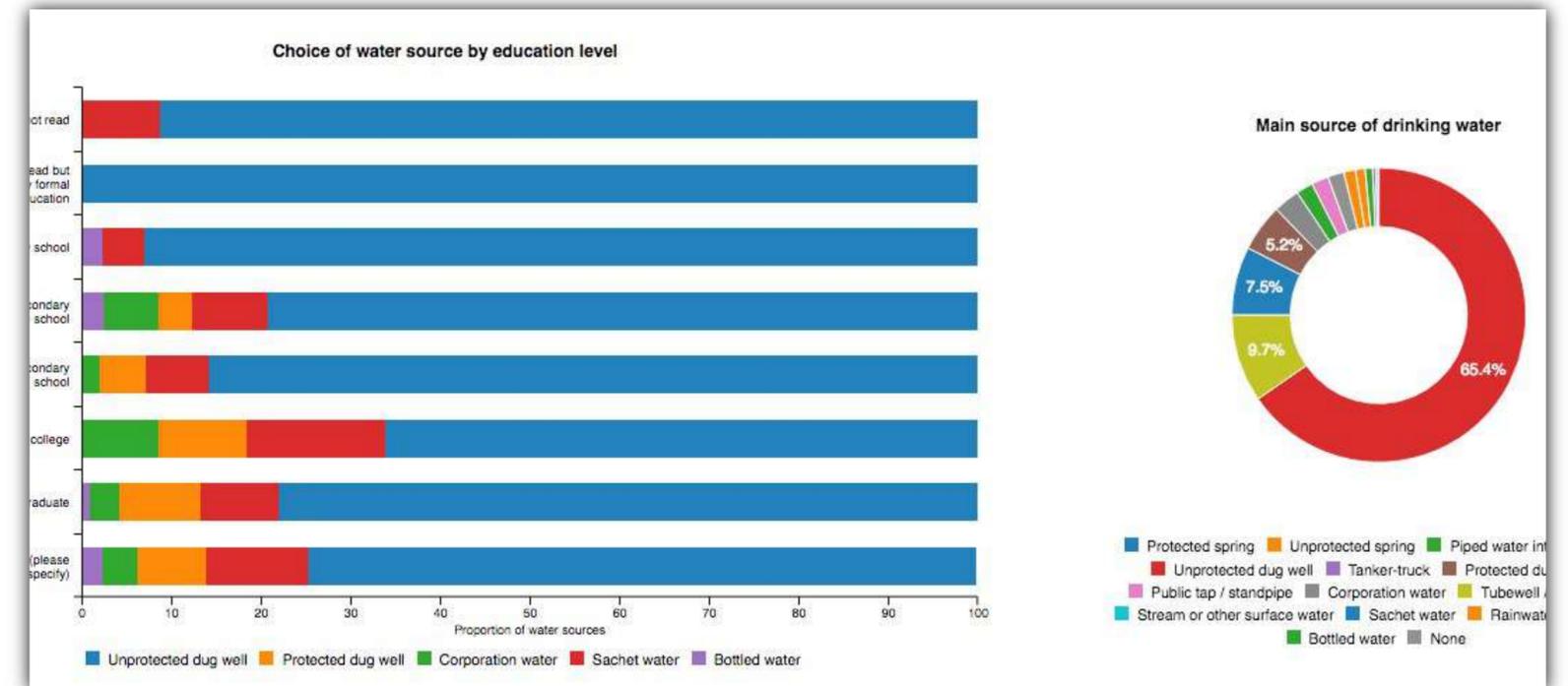


# mWater Portal Training

# mWater Portal Training

## Modules:

- [1. Portal overview](#)
- [2. Core concepts](#)
- [3. Surveys - Design](#)
- [4. Surveys - Deployments](#)
- [5. Surveys - Cleaning and managing survey data](#)
- [6. Sites](#)
- [7. Data visualization](#)
- [8. Organizations and user management](#)
- [9. Issues](#)



3. water point observation

**Water point \***  
Select or create the water point site that is the main water source for this community

WM-1: OBSERVE: Is the water point being cleaned and maintained by those responsible?

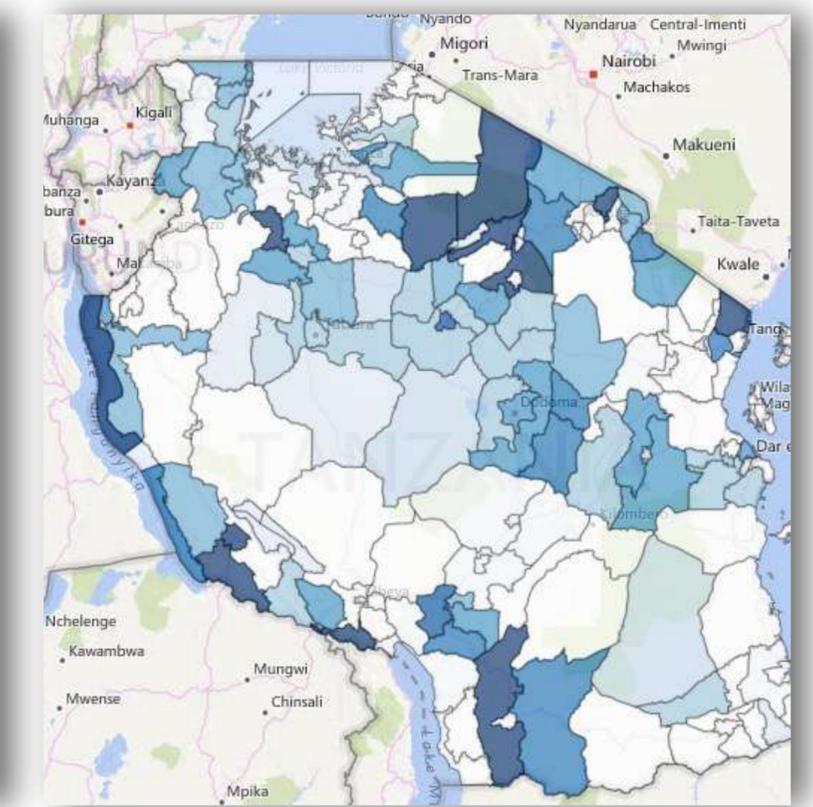
Yes  
 Some, but not all  
 No

WM-2: OBSERVE: Were any of the following maintenance issues observed?

Water collection lacks adequate drainage  
 Animal faeces or litter present around the water collection area  
 Cracks or damage to the concrete floor around the water collection area  
 Other (please specify)

4. Water Point Questions

WR-1a: Does the water point function as designed?



Governments  
and utilities

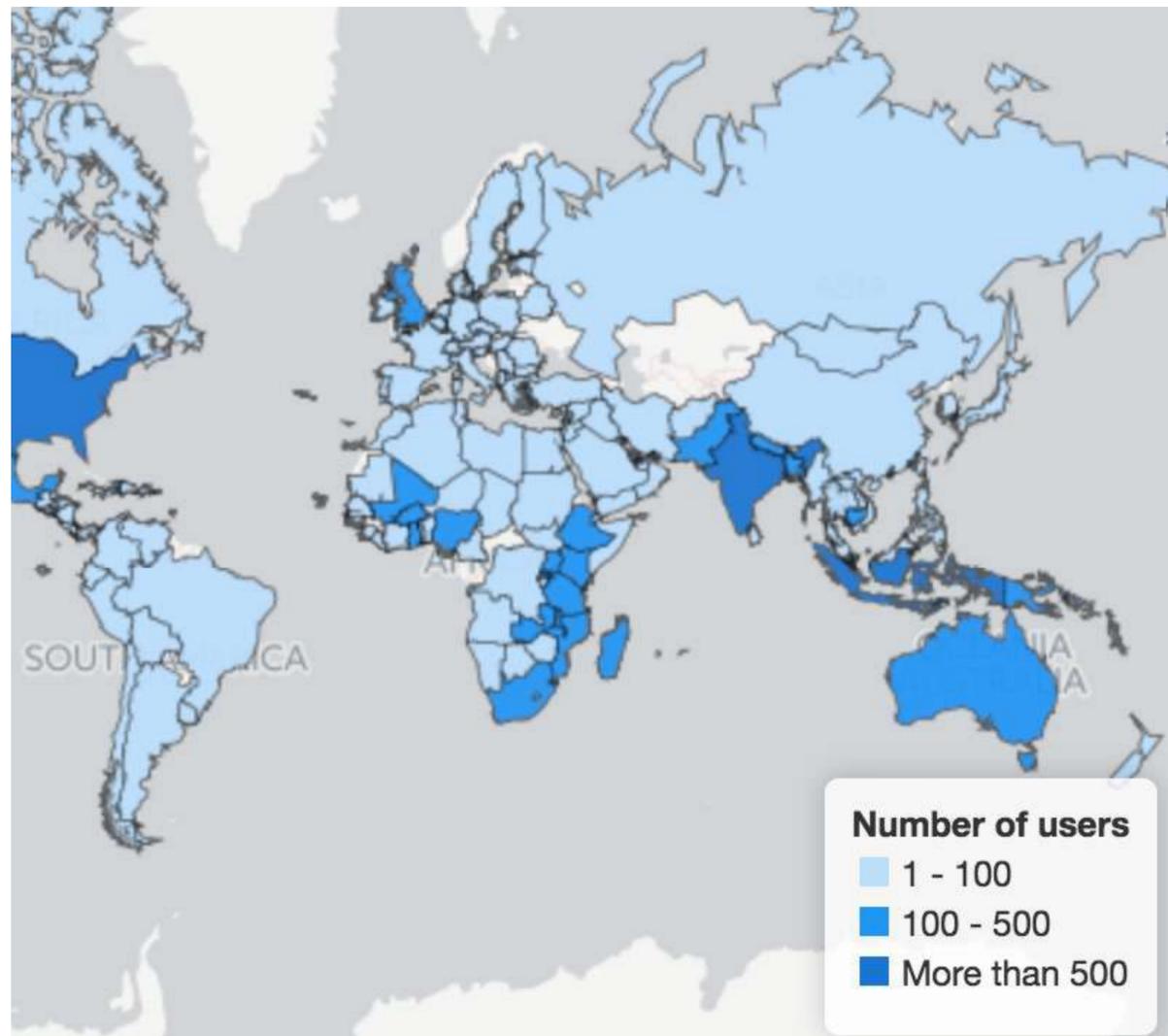


# Section 1

## Portal overview

Topics:

- About mWater
- What can you do with mWater?
- Accessing and exploring the Portal



Local NGOs and  
researchers



International  
organizations  
and large NGOs

# About mWater

mWater is a mobile data collection and analysis platform which is **free for unlimited use!**

Used by 100,000+ users in 187 countries

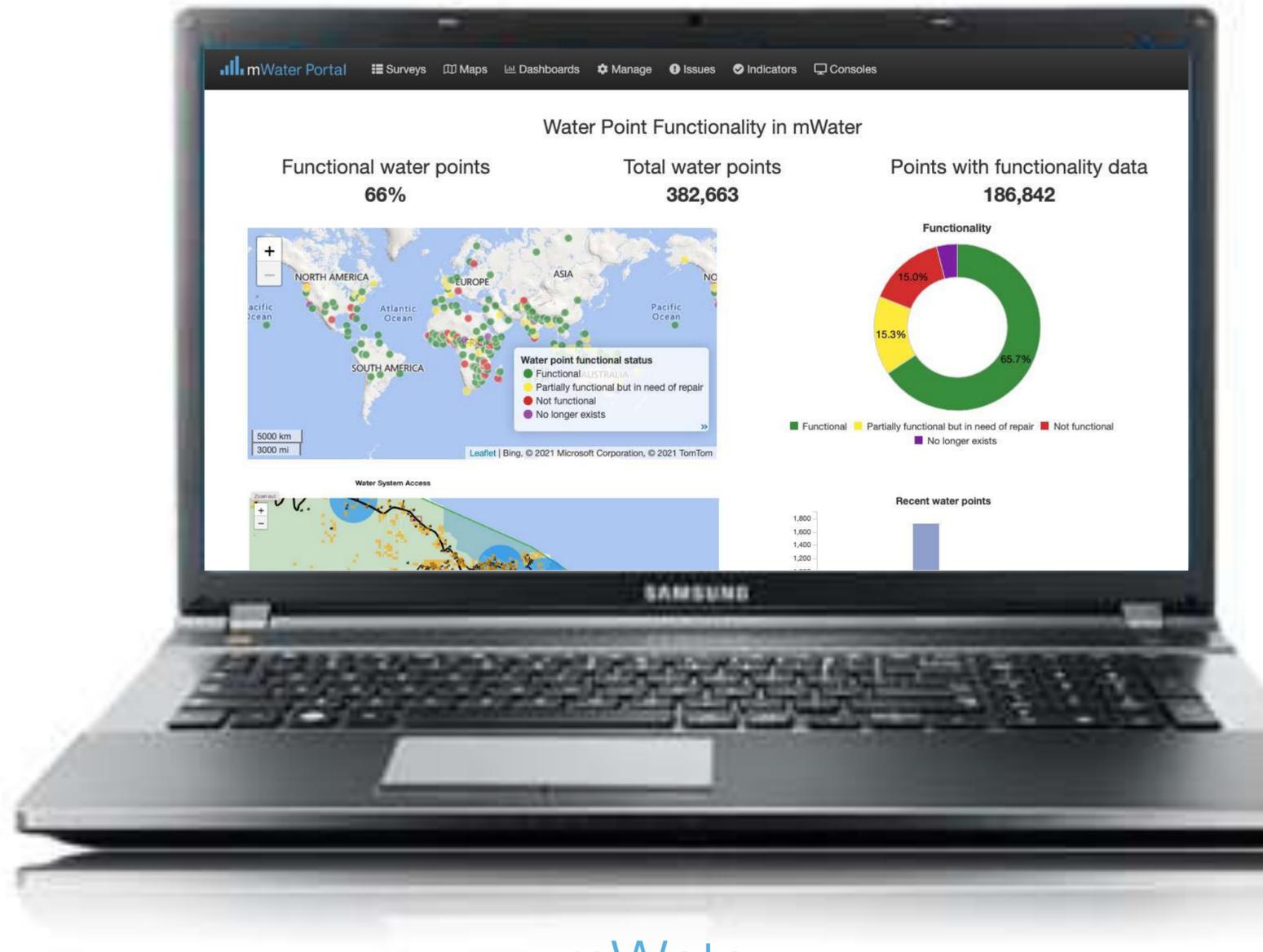
mWater consists of two main components:

**1. mWater Surveyor** – Mobile app for [Android](#), [iPhone](#), & [web](#)

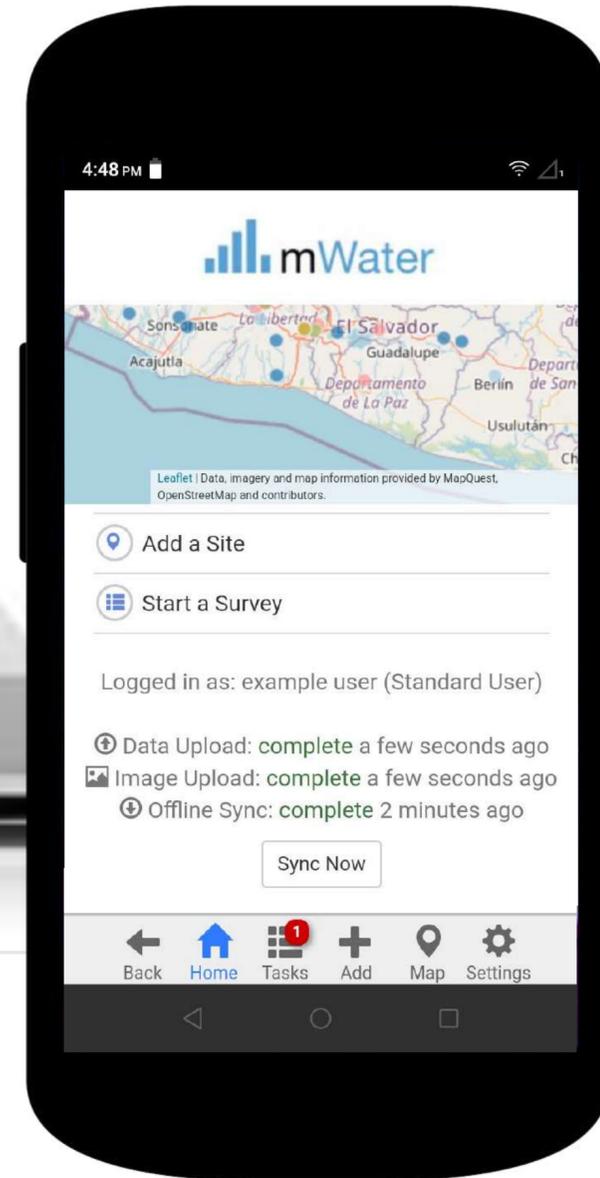
- Data collection – Online & offline

**2. mWater Portal** - Website at [portal.mwater.co](http://portal.mwater.co)

- Design of data collection (Surveys, sites, issues, etc)
- Survey deployment and assignment
- Data approvals and cleaning
- Visualization, analysis, sharing and export



mWater  
Portal



mWater  
Surveyor

# What can you do with the mWater platform?

**1. Surveying** – A one-time or infrequent data collection activity

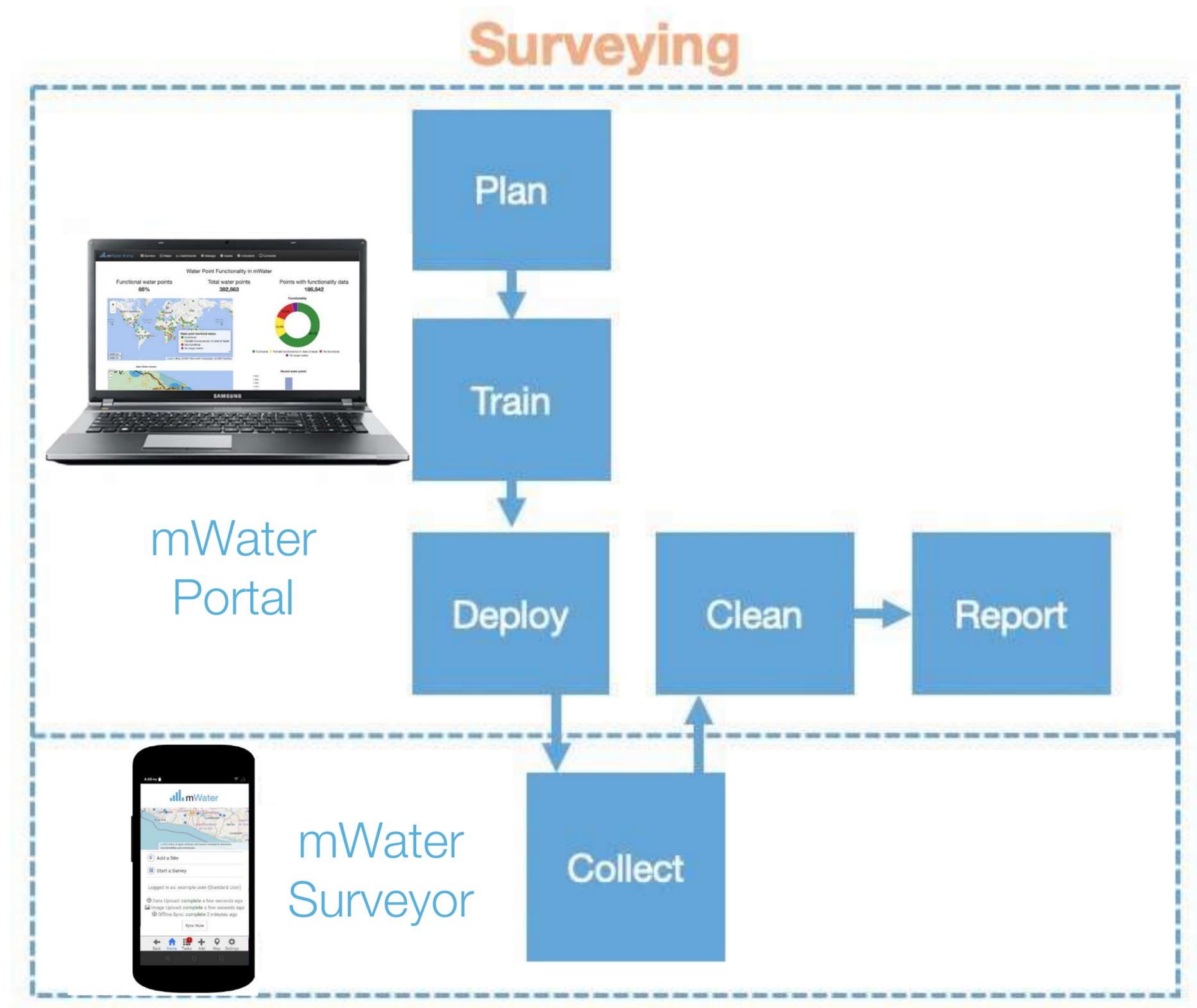
*e.g. sampled household survey*

**2. Monitoring, evaluation, and learning (MEL)** – A recurring data collection, learning and adaptation cycle

*e.g. annual water point updates*

**3. Management** – A regular process of identifying, assigning, performing, and responding to tasks (in addition to MEL)

*e.g. water utility maintenance issues*

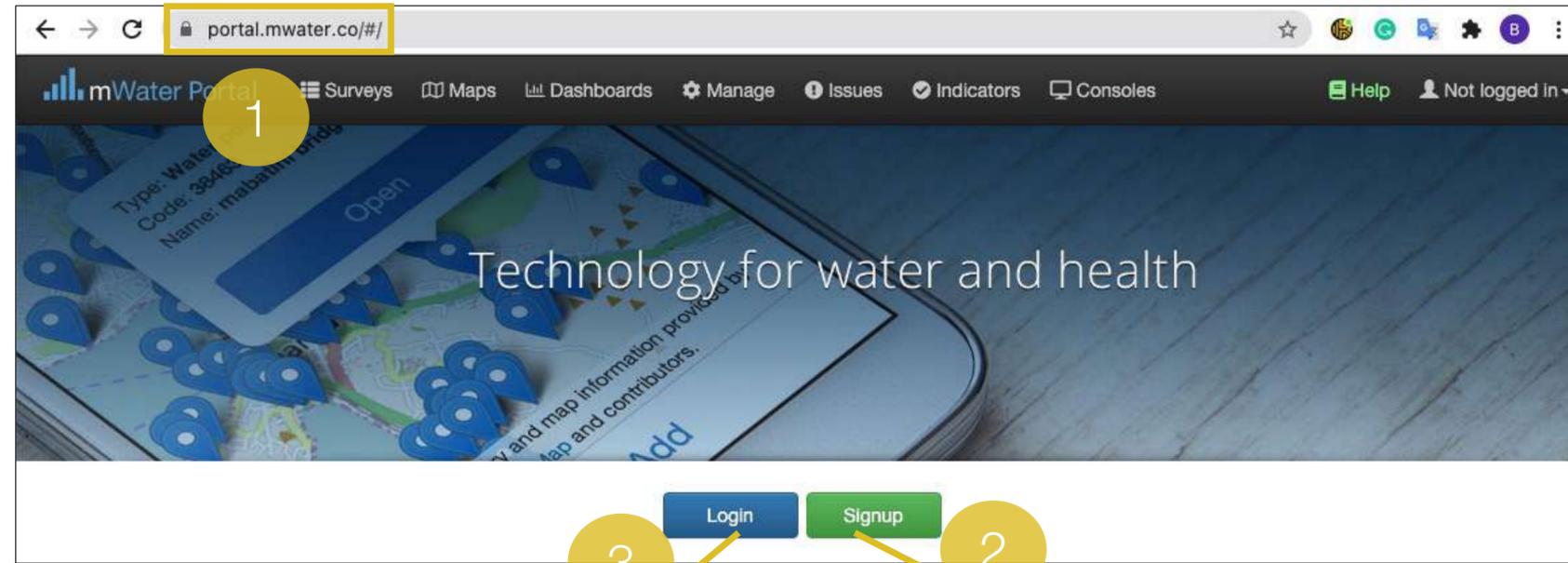


# Accessing the portal

To access the portal:

1. Go to <https://portal.mwater.co/>
2. If you **do not already** have an account:
  - a) Click the **Signup** button
  - b) Enter in your information and click **Signup**
3. If you **already have** an account:
  - a) Click the **Login** button
  - b) Enter in your **username or email address** and the password
  - c) Click the **Login** button

**Note:** The same mWater account is used for both the Portal and Surveyor app



### Login to mWater

**Username or Email**

**Password** [Forgot Password?](#)

Save login

- or -

[Signup](#)

Existing clients may also login using

### Signup with mWater

**Given Name**  **Family Name**

**Username**

We recommend creating accounts with your real name rather than a generic code. Every user requires a unique username which is visible to other users. You can change your username, email or password later in My Account.

