set the **default viewing mode**for this saved search(choosing between Map, Timeline or Activity). This is the view that a user will see when they first arrive at this saved search
- 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.

7.2.2 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.

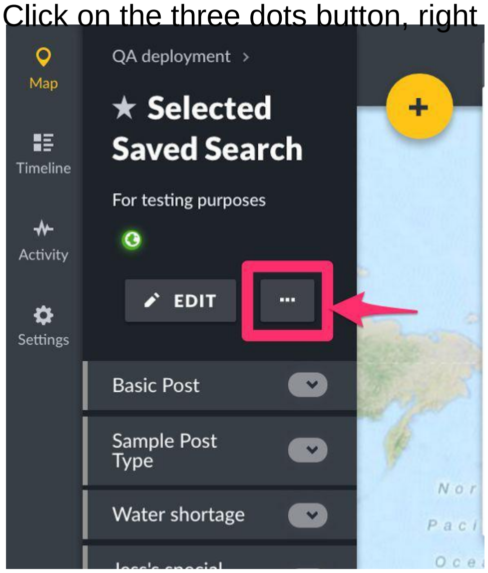
- Set your parameters on the search bar by either typing or selecting options from the search
- An ***Update Search***button will appear on the menu bar on the left of your screen. Click on it.



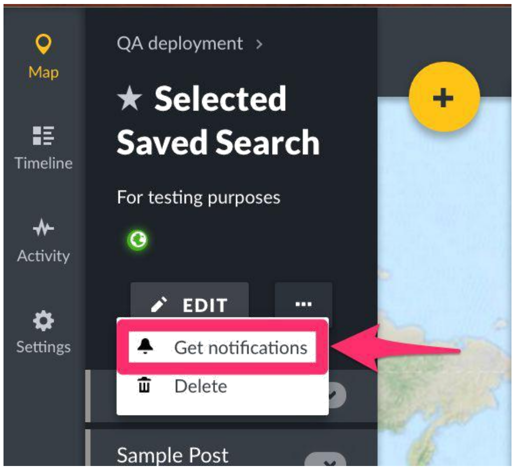
7.2.3 Adding a notification to a saved search

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,

- Click on the 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***

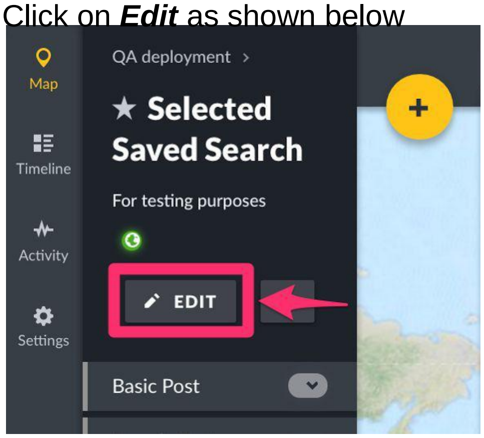


- You can turn off notifications for this saved search using the same process described above.

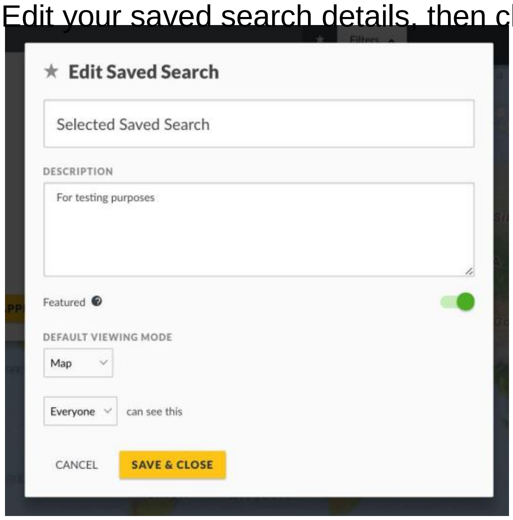
7.2.4 Editing a saved search

To edit a saved search,

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



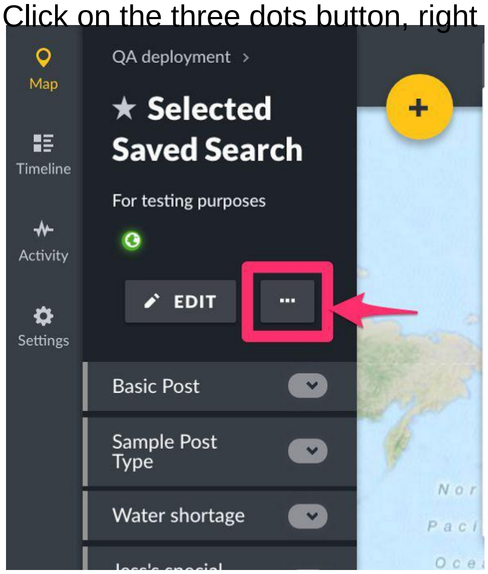
- Edit your saved search details, then click on***Save&Close***



