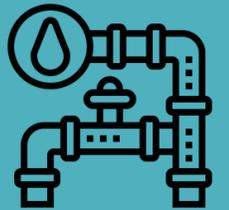
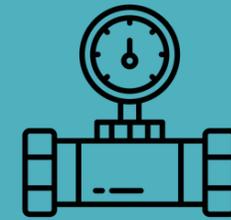


Introduction to mWater ACHAP

17 August 2023



Training Agenda

Day 1: 16th August English: 11am-1pm EAT	Introduction to the mWater platform (Portal and Surveyor) Designing surveys and deploying surveys for data collection Introducing examples of WASH in HCF and IPC surveys Exercise on survey design
Day 2: 17th August English: 11am-1pm EAT	Review survey design exercise and feedback Data collection: process, troubleshooting, training data collectors. Data viewing, cleaning, analysis
Day 3: 23rd August English: 11am-1pm EAT	Data analysis: dashboards, maps, data grids, consoles Organization structure and management on mWater Custom app configuration: what it does, set up and updating.
Day 4: 24th August English: 11am-1pm EAT	Custom App configuration set up and updating. Other (TBC based on needs)

Day 2 Agenda

20 min - Review exercise and questions on survey design

10 min - Survey deployment and data collection

10 min - Practice: Testing deploying the survey and respond to survey

15 min - Best Practice on data collection processes, training of enumerators, troubleshooting data collection

20 min - Practice: Data review and data cleaning

20 mins - Organisational chart set up and management

10 min - Practice: add users to organisational chart

15 min - Questions & Next steps

**Users:
Governments
and utilities**



mWater

20 million surveys

200,000+ users

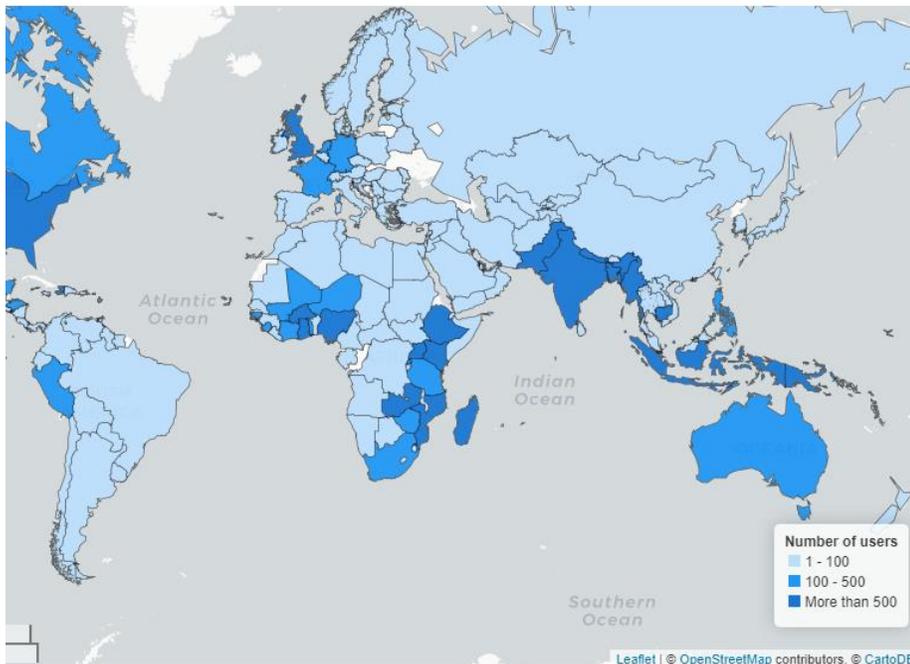
200 countries

**Public Digital Good: free mobile
data collection and management
platform**

Designed by WASH experts

Expanded to cover all sectors

Users by Country



**Local NGOs
and
researchers**



**International
organizations
and large NGOs**

Exercise for day 2

- Develop a survey that responds to your organisation's data needs
- Link at least 1 site type (e.g. Health care facility)
- Include at least 1 indicators from library

Portal tabs -Surveys

Surveys –

1. Design, translated, assign, and deploy survey forms
2. Clean and approve completed survey responses
3. Visualize and report survey data in maps, graphs, tables, and more

The **Survey** is the questionnaire template that is used when creating new survey responses
e.g. Water point survey

The **Survey responses** are the individual questionnaires which are created for each visit
e.g. Khamasa well report, March 2020