**Password**

**Email address**

Note: Your email address will never be shared

**Employer or organization (optional)**

I confirm that I am at least 13 years of age

# 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. The top navigation bar includes 'mWater Portal', 'Surveys', 'Maps', 'Dashboards', 'Manage', 'Issues', 'Indicators', and 'Consoles'. The secondary navigation bar features 'Design', 'Translate', 'Preview', 'Settings', 'Deploy', 'Assignments', 'Responses', 'Visualization', 'Activity', and 'Survey Report'. The main content area shows the 'Water point survey' form with fields for 'Water point', 'Date of survey', and 'Functional status'. A sidebar on the right contains a search bar and a list of survey sections: '1. General information' (with sub-items 1.1-1.4) and '2. Management' (with sub-item 2.1). Three yellow circles with numbers 1, 2, and 3 are overlaid on the interface, connected by a yellow line, indicating the flow from the 'Design' tab to the 'Responses' tab and then to the 'Visualization' tab.

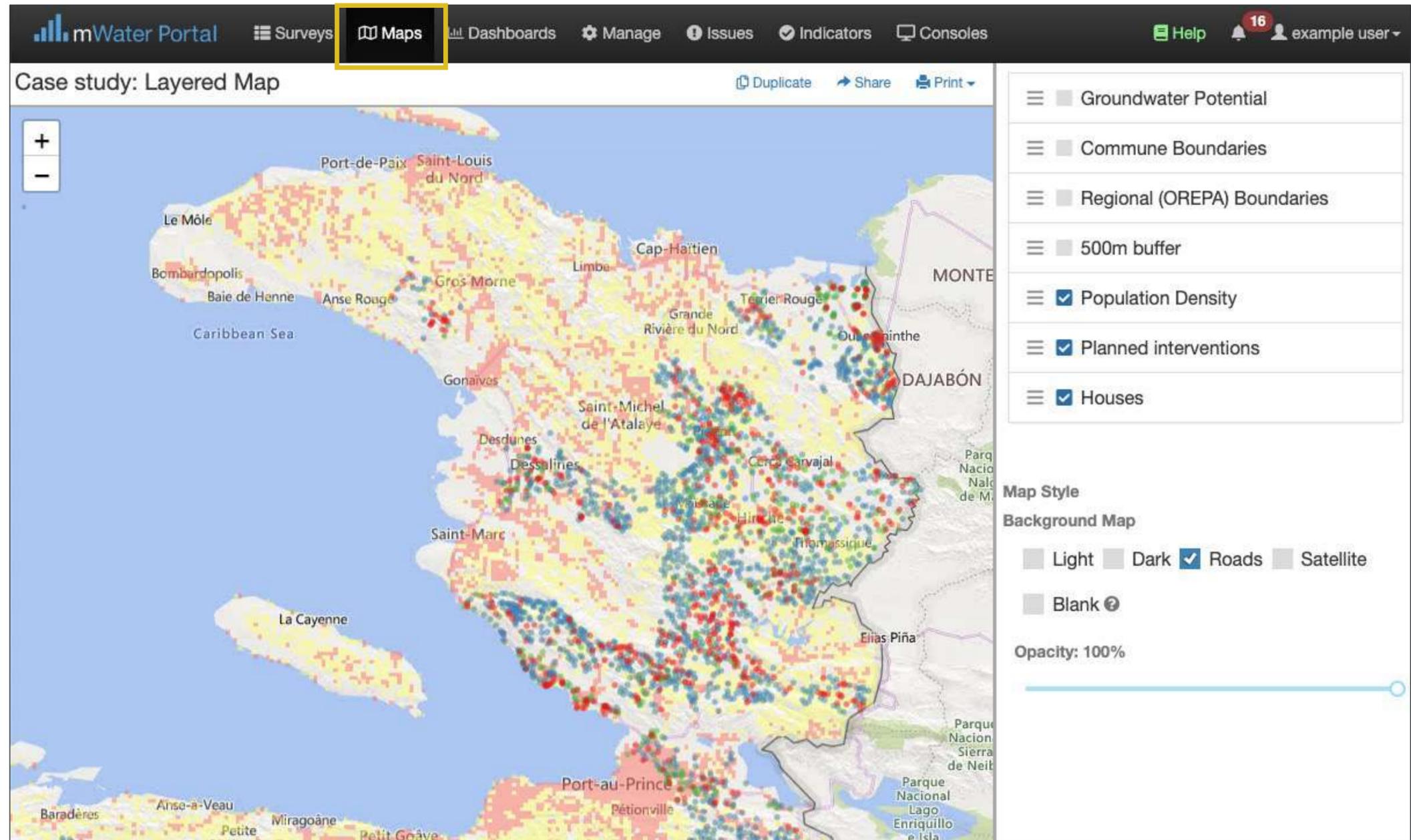
# Tabs - Maps

**Maps** – Displays location data on a full-page map

- Create, share, and export multi-layered maps
- Display mWater data points, lines, regions and grids
- Customize the symbology and perform spatial analytics on the data
- Can show population and custom basemaps

*Note: The map tab displays full-page maps, which can be added tabs within multi-tabbed Consoles.*

*Map modules are smaller maps which can be integrated on the same page as other modules like graphs, tables, etc.*

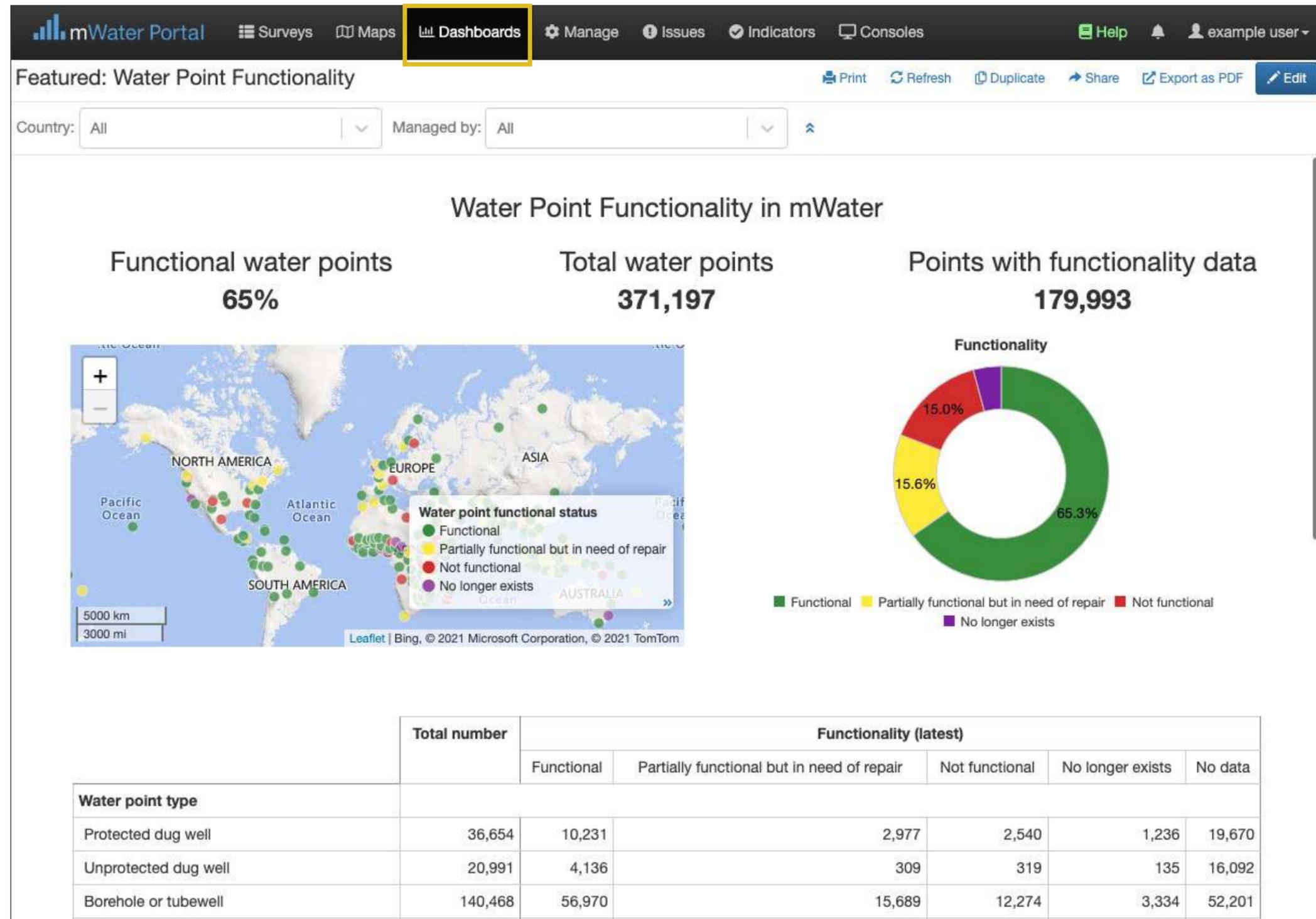


# Tabs - Dashboards

**Dashboards** - Individual pages which can contain many data visualization widgets e.g. maps, graphs, tables

Dashboards allow users to:

- Filter, search, and drilldown into the data
- Print and export data and reports
- Share data with other users or via a shareable/embeddable link



# Tabs - Manage

**Manage** – Users can manage site data, organizations and documents

1. Site data are locations which can be monitored over time
2. Organizations can be used to create hierarchal branches of roles and permissions
3. Datagrids are live data spreadsheets
4. Water systems is an interface for managing piped water systems
5. Site approvals is where administrators can approve changes made to sites
6. Reference documents of any type can be stored for individual users or for an organization

The screenshot shows the 'Manage' tab in the mWater Portal. The navigation bar at the top includes 'mWater Portal', 'Surveys', 'Maps', 'Dashboards', 'Manage' (highlighted with a yellow box), 'Issues', 'Indicators', 'Consoles', 'Help', and a user profile for 'Brian Jensen'. The main content area is titled 'Manage' and contains six numbered cards:

- 1 Sites**: View, organize and edit sites (water points, households, communities, etc.)
- 2 Organizations**: Manage and create organizations and groups
- 3 Datagrids**: Create spreadsheet-like views of your data
- 4 Water Systems**: View and modify waters systems and their components
- 5 Site Approvals**: Approve, reject or undo changes to sites
- 6 Documents**: Upload, access and manage documents

# Tabs - Issues

**Issues-** Users can manage multi-step processes including opening, assigning, updating, resolving and closing steps e.g. water system leak issue

Issue types are standardized processes for a specific use-case

The screenshot shows the 'Issues' tab in the mWater Portal. The navigation bar includes 'mWater Portal', 'Surveys', 'Maps', 'Dashboards', 'Manage', 'Issues' (highlighted), 'Indicators', and 'Consoles'. Below the navigation bar, the 'Issues' section is titled 'Track operational and maintenance issues. [Learn More.](#)'

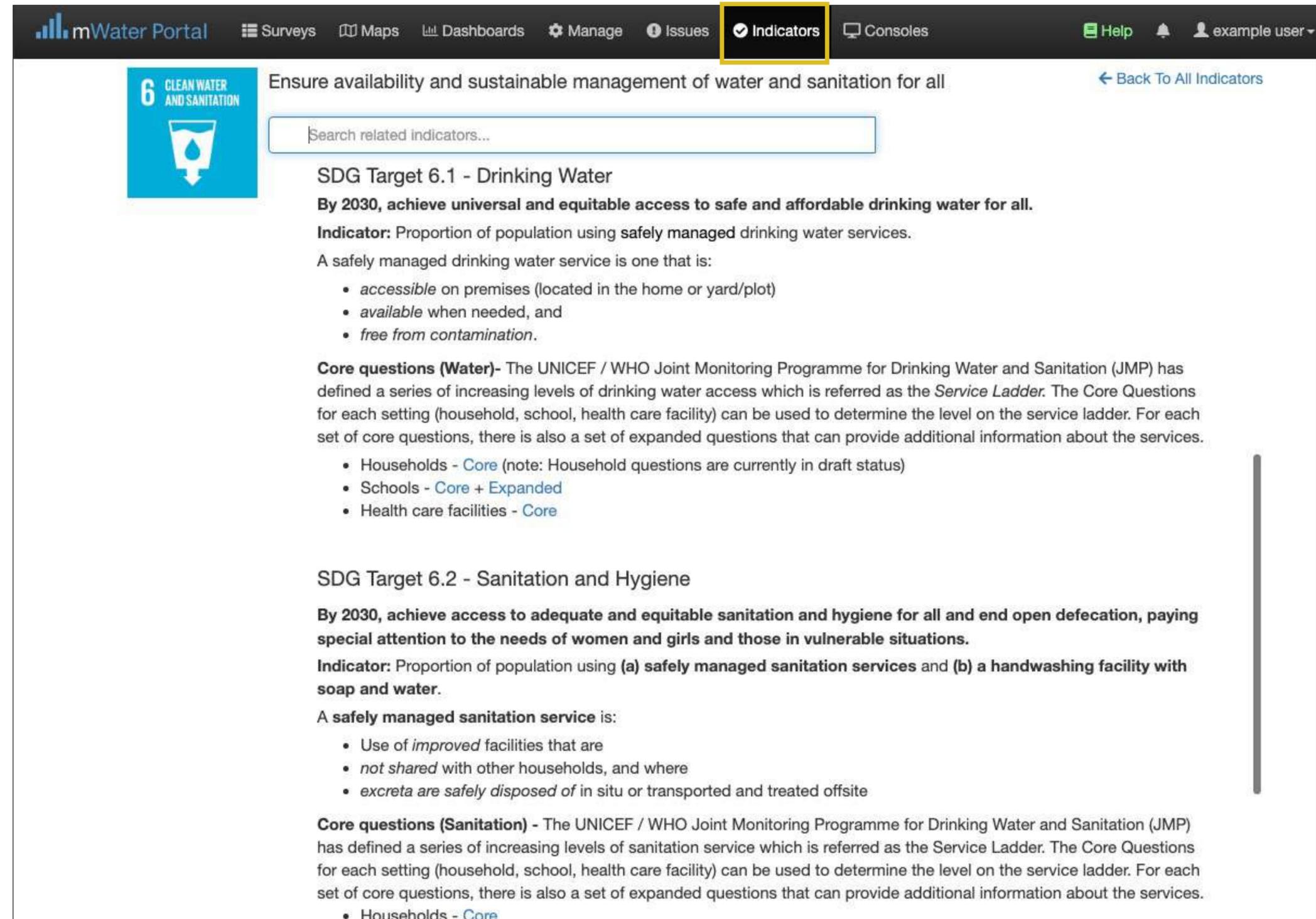
There are filters for 'Type' (set to 'All') and 'State' (set to 'All'), along with a '+ Open New Issue' button and an 'Edit Issue Types' button.

Type	State	Name	Description	Opened by	Modified
Water Point Functionality Issue	resolved	IPONRIN	Maintenance required	saadusman	Aug 3, 2021
Water Point Functionality Issue	open	Iponrin	Maintenance required	liman24	Aug 3, 2021
Water Point Downtime Issue	open	BS AMBANITANANA BEFORONA BEFORONA	Aug 3, 2021 9:35 AM	Josy	Aug 3, 2021
Water Point Functionality Issue	closed	Jadabvu Bhagi	Maintenance required	○	Aug 3, 2021
Water Point Functionality Issue	open	Izangwa borehole	Maintenance required	○	Jul 31, 2021
Water Point Functionality Issue	open	Teogali village	Maintenance required	○	Jul 30, 2021
Water Point Functionality Issue	open	Rwakanuma	Insufficient water supplied	○	Jul 30, 2021

# Tabs - Indicators

**Indicators** – Allows users to easily align with standard global, national, and institutional indicators e.g. JMP SDG 6 monitoring

Survey forms can contain indicators as questions in the form. This ensures consistency across various different and organizations. A full indicator set can be added to a survey form with only one click!



mWater Portal | Surveys | Maps | Dashboards | Manage | Issues | **Indicators** | Consoles | Help | example user

6 CLEAN WATER AND SANITATION

Ensure availability and sustainable management of water and sanitation for all

← Back To All Indicators

Search related indicators...

### SDG Target 6.1 - Drinking Water

**By 2030, achieve universal and equitable access to safe and affordable drinking water for all.**

**Indicator:** Proportion of population using safely managed drinking water services.

A safely managed drinking water service is one that is:

- *accessible* on premises (located in the home or yard/plot)
- *available* when needed, and
- *free from contamination*.

**Core questions (Water)-** The UNICEF / WHO Joint Monitoring Programme for Drinking Water and Sanitation (JMP) has defined a series of increasing levels of drinking water access which is referred as the *Service Ladder*. The Core Questions for each setting (household, school, health care facility) can be used to determine the level on the service ladder. For each set of core questions, there is also a set of expanded questions that can provide additional information about the services.

- Households - [Core](#) (note: Household questions are currently in draft status)
- Schools - [Core](#) + [Expanded](#)
- Health care facilities - [Core](#)

### SDG Target 6.2 - Sanitation and Hygiene

**By 2030, achieve access to adequate and equitable sanitation and hygiene for all and end open defecation, paying special attention to the needs of women and girls and those in vulnerable situations.**

**Indicator:** Proportion of population using (a) **safely managed sanitation services** and (b) **a handwashing facility with soap and water**.

A **safely managed sanitation service** is:

- Use of *improved* facilities that are
- *not shared* with other households, and where
- *excreta are safely disposed of* in situ or transported and treated offsite

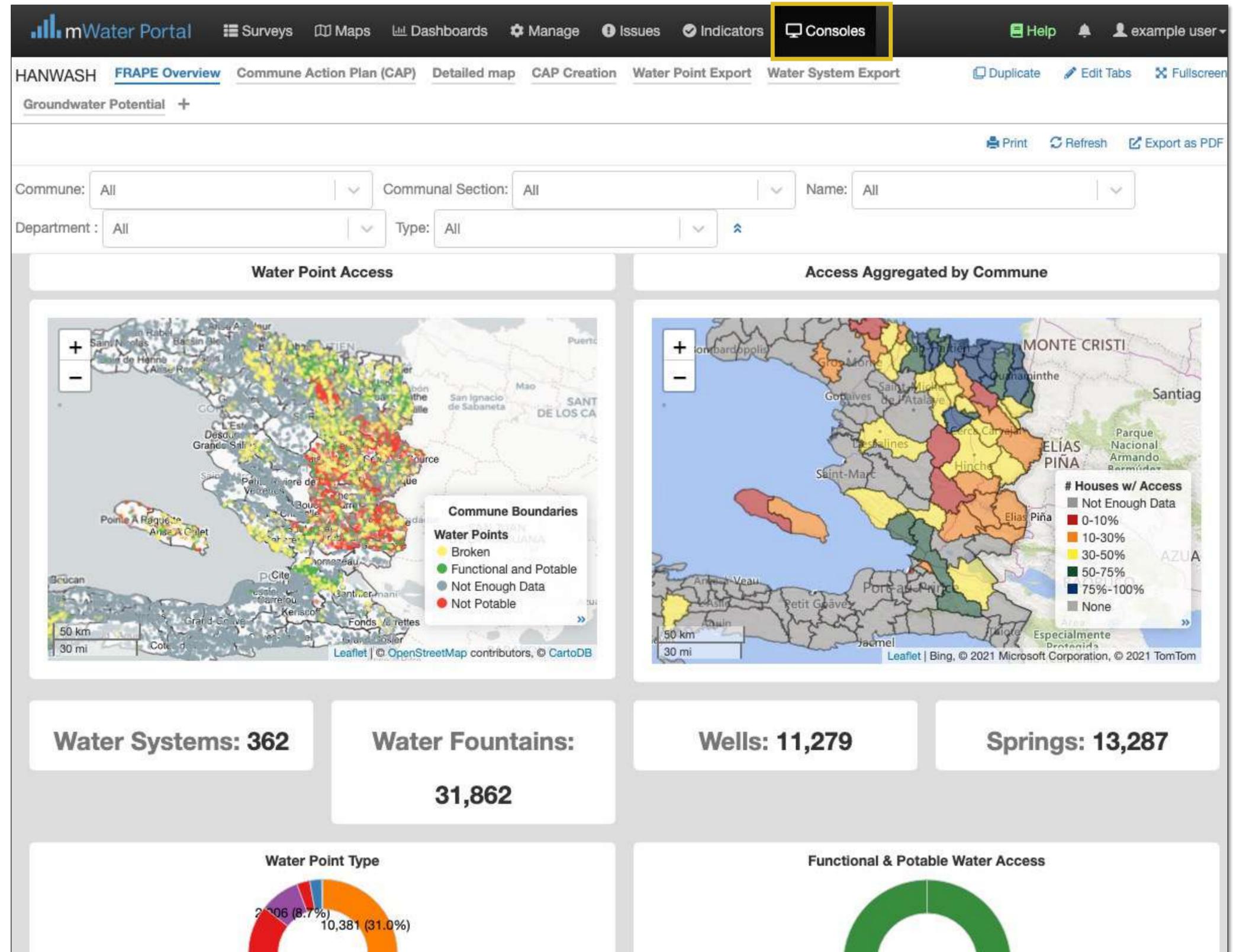
**Core questions (Sanitation) -** The UNICEF / WHO Joint Monitoring Programme for Drinking Water and Sanitation (JMP) has defined a series of increasing levels of sanitation service which is referred as the *Service Ladder*. The Core Questions for each setting (household, school, health care facility) can be used to determine the level on the service ladder. For each set of core questions, there is also a set of expanded questions that can provide additional information about the services.

- Households - [Core](#)

# Tabs - Consoles

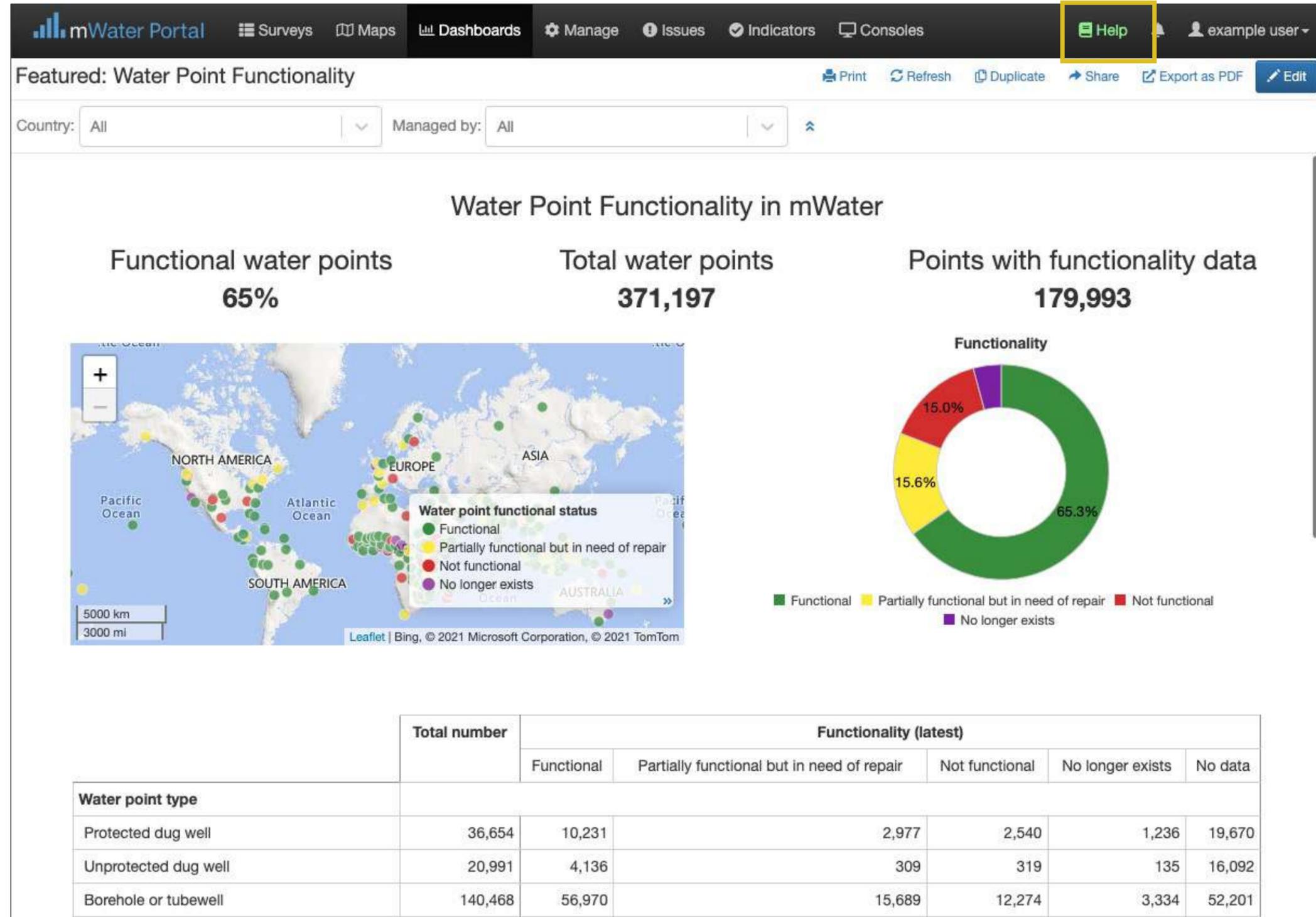
**Consoles** – Multi-tabbed interfaces for data visualization, analysis, and sharing  
*e.g. water infrastructure and access console*

Existing maps, dashboards, and datagrids can be added as separate tabs.