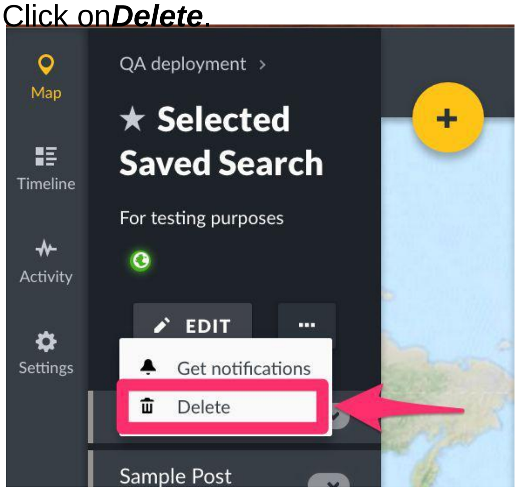
7.2.5 Deleting a saved search

To delete a saved search,

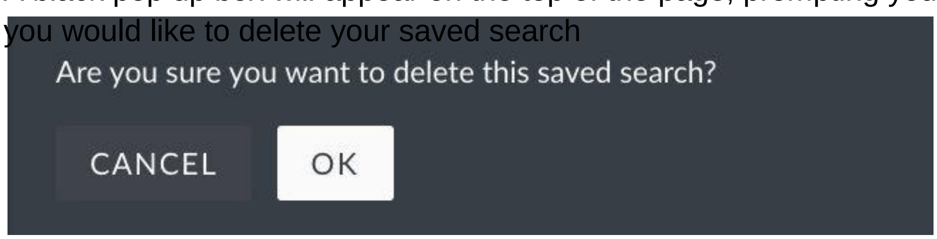
- Click on the saved search you would like to delete
- Click on the three dots button, right next to the ***Edit*** button.



- Click on ***Delete***.



- A black 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***

7.3 Collections

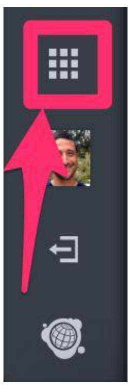
A “Collection” is a manually-curated grouping of posts. It is not dynamic, meaning the posts within it do not change unless a you manually update them.

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

7.3.1 Creating new collections

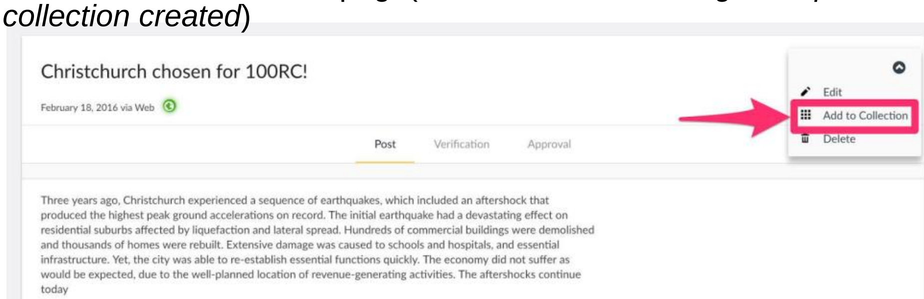
To create a new collection,

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

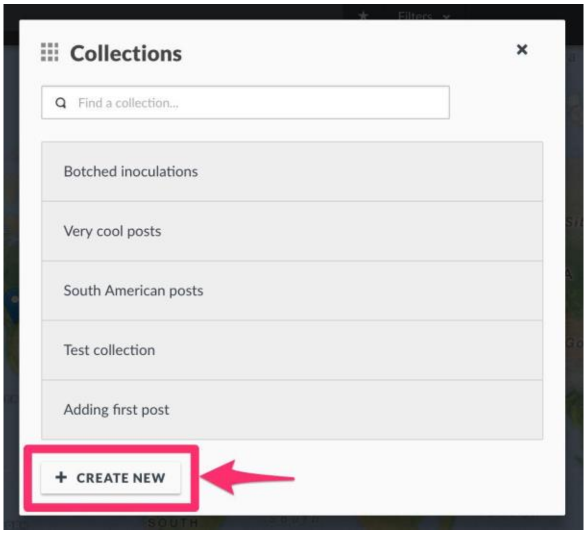


  - The Posts List page on the menu adjacent to each post on the right(*note that this will assign this post to the new collection created*)