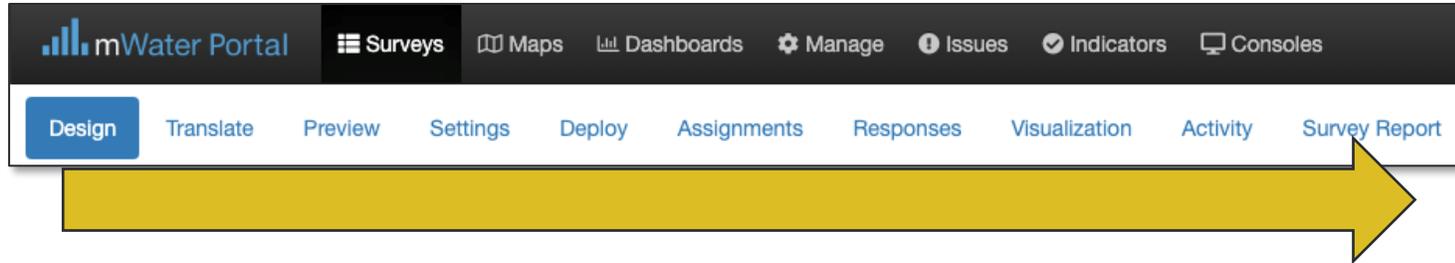
The screenshot displays the mWater Portal interface for managing surveys. The top navigation bar includes 'mWater Portal', 'Surveys', 'Maps', 'Dashboards', 'Manage', 'Issues', 'Indicators', 'Consoles', 'Help', and a user profile. Below this, a secondary navigation bar features tabs for 'Design', 'Translate', 'Preview', 'Settings', 'Deploy', 'Assignments', 'Responses', 'Visualization', 'Activity', and 'Survey Report'. A yellow line with three numbered circles (1, 2, 3) highlights the 'Design', 'Responses', and 'Survey Report' tabs. The main content area shows a 'Water point survey' form with the following fields:

- Water point ***: A dropdown menu with the placeholder text 'mWater ID of Site' and a 'Select' button.
- Date of survey ***: A date input field with the placeholder text 'YYYY-MM-DD' and a calendar icon.
- Functional status**: A group of radio buttons with the following options:
 - Functional
 - Partially functional but in need of repair
 - Not functional
 - No longer exists

A sidebar on the right contains a search bar and a table of contents for the survey form:

- Search...
- 1. General information
 - 1.1. Water point
 - 1.2. Date of survey
 - 1.3. Functional status
 - 1.4. Monitoring type
- 2. Management
 - 2.1. Management structure

Surveys workflow



Surveys follow a workflow which is shown by the order of the tabs in the survey form view:

Design - Create the questionnaire that the enumerator will use to collect data

Translate – Set the base language and translate survey text into any other language

Preview – View the survey in the same format as the enumerator will see it

Settings – Set permissions and other options

Deploy – Define roles and permissions for a set of survey responses

Assignments – Delegate enumerators to conduct a specific set of survey responses

Responses – View, approve, reject, and edit individual survey responses

Visualizations – Visualize aggregate data in a standard way

Activity – Track progress and performance of the survey and enumerators

Survey report – Customize a data dashboard for viewing results from the survey

Question types

The question **Type** controls what kind of data can be entered.

Question type	Description
Text	type a response using the keyboard
Number	type a number using the number keypad
Dropdown	pick a single answer from a dropdown
Radio Button	pick a single answer from a list
Checkbox	single checkbox
Multi-check	pick more than one answer from a list
Date	enter a date, time, or both using a calendar
mWater Site	select a site to link to this survey
Location	set GPS coordinates using device or map
Units	number with units of measure included
Image (s)	use camera (or gallery) to capture one or more images
Text List	add multiple items of text in a list
Cascading lists	displays several dropdown questions which are each conditional on the previous ones
Scan Barcode	get text or numbers from a QR or barcode
Matrix	enter data in a table with pre-defined rows and columns
Roster matrix	enter data in a table with pre-defined columns, where enumerators can add rows
Question group	enter a set of questions, grouped together
Roster group	enter a set of questions, grouped together, where enumerators can click +Add to repeat the question group

Survey approvals

To ensure that data collected is reliable, most survey administrators will add a survey approval step which requires the supervisor to approve or reject each survey response before it is finalized.