# Resource center

**Help (Resource center)** – Provides users with information on the mWater platform like user manuals, video tutorials, training materials, troubleshooting guides, and case studies



# User account

**User account** – Manage your user account information like:

- Name
- Username
- Email address
- Password

You can view and remove any personal data from the platform at any time using the Data section

Clicking your account name also displays the **Report a problem** button, which can be used to contact **mWater staff** to report technical bugs with the platform

The screenshot displays the 'My Account' page in the mWater Portal. The top navigation bar includes links for Surveys, Maps, Dashboards, Manage, Issues, Indicators, Consoles, Help, and a user profile dropdown for 'example user' with options for Logout, My Account, and Report a Problem. The main content area is titled 'My Account' and includes a link to 'mWater Terms of service'. Below this, there are five rows of user information, each with an 'Edit' button:

Name	John Doe	Edit
<i>Your Given and Family Names are collected to help your organization's administrators add you to the right surveys and visualisations.</i>		
Username	example user	Edit
<i>Your username is what identifies you in the system and gets added to surveys and visualizations.</i>		
Email	jensbrian@gmail.com	Edit
<i>mWater uses your email to allow you to reset your password and to contact you if you submit problem reports.</i>		
Age confirmed	Yes	
<i>mWater verifies users are over 13 years old to comply with the Children's Online Privacy Protection act (1998).</i>		
Email verified	Yes	
<i>mWater verifies your email address to be able to respond to your problem reports.</i>		

Below the user information, there is a 'Change Password' button. At the bottom of the page, there is a 'Data' section.

Section

# 2

## Core concepts

Basic Topics:

- Sites and surveys
- User roles
- Survey approvals

# Surveys and sites

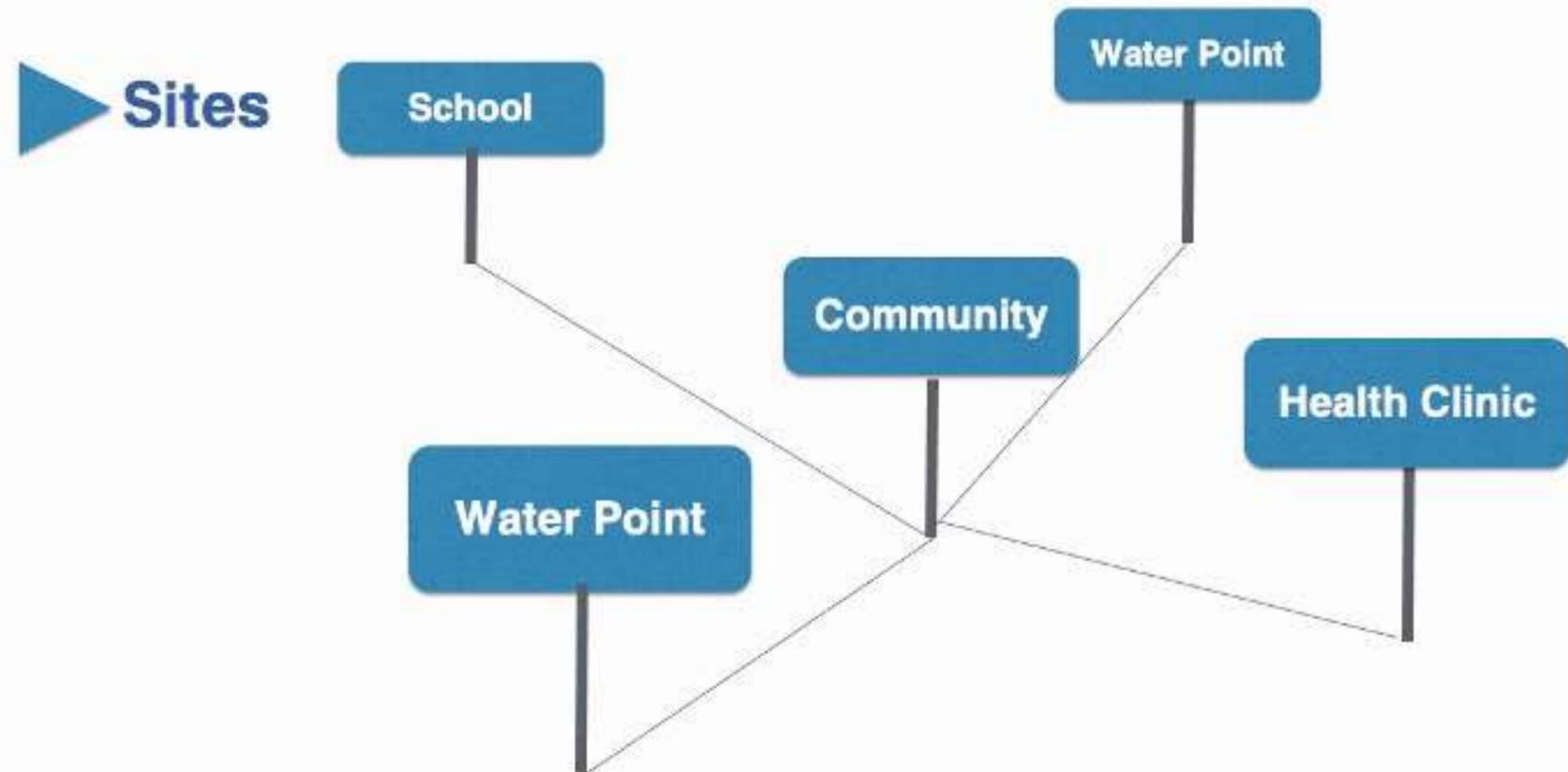
**Sites** are locations or facilities that can be monitored over time.

**Surveys** can be used to monitor changes in Sites over time.

This permits powerful data analysis and visualization to provide insight into specific sites and their history instead of just the survey sample as a whole.

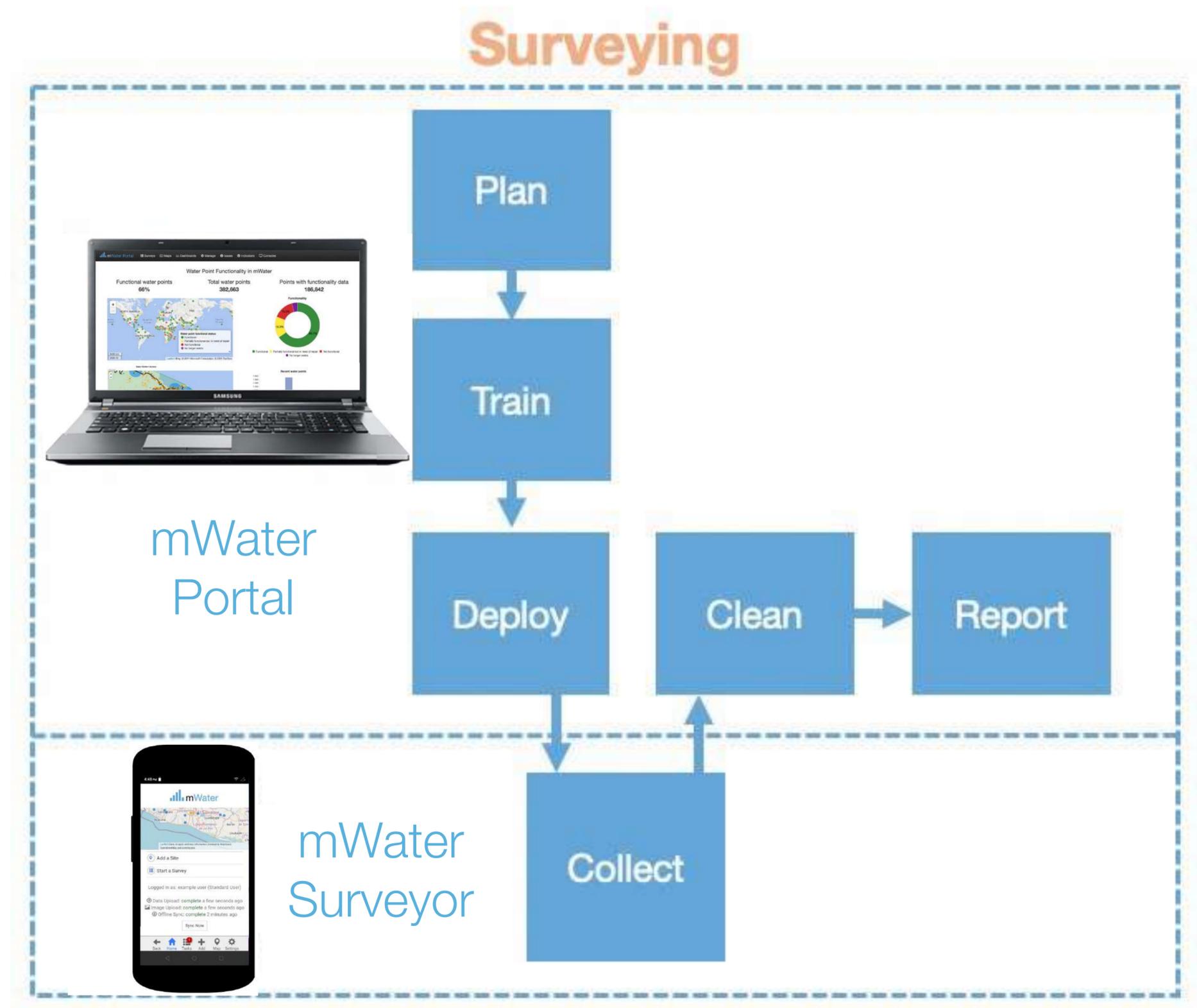
Sites can be shared with the whole mWater community so that the entire sector can work from a common dataset.

All sites use a table with standardized questions common to all users



# User roles

- 1. Survey administrator** – Uses the mWater Portal to create, deploy and manage surveys, sites, issues, etc.
- 2. Enumerator** – Uses the mWater Surveyor app to collect data, update data, and respond to assignments.
- 3. Respondent** – Responds to the questions asked by the enumerator.



# 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.

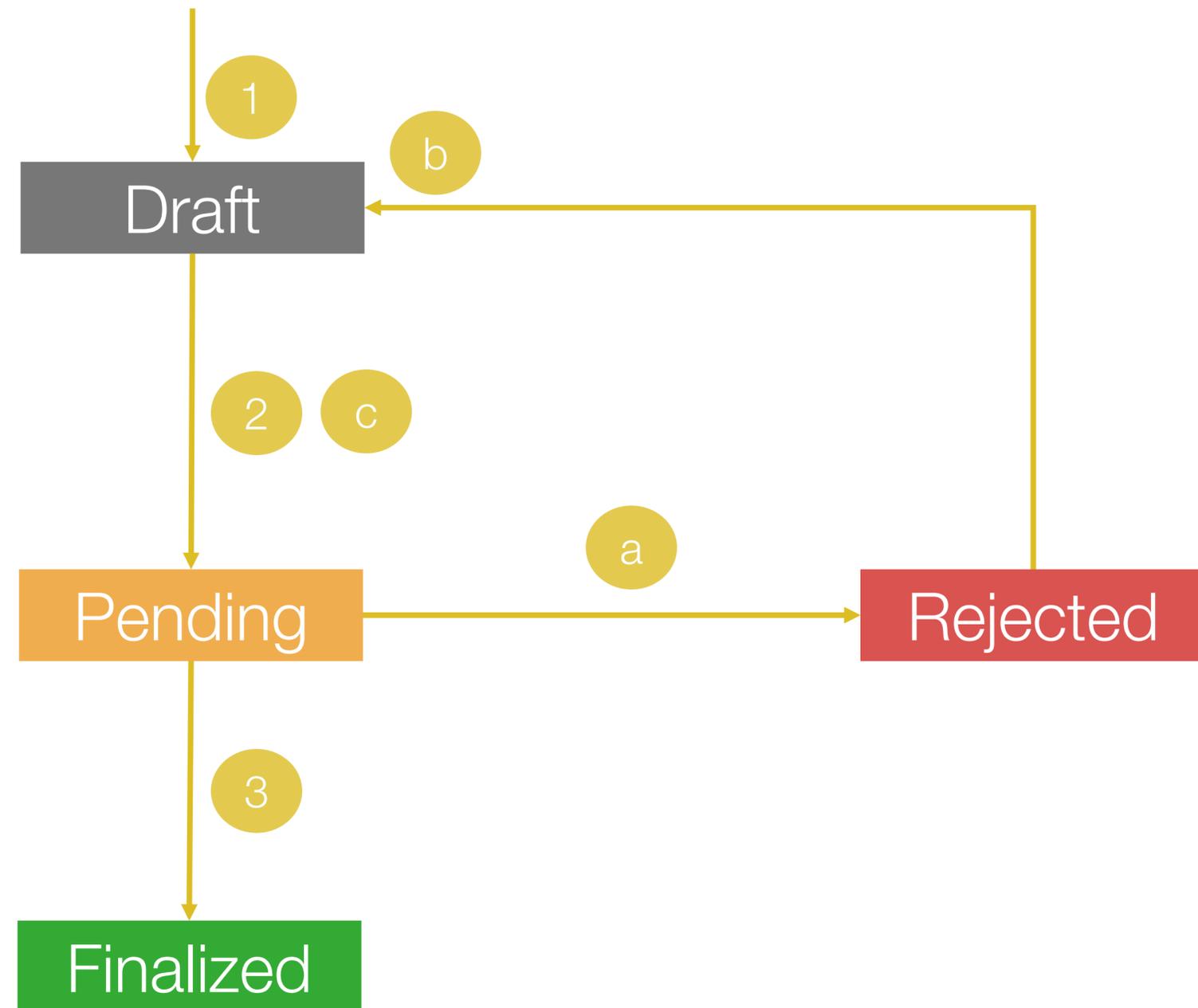
## Approval steps:

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



Section

# 3

## Surveys – Form design

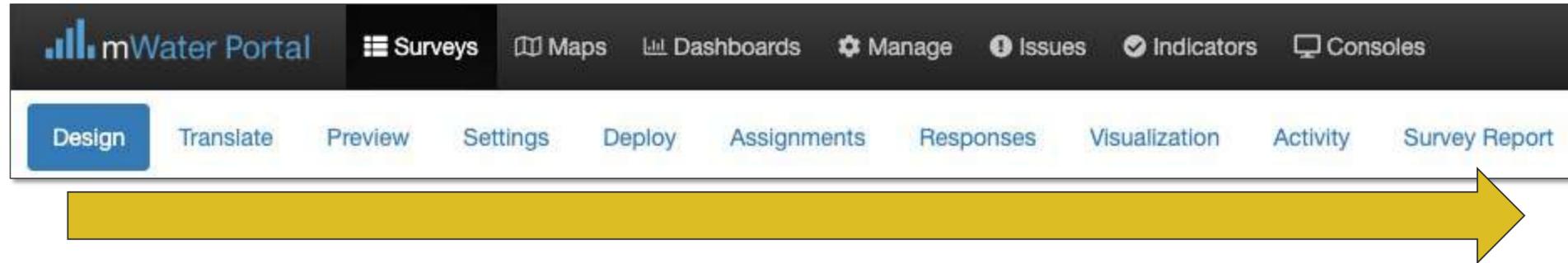
Basic Topics:

- Creating a new form
- Design view
- Adding questions
- Question types (overview)
- Instructions
- Sections
- Conditions
- Editing forms
- Translate
- Preview
- Share (permissions)

Advanced Topics:

- Question options
- Indicators

# 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

# Key terms

In mWater various terms have very specific meanings, as shown at right

## Form:

the set of questions that will be asked in a survey

## Response:

the set of answers from a form that was filled out

## Deployment:

one instance of a form being sent to users to fill out

## Enumerators:

users or groups who can submit responses to a form

## Assignment:

one pre-filled survey response for the assigned enumerator to complete

# Survey list

The survey list page contains:

1. A **+Create a new survey** button
2. A list of surveys that your user account has access to
3. A search bar to find specific surveys
4. A set of default and customizable folders to filter and organize different surveys

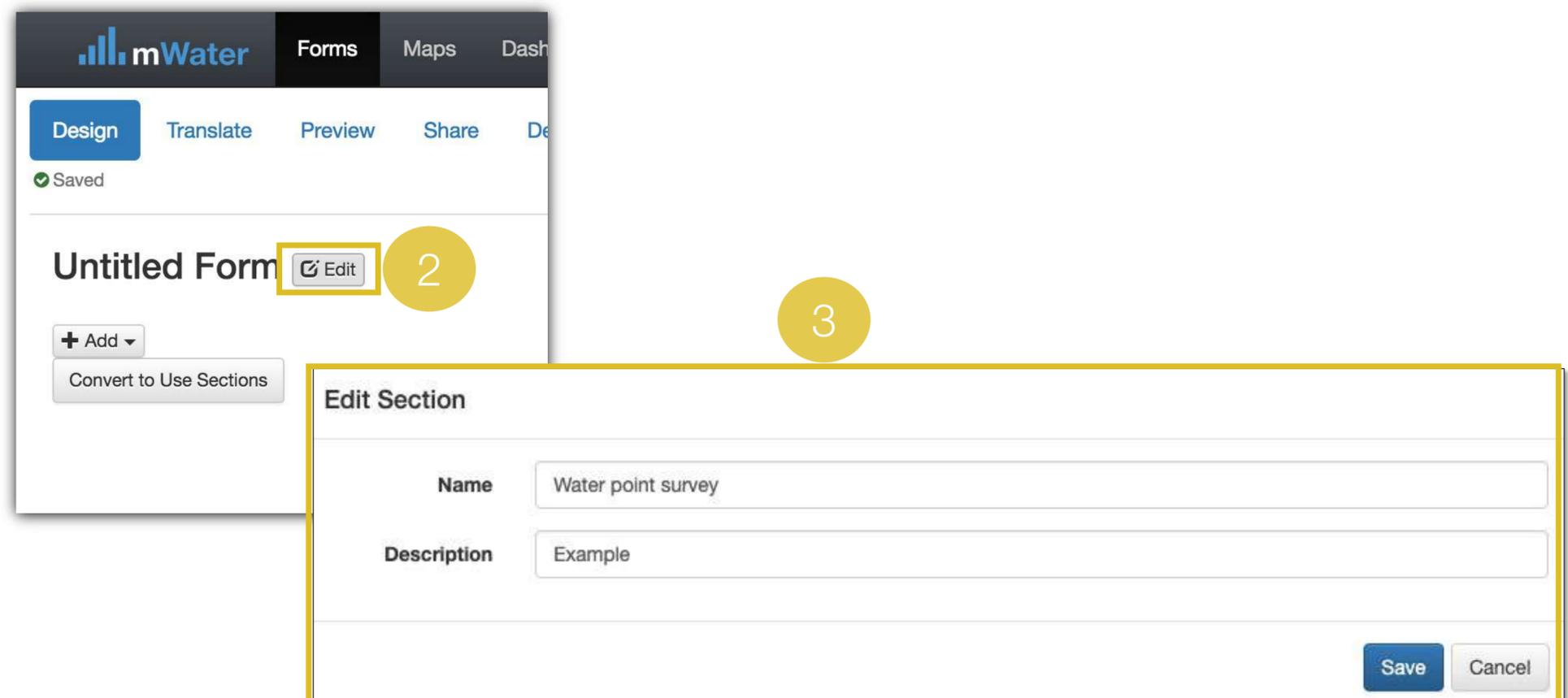
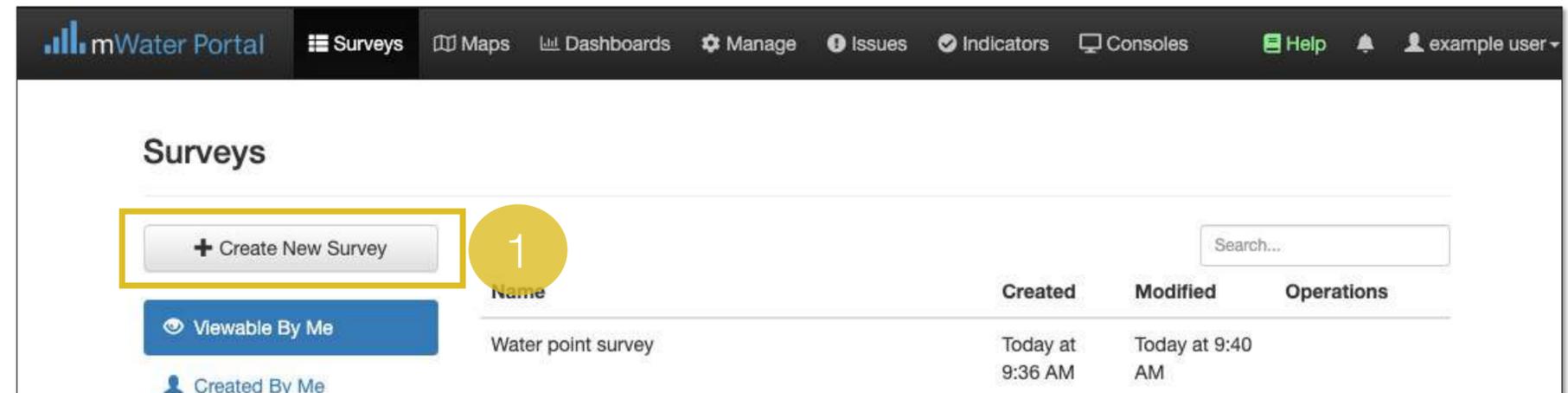
The screenshot shows the 'Surveys' page in the mWater Portal. The page features a navigation bar at the top with links for Surveys, Maps, Dashboards, Manage, Issues, Indicators, Consoles, and Help. The main content area is titled 'Surveys' and includes a '+ Create New Survey' button (callout 1), a search bar (callout 3), and a list of surveys (callout 2). A sidebar on the left contains a list of folders and filters (callout 4), including 'Viewable By Me', 'Created By Me', 'Editable By Me', 'Deployable By Me', 'Shared With Me', 'Public', 'Trash', 'Example folder', and 'New Folder'. The survey list table has columns for Name, Created, Modified, and Operations.

Name	Created	Modified	Operations
Water point survey	Today at 9:36 AM	Today at 9:40 AM	
Inventaire des points d'eau	05/14/2020	Today at 8:56 AM	
Fòm Fidback Fomasyon	12/11/2018	Last Thursday at 12:05 PM	
Formulaire Profil Communauté - EPAH - Haiti (Pre-déclanchement)	01/12/2020	Last Thursday at 9:50 AM	
Formulaire Ménage - EPAH - Haiti PMO	07/21/2021	07/27/2021	
Rapo Reyinyon	04/21/2017	07/27/2021	
Demand Letter	04/06/2017	07/27/2021	
Suivi Water trucking_CDC	04/06/2021	07/26/2021	
Sensibilisation_COVID19_2e vague_CDC	07/19/2021	07/26/2021	

# Creating a new form

To create a new form:

1. Click the **+Create new survey** button
2. Select **Edit**
3. Enter a name and description for the survey form and click **Save**



# Design view

This tab is where the survey administrator configures the structure of the survey form, including:

- 1. The form view** – Displays each question, similarly to how it will appear for the enumerator
- 2. Table of contents** – The overall view of the structure of the survey form
- 3. Basic controls** – Undo, redo, print
- 4. Advanced controls** - Add calculated values and standard indicators to the survey form

## Notes:

- All changes are instantly saved (green Saved icon)
- More than one user can work at the same time
- Move your cursor over a section or question to get more choices
- For surveys with sections (pages), these will all show up here as a single page, separated by grey boxes

The screenshot shows the mWater Portal interface in the Design view for a survey titled "Water point survey". The interface is divided into several sections:

- Header:** Includes the mWater Portal logo, navigation tabs (Surveys, Maps, Dashboards, Manage, Issues, Indicators, Consoles, Help), and a user profile (example user).
- Sub-headers:** Design, Translate, Preview, Settings, Deploy, Assignments, Responses, Visualization, Activity, Survey Report.
- Tools:** A toolbar with icons for Undo, Redo, Print, Calculations, and Indicator Library.
- Form View (1):** The main area showing the survey form structure. It includes a "1. General information" section with fields for "Water point\*" (a dropdown menu with "mWater ID of Site" and a "Select" button), "Date of survey\*" (a date picker with "YYYY-MM-DD" and a calendar icon), "Functional status" (radio buttons for "Functional", "Partially functional but in need of repair", "Not functional", and "No longer exists"), and "Monitoring type\*".
- Table of Contents (2):** A sidebar on the right showing a search bar and a list of sections: "1. General information" (with sub-items 1.1. Water point, 1.2. Date of survey, 1.3. Functional status, 1.4. Monitoring type) and "2. Management" (with sub-item 2.1. Management structure).