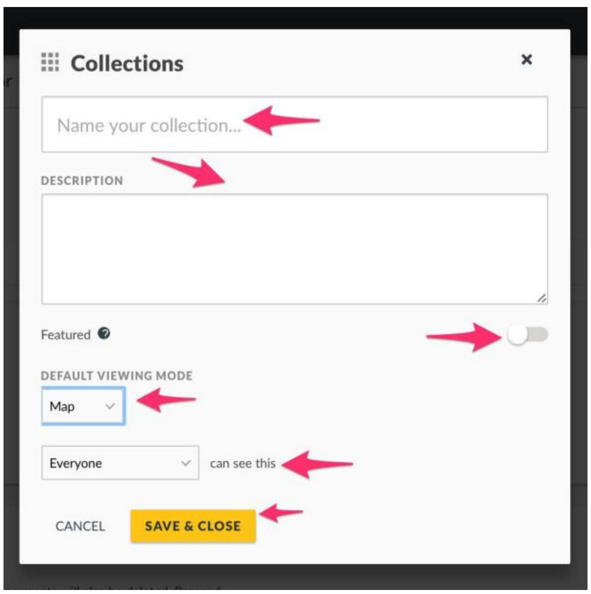
  - The individual Post view page(*note that this will assign this post to the new collection created*)



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



- Then, fill in the following details:-

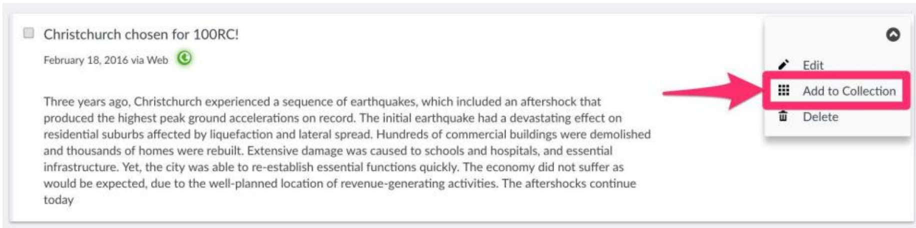


  - Assign a ***Collection name***
  - Provide a ***description***
  - Set the **audience** allowed to see this collection
  - Set the **default viewing mode** for this collection (choosing between Map, Activity, or Timeline). This is the view that a user will see when they first arrive at this collection
  - 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***