Approval steps:

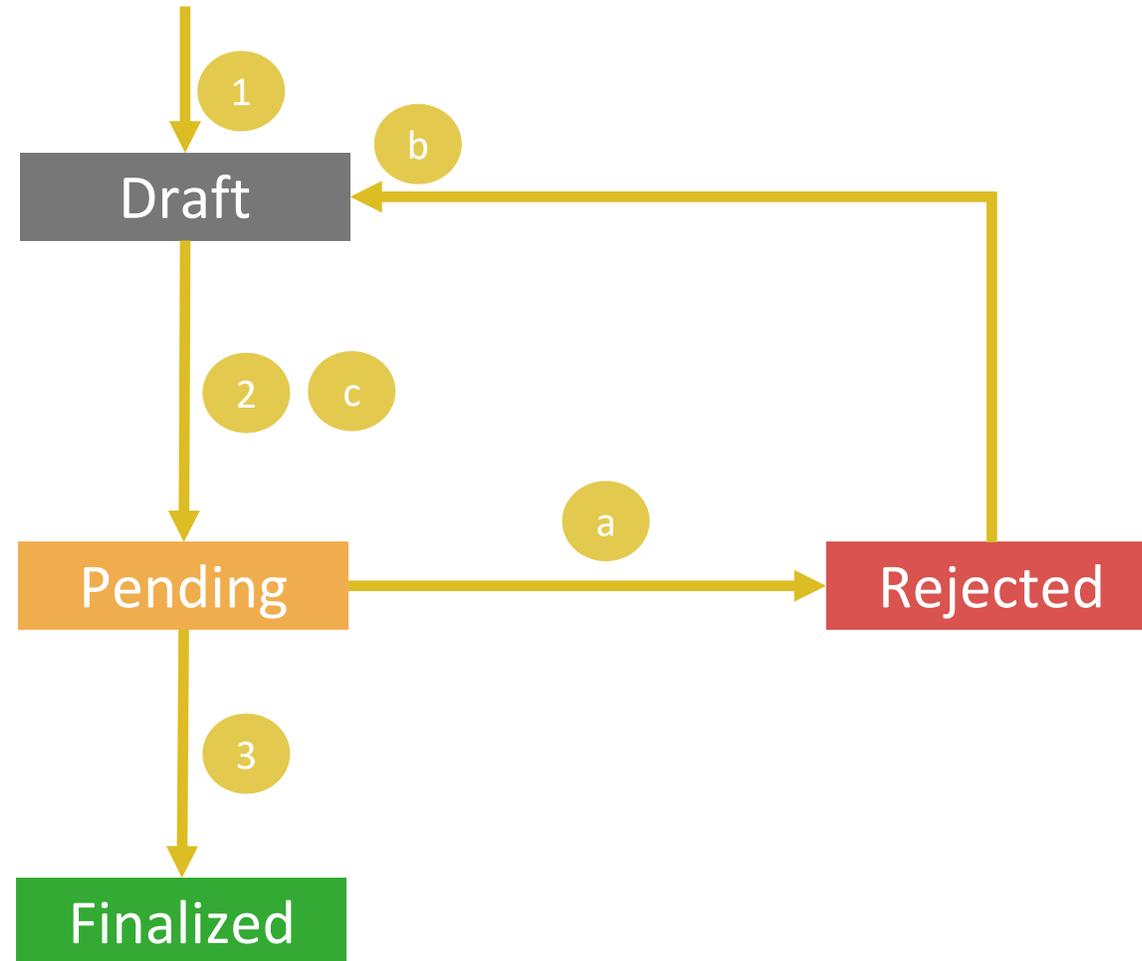
1. Enumerator starts a survey response
2. Enumerator submits the response

If the response has errors:

- a) Supervisor rejects the response due to errors
- b) Enumerator corrects the response
- c) Enumerators submits it again

If the response does not have errors:

3. Supervisor approves the response



INDICATORS

Global Indicator Library + Create

The mWater Global Indicator Library contains standardized, consistent indicators that you can easily add to populate your surveys with questions. This library comprises highly researched and field-tested indicators from partner organizations. Indicators make collected data comparable across organizations and geographies. They also make it possible to share outcomes of your data to the public at the indicator level while raw, private data. To add an indicator to a survey you are editing, click on the [Indicator Library](#) link on the top right of the survey designer.

Sort Indicators by Sustainable Development Goal:



[Edit](#) [Duplicate](#) [Delete](#)

[← Back To All Indicators](#)

SDG 6.2a: Household - Sanitation service ladder (SDG6_HH_S)

WHO/UNICEF Joint Monitoring Programme Core Household indicator for sanitation at the household level

Category: JMP service levels
Data Points in mWater: 51116
Part of: SDG 6 WASH in Households - Core

[+ Start New Survey For This Indicator](#)

This is the core household sanitation indicator developed by the UNICEF / WHO Joint Monitoring Programme. Using a set of questions or observations, the household is assigned a category of sanitation service according to the JMP sanitation service ladder.