# Adding questions

To add a question to the survey form:

1. Click the **+Add** or **+Insert** button
2. Select an option from the dropdown menu
  - a) **New question** – creates a new blank question
  - b) **Search question library** – Search for an existing question within any other survey and add it to this form
  - c) **Instructions** – Insert notes for the enumerator
  - d) **Timer** – Insert a timer which can be stopped by the enumerator
  - e) **Question/roster group and roster matrix** – Inserts a set of questions grouped together
3. Use the popup to configure the question and click **Save**

The screenshot illustrates the '2. Management' interface for a survey form. It shows a list of management structures: Direct Government Operation, Private Operator/Delegated, Community Management, Institutional Management, and Other (please specify). A yellow box highlights the '+ Insert' button (1), which opens a dropdown menu with options: New Question, Search Question Library, Instructions, Timer, Question Group, Roster Group, and Roster Matrix. A second yellow box highlights the '+ Add' button (2), which opens a similar dropdown menu. A third yellow box highlights the 'New Question' option (3) in the dropdown menu, which opens a 'New Question' configuration popup. The popup includes fields for 'Type' (Text Question), 'Question Text', 'Format' (Single line of text), 'Validation' (None), 'Conditions' (Always show), 'Alternates' (Not Applicable Option, Don't Know Option), and 'Advanced' options (Include a comments field, Record GPS location, Record date and time, Default answer from the last time form). The popup also has 'Cancel' and 'Add' buttons.

# 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

# Instructions

Instructions are blocks of informational content that you want to include in the form for the enumerator

You can add special codes using a language called Markdown to add formatting to the text:

- Click on **Markdown syntax** for more details on formatting
- Press **Preview** to see how the text will look

**Note:** Instructions can contain calculated formulas and also embedded images

**New Instructions**

**Text**

**\*\*Please read the following instructions before completing this form:\*\***

- One form should be completed for each water point
- Ask to interview the Water User Committee Chair

Remember to press Submit when you are finished.

Hide

**Please read the following instructions before completing this form:**

- One form should be completed for each water point
- Ask to interview the Water User Committee Chair

Remember to press Submit when you are finished.

Use [Markdown syntax](#) for formatting.

**Conditions** Always show [Add Condition](#)

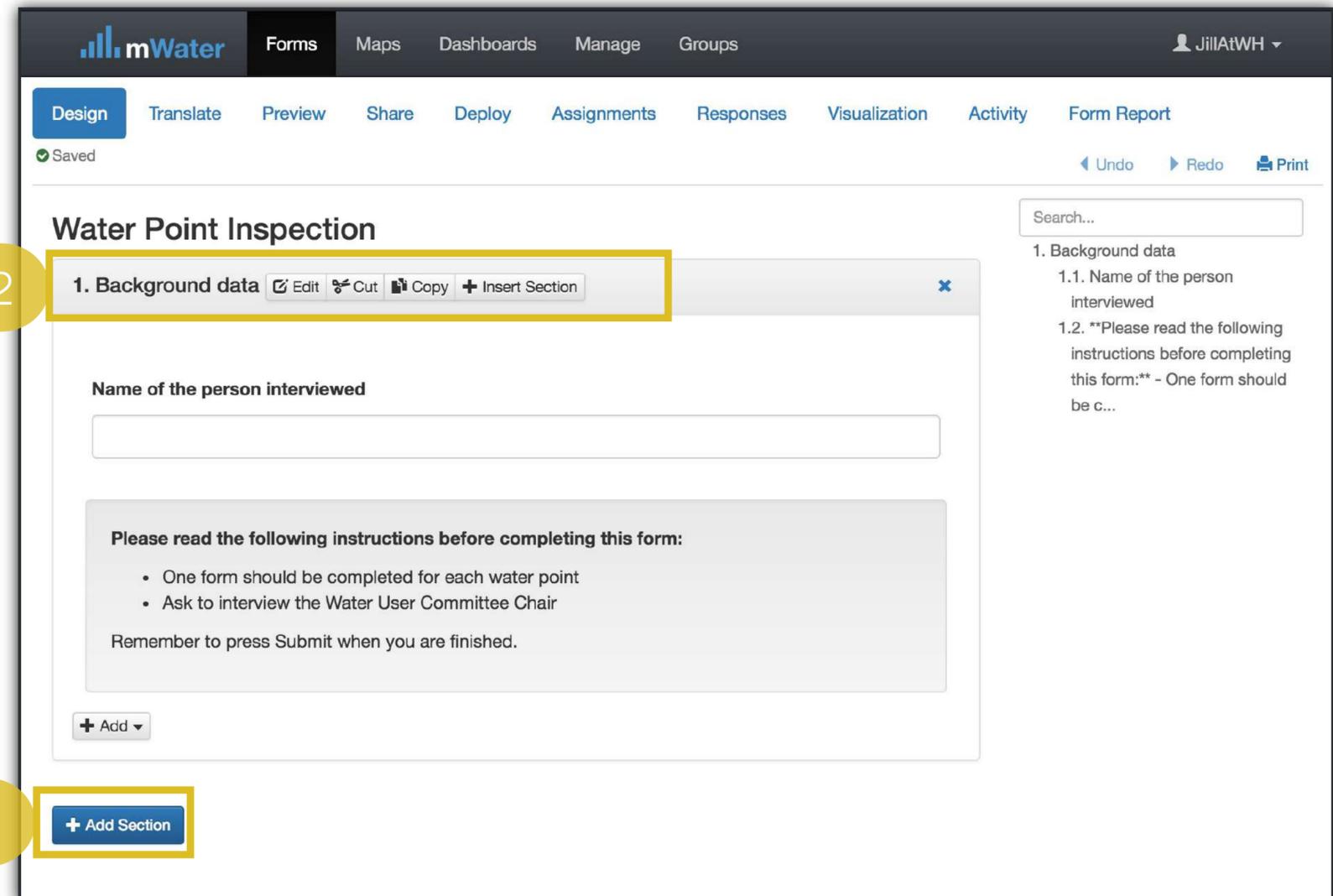
Cancel Add

# Sections

Using sections splits a survey form into pages for the enumerator. Each page must be completed before advancing to the next.

To use sections:

1. Click on **Convert to Sections**. A box will appear around all of the current questions, grouping them into a single section
2. Move your mouse over the section title to see more options
  - a) **Edit** – Change the name, description, and conditions of the section
  - b) **Cut/copy/paste** – Move or duplicate the section to another location
3. Further sections can be added via the **+Add section** or **+Insert section** button



# Conditions

**Conditions** - Control whether a question, section, etc will be displayed, based on the answers to previous questions.

Example:

Question mwf03 asks “Is water available at all times of the day from this source?” (Yes/No)

Question mwf04 asks “How many hours per day is water usually available from this source?” (Number)

IF MWF03 IS NO -> ASK MWF04

IF MWF03 IS YES -> DO NOT ASK MWF04

To add this condition:

1. From the MWF04 popup menu, add a condition
2. Use the menus to enter “Is water available at all times of the day from this source? Is No”

mwf03: Is water available at all times of the day from this source?

Yes

No

If Is water available at all times of the day from this source? is No:

mwf04: How many hours per day is water usually available from this source?

Is water available at all times of the year from this source?

Yes

No

Edit

Type: Number Question  Requires Answer

Question Text: How many hours per day is water usually available from this source?

Code: mwf04

Code is s

Conditions: Is water available at all times ... is No

+ Add Condition  
+ Add Advanced Condition

Validation: None  
+ Add Validation  
+ Add Advanced Validation

Conditions: Always show Add Condition  
+ Add Advanced Condition

1

2

# Editing forms

Cut and paste (moves a question anywhere)

1. Click **Cut** button and then select **Paste** or **Paste before**

Copy and paste (duplicates a question)

2. Click **Copy** button and then select **Paste** or **Paste before**

Move (moves a question within a section)

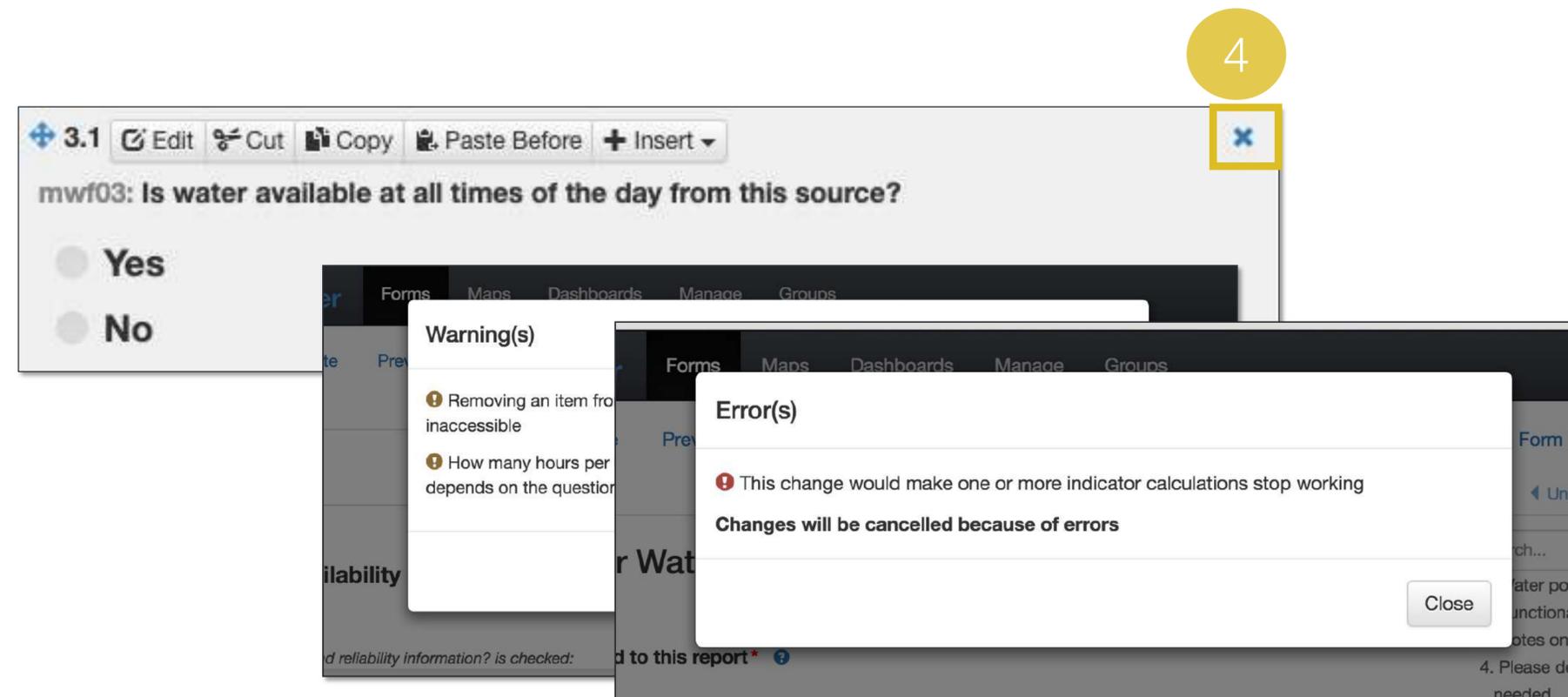
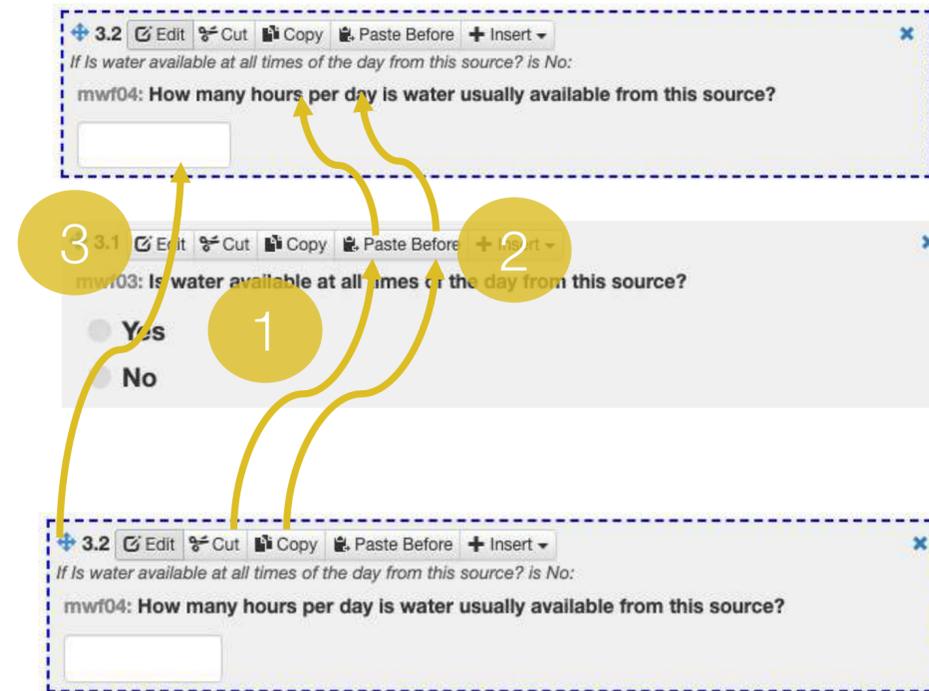
3. Use the  icon to drag a question to a different location within a section

Delete a question

1. Click on the X at the top right of the object to delete it.

*A warning will appear and you will be asked if you are sure you want to delete the item:*

- *Deployed form. If a question is deleted from an active, deployed form the data already collected will be lost.*
- *Condition. If a condition depends on a question, you will be warned before it can be deleted.*
- *Indicator. Questions that inform indicators cannot be deleted without deleting the calculation first. Contact a form administrator if you receive this error.*



# Translate

Adding a language:

1. Click the button **Add/Edit Languages**
2. Use **+Add language** to choose a language from the list or **+Add custom language**.
3. Enter a language in the list and click **Save**.

There are two methods to translate the survey:

- a) Edit translations online
- b) Download/upload XLSX

The screenshot displays the mWater Portal interface for editing a survey. The main navigation bar includes 'Design', 'Translate', 'Preview', 'Settings', 'Deploy', and 'Assignments'. The survey title is 'Water point survey'. Under the 'Languages' section, the base language is English, and other languages listed are Français (18% translated), Malagasy (0% translated), and Zulu (isiZulu) (0% translated). The 'Add/Edit Languages' button is highlighted with a yellow box and a '1' in a yellow circle. Below this, the 'Manage Translations' section offers 'Edit Translations Online' (a) and 'Download XLSX' (b). The 'Download XLSX' button is highlighted with a yellow box and a 'b' in a yellow circle. An 'Edit Languages' modal is open, showing a list of languages: French (Français), Malagasy (Malagasy), zul, and Zulu (isiZulu) (2). The '+ Add Language' button is also highlighted with a yellow box and a '2' in a yellow circle. The modal has 'Save' and 'Cancel' buttons.

# Translate – Edit translations online

Translations can be added for each line by:

1. Selecting the cell in the translated language column
2. Typing in the translation
3. Clicking outside of the cell to store the translation
4. Clicking Save when finished

The screenshot shows the mWater Portal interface for editing translations for a 'Water point survey'. The main page has a navigation bar with 'Design', 'Translate', 'Preview', 'Settings', 'Deploy', 'Assignments', 'Responses', 'Visualization', 'Activity', and 'Survey Report'. The 'Translate' tab is active. Below the navigation, there are sections for 'Languages' (English: base language, Français: 18% translated, Malagasy: 0% translated, Zulu (isiZulu): 0% translated) and 'Manage Translations' (Edit Translations Online, Download XLSX, Upload Translated XLSX). An 'Edit Translations' modal window is open, displaying a table with columns for English, Français, Malagasy, and Zulu (isiZulu). The table contains the following text:

English	Français	Malagasy	Zulu (isiZulu)
Water point survey			
General information			
Water point			
Date of survey			
	This question is used to assess whether a water point is		
	Functional status		
	Functional		
	Partially functional but in need of repair		
	Not functional		

Note: Any blank cells will use the base language text

Buttons: Save, Cancel

# Translate – Download/upload XLSX method

1. Download the XLSX file
2. Translate the blank cells after columns C
3. Upload the completed file

**Note:** This method is recommended for surveys with long help text descriptions with markdown formatting or for outsourcing the translation to someone who does not have an mWater account

The screenshot shows the mWater Portal interface for a 'Water point survey'. The 'Translate' tab is active, displaying the following information:

- Languages:** English: base language (the language that survey is written in); Français: 18% translated; Malagasy: 0% translated; Zulu (isiZulu): 0% translated.
- Buttons:** Add/Edit Languages, Change Base Language, Edit Translations Online.
- Download XLSX:** A button labeled '1' is highlighted, with a note: 'This creates a spreadsheet that can be sent to a translator. Please do not change the first column or first row of the spreadsheet.'
- Upload Translated XLSX:** A button labeled '3' is highlighted, with a note: 'Once translation is complete, open this screen again and upload the file.'

An Excel spreadsheet titled 'Localization (37)' is overlaid on the right side of the screen. The spreadsheet has columns for 'Original Language', 'English', 'Português', 'Español', and 'Kiswahili'. A yellow box highlights the data rows, and a yellow circle with the number '2' is placed over the 'Español' column header, indicating the step to translate blank cells in columns C and D.

	A	B	C	D	E
1	Original Language	English	Português	Español	Kiswahili
2	English	Mosquito breeding site report	Notificação de criadouro de mosquito		Ripoti za maeneo mbu wanapozaliana
3	English	Press select to find an existing site or add a new one	Escolha a opção SELECT para encontrar um site existente ou adicionar um novo		Gusa chagua kutafuta saiti iliyopo au anzisha mpya
4	English	Location of the mosquito breeding site	Localização de local de reprodução do mosquito		Eneo la mazalia ya mbu
5	English	Select	selecionar		Chagua
6	English	Site status	status do site		Hali ya Saiti
7	English	conditions are likely lead to mosquito breeding	Depósito com condições para reprodução de mosquito		Mazingira yanayoweza kusababisha mbu wazaliane
8	English	At risk for mosquito breeding	Em risco para reprodução do mosquito		Katika hatari ya kuzaliana kwa mbu
9	English	larvae or resting adult mosquitos present	mosquitos adultos e larvas presentes		Lava au mbu wakubwa waliotulia wapo
10	English	Active mosquito breeding site no longer at risk	Depósito ativo para reprodução do mosquito		Mbu wanazaliana
11	English	Controlled	local fora de risco		Saiti haipo hatarini tena
12	English	Environmental risk factors	Controlada		Imedhibitiwa
13	English	Artificial containers	fatores de risco ambientais		Sababu hatarishi za mazingira vyombo vya bandia
14	English	Tree holes	recipientes artificiais		Matundu katika miti
15	English	Water drainage system	buracos de árvores		Mfumo wa utiririshaji maji
16	English	Floodwater site	sistema de drenagem de água		Saiti yenye maji ya mafuriko
17	English	Pond, lake, or lagoon	água		Bwawa au ziwa
18	English	Marsh or swamp	Lagoa ou lago		Jaruba au kinamasi
19	English	Irrigated field	Pântano ou mangue		Eneo linalomwagiliziwa
20	English	Photos of environmental risk factors	campo alagado		Picha za sababu hatarishi za mazingira
21	English		Fotos de fatores de risco ambientais		

# Preview

1. Click on the **Preview** tab to view how the form will appear to enumerators.

2. Choose the language from the dropdown box.

3. Choose the type of preview:

**a) Select the Entire Form** - This will display the entire form as an interactive preview. All sections will appear on the same page.

**b) Interactive preview** – Displays the form exactly how it will appear on the device. Sections will be displayed as different pages. You may also choose the type of device (phone or tablet) for the preview.

**Note:** This tab is only to preview the survey form, not for data collection. Data that is entered here will not be saved.

mWater Portal | Surveys | Maps | Dashboards | Manage | Issues | Indicators | Consoles | Help | example user

Design | Translate | **Preview** | Settings | Deploy | Assignments | Responses | Visualization | Activity | Survey Report

## Water point survey

Created by: example user on 2021-08-04 9:36 am  
Last modified by: example user on 2021-08-04 3:42 pm

This is a preview of the form. Your answers will not be saved

English | **Entire Form** | Interactive Preview

### 1. General information

**Water point\***

mWater ID of Site

**Date of survey\***

YYYY-MM-DD

**Functional status**

**Functional**

**Partially functional but in need of repair**

### Device Preview

#### 1. General information

##### General information

**Water point\***

mWater ID of Site | Select

**Date of survey\***

YYYY-MM-DD

**Functional status**

**Functional**

**Partially functional but in need of repair**

**Not functional**

**No longer exists**

**Monitoring type\***

**Initial**

**In process**

**Verification**

**Monitoring**

Next | Save for Later | Discard

Close

# Settings

Under the Settings tab, the survey level permissions controls which users have permission to view/edit the survey form itself.

To add a user or organization to the role:

1. Click Select...
2. Type the name of the user or organization
3. Select the user or organization from the list

**Note:** The ability to view survey responses (*the data itself*) is controlled separately in each Deployment.

**Draft name required** – when checked, users will be prompted to name the draft before starting to fill out the form.

**Enable confidential data mode** – This enables questions to be marked as confidential, which prevents anyone except for admins of the form to see the unredacted answers

mWater Portal | Surveys | Maps | Dashboards | Manage | Issues | Indicators | Consoles | Help | example user

Design | Translate | Preview | **Settings** | Deploy | Assignments | Responses | Visualization | Activity | Survey Report

### Water point survey ?

Survey level permissions

This is where you set survey level permissions. These do not impact deployments. To set deployment level permissions, select Deploy from the top row.

**Managed by** - The organization or organization branch which can see basic information about the survey

Select... | v

**Administer** - Can edit survey, delete survey and change permissions

example user (John Doe) x | v

**Deploy** - Can deploy survey but not edit design

Select... | v

**View** - Can view only. Automatically includes users and groups that need to be able to see the survey as enumerators

Select... | v

Options

Draft Name Required  
When checked, users will be prompted to name the draft before starting to fill out the form

Enable Confidential Data Mode  
This enables questions to be marked as confidential which prevents anyone except for admins of the form from seeing the unredacted answers of the question

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

# Survey permissions

# Surveys -Form design Advanced Topics

- Question options
- Assignments
- Indicators

# Question Options

## Alternates

Adds a checkbox for two common situations:

- *Not Applicable*
- *Don't Know*

1. These options are shown in a separate column on export.

impacting performance. The dictionary definition of \*functional\* is "working properly." A water point may be working properly but not actually providing water at the time of a visit due to rationing, opening

Show Preview

Help is only shown when the user clicks on help icon. Use [Markdown syntax](#) for formatting.

Choices							
+	Functional	x	1	x	Hint	x	Add conditions
+	Partially functional but in need of	x	2	x	works but not as d	x	Add conditions
+	Not functional	x	3	x	not working as des	x	Add conditions
+	No longer exists	x	4	x	abandoned or miss	x	Add conditions

+ Add Choice + Add "Other" with text box

**Conditions** Always show [Add Condition](#)

**Alternates**  Not Applicable Option  Don't Know Option

**Advanced**

- Include a comments field with this question
- Record GPS location where question was answered
- Record date and time when question was answered
- Default answer from the last time form was completed on this device
- Disable this question and prevent it from ever being asked

**Export ID:**  x

Cancel Save

# Question Options

## Hint

The **Hint** contains text that is always shown below the question or next to an answer choice. Use this for short reminders or explanations to enumerators.

The image shows the 'Edit' configuration screen for a survey question in the mWater application. The configuration includes:

- Type:** Radio Button Question (with a 'Requires' checkbox).
- Question Text:** Functional status
- Code:** mwf01 (with a 'Code is short identifier that is displayed before the question and used in' note).
- Hint:** Does the water point function as designed? (with a note: 'Hint is shown in grey below question text').
- Help:** This question is used to assess whether a water point is working as de impacting performance. The dictionary definition of \*functional\* is "wor be working properly but not actually providing water at the time of a vis (with a 'Show Preview' link and a note: 'Help is only shown when the user clicks on help icon. Use Markdown sy').
- Choices:** A table of four radio button options, each with a number, a description, and an 'Add conditions' link.