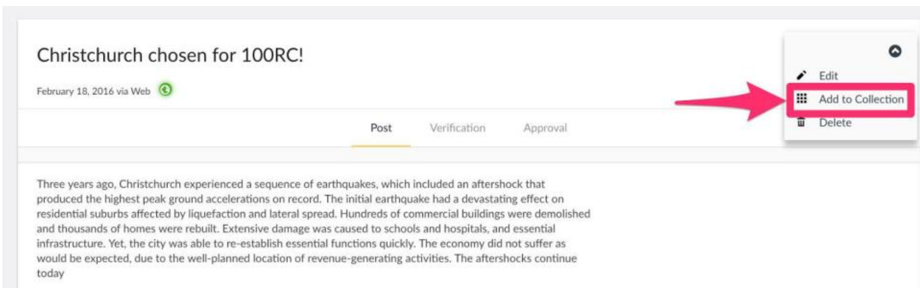
7.3.2 Adding Posts to collections

You can add a post to a collection from:-

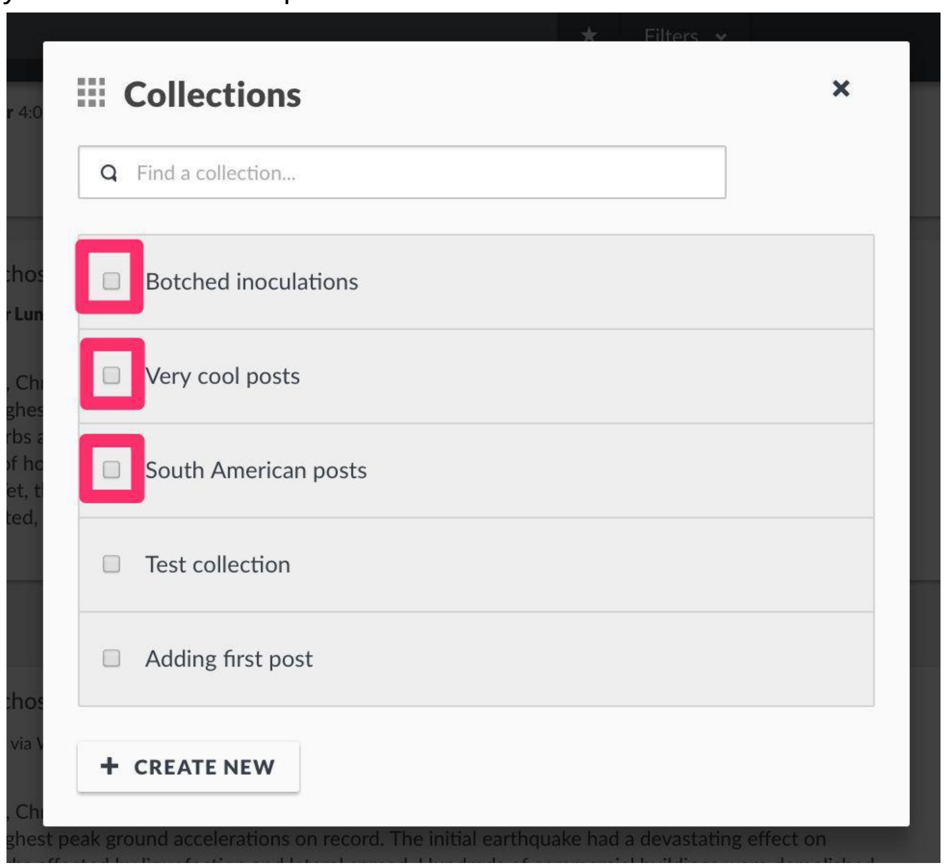
- The Posts List page on the menu adjacent to each post on the right



- The individual Post view page



- 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.

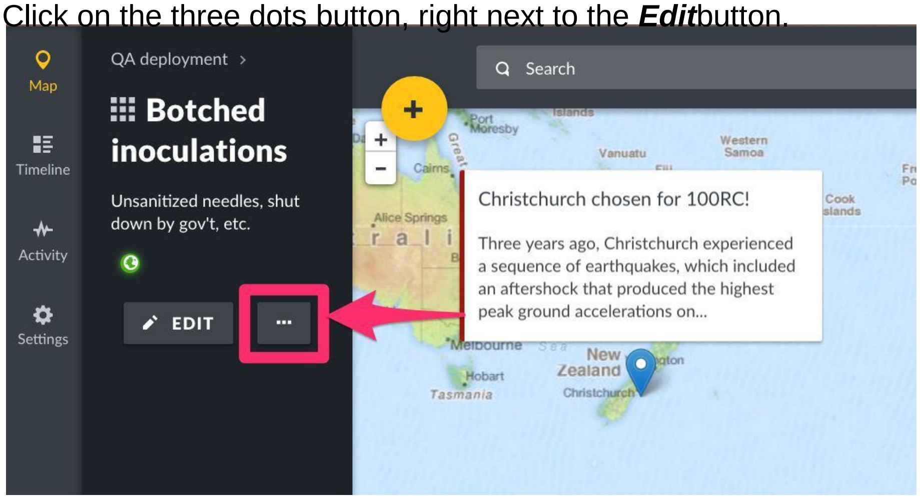


- You can add a post to multiple collection, so tick all checkboxes that apply.
- You can also create a new collection to add the post to from these two pages. Simply click on ***Create New*** from within this dropdown as described in the Creating new collections (section 7.3.1)of this manual