Contents

- [Definitions](#)
- [Notes on use](#)
- [Calculations](#)
- [Evidence](#)
- [Recommended visualizations](#)
- [References](#)
- [Version history](#)
- [Properties](#)
- [Comments](#)
- [Question Sets](#)

Definitions

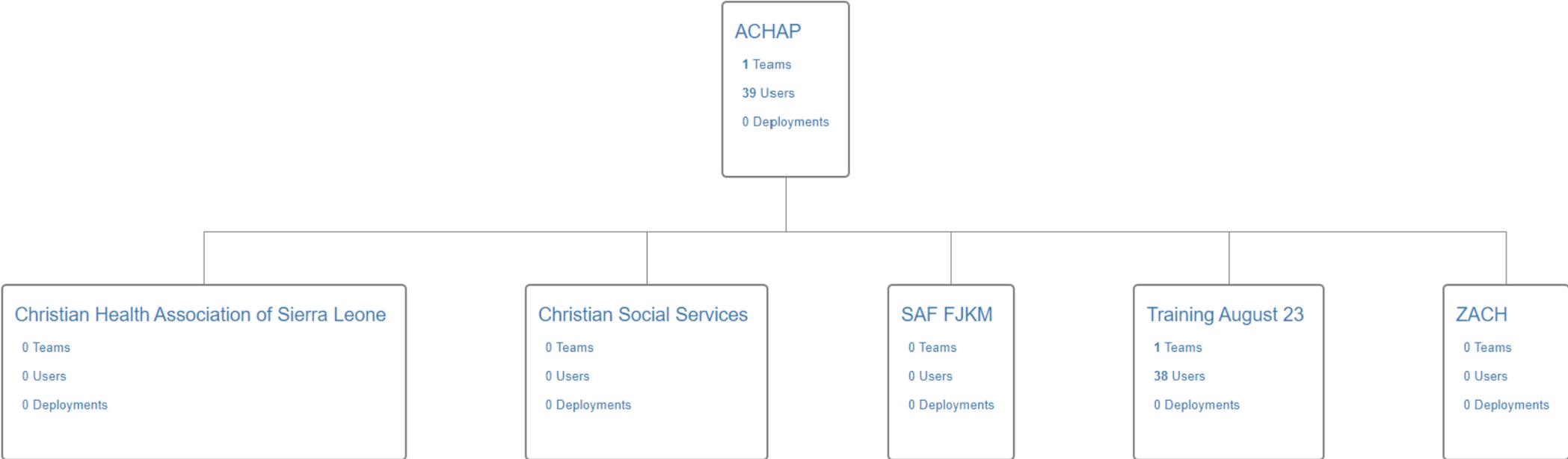
Service Level categories are defined as follows:

- **Safely managed:** Use of improved facilities which are not shared with other households and where excreta are safely disposed in situ or transported and treated off-site
- **Basic:** Use of improved facilities which are not shared with other households
- **Limited:** Use of improved facilities shared between two or more households
- **Unimproved:** Use of pit latrines without a slab or platform, hanging latrines or bucket latrines
- **Open defecation:** Disposal of human faeces in fields, forests, bushes, open bodies of water, beaches and other open spaces or with solid waste

Standard set of indicators that can be added to any surveys

Organizational structure for ACHAP

Organization: ACHAP



Survey (Design of a form)	Deployment (Set of responses to a form)	Organization (Structured group of users)	Site (Location monitored over time)	Dashboard, Map, Datagrid, & Console (Data visualizations)
<p>Managed by The organization or organization brand which can see basic information about the survey</p> <p>Admin Can edit form design and view and edit all responses</p> <p>Deploy Can create new deployments</p> <p>View Can view the design of the form</p>	<p>Enumerators Can open the form in Surveyor App and submit responses</p> <p>Approvers Can approve or reject responses</p> <p>Managers Can view, edit, or approve responses at any time</p> <p>Viewer Can view final approved responses</p>	<p>Admin Can create lower level branches and teams, add/remove users, change settings</p> <p>Managers Automatically added as managers to new deployments</p> <p>Viewer Automatically added as viewers to new deployments</p>	<p>Managed By User or organization that can edit or delete the site data</p> <p>Site privacy levels:</p> <p>Protected (recommended): any user can see the basic site data and reference site in surveys</p> <p>Private: only the Managed By organization can view site</p> <p>Public: any user can view and edit the site data</p>	<p>Admin Can view, edit, and delete visualization and share access to it</p> <p>View Can view all data and visualizations on the page</p> <p>Create Shareable Link Generates a unique URL to provide view access without an mWater account</p> <p>Create Shareable Link With Quickfilters Locked Generates a unique URL to provide view access without an mWater account only to the filtered dataset</p>