Choice Label	Order	Description	Action
Functional	1	works as designed	Add conditions
Partially functional but in need of repair	2	works but not as de	Add conditions
Not functional	3	not working as desi	Add conditions
No longer exists	4	abandoned or missi	Add conditions

Buttons: + Add Choice, + Add "Other" with text box

The mobile phone screen shows the survey form with the following content:

- WaterHelper Water Point Functionality Survey
- Water point linked to this report\*
- Select
- mwf01: Functional status
- Does the water point function as designed?
- Functional works as designed
- Partially functional but in need of repair works but not as designed
- Not functional not working as designed
- No longer exists abandoned or missing
- mwf02: Notes on functionality status
- Navigation bar: Back, Home, Surveys, Add, Map, Settings

# Question Options

## Help

The **Help** text is only shown when the enumerator clicks on the ? icon next to the question text.

Help text can include formatting, links, and images (when online). Click on “Markdown syntax” in the question popup for more information on formatting.

The image shows the 'Edit' interface for a question in the mWater system. The interface includes the following fields:

- Type:** Radio Button Question (dropdown menu)
- Requires Answer:**
- Question Text:** Functional status (with a help icon 'fx')
- Code:** mwf01 (with a delete icon 'x')
- Code description:** Code is short identifier that is displayed before the question ar
- Hint:** Does the water point function as designed? (with a help icon 'fx')
- Hint description:** Hint is shown in grey below question text
- Help:** This question is used to assess whether a water point is wor impacting performance. The dictionary definition of \*funcnior be working properly but not actually providing water at the ti. Includes a 'Show Preview' link.
- Help description:** Help is only shown when the user clicks on help icon. Use Ma
- Choices:** A list of four options: Functional, Partially functional but in need of, Not functional, and No longer exists. Each has an 'Add code' button.
- Buttons:** + Add Choice, + Add "Other" with text box

To the right, a mobile phone displays the form as it appears to the user. The phone screen shows the question text 'mwf01: Functional status' and the hint 'Does the water point function as designed?'. A hand icon points to a help icon (a question mark in a circle) next to the question text. Below the question, the help text is displayed in a grey box, matching the content in the 'Edit' interface. The phone's bottom navigation bar shows icons for Back, Home, Surveys, Add, Map, and Settings.

# Question Options

## Code

The question **Code** is optional text that will be shown in front of the question in a different font.

**Edit**

**Type** Radio Button Question  Requires Answer

**Question Text** Functional status f\_x

**Code** mwf01 x  
Code is short identifier that is displayed before the question and used in export

**Hint** Does the water point function as designed?  
Hint is shown in grey below question text

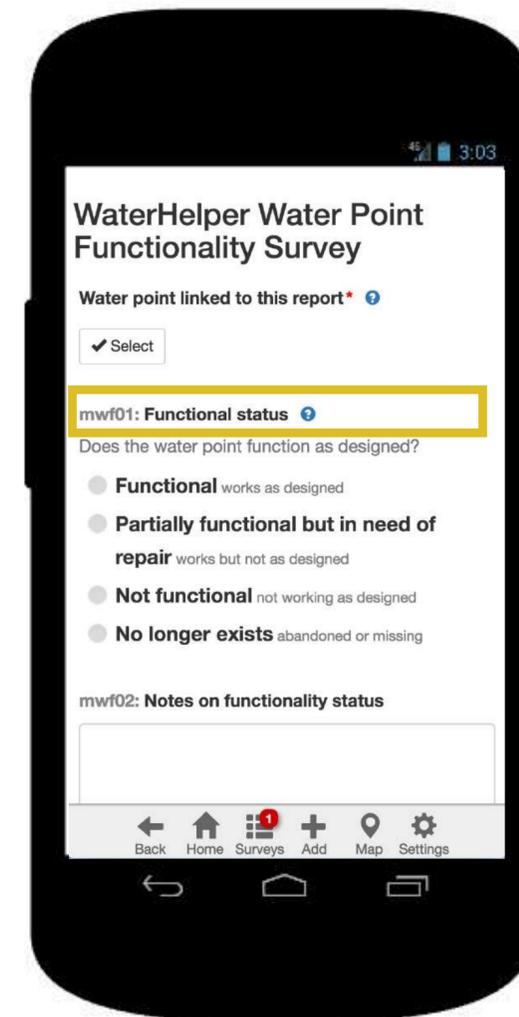
**Help** This question is used to assess whether a water point is impacting performance. The dictionary definition of \*fun be working properly but not actually providing water at  
[Show Preview](#)  
Help is only shown when the user clicks on help icon. Use

**Choices**

<input type="checkbox"/>	Functional	<input type="checkbox"/>	1
<input type="checkbox"/>	Partially functional but in need of	<input type="checkbox"/>	2
<input type="checkbox"/>	Not functional	<input type="checkbox"/>	3
<input type="checkbox"/>	No longer exists	<input type="checkbox"/>	4

[+ Add Choice](#) [+ Add "Other" with text box](#)

**Conditions** Always show [Add Condition](#)



# Question Options

## Export ID

Questions and answer choices can each have an **Export ID** that replaces the full text when exporting survey data.

- The enumerator does not see the Export ID
- You can choose whether or not to use the ID at the time of export.

impacting performance. The dictionary definition of \*functional\* is "working properly." A water point may be working properly but not actually providing water at the time of a visit due to rationing, opening

Show Preview

Help is only shown when the user clicks on help icon. Use [Markdown syntax](#) for formatting.

Choices	ID	Hint	Action
Functional	1	Hint	Add conditions
Partially functional but in need of	2	works but not as d	Add conditions
Not functional	3	not working as des	Add conditions
No longer exists	4	abandoned or miss	Add conditions

+ Add Choice + Add "Other" with text box

**Conditions** Always show [Add Condition](#)

**Alternates**  Not Applicable Option  Don't Know Option

**Advanced**

- Include a comments field with this question
- Record GPS location where question was answered
- Record date and time when question was answered
- Default answer from the last time form was completed on this device
- Disable this question and prevent it from ever being asked

**Export ID:**

Cancel Save

# Indicators

Indicators are the best way to collect standardized data in mWater. They allow you to:

- Standardize data collection across surveys
- Automatically calculate results

To add an indicator:

1. Click the indicator library button
2. Search for an indicator via the search box and list
3. Click the “Add to Survey” button
4. Configure the parameters and click Proceed.

**Open** – The indicator values are visible to everyone, while raw responses are private

**Closed** – The indicator values and raw responses are private (only visible to viewers of the deployment)

**Merge these similar questions** – This option allows admins select whether to create a new question, use existing question, or both.

Any question which is part of an indicator will show up with a blue check mark at the top right.

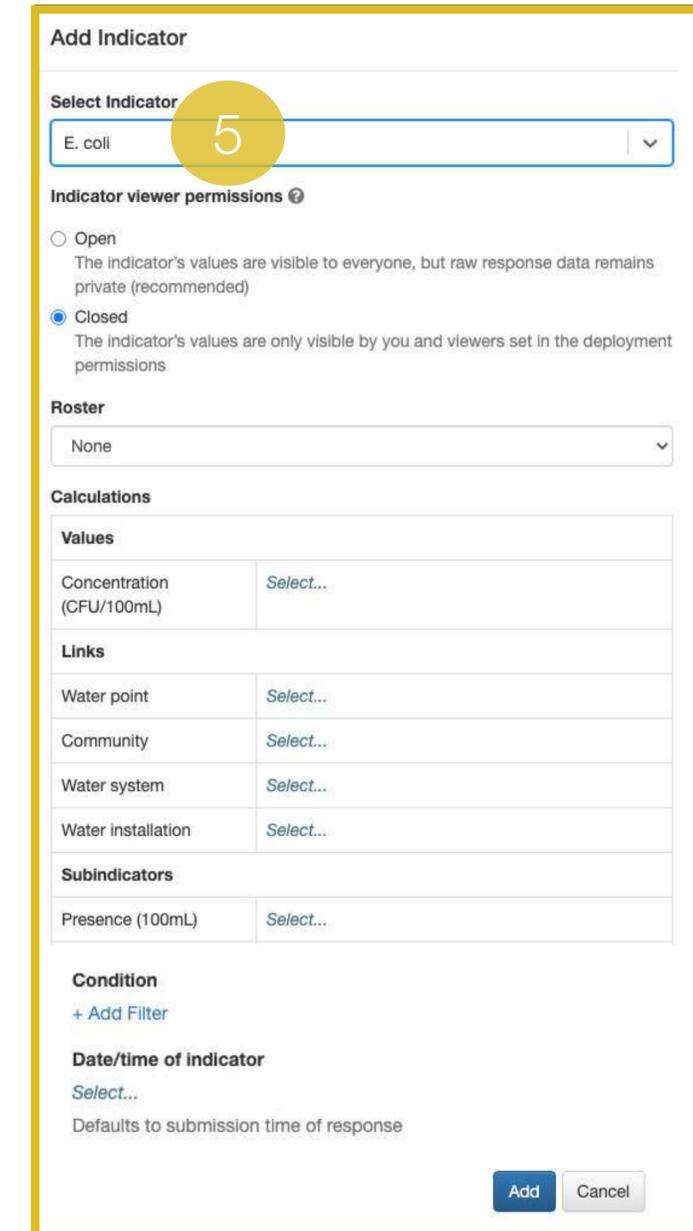
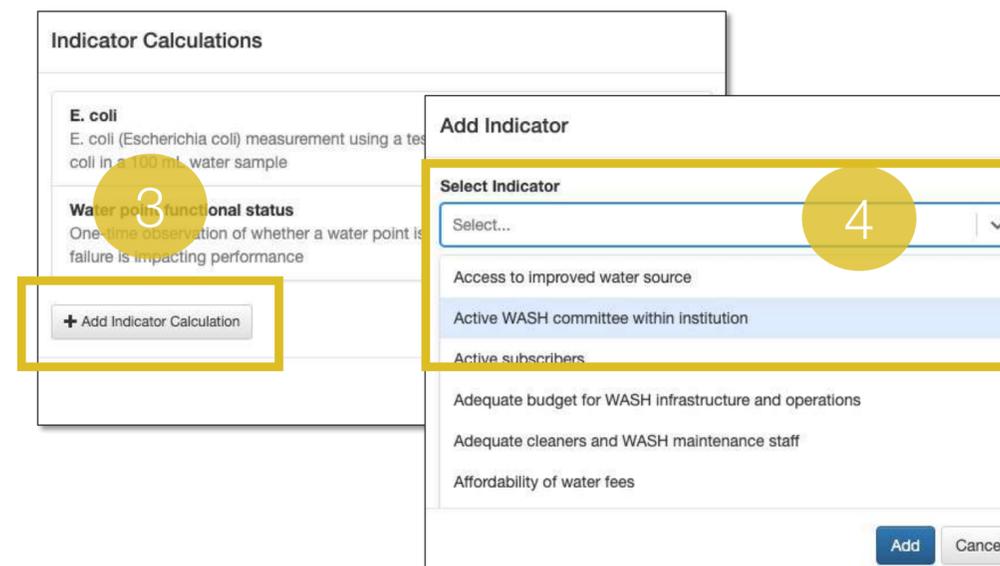
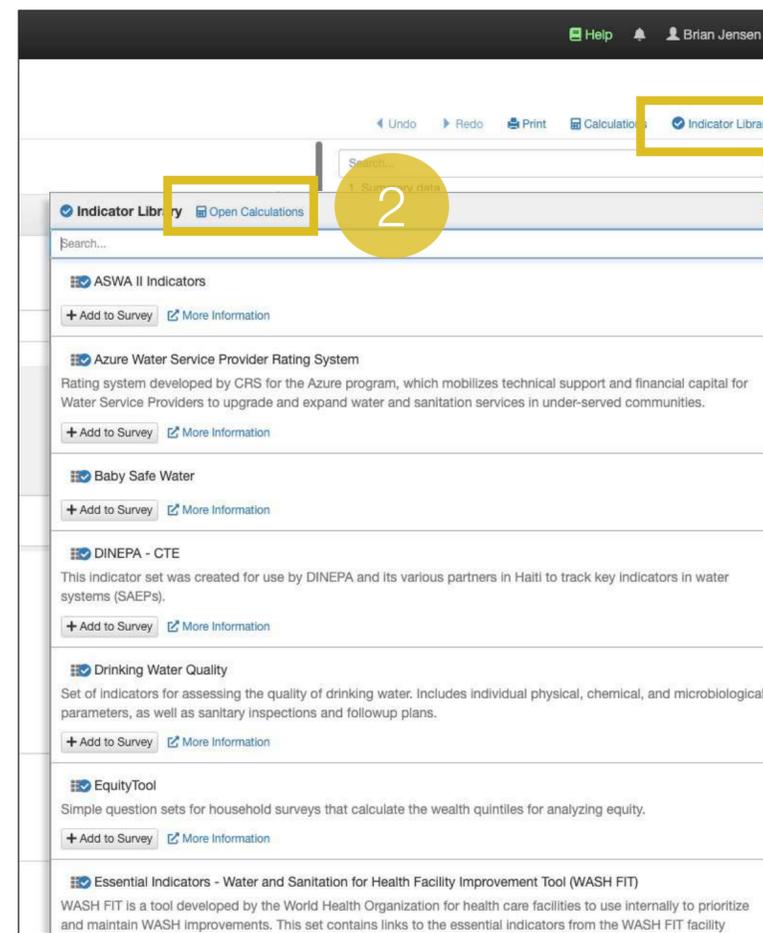
The screenshot displays the mWater Portal interface for adding an indicator to a survey. The top navigation bar includes 'Design', 'Translate', 'Preview', 'Settings', 'Deploy', 'Assignments', 'Responses', 'Visualization', 'Activity', and 'Survey Report'. The main survey design area shows a '1. Summary data' section with a 'Water point site' field and a 'Dropdown question' field. The right-hand panel, titled 'Indicator Library', contains a search box and a list of indicators. A yellow box highlights the 'Indicator Library' button in the top right. A yellow circle highlights the search box, and another yellow circle highlights the 'Add to Survey' button for the 'ASWA II Indicators' entry. A modal window titled 'Add Indicator' is open, showing a green checkmark and the text 'Analyzing 4m'. The modal includes options for 'Indicator viewer permissions' (Open or Closed) and a section for 'Merge these similar questions?' with radio buttons for 'Use indicator question', 'Use existing question', and 'Keep both questions'. At the bottom of the modal are 'Proceed' and 'Cancel' buttons. A separate panel on the right shows 'Functional status' options: Functional, Partially functional but in need of repair, Not functional, and No longer exists, with a blue checkmark next to 'Functional'.

# Manually adding/editing an indicator

To manually add/edit an indicator:

1. Click the Indicator Library
2. Select Open Calculations
3. Click Add indicator calculation
4. Select the indicator from the list
5. Configure the indicator as needed and select Add. Make sure to select an input question from the survey for each indicator calculation. Any of them left blank will cause that part of the indicator to be blank.

**Note:** Each indicator has a documentation page in the indicator library which can be accessed via the More information button



# Using the indicator library

The indicator library contains documentation on each indicator.

To access an indicator:

1. Use the search bar or the Sustainable Development Goals diagram to search/filter the indicator list
2. Select the indicator from the list
3. The title of the indicator displays basic information like the number of data points in the system and an option to start a new survey with these indicators
4. The documentation section outlines definitions, Calculations, evidence, recommended visualizations, properties, and notes on use.
5. The last section of each indicator page contains an example survey with the indicator questions. This can be easily duplicated by clicking "Start new survey with these questions"

The screenshot shows the mWater Global Indicator Library interface. The top navigation bar includes links for Surveys, Maps, Dashboards, Manage, Issues, Indicators, and Consoles. The main content area is titled "Global Indicator Library" and features a search bar and a grid of 15 Sustainable Development Goals (SDGs) represented by icons. A yellow circle with the number "1" is placed over the search bar. Below the SDG grid, there is a section for "Recommended Indicators" with a sub-section for "Equity and Inclusion" listing "Vulnerable household (RW-EI-1) by WaterAid Australia". A yellow circle with the number "2" is placed over this section. The main indicator page for "SDG 6.2a: Household - Sanitation service ladder (SDG6\_HH\_S)" is displayed. The title is highlighted in yellow, and a yellow circle with the number "3" is placed over it. Below the title, there is a "Start New Survey For This Indicator" button. The "Contents" section is highlighted in yellow, and a yellow circle with the number "4" is placed over it. The "Definitions" section is also highlighted in yellow, and a yellow circle with the number "5" is placed over the "Please record the GPS location of the household" text. The "Recommended visualizations" section is highlighted in yellow, and a yellow circle with the number "5" is placed over the "English Visualization" link. The "Sanitation SDG service ladder" section is highlighted in yellow, and a yellow circle with the number "5" is placed over the "Start new survey with these questions" button.

Section

# 4

## Deployments and assignments

Basic Topics:

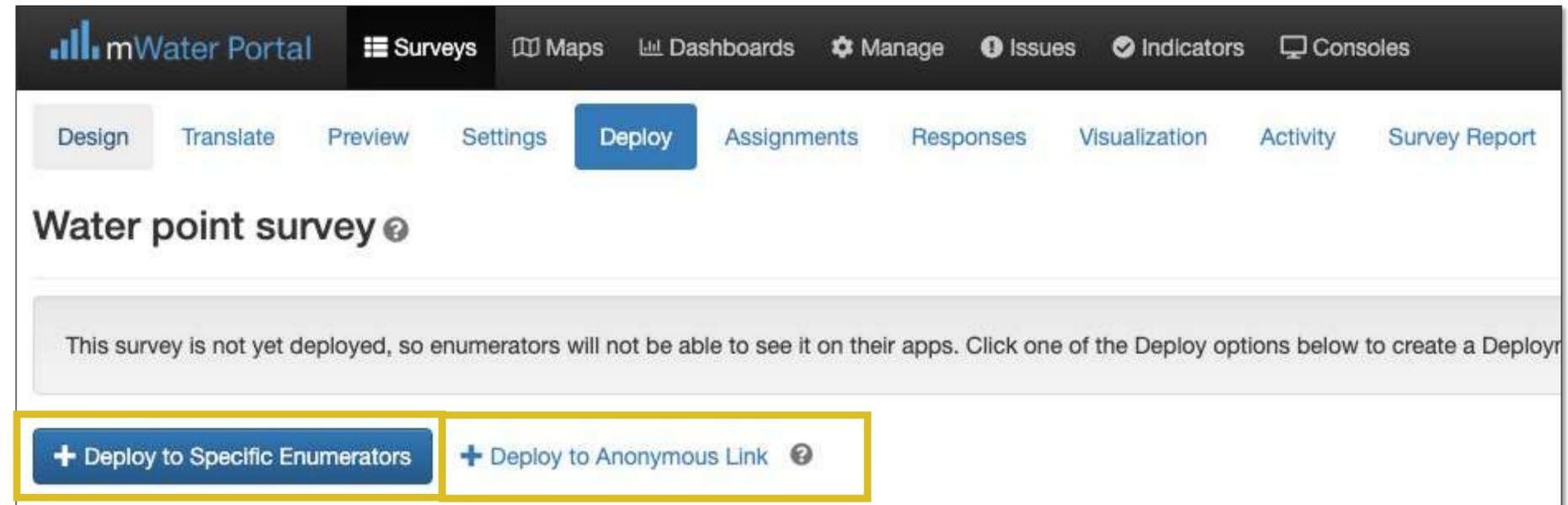
- Using the deployment wizard
- Deployment popup
- Roles and permissions
- Approval chains
- Assignments

# 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.



The screenshot shows the mWater Portal interface. The top navigation bar includes 'mWater Portal', 'Surveys', 'Maps', 'Dashboards', 'Manage', 'Issues', 'Indicators', and 'Consoles'. Below this, a secondary navigation bar has tabs for 'Design', 'Translate', 'Preview', 'Settings', 'Deploy', 'Assignments', 'Responses', 'Visualization', 'Activity', and 'Survey Report'. The 'Deploy' tab is selected. The main content area is titled 'Water point survey' and contains a message: 'This survey is not yet deployed, so enumerators will not be able to see it on their apps. Click one of the Deploy options below to create a Deploy'. Below the message are two buttons: '+ Deploy to Specific Enumerators' (labeled 1) and '+ Deploy to Anonymous Link' (labeled 2).

1

2

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

**Title** Water point update 2021  
Title of this deployment

**Status** Active Inactive  
Deployment is accepting new responses

**Enumerators** Example Organization -> Field staff x  
Branches or users who will be able to create responses to the survey

**Viewers** Example Organization x  
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** example user (John Doe) x  
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** example user (John Doe) x  
 Only allow these approvers to approve or reject responses. Managers can still edit or delete responses.  
+ Add Approval Stage  
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.



# Assignments

Assignments allow administrators to create pre-filled responses that can be assigned to specific enumerators to complete. The enumerator will receive the assignment on their device, go to the assigned location, and complete the survey response.

To create assignments:

1. Click the +Add assignments button
2. Select an option
  - a) Prefill from spreadsheet – Use an excel spreadsheet for the list of assignments
  - b) Pre-fill using existing mWater data – Uses existing sites or surveys to create a list of assignments
3. Enable random sampling – Allows for a random sampling of a user-defined percentage of the assignment list
4. Choose the deployment for which the responses will be collected

**GeMAP Survey v4 ENDLINE**

**+ Add Assignments** (1)

Assignments are queued responses that can have certain questions pre-filled. You can only assign users or teams to whom you have already deployed the survey. Assignments are optional.

We do not recommend assigning in batches over 500. Talk to mWater if you have a more complex survey that requires custom support for larger batches.

Status: All Unassigned Assigned Draft Rejected Pending Final Assigned To: Select...

**Add Assignments**

Assignments will appear in a special section of the Surveys screen of the mWater Surveyor app. They can contain some questions as a name and location, and you can also pre-fill some of questions in the survey. You can assign them to individual users or teams. Once a user accepts the assignment, it converts into a draft response for this survey.

**Choose a method to create assignments:**

- Pre-fill from a spreadsheet (2) Create assignments by uploading a spreadsheet template that includes the name, location, or pre-filled question responses.
- Pre-fill using existing mWater data (2) Choose a source of data currently in mWater (past surveys, sites, etc.) and create one assignment for each point.

**Random sampling** (3)

- Enable random sampling

Random sampling will randomly select the assignments from the complete list you provide. It can do a simple sample or a fixed number per cluster.

**Select Deployment** (4)

Endline

Surveys must be deployed before assignments can be made. If you are not ready to start collecting data, please un-select "Deployment is accepting new responses" on the deployment.

Cancel < Back Next > Finish

Cluster Name	Assignment Name	Latitude	Longitude	Name of respondent	Gender of respondent
North cluster	John Doe	24.091221	6.09213	John Doe	Male
Southern cluster	Frank Adler	23.091241	6.09532	Frank Adler	Male
North cluster	Kate Holinsworth	24.096656	6.09923	Kate Holinsworth	Female

**Select the mWater data source**

In this step, you will select the existing mWater data that will be used to generate the fields in your existing data source to pre-filled questions in this survey.

**Data Source:**

Select data from sites, surveys or an advanced category below. Indicators can be used to filter data.

Sites Surveys Indicators Issues Advanced

**Water point**  
Location where people gather or access water for drinking, domestic use, or agriculture

**Sanitation facility**  
Toilet, latrine, or other place used by people to meet sanitation needs

**Household**

**Community**  
Use to map any village, town, municipality, street, or other informal grouping of people

**School**

# Pre-filling values

The next step is to choose which questions to pre-fill and which values to use.

This page includes:

1. A section to select all of the question to pre-fill
2. A section to choose which values to put in those questions. The values on the right hand side are selected from the assignments data source e.g. the uploaded excel or existing mWater data source
3. A button to create assignments.
4. Clicking Preview will prepare the assignments for preview. These can be finalized by clicking Finish.

### Add Assignments

You can choose fields from the existing mwater data source to use to pre-fill questions or assignment information.

There are some optional fields that are always included with an assignment:

- **Name** - this will appear at the top of each assignment on the enumerator's device
- **Location** - GPS coordinates to help the enumerator find the location of the assignment
- **Cluster** - grouping variable, each unique value will create a cluster

#### Questions to be pre-filled (optional)

- Does any member of the household own a stove?
- Does any member of the household own a mattress/bed?
- Does any member of the household own a radio?
- Name of the respondent
- Gender of the respondent
- Education level of the respondent
- Education level of the respondent (Other (please specify)) - specify
- Occupation of the the respondent
- Occupation of the the respondent (Other (please specify)) - specify
- Gender of the head of the household
- How many adults live in the household?
- How many children live in the household?
- How many adults earned income during the last year?

#### Pre-fill Values

Cluster	Select...
Name	Name of the respondent
Location	Please press Set button household.
Please press Set button below to record the location of this household.	