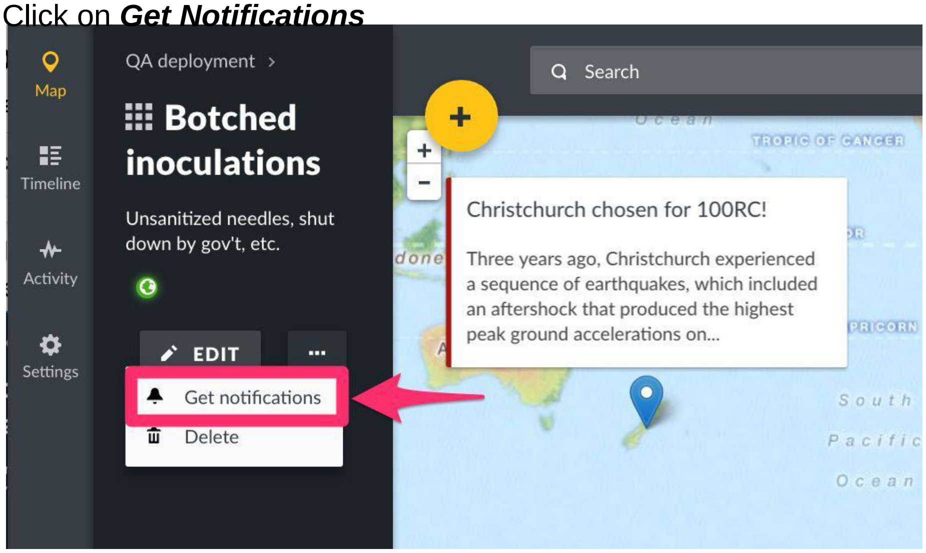
7.3.3 Adding notifications to collections

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***

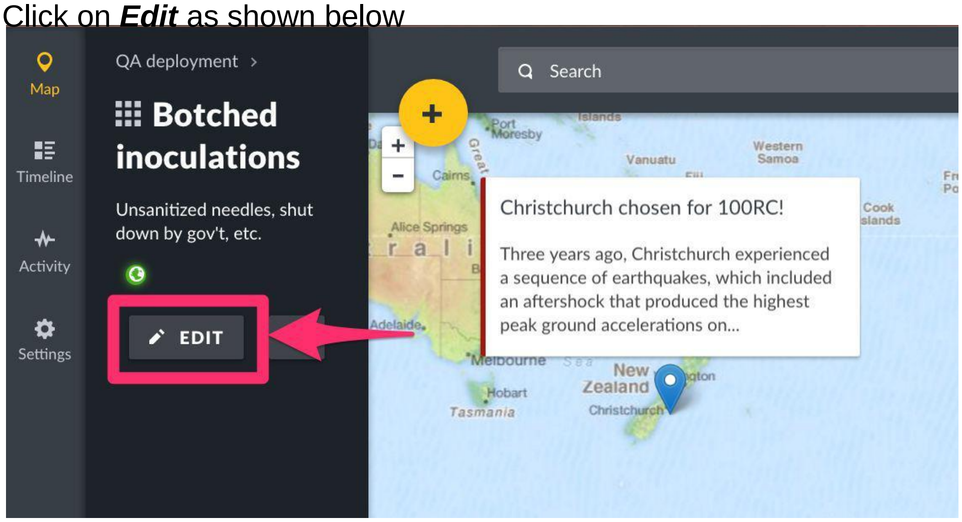


- You can turn off notifications for this collection using the same process described above.