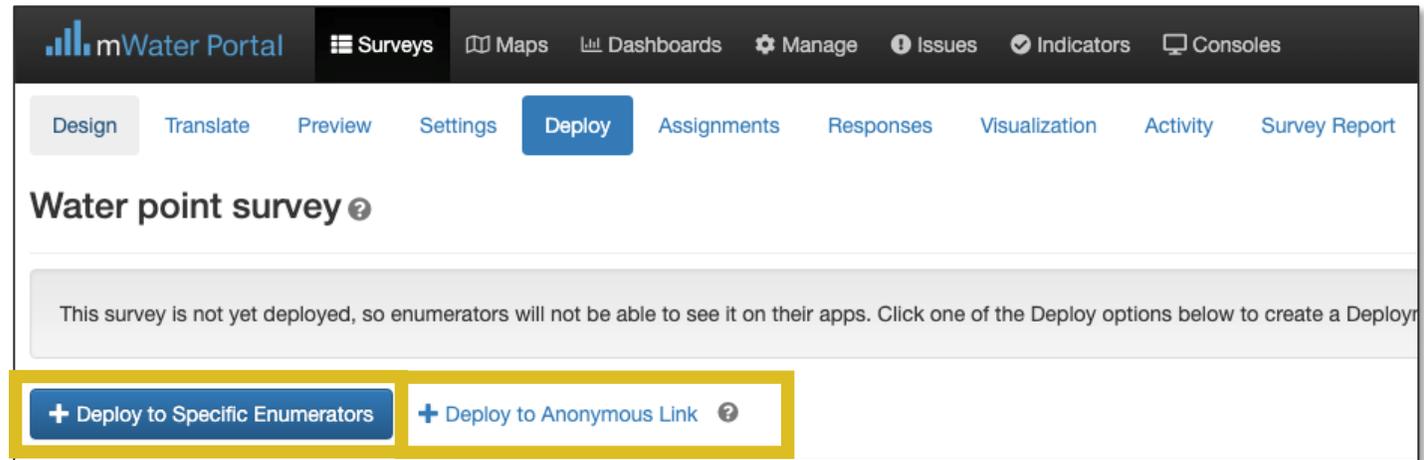


Creating a deployment

The deploy tab sets up the roles and permissions for a set of survey responses.

There are two types of survey deployments:

- 1. Deploy to Specific Enumerators** – This is used in the majority of cases for deploying the survey to mWater users via the Surveyor app.
- 2. Deploy to Anonymous Link** – This is used for deploying the survey to anyone with the link. Users click the link and use the web browser to complete the response.



Survey (Design of a form)	Deployment (Set of responses to a form)	Organization (Structured group of users)	Site (Location monitored over time)	Dashboard, Map, Datagrid, & Console (Data visualizations)
<p>Managed by The organization or organization brand which can see basic information about the survey</p> <p>Admin Can edit form design and view and edit all responses</p> <p>Deploy Can create new deployments</p> <p>View Can view the design of the form</p>	<p>Enumerators Can open the form in Surveyor App and submit responses</p> <p>Approvers Can approve or reject responses</p> <p>Managers Can view, edit, or approve responses at any time</p> <p>Viewer Can view final approved responses</p>	<p>Admin Can create lower level branches and teams, add/remove users, change settings</p> <p>Managers Automatically added as managers to new deployments</p> <p>Viewer Automatically added as viewers to new deployments</p>	<p>Managed By User or organization that can edit or delete the site data</p> <p>Site privacy levels:</p> <p>Protected (recommended): any user can see the basic site data and reference site in surveys</p> <p>Private: only the Managed By organization can view site</p> <p>Public: any user can view and edit the site data</p>	<p>Admin Can view, edit, and delete visualization and share access to it</p> <p>View Can view all data and visualizations on the page</p> <p>Create Shareable Link Generates a unique URL to provide view access without an mWater account</p> <p>Create Shareable Link With Quickfilters Locked Generates a unique URL to provide view access without an mWater account only to the filtered dataset</p>

Deployment permissions

Deploy to specific enumerators

The first time that a deployment is created from this survey, mWater will ask how you want to manage the ownership of the survey deployment:

- Selecting **Organization** will add the organization's administrators as admins of this Survey
- Selecting **Just myself** will not change the administrators of the form

Set survey ownership

Before deployment, please set the owner of this survey on this page. This adds organization admins to the survey so they have visibility over it. This does not deploy the survey to the organization or organization branch. Once your survey is ready, you must **deploy** it so it becomes available for users. Managing deployments and users is best done through **Organizations**.

Learn more about [designing and deploying surveys](#)

Learn more about [Organizations](#)

Are you creating this survey as part of an organization, or only yourself?

Organization
Admins will be notified

Just myself
Add admin later

Select organization

Example Organization

Organization branch

Head of organization

Note: The survey will not be deployed to selected the organization or organization branch. Deployment permissions are set on the next screen.