[▶ Create Assignments](#)

### Add Assignments

#### Preview

Cluster: North cluster

Assigned To	Info	Pre-filled Data	Status						
<input type="checkbox"/>	John Doe Deployment: Endline Location	<table border="1"><thead><tr><th>Question</th><th>Answer</th></tr></thead><tbody><tr><td>Name of respondent</td><td>John Doe</td></tr><tr><td>Gender of respondent</td><td>Male</td></tr></tbody></table>	Question	Answer	Name of respondent	John Doe	Gender of respondent	Male	Unassigned
Question	Answer								
Name of respondent	John Doe								
Gender of respondent	Male								
<input type="checkbox"/>	Kate Holinsworth Deployment: Endline Location	<table border="1"><thead><tr><th>Question</th><th>Answer</th></tr></thead><tbody><tr><td>Name of respondent</td><td>Kate Holinsworth</td></tr><tr><td>Gender of respondent</td><td>Female</td></tr></tbody></table>	Question	Answer	Name of respondent	Kate Holinsworth	Gender of respondent	Female	Unassigned
Question	Answer								
Name of respondent	Kate Holinsworth								
Gender of respondent	Female								

Cluster: South cluster

Assigned To	Info	Pre-filled Data	Status
-------------	------	-----------------	--------

[Cancel](#) [◀ Back](#) [Next ▶](#) [Finish](#)

# Managing assignments

Once the assignments have been created they can be assigned out to enumerators.

To do so:

- In the row for each assignment, select the blue **Assign To** button and choose an enumerator

OR

- Select the checkmark next to the assignment (or click the Select all button)
- Click the grey **Assign To** button at the top of the page and choose an enumerator.

Design Translate Preview Share Deploy **Assignments** Responses Visualization Activity Survey Report

## GeMAP Survey v4 ENDLINE

**+ Add Assignments** Assignments are queued responses that can have certain questions pre-filled. You can only assign users or teams to whom you have already deployed the survey. Assignments are optional.

We do not recommend assigning in batches over 500. Talk to mWater if you have a more complex survey that requires custom support for larger batches.

Status: All Unassigned Assigned Draft Rejected Pending Final Assigned To: Select...

Delete 2 Assignments Assign To...

Unselect All

Cluster: None Unselect All

	Assigned To	Info	Pre-filled Data	Status						
<input checked="" type="checkbox"/>	BobAtWH Assign To...	Mr j.o olujobi Deployment: Endline Location	<table border="1"><thead><tr><th>Question</th><th>Answer</th></tr></thead><tbody><tr><td colspan="2"><b>Consent and Interview Information</b></td></tr><tr><td>Please press Set button below to record the location of this household.</td><td>7.66408696° 5.21865049°</td></tr></tbody></table>	Question	Answer	<b>Consent and Interview Information</b>		Please press Set button below to record the location of this household.	7.66408696° 5.21865049°	Assigned
Question	Answer									
<b>Consent and Interview Information</b>										
Please press Set button below to record the location of this household.	7.66408696° 5.21865049°									
<input checked="" type="checkbox"/>	Assign To...	Deployment: Endline Location	<table border="1"><thead><tr><th>Question</th><th>Answer</th></tr></thead><tbody><tr><td colspan="2"><b>Consent and Interview Information</b></td></tr><tr><td>Please press Set button below to record the</td><td>7.67150561° 5.21596978°</td></tr></tbody></table>	Question	Answer	<b>Consent and Interview Information</b>		Please press Set button below to record the	7.67150561° 5.21596978°	Unassigned
Question	Answer									
<b>Consent and Interview Information</b>										
Please press Set button below to record the	7.67150561° 5.21596978°									

Section

# 5

## Cleaning and managing survey data

Basic Topics:

- Responses
- Rejecting a response
- Approving a response
- Exporting responses
- Managing sites

Advanced Topics:

- Importing responses

# 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:

- Filters and search controls** – Use these controls to locate a specific set of responses
- View controls
  - Randomize order** – Displays the survey responses in a random order
  - Detailed view** – Shows the responses in a table where each column is a survey question
  - Summary view** – Shows the responses in a table, with summary data like status, user, submitted on, deployment, and response ID.
  - Import/export responses** – Import/export responses from/to an excel or CSV format
- 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 'Responses' tab in the mWater Portal. The top navigation bar includes 'mWater Portal', 'Surveys', 'Maps', 'Dashboards', 'Manage', 'Issues', 'Indicators', 'Consoles', 'Help', and a user profile 'example user'. Below the navigation, there are tabs for 'Design', 'Translate', 'Preview', 'Settings', 'Deploy', 'Assignments', 'Responses' (selected), 'Visualization', 'Activity', and 'Survey Report'. The main heading is 'Water point survey'. Below this, there are summary statistics: 'Draft: 1', 'Pending: 3', 'Rejected: -', 'Final: -', 'All: 4'. A filter bar shows 'Draft', 'Pending 3', 'Rejected', 'Final', and 'All' buttons, along with a 'Refresh' button and a search box. Below the filter bar, there are controls for 'Deployment' (set to 'All'), '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 columns: 'Status', 'User', 'Submitted On', 'Deployment', 'Response ID', and 'Operations'. The table contains five rows of data, with the first row highlighted in yellow. The first row has a 'Rejected' status, user 'Brian Jensen', submitted 'Today at 6:35 PM', deployment 'Water point update 2021', and response ID 'Brian Jensen-9MN7UD'. The second row has a 'Pending' status, user 'Brian Jensen', submitted 'Today at 6:34 PM', deployment 'Water point update 2021', and response ID 'Brian Jensen-9MN7TZ'. The third row has a 'Draft' status, user 'Brian Jensen', submitted 'Today at 6:34 PM', deployment 'Water point update 2021', and response ID 'Brian Jensen-9MN7TF'. The fourth row has a 'Draft' status, user 'Brian Jensen', submitted 'Draft', deployment 'Water point update 2021', and response ID 'Brian Jensen-9MN7UT Lacoste water pump'. The fifth row is partially visible and has a 'Draft' status.

Status	User	Submitted On	Deployment	Response ID	Operations
Rejected	Brian Jensen	Today at 6:35 PM	Water point update 2021	Brian Jensen-9MN7UD	
Pending	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	
Draft					

# 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	Subm
Pending	Brian Jensen	Today
Rejected	Brian Jensen	Today
Draft	Brian Jensen	Draft
example user	Brian Jensen	Today
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](#)

Export as PDF

Approve Reject Delete Edit Response English

Question	Answer
<b>General information</b>	
Date of survey	August 4, 2021
Functional status	Partially functional but in need of repair
Monitoring type	Initial
<b>Management</b>	
Management structure	Private Operator/Delegated Management
<b>Access</b>	
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, it displays 'Draft: 1 Pending: 1 Rejected: 1 Final: 1 All: 4'. Below this are buttons for 'Draft', 'Pending' (with a '1' indicator), 'Rejected', 'Final', 'All', and a 'Refresh' button. A search bar is on the right. 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 below shows 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 duplicate 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: Determines how columns will be labelled in the exported version. If 'Both' is selected, there will be 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)

An 'Export Responses' button is at the bottom of the popup.

# Section Surveys - Advanced

Advanced topics:

- Importing survey responses

# 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.

mWater Portal | Surveys | Maps | Dashboards | Manage | Issues | Indicators | Consoles | Help | 2 | example user

Design | Translate | Preview | Settings | Deploy | Assignments | **Responses** | Visualization | Activity | Survey Report

### Water point survey

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

Draft | Pending **1** | Rejected | Final | All | Refresh

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

Status	User	Submitted On	Deployment	Response ID	Operations
Pending	Brian Jensen				
Rejected	Brian Jensen				
Draft	Brian Jensen				
example user	Brian Jensen				
Final					

#### Import Responses

**Step 1: Select options**

**Multicheck Questions**  Single Column  One Column per Choice  
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  
Determines how location questions will be imported

**Step 2: Download template for responses**

**Step 3: Upload completed template**

Deployment:

# Section

# 6

# Sites

## Basic Topics:

- About sites
- Sites permissions
- Viewing, editing, and deleting sites
- Exporting site data

## Advanced Topics:

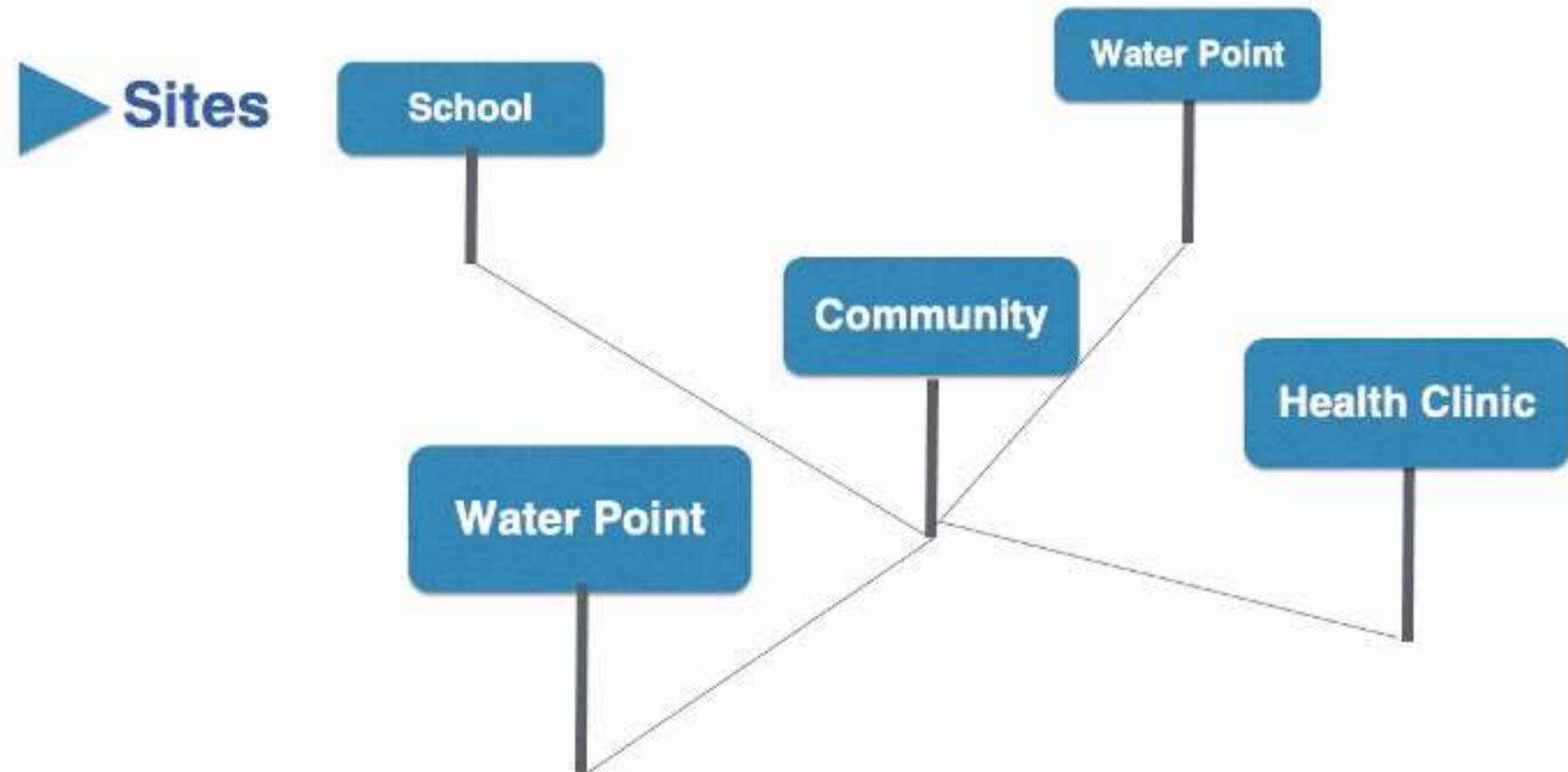
- Importing sites
- Bulk editing
- Deduplicating sites
- Site approvals

# What are Sites and Surveys?

**1.Sites** are locations or facilities that can be monitored over time.

**2.Surveys** can be used to monitor changes in Sites over time.

This permits powerful data analysis and visualization to provide insight into specific sites and their history instead of just the survey sample as a whole.



# Sites

All sites use a table with standardized questions common to all users

1. There are standard site types available for all users. These types are published by mWater and cannot be changed by users.
2. Each site type has various fields, some of which are standard for all types of sites.

## Site types

Site Type	Description
Abstraction point	Location where water is abstracted from surface or groundwater
Access site	Location with access to transportation
Business	A location where a commercial enterprise operates
Community	The location of any village, town, municipality, street or other informal grouping of people.
Energy	Energy source
Gathering site	A place where people gather e.g. public plaza, sports facility, market, etc
Handwashing facility	Location used for washing hands
Health facility	Location where health care services are available
Household	A grouping of people who live together as a single unit. Definition may vary by country and context.
Hydromet station	Hydrologic and/or meteorologic monitoring station
Mosquito breeding station	A location with standing water where mosquitos may breed
Pipe	Pipes attached to a water distribution network
Place of worship	Church, mosque, or temple
Sanitation facility	Toilet, latrine, or other place used by people to meet sanitation needs
School	A location where formal education takes place
Surface water	Site used for ongoing monitoring of a surface water body
Waste disposal site	Formal or informal location where waste is disposed of
Wastewater treatment system	System or process used to convert wastewater or sewage into an effluent that can be safely released to the environment or reused
Water installation	The location of equipment or facility which is connected to a piped water system but does not supply water directly to users. For points which supply water directly to users please use "Water point".
Water point	Location where people gather or access water for drinking, domestic use, or agriculture
Water service provider	The location of a water utility which manages one or more water systems
Water system	System or scheme that supplies water through a distribution network

## Standard site fields

Property Name	Data Type	Description
Unique ID	Numerical ID	ID generated automatically by mWater to uniquely identify each site
Name	Text	Stores a short name which refers to the site. Note: This name does not have to be unique
Description	Text	Stores a detailed description of the site
Photos	Multi-photo	Stores photos of the site
Custom ID / assigned by	Text / Text	Contains any custom assigned ID and the name of the organization who manages this ID
Import code	Text	Contains a custom import code to help when importing site data and connecting it to survey data
Pending approvals	True/False	Defines whether the site is currently pending approvals (True) or not (False)
Location	Section folder	Contains GPS location, Administrative region, Location accuracy, Location altitude, and Altitude accuracy
Attributes	Section folder	Contains standard properties for this site type
Custom fields	Section folder	Contains non-standard properties for this site type which are specific to an organization
Managed by	Reference	Contains a referenc to the user or organization who manages the site
Added	Section folder	Contains the Date/time and user who created the site
Modified	Section folder	Contains the Date/time and user who last modified the site
Datasets	Reference list	Contains a reference to all datasets to which this site belongs
Related surveys	Reference list	Contains a reference to all surveys containing a related site question
Related or Linked sites	Reference list	Contains a reference to all site types to which the site can be connected
Related indicators	Reference list	Contains a reference to all indicators containing a related site question

# Site permissions

Every site has sharing permissions, which can be set to allow different levels of data privacy.

The different privacy levels are:

- **Private** – Only the managing organization/user can view and edit the site data
- **Protected (recommended)** – All users can view the site data, but only the managing organization/user can edit it
- **Public** – All users can view and edit the site data

**Who will manage the site?** - When data is made Private or Protected, users must define which organization manages the data. Users in the managing organization can view, modify, and delete the site.

The screenshot shows the 'Add WPDx information?' screen in the mWater mobile app. At the top, there is a status bar with the time 3:49 and various icons. Below the status bar, there is a toggle switch for 'Add WPDx information?' which is currently turned off. The 'Privacy setting' section is highlighted with a yellow box and contains three radio button options: 'Public', 'Protected' (which is selected), and 'Private'. Below this, the 'Who will manage the site?' section is highlighted with a yellow box and contains a dropdown menu with 'WaterHelper Kenya Staff' selected. At the bottom of the form, there are two buttons: 'Create' and 'Cancel'. The bottom navigation bar of the app is visible, showing icons for Back, Home, Surveys (with a red notification badge), Add, Map, and Settings.

# Viewing site data

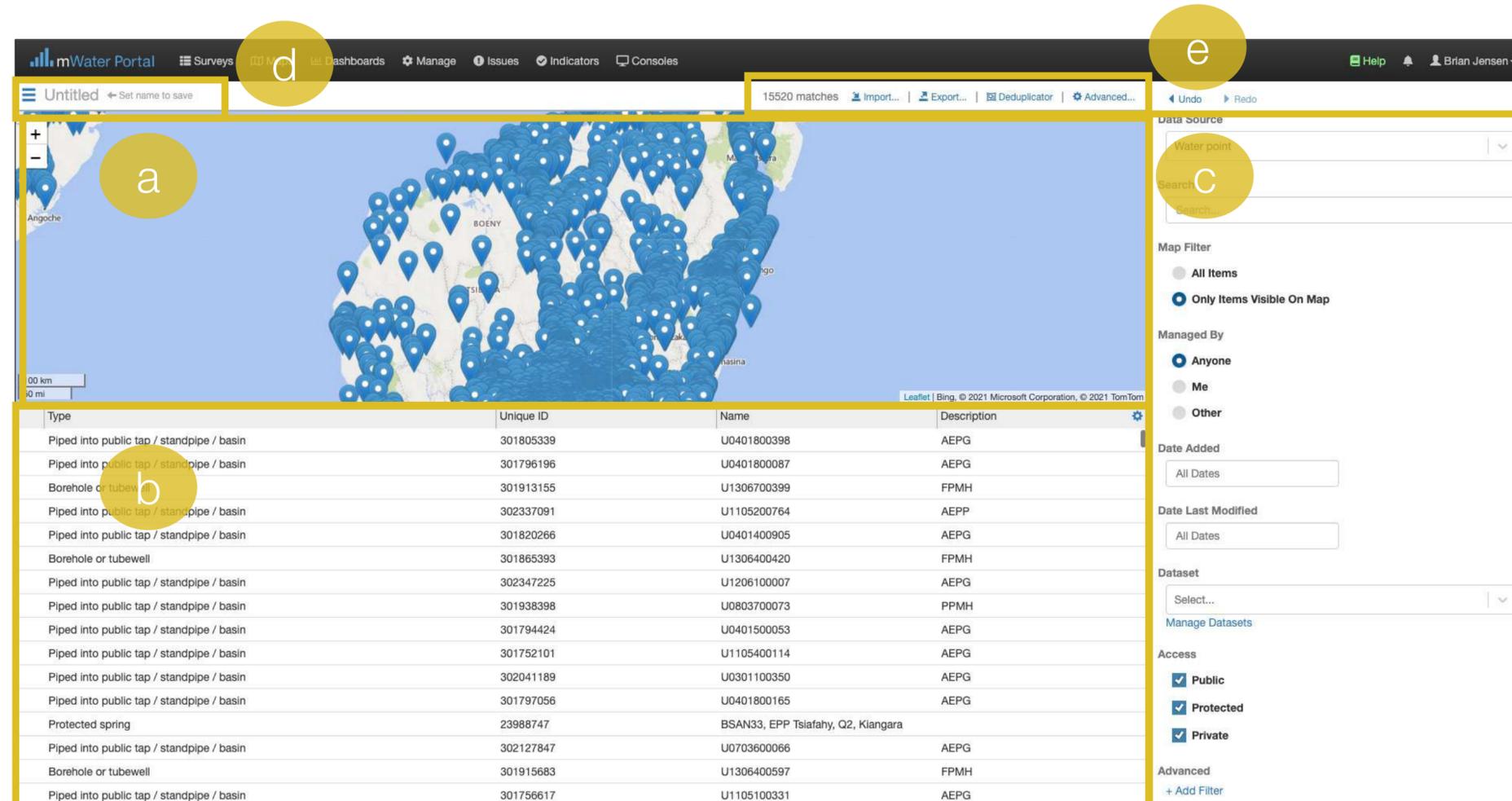
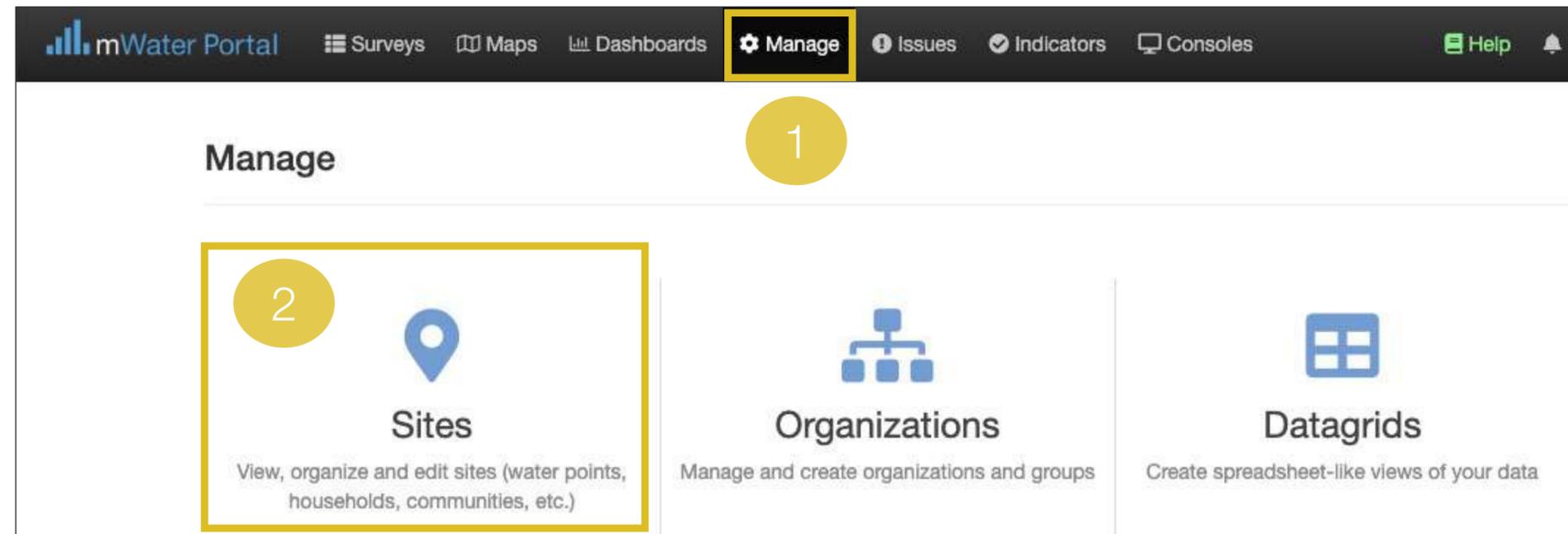
Sites can be viewed and modified from various pages, but are typically viewed from the Sites management page.

To locate this page:

1. Click Manage
2. Select Sites

This page includes:

- a) A map sites
- b) A list of sites
- c) Options to filter and search for sites
- d) Buttons to save the page or load a different one
- e) Buttons to import, export, and duplicate the page



# Viewing, modifying, and deleting a site

To modify or delete a site:

1. Select the site from the list or map

2. The site page contains:

- Basic information about the site
- A list of all surveys and issues connected to the site
- There is a section containing all related surveys and issues
- The bottom of the page contains a **X Delete** button

3. Click **Edit**

4. Modify the data and click the **Save** button

1 of 15520 matches | Edit/Delete Selected... | Datasets... | Import... | Export... | Deduplicator | Advanced...

Access	Type	Unique ID	Name	Description
<input checked="" type="checkbox"/> Protected	Piped into public tap / standpipe / basin	301805339	U0401800398	AEPG
<input type="checkbox"/> Protected	Piped into public tap / standpipe / basin	301796196	U0401800087	AEPG

**Water point** U0401800398 **Edit**

Water point managed by Madagascar MERL (protected)

Description: AEPG

Type: Piped into public tap / standpipe / basin

Location

GPS Location:

50 m 100 ft

Administrative region: Ambatomanoina, Anjozorobe, Analamanga, Antananarivo, Madagascar

Unique ID: 301805339

**Water point**

Name - Name used locally to refer to the water point

U0401800398

Description - Additional information to help locate or describe the water point

AEPG

Type - Technology or design that allows users to access water (based on JMP definitions)

Piped into public tap / standpipe / basin

Location

GPS Location - Latitude/longitude of the water point

50 m 100 ft

Enter location manually

Cancel Save

# Locating a specific set of sites

The sites page has various data filters to help locate any sites in the system.

This includes:

- A data source dropdown listing all Site types
- A search bar which searches site name, ID, and descriptions
- A map filter which displays all items or just those which are currently visible on the map
- Managed by – Filter the sites those managed by Anyone, Me, or a selected organization/user
- Date added/modified – Filters sites based on their date fields
- Dataset – If sites were added to a dataset, they can be located by selecting the dataset
- Access – Filters sites based on their privacy settings
- +Add filter – Allows users to create any other type of filter on the sites page

1

2

3

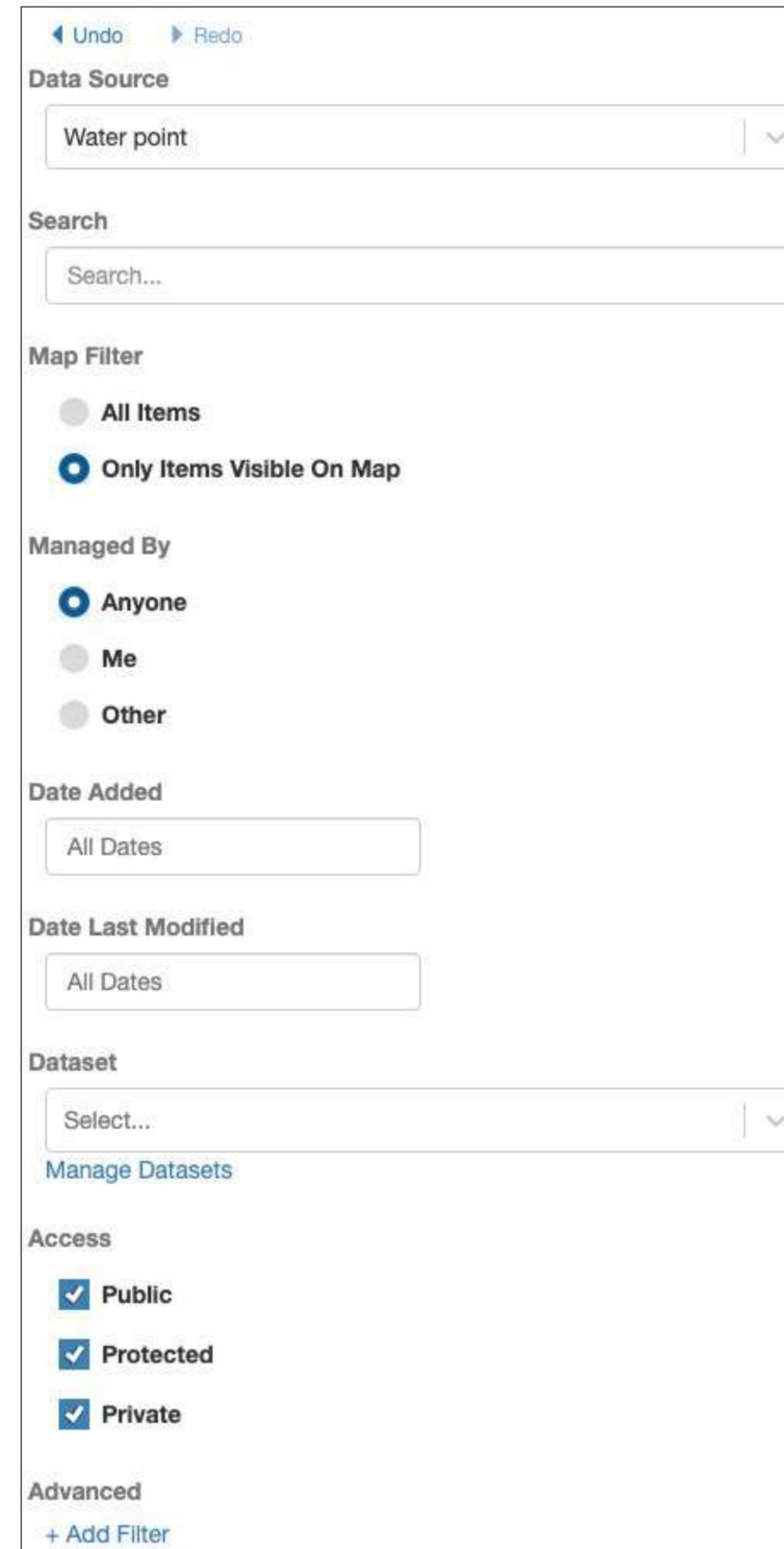
4

5

6

7

8



← Undo    ▶ Redo

**Data Source**  
Water point

**Search**  
Search...

**Map Filter**  
 All Items  
 Only Items Visible On Map

**Managed By**  
 Anyone  
 Me  
 Other

**Date Added**  
All Dates

**Date Last Modified**  
All Dates

**Dataset**  
Select...  
[Manage Datasets](#)

**Access**  
 Public  
 Protected  
 Private

**Advanced**  
[+ Add Filter](#)

# Export data

Site data can be exported from the Site page by:

1. Clicking the **Export** button
2. Selecting the option to **Export the columns in list** or **All Columns**

By clicking the gear icon in the list, users can add any or all columns.

453242 matches | Import... | **Export...** | Deduplicator | Advanced...

Columns in List  
All Columns

Unique ID	Previous mWater IDs	Name
132159687		Nakonyen, Katikekil
302012938		U1507700432
175235999		Lol-Kou Borehole
295553007		Benjamin Ankrah
126884894		Tahtay Gerhu
220609052		UCZ njase
307054366		Oscar mazimba hou
159888081		Dlo nan basen Cius
17365794		bairro caboverde
8019578	159815096	Pwi Nan Bannan
159870385		Dlo kay Louisane
63278857		Masinja Shallow wel
223474998		Musondela's tap
164169065		Bingo Simba magwi
301805339		U0401800398
55770842		Patrick makonyola n

# Section Sites - Advanced

## Advanced Topics:

- Importing site data
- Bulk editing sites
- Site deduplicator
- Site approvals

# Importing sites

Sites can be imported from the Manage > Sites page.

To do so:

1. Click the Import button
2. Choose an excel or CSV file from the device. A template is available for download with the site fields. Once the green message has confirmed the upload, click Next
3. This page displays the column name from the Excel/CSV on the left and the mWater Site field on the right. Choose which fields and values to import as the site fields. Click Next.
4. Select a privacy level, Managed by, and Data set for the imported sites. Click Preview.
5. Click Finish and wait until the data is finished uploading.

Note: For large datasets, the import function can take a long time. If the page times out in the middle of an import please wait a few minutes and reload the page to verify if the data has been uploaded.

Import

Upload import file

Use this uploader only to upload new sites; do not use it to update existing sites.

Drop file here or click to select file

Your file has been successfully uploaded.  
It contains 10 columns and 263 rows.

Optional: [Download a template with basic fields](#)

Cancel < Back Next >

Import

Map import file columns

Serial No → Select to map  
Funded by - text

Latitude → Date constructed - date

Longitude → Import ID - text - Identification code used to link imported sites to the original dataset

Name → External photo location - text - Use this field to store a link to an external photo when importing sites

Facility Type → Type (other) - text - Answer provided when 'Other' was selected for Type  
Name - text

Facility Type → Type - enum - Type of facility as defined by the WHO Bangladesh

Community Clinic → Select...

Diagnostic point → Diagnostic Point

Diarrheal Treatment Centre → Select...

Diphtheria Treatment Centre → Select...

Health Post Fixed → Health Post (fixed)

Cancel < Back Next >

Import

Privacy

Public

Protected

Private

Who manages the entities

WHO Cox Bazar

Add imported items to a dataset

Create New Dataset

Use Existing Dataset

No Dataset

Dataset Name

Cpx bazar health facilities import Jan 24 2018

Cancel < Back Finish

portal.mwater.co says:  
Import Successful

OK

Import

Preview

Import ID	GPS Coordinates	GPS Coordinates	Name	Implementing Or	Type	Description
HF_001	21.2928672	92.093569	MOH - Community Clinic	MOH	community_clinic	
HF_002	21.2731051	92.1047835	MOH - Community Clinic	MOH	community_clinic	
HF_003	21.2840741	92.0612176	MOH - Community Clinic	MOH	community_clinic	
HF_004	21.2770438	92.0866552	MOH - Community Clinic	MOH	community_clinic	
HF_005	21.2530046	92.109832	MOH - Community Clinic	MOH	community_clinic	
HF_006	21.2971444	92.1252476	MOH - Community Clinic	MOH	community_clinic	
HF_007	21.252873	92.1732737	MOH - Community Clinic	MOH	community_clinic	
HF_008	21.28201	92.14582	MOH - Community Clinic	MOH	community_clinic	
HF_009	21.0442794	92.2361449	MOH/ACF - Community	MOH/ACF	community_clinic	
HF_010	21.0297167	92.2372652	MOH/IOM - Community	MOH/IOM	community_clinic	Iran RC,
HF_011	20.9840414	92.2438248	MOH/IOM - Community	MOH/IOM	community_clinic	Iran RC,
HF_012	21.2166277	92.1626904	MOH/IOM - Community	MOH/IOM	community_clinic	May not be

Cancel < Back Finish

# Sites – Bulk editing

**WARNING:** Using this feature can result in unintended data loss or modification. This cannot be undone!

The site page allows users to edit any number of sites simultaneously.

To edit multiple sites:

1. Click the Checkbox next to any site to select it OR click the Checkbox header to select all sites
2. Click the Edit/Delete Selected button
3. Modify an data field and click Save to finalize the changes.

OR Select Delete to permanently erase the sites.

**Note:** The user must have permission to modify all selected sites in order to edit them.

The screenshot displays the mWater Portal interface. At the top, there is a navigation bar with options like Surveys, Maps, Dashboards, Manage, Issues, Indicators, and Consoles. Below this, a header shows 'Untitled' and '6 of 23 matches'. A yellow box highlights the 'Edit/Delete Selected...' button. The main area features a map with several red location pins. A yellow circle '2' is placed near the map. Below the map is a table with columns for 'Access' and 'Type'. A yellow box highlights the 'Access' column checkboxes, with a yellow circle '1' next to it. The table contains several rows of 'Protected' sites with 'Rainwater' as the type. A 'Bulk Edit' dialog box is open on the right, with a yellow box around it and a yellow circle '3' next to the 'Type' dropdown menu. The dialog box has fields for 'Name', 'Description', and 'Type'. Below these is a 'Location' section with a 'GPS Location' field and a map. At the bottom of the dialog box are 'Delete', 'Save', and 'Cancel' buttons.

Access	Type
<input checked="" type="checkbox"/>	Protected Rainwater
<input checked="" type="checkbox"/>	Protected Rainwater
<input type="checkbox"/>	Protected Rainwater
<input type="checkbox"/>	Protected Rainwater
<input checked="" type="checkbox"/>	Protected Rainwater
<input type="checkbox"/>	Protected Rainwater
<input type="checkbox"/>	Protected Rainwater
<input checked="" type="checkbox"/>	Protected Rainwater
<input type="checkbox"/>	Protected Rainwater
<input type="checkbox"/>	Public
<input checked="" type="checkbox"/>	Protected Rainwater
<input type="checkbox"/>	Protected Rainwater

# Site deduplicator

The site deduplicator allows users to identify and combine duplicate sites into one site.

To deduplicate sites:

1. From the Manage > Sites page select the Deduplicator button.
2. Filter to a subset of sites for which to check for duplicates
3. Select a match criteria and click Find matches:
  - a) Match by distance – All points within X distance of each other will be selected as a set e.g. within 30meters
  - b) Match by property – All sites which have the same value for a property e.g. Name = Lacoste well
  - c) Match known duplicates – Add sites, separated by commas to view only those sites in the set
4. Each set of potential matches will be displayed one next to the other.
5. Selecting one site as the main site and the other as the Duplicate then clicking Merge them will delete the Duplicate site and connect any survey, indicator, or issue data to the Main site instead.
6. Selecting Not duplicate and selecting Merge indicates that they are not duplicates, so they will not appear in the list again

The screenshot shows the mWater Deduplicator interface. The top navigation bar includes 'Untitled', 'Set name to save', 'Loading...', 'Import...', 'Export...', 'Deduplicator', and 'Advanced...'. The main area is a map with several blue location pins. A yellow box highlights the 'Deduplicator' panel, which contains the following sections:

- Site type:** Water point
- Admin Region:** Sud-Est, Haiti
- Managed by:** DINEPA
- Created by:** Select...
- Created on:** All
- Advanced filters:** Not Type is any of Piped into yard/plot, Piped into dwelling
- Match criteria:** Match by distance (selected), Match by property, Match known duplicates
- Distance:** 30 meters
- Options:** Show non duplicate sites, Show non-editable sites
- Find Matches:** A blue button to execute the search.

Below the filter panel, a 'Find Matches' dialog box is open, showing 'Showing set 1 of 2 sets found'. It features a 'Merge' button and a 'View this set on map' link. The dialog displays a comparison table for two sites:

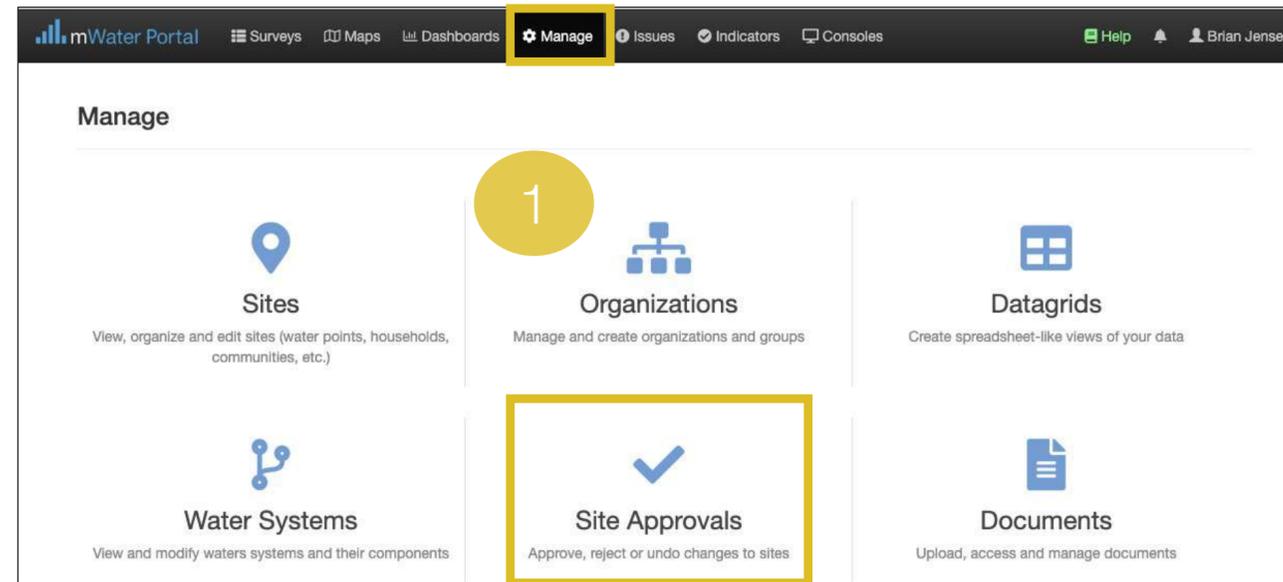
Properties	Main site	Duplicate	Not duplicate
Distance from site 126773		58.72 meters	
Created By	Amandus M	John Feighery	
Created On	August 4, 2014 3:10 PM	August 3, 2014 1:33 PM	
GPS input mode	GPS	GPS	
Name	Nyasa Training	central market	
Type	Bottled water	Borehole or tubewell	
GPS Coordinates	-13.976261, 33.758152	-13.976896, 33.758140	
Administrative region			
Location Accuracy	8.88651	5	
Location Altitude	1090	1110	
mWater ID	126773	410023	

# Site approvals

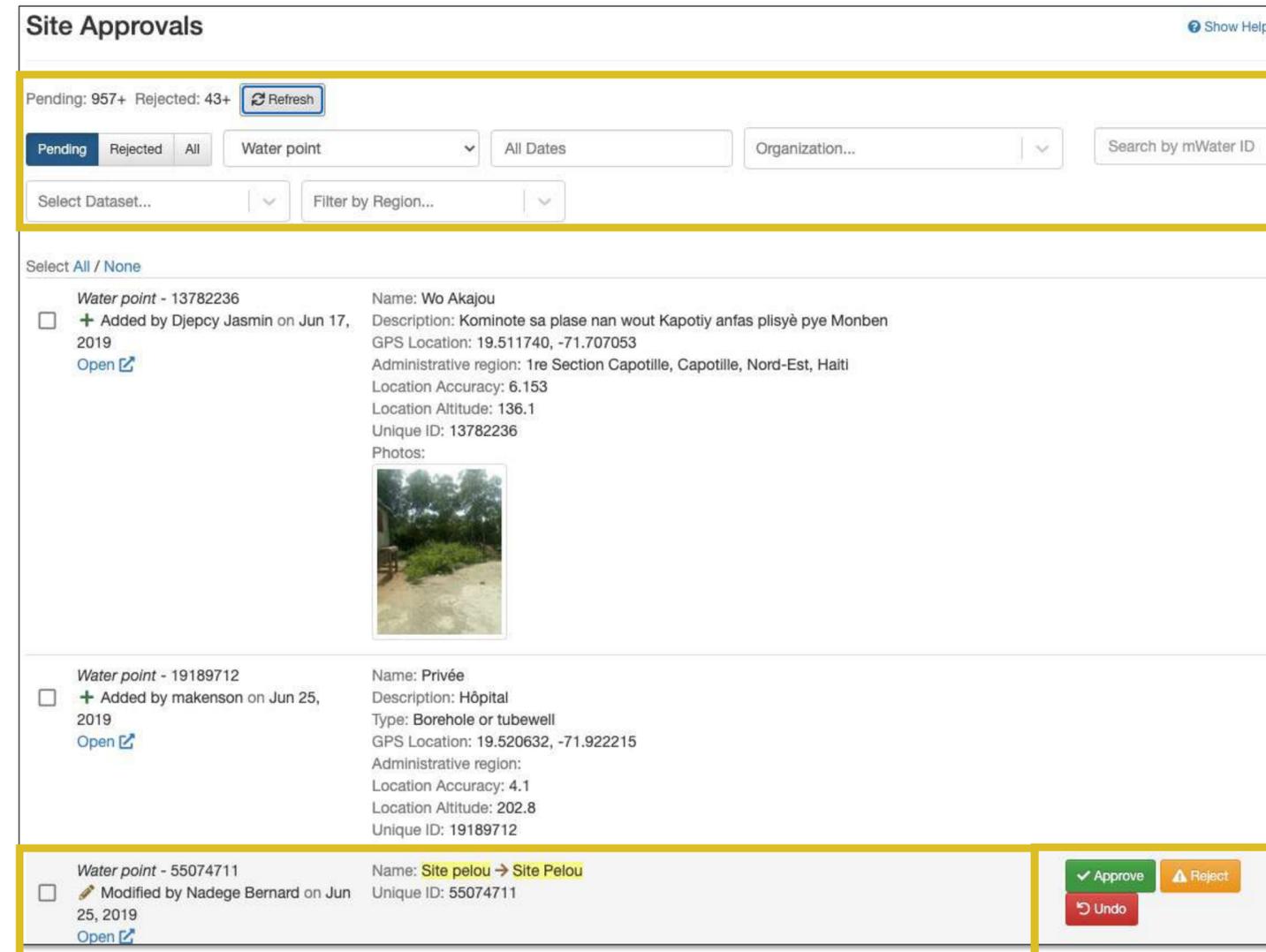
Site approvals allows authorized users to approve, reject, or undo modifications made to Sites by any user in their organization.

To do so:

1. Click Manage, Site approvals
2. Filter sites to the desired set
3. Review the Site modification
4. Approve, Reject or Undo the site modification using the buttons



2



3

4

Section

# 7

## Data visualization

Basic Topics:

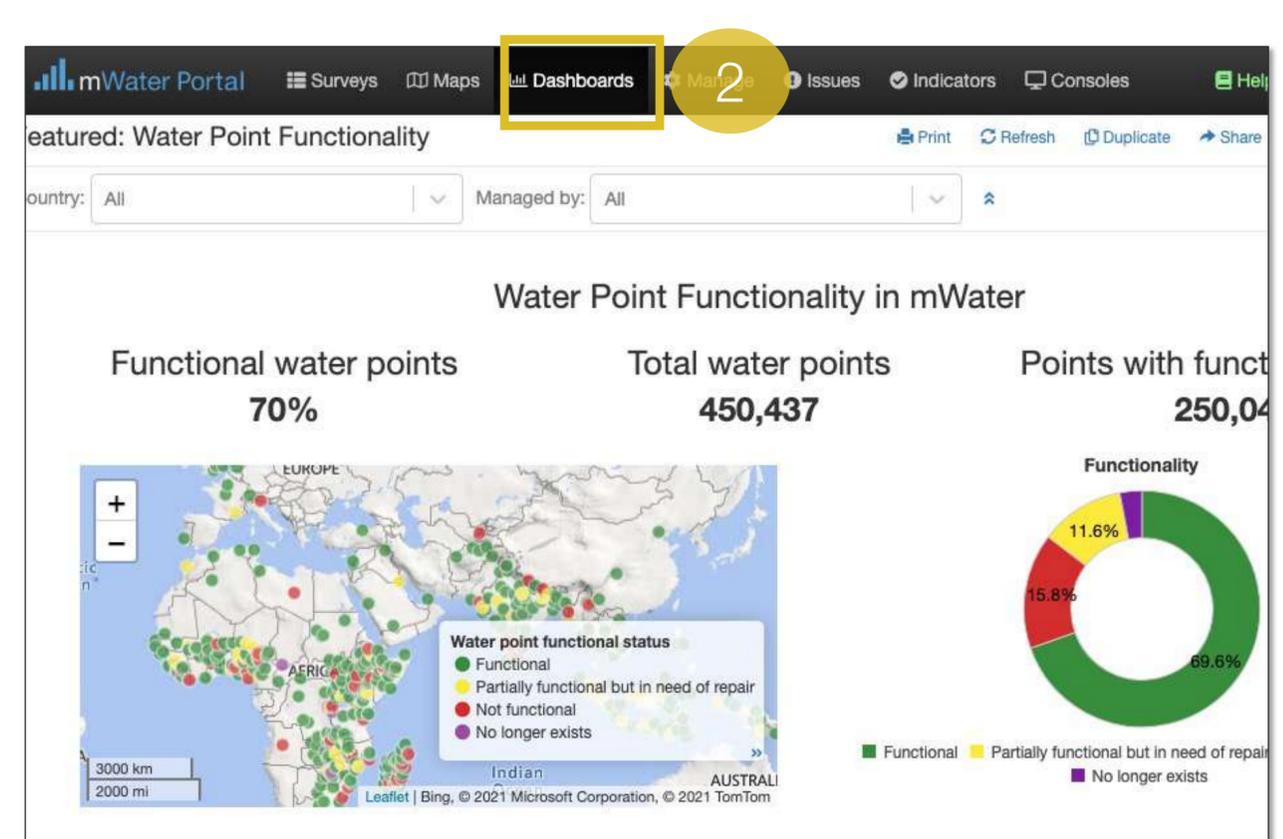
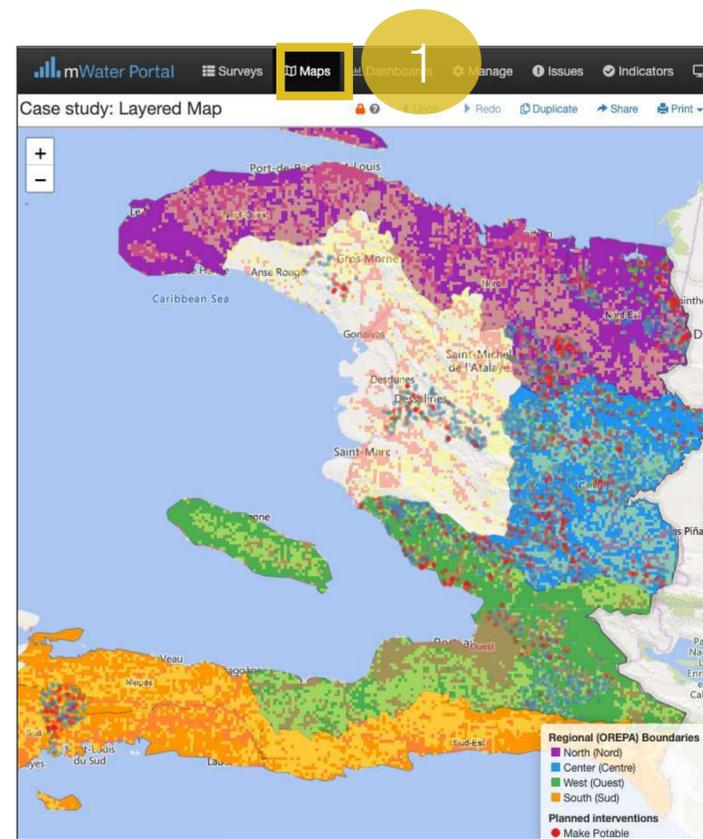
- Dashboards, consoles, datagrids, and maps
- Common elements of all visualizations
- Maps
- Charts
- Tables
- Pivot tables
- Filters
- Expressions

# Vizualisations – Maps, Dashboards, datagrids, and consoles

The mWater portal has a robust set of features for visualizing site and survey data in various formats.