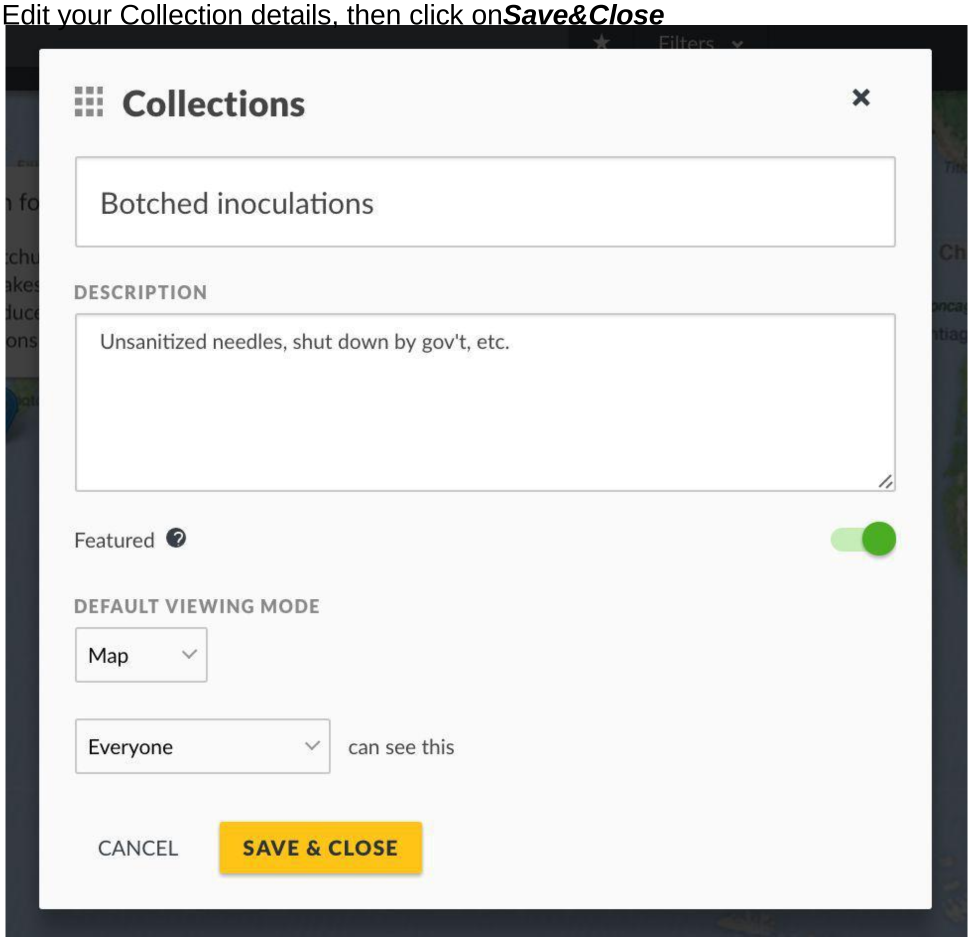
7.3.4 Editing Collections

To edit a Collection,

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



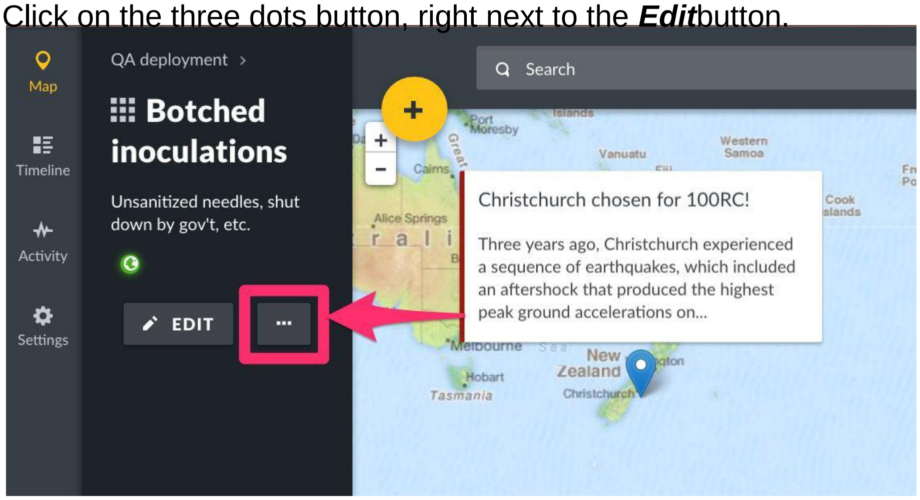
- Edit your Collection details, then click on***Save&Close***