Cancel Proceed

Deployment settings

The deployment menu contains the following parameters:

1. **Title** – The name of the data collection activity e.g. water point update 2020
2. **Status** – Active means that enumerators will be able to create new survey responses
3. **Enumerators** – The users or branches which can create responses to the survey. The survey will automatically show up in their Surveyor app
4. **Viewers** – Users or branches which can view finalized survey responses
5. **Managers** – Can view, edit, or approve responses at any time. Checking the box will allow enumerators to edit/delete their responses even after finalized.
6. **Approvers** – These users or branches need to approve the responses before they are finalized (if none, then responses are automatically finalized). Multiple approval stages can be added

WARNING : DELETING A DEPLOYMENT WILL PERMANANTLY DELETE THE SURVEY RESPONSES IN THAT DEPLOYMENT. THIS CANNOT BE UNDONE!

Deployment

Deployments allow you to activate a survey for selected enumerators so it appears in their app. Here you set the permissions for who can collect data, view approved data, and view data pending in the approval process.

Survey
Survey of this deployment

Title 1
Title of this deployment

Status Active Inactive 2
Deployment is accepting new responses

Enumerators 3
Branches or users who will be able to create responses to the survey

Viewers 4
Branches or users who will be able to view finalized responses of this deployment

Advanced

Enumerators can continue to edit or delete their own responses when final

Managers 5
Branches or users who will be able to edit all responses, including finalized ones of this deployment. Managers can view responses during all stages

Approval Chain 6
 Only allow these approvers to approve or reject responses. Managers can still edit or delete responses.

Who needs to approve the responses before they are finalized.

Delete this deployment

Save

Cancel

Deploy to anonymous link

Deploying surveys to an anonymous link displays the following parameters:

1. **Title** – The name of the data collection activity e.g. water point update 2020
2. **Status** – Active means that enumerators will be able to create new survey responses
3. **Link** – This is the link that anyone can use to complete a survey response for this deployment
4. **Contact name and email** – This will be displayed at the top of the Survey, so that enumerators can contact them with questions
5. **Viewers** - Users or branches which can view finalized survey responses
6. **Managers** – Can view, edit, or approve responses at any time.

Note: Surveys with Site questions cannot be deployed to Anonymous link

Deployment

Deployments allow you to activate a survey for selected enumerators so it appears in their app. Here you set the permissions for who can collect data, view approved data, and view data pending in the approval process.

Survey
Survey of this deployment

Title
Title of this deployment

Status Active Inactive
Deployment is accepting new responses

Link
Send this link to enumerators to allow them to complete the survey without logging in

Contact Name
Optional name of person to contact with questions. Will be displayed at top of survey.

Contact Email
Optional email address of person to contact with questions. Will be displayed at top of survey.

Viewers
Branches or users who will be able to view finalized responses of this deployment

Advanced

Managers
Branches or users who will be able to edit all responses, including finalized ones of this deployment. Managers can view responses during all stages.

Responses tab

The responses tab allows authorized users to view, edit, delete, and approve individual survey responses. This page can also be used to import and export survey responses.

This page includes:

1. **Filters and search controls** – Use these controls to locate a specific set of responses
2. **View controls**
 - a) **Randomize order** – Displays the survey responses in a random order
 - b) **Detailed view** – Shows the responses in a table where each column is a survey question
 - c) **Summary view** – Shows the responses in a table, with summary data like status, user, submitted on, deployment, and response ID.
 - d) **Import/export responses** – Import/export responses from/to an excel or CSV format
3. **Response list** – Displays responses in a table. Click the row to approve, reject, edit, or delete the response.

Note: The approve/reject buttons will only display for Approvers

Note: The edit/delete buttons will only display for Managers and Approvers

The screenshot shows the mWater Portal interface. The top navigation bar includes 'mWater Portal', 'Surveys', 'Maps', 'Dashboards', 'Manage', 'Issues', 'Indicators', 'Consoles', 'Help', and a user profile 'example user'. The main navigation bar has 'Design', 'Translate', 'Preview', 'Settings', 'Deploy', 'Assignments', 'Responses' (highlighted), 'Visualization', 'Activity', and 'Survey Report'. The page title is 'Water point survey'. Below the title, there are summary statistics: 'Draft: 1', 'Pending: 3', 'Rejected: -', 'Final: -', 'All: 4'. A filter bar shows 'Draft' (1), 'Pending' (3), 'Rejected', 'Final', and 'All' buttons, along with a 'Refresh' button and a search box. Below this is a 'Deployment' dropdown set to 'All', and buttons for 'Randomize Order', 'Detailed view', 'Summary view', 'Import Responses', 'Export Responses', and a language dropdown set to 'English'. The main content is a table with the following data:

Status	User	Submitted On	Deployment	Response ID	Operations
Rejected	Brian Jensen	Today at 6:35 PM	Water point update 2021	Brian Jensen-9MN7UD	
example user	Brian Jensen	Today at 6:34 PM	Water point update 2021	Brian Jensen-9MN7TZ	
Pending	Brian Jensen	Today at 6:34 PM	Water point update 2021	Brian Jensen-9MN7TF	
Draft	Brian Jensen	Draft	Water point update 2021	Brian Jensen-9MN7UT Lacoste water pump	

Viewing, editing, and approving response

To view a detailed survey response, click on it from the Survey list:

1. **View** – Review the question response to see if it was completed correctly
2. **Approve**- This will change the survey status to Final. If the deployment has multiple approval stages, this will only approve one of the stages. The next stage must be handled by one of the users in that approval stage.
3. **Reject**- This will return the response to the enumerator for corrections. The manager can enter notes on the errors that the enumerator must fix, which will appear in their application. In mWater Surveyor, rejected surveys can be viewed in the Rejected section of the Tasks page.
4. **Delete**- WARNING THIS WILL PERMANENTLY DELETE THE RESPONSE DATA.
5. **Edit response**- This will allow the approver or manager to modify any of the fields in the response. This modification will add an "Edited" tag on the response and be tracked in the History of Changes.
6. **Export as PDF** – Exports the full survey response as a PDF

Water point survey ?

Draft: 1 Pending: 1 Rejected: 1 Final: 1 All: 4

Draft Pending **1** Rejected Final All Refresh Search...

Deployment: Water point update 2021 Randomize Order Detailed view Summary view Import Responses Export Responses English

Status	User	Subr
Pending	Brian Jensen	Toda
Rejected	Brian Jensen	Toda
Draft	Brian Jensen	Draft
example user	Brian Jensen	Toda
Final		

View Response

User: **Brian Jensen**
Response Id: **Brian Jensen-9MN7TF**
Submitted: **Aug 4, 2021 6:34 PM**
IP Address: **107.4.200.244**
Status: **Pending**
Submitted by Brian Jensen on Aug 4, 2021 6:34 PM
[Show History](#)

Approve Reject Delete Edit Response English

Question	Answer
General information	
Date of survey	August 4, 2021
Functional status	Partially functional but in need of repair
Monitoring type	Initial
Management	
Management structure	Private Operator/Delegated Management
Access	
Is water available at all times of the day from this source?	Yes
Is water available at all times of the year from this source?	No

Exporting survey responses

Clicking the button Export Responses will display a popup with the following parameters:

1. **Status** – Check the status of survey responses you want to include in the export
2. **Deployments** – Select the list of deployments to export
3. **Format for reimporting** – Check this box to format the export so that it can easily be imported into a survey form
4. **Language** – Select the language for the export questions and options
5. **Header rows** – Export Id/Code (shorter), question text (longer), Both (longest)
6. **Choice questions** – determines how choice questions are exported. If Code is selected, it will preferentially be used over the option text
7. **Multicheck questions** - Determines how multicheck questions will be exported. If one column per choice is selected, it will use a true/false column for each choice
8. **Include asked columns** – Select Yes to include columns whether each question was asked or not, based on the conditions in the survey design
9. **Format** – CSV or Excel

The screenshot shows the 'Water point survey' interface. At the top, there's a status bar: 'Draft: 1 Pending: 1 Rejected: 1 Final: 1 All: 4'. Below it are filters for 'Draft', 'Pending' (with a '1' badge), 'Rejected', 'Final', and 'All', along with a 'Refresh' button and a search bar. The 'Deployment' is set to 'Water point update 2021'. There are buttons for 'Randomize Order', 'Detailed view', 'Summary view', 'Import Responses', 'Export Responses', and a language dropdown set to 'English'. A table lists survey responses with columns for Status, User, Submitted On, Deployment, Response ID, and Operations. The 'Export Responses' popup is open, showing various settings:

- Status:** Final Pending Draft Rejected. Description: Determines which status of responses will be exported. (Callout 1)
- Deployments:** Water point update 2021. Description: Determines which deployments will be exported. (Callout 2)
- Format for re-importing:** Format for re-importing - Select to format for re-importing into a survey form. Note: re-importing into same form will cause data duplication. (Callout 3)
- Language:** English. Description: Determines how translated items like choices are displayed. (Callout 4)
- Header Rows:** Export Id/Code Question Text Both. Description: Both. Will always default to Export Id over Code, if present for a question. Will always fallback to question text if neither Export Id or Code is present. (Callout 5)
- Choice Questions:** Code Text. Description: Determines how choice questions will be exported. If 'Code' is selected, it will preferentially use the code of the choice over the English text. (Callout 6)
- Multicheck Questions:** Single Column One Column per Choice. Description: Determines how multicheck questions will be exported. If 'One Column per Choice' is selected, it will use a true/false column for each choice. (Callout 7)
- Include Asked Columns:** Yes No. Description: Select Yes to include columns indicating whether each question was asked or not based on conditions. (Callout 8)
- Format:** CSV Excel. Description: Use CSV for large downloads. (Callout 8)

At the bottom of the popup is an 'Export Responses' button.