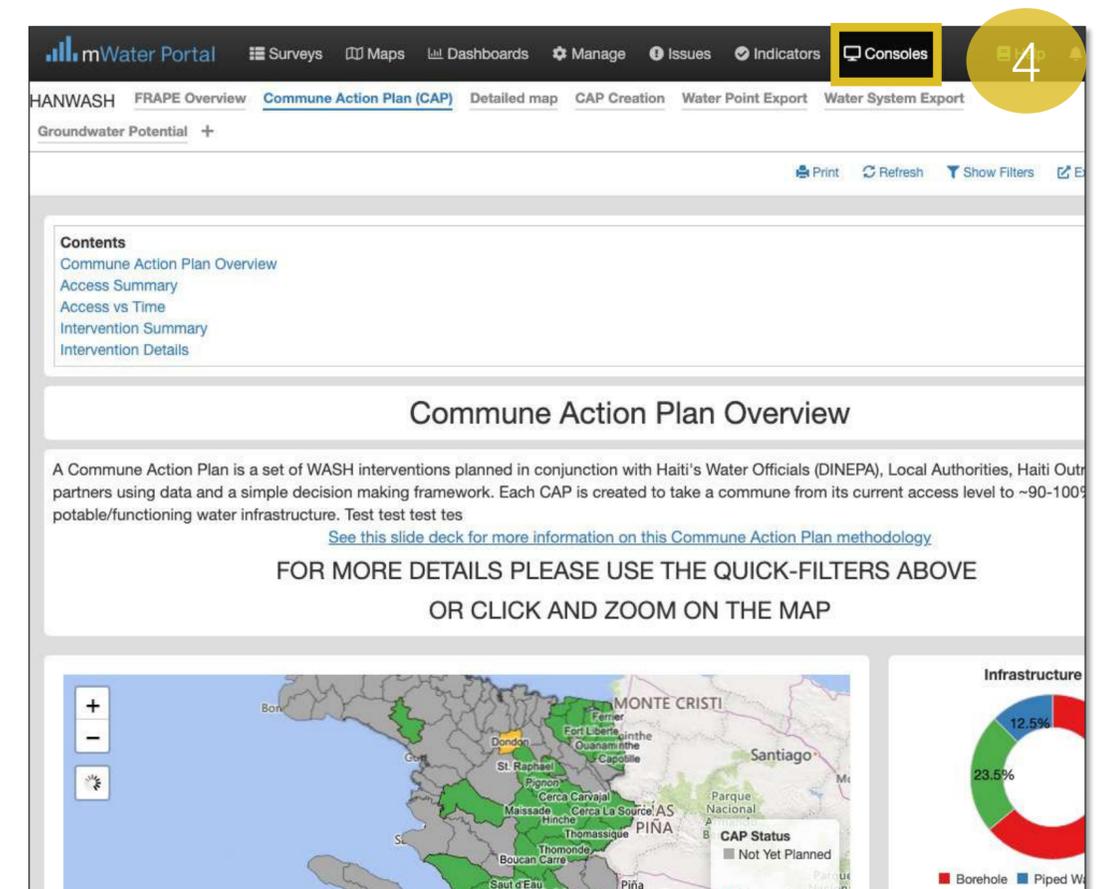
These visualization features include:

1. **Maps** – Full page maps for displaying geospatial data as points, lines, polygons, or grids
2. **Dashboards** – A single page interface with various different widgets
3. **Datagrids** – Excel-like data tables
4. **Consoles** – A multi-tabbed interface which combines maps, dashboards, and datagrids



Health care facilities

Name	Description	None	Implementing Organi	Type	GP
Santa Elena III Zona 16	Guatemala Clinica Lim				14.0
Kazungula Hospital					-17.0
Zahrau Hospital	Demo				-6.0
Sahasifotra	CSB1 Sahasifotra				
Dispensaire la croix sa					19.0
Hebbalaguppe	Data collection				12.0
Vunairima College	Gazelle District				-4.2
Nyamata Hospital					-2.0
Mapamba Rural Health	Mapamba ward				-12.0
Msufini	Dispensary				-4.4
Chiphio	Dispensary/Maternity				-16.0
Ampanrana	CSB2 Ampanrana				
Doddamagge	Phc 24*7				12.0



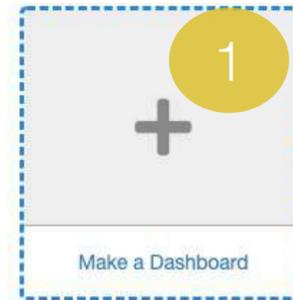
# Visualization gallery

Each type of visualization has a gallery which displays existing visualizations and an option create a new one.

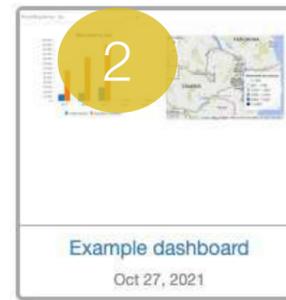
The gallery includes:

1. Make a [Dashboard, maps, etc] – Creates a new visualization
2. My [Dashboards, maps, etc] – Shows visualizations created by you
3. Featured [Dashboards, maps, etc] – Displays visualizations published by mWater for key use cases
4. Shared with me – Shows any visualization which another user has shared with you
5. Public – All visualizations shared with Public (all users)
6. Search bar – used to locate the appropriate visualization

## My Dashboards



Make a Dashboard



Example dashboard  
Oct 27, 2021



Example dashboard  
Oct 27, 2021



mWater endpoints  
Sep 30, 2021



Flux d'informations  
Sep 14, 2021

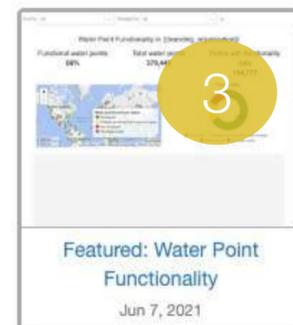


Resource Center  
Sep 8, 2021

Search...

6

## Featured Dashboards



Featured: Water Point Functionality  
Jun 7, 2021



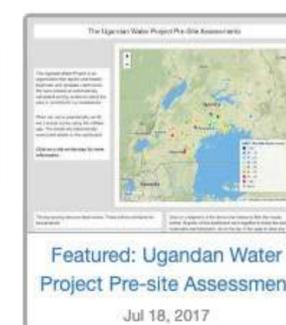
Featured: Water Point Functionality (duplicate)  
Mar 2, 2021



Featured: World Bank Ekiti GeMap Dashboard  
Feb 25, 2021

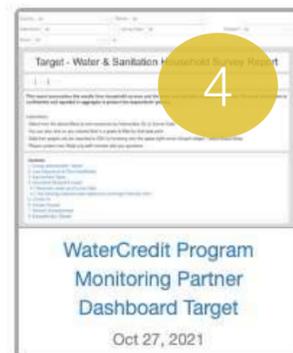


Featured: Pivot Table Example - Water Point Functionality  
Mar 23, 2018



Featured: Ugandan Water Project Pre-site Assessment  
Jul 18, 2017

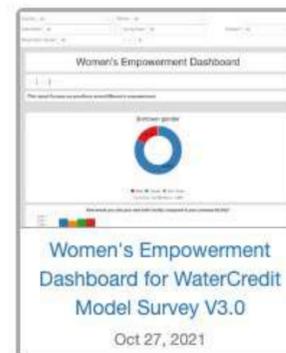
## Shared With Me



WaterCredit Program Monitoring Partner Dashboard Target  
Oct 27, 2021



WaterCredit Program Monitoring Partner Dashboard IKEA V  
Oct 27, 2021



Women's Empowerment Dashboard for WaterCredit Model Survey V3.0  
Oct 27, 2021



Tableau de bord de la Coordination Générale de la DINEPA  
Oct 20, 2021



Azure - Where We Work  
Oct 20, 2021



2021 Zambia Activity Tracker  
Oct 19, 2021

## Public



Test Dashboard  
Sep 17, 2021



Sample Dashboard  
Sep 3, 2021



SHIPO SMART CENTRE Tanzania Captured water points  
Sep 3, 2021

# Sharing visualizations

Each visualization has a Share button which is displayed to administrators.

There are several ways to share a visualization:

1. Adding mWater Users
  - a) Administrator – These users can modify the visualization
  - b) View – These users can only view the visualization
2. Creating a shareable link – Creates a link which can be used by anyone, even non-mWater users
3. Creating a filtered share link – The same as a shareable link, but with a pre-established filter which cannot be removed by the user.

 Share

1

## Sharing and Permissions

**Administrator** - Can edit, delete and share. Generally there should only be one user with this right.

mWater Staff x

2

**View** - Can view and share link

Public x

Create Shareable Link

User will be able to see the data in this console as you see it but will not be able to make changes

3

Create Shareable Link of Layout Only

This will not share the data in this console. Only the layout of the tabs will be shared.

The link below allows users to see the console without needing to log in

The user can see data in the console that the sharer can see

[https://share.mwater.co/v3/console\\_link/9d1e90abb38e42a983e211b0838c338f?share=82e068f32](https://share.mwater.co/v3/console_link/9d1e90abb38e42a983e211b0838c338f?share=82e068f32)

Embed

Save

Cancel

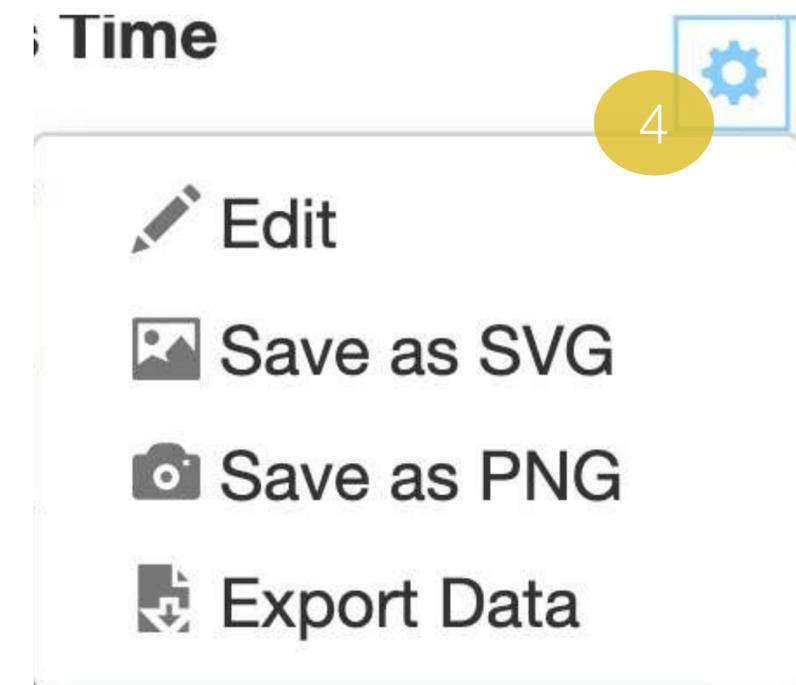
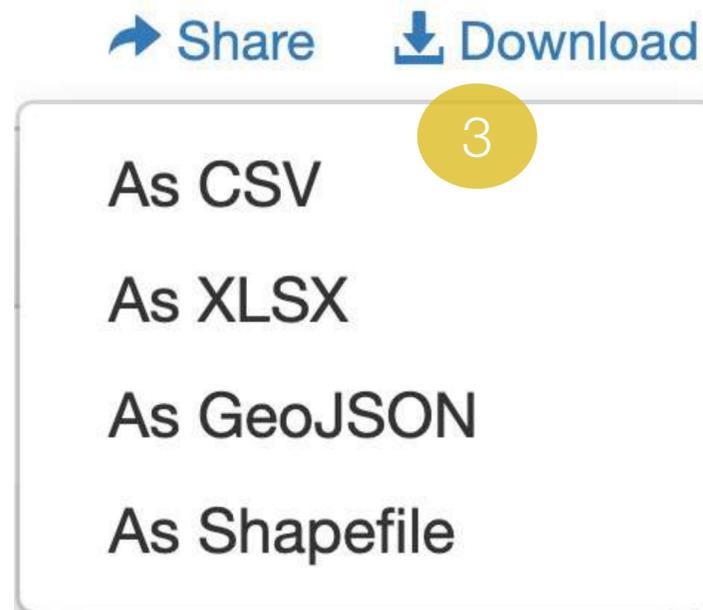
<b>Survey</b> (Design of a form)	<b>Deployment</b> (Set of responses to a form)	<b>Organization</b> (Structured group of users)	<b>Site</b> (Location monitored over time)	<b>Dashboard, Map, Datagrid, &amp; Console</b> (Data visualizations)
<p><b>Managed by</b> The organization or organization brand which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

# Data visualization permissions

# Downloading, printing, and exporting

Each visualization has various methods to download, print or export the data:

1. **Print** – Prints the full page visualization without the Portal menu and buttons
2. **Export as PDF** – Exports data in a PDF format
3. **Download** (Click the Download button)
  - **XLSX** – Microsoft Excel format
  - **CSV** – Similar to XLSX, but more appropriate for large dataset
  - **Shapefile** – Used for geospatial/mapping applications
4. **Widgets downloads** (Click the gear icon)
  - **Export data** – Exports an CSV file of the underlying data
  - **SVG** – Scaleable vector graphics allow for images to be scaled to any dimension without pixilation or stretching
  - **PNG** – Exports an image file of the visualization



# Maps

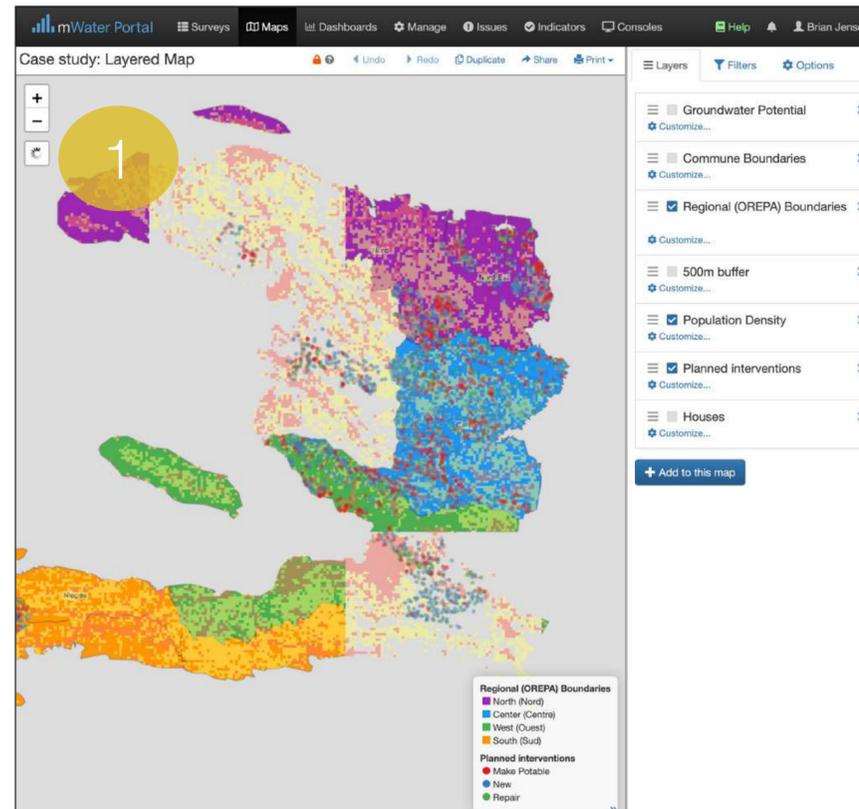
Maps can be used:

1. Maps - As a full-page map display
2. Map widget - As a map widget within a dashboard or console
3. Map tab - As a map tab, which is a full-page map display within a console. By clicking the + button, a blank map tab can be added or an existing full-page map can be imported to the console.

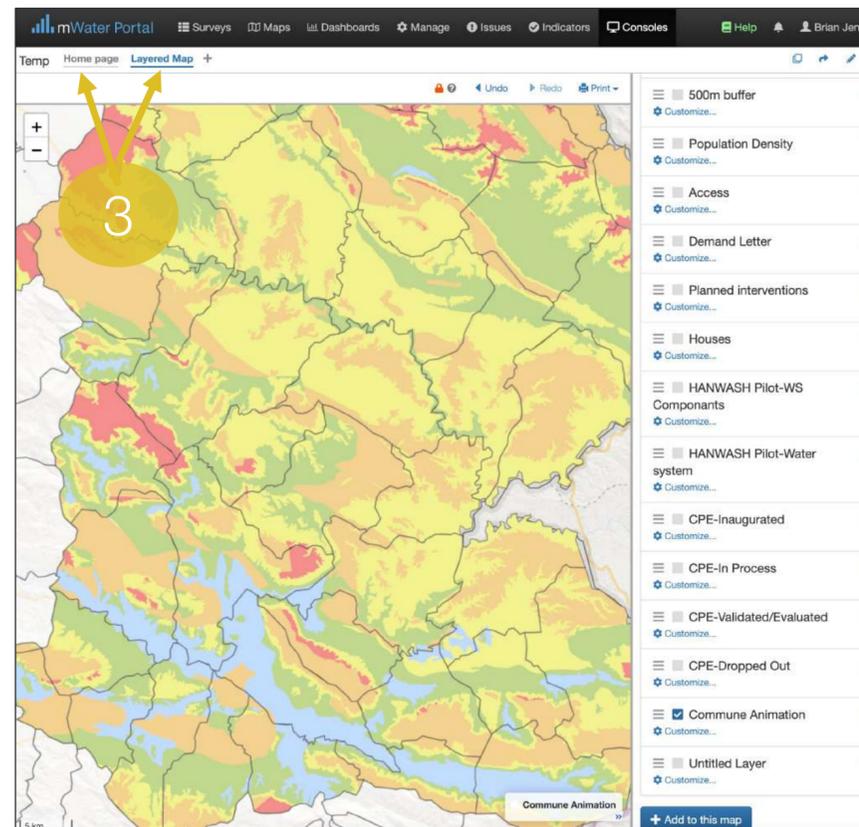
Using full-page maps allows users to turn off and on map layers.

In map widgets, users can click a layer icon and select/deselect layers to turn them on/off.

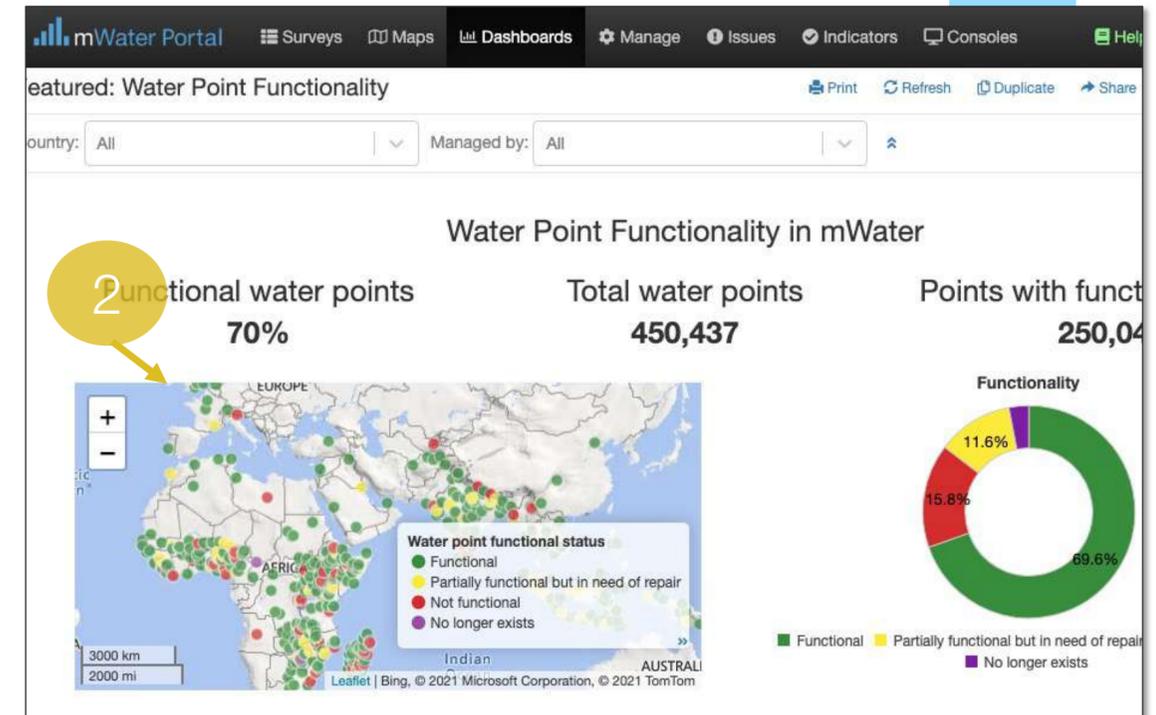
## 1) Maps – Single tab



## 3) Console - Multiple tabs



## Dashboards – Modular map widget2)



# Maps - Starting a new map

To create a full-page map:

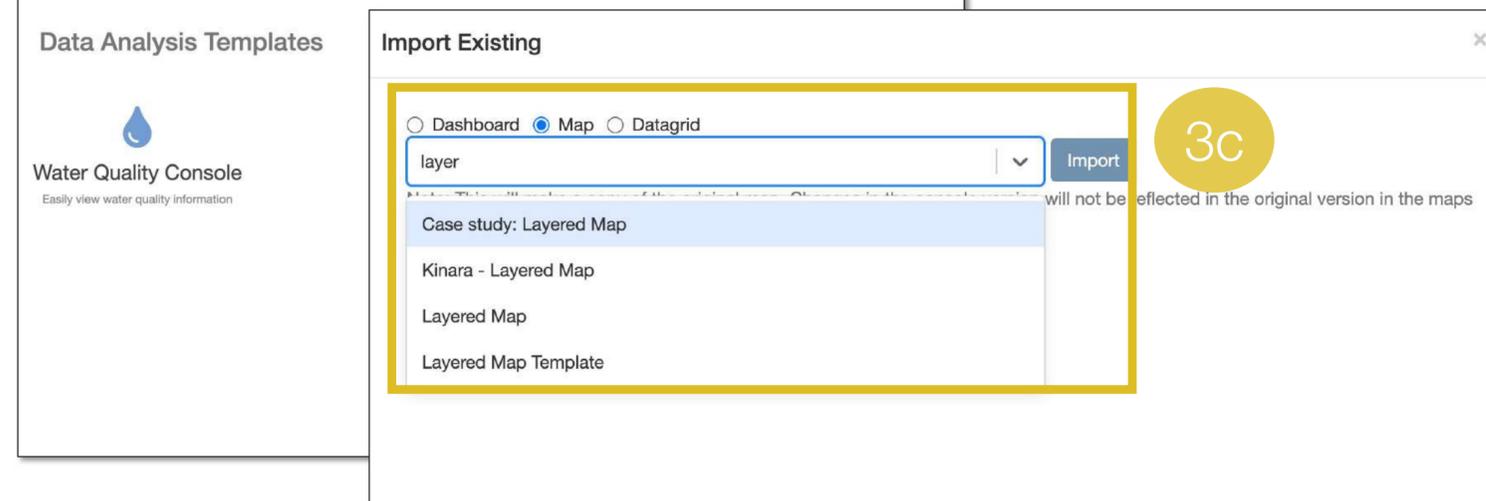
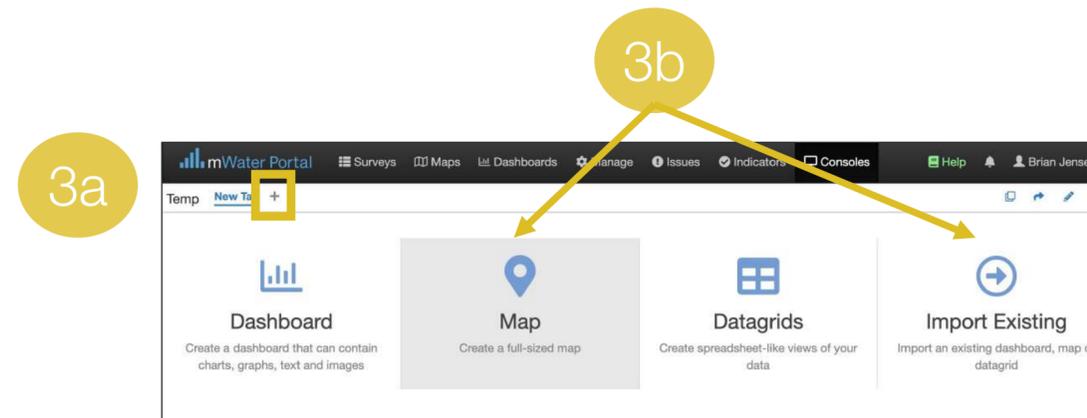