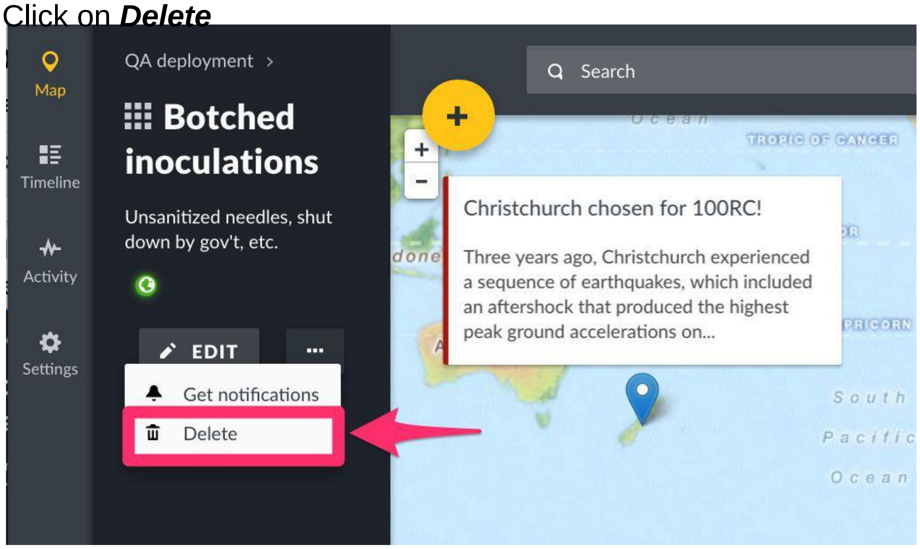
7.3.5 Deleting Collections

To delete a collection,

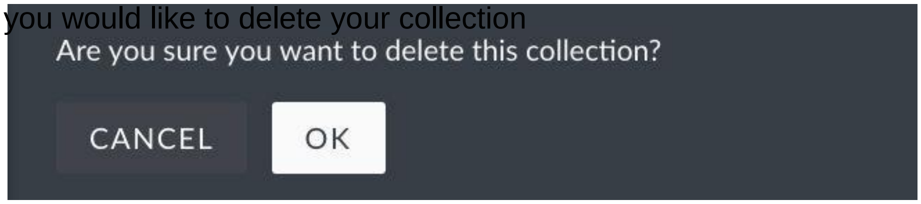
- Click on the collection you would like to delete
- Click on the three dots button, right next to the ***Edit***button.



- Click on ***Delete***



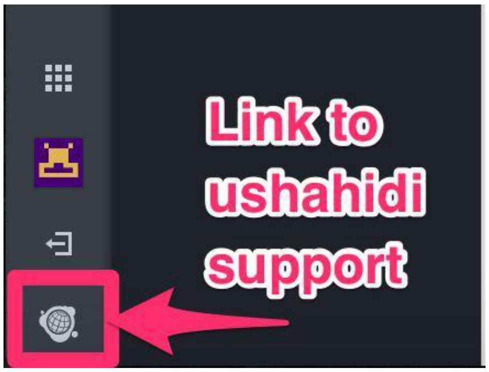
- A black pop up box will appear on the top of the page, prompting you to confirm whether you would like to delete your collection



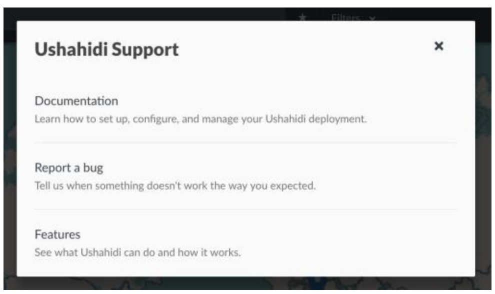
  - Click on ***OK***to delete your collection
  - If you'd like to cancel the collection deletion process, click on ***Cancel***

8. Additional Links

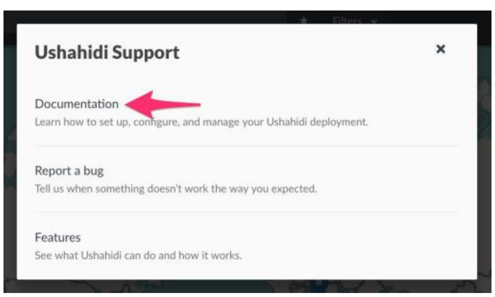
These additional links are available on the mode bar to the left of your deployment



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

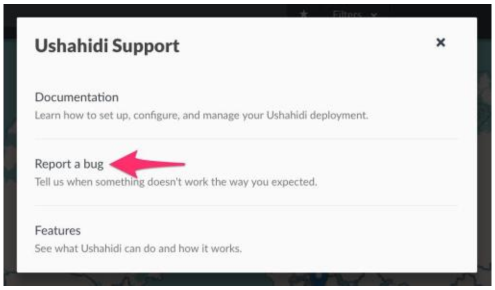


8.1 Documentation



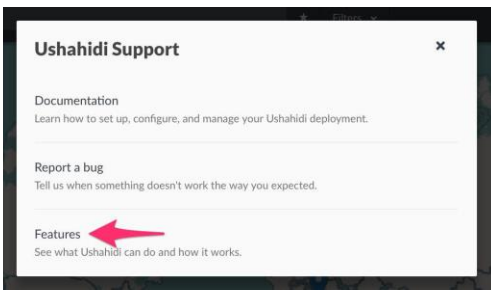
This link redirects you to our website's support section for access to documentation

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~~.