Import survey responses

Importing responses allows users to upload responses to the survey from CSV or Excel files.

Steps to import responses:

1. Select how multicheck and location questions are formatted in the source document
2. Download a Template of the survey structure. In the source document, copy the data into the correct location of the Template
3. Choose a deployment to store the uploaded response
4. Select the Upload Data button to choose the completed template. Click Ok when the import has completed.

The screenshot shows the mWater Portal interface for a survey titled "Water point survey". The main navigation bar includes "Design", "Translate", "Preview", "Settings", "Deploy", "Assignments", "Responses", "Visualization", "Activity", and "Survey Report". The "Responses" tab is active, showing a table of responses with columns for Status, User, Submitted On, Deployment, Response ID, and Operations. A yellow arrow points to the "Import Responses" button in the top right of the main interface.

The "Import Responses" dialog box is overlaid on the table, containing the following steps:

- Step 1: Select options**
 - Multicheck Questions:** Single Column One Column per Choice. Description: Determines how multicheck questions will be imported. If *One Column per Choice* is selected, it will use a true/false column for each choice.
 - Location Questions:** Lat/Lng in separate columns Lat/Lng in one column or UTM. Description: Determines how location questions will be imported.
- Step 2: Download template for responses**
 - Download Template button
- Step 3: Upload completed template**
 - Deployment: Select a deployment dropdown menu
 - Upload Data button

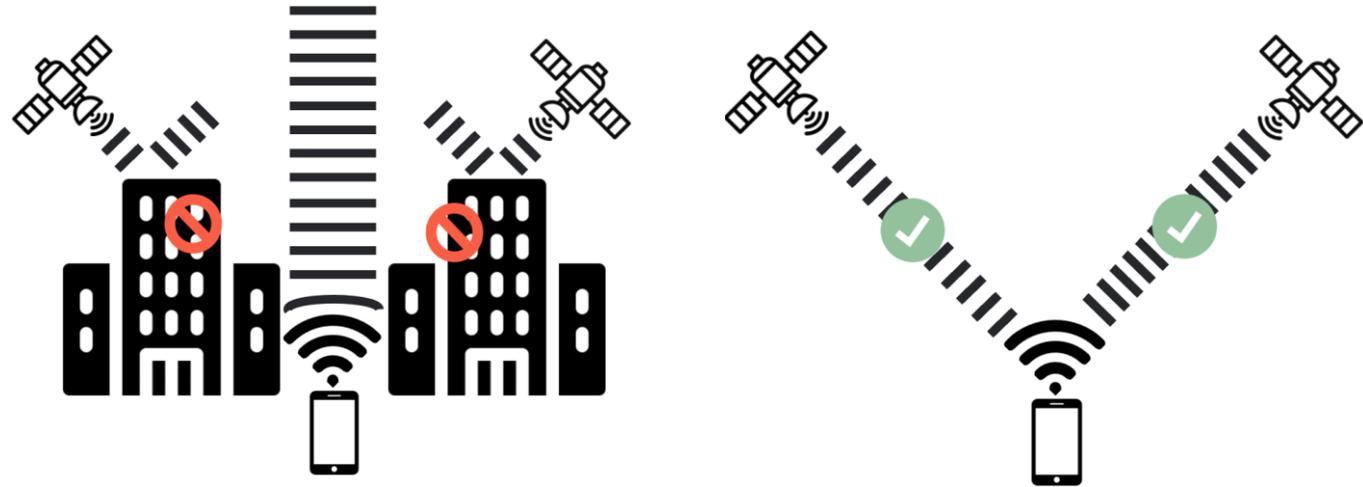
A "Close" button is located at the bottom right of the dialog box.

GPS Problems

Common causes of GPS issues are:

- The GPS is turned off
- High accuracy mode is turned off
- The Surveyor app does not have permission to use the GPS
- Poor signal due to obstructions like buildings or trees (See diagram at right)
- Google Maps hasn't been updated or initialized

Note: Computers or laptops do not have a GPS chip or antenna.



Note: GPS is not blocked by rain or clouds

images: Flaticon.com



Introduction to mWater ACHAP

16 August 2023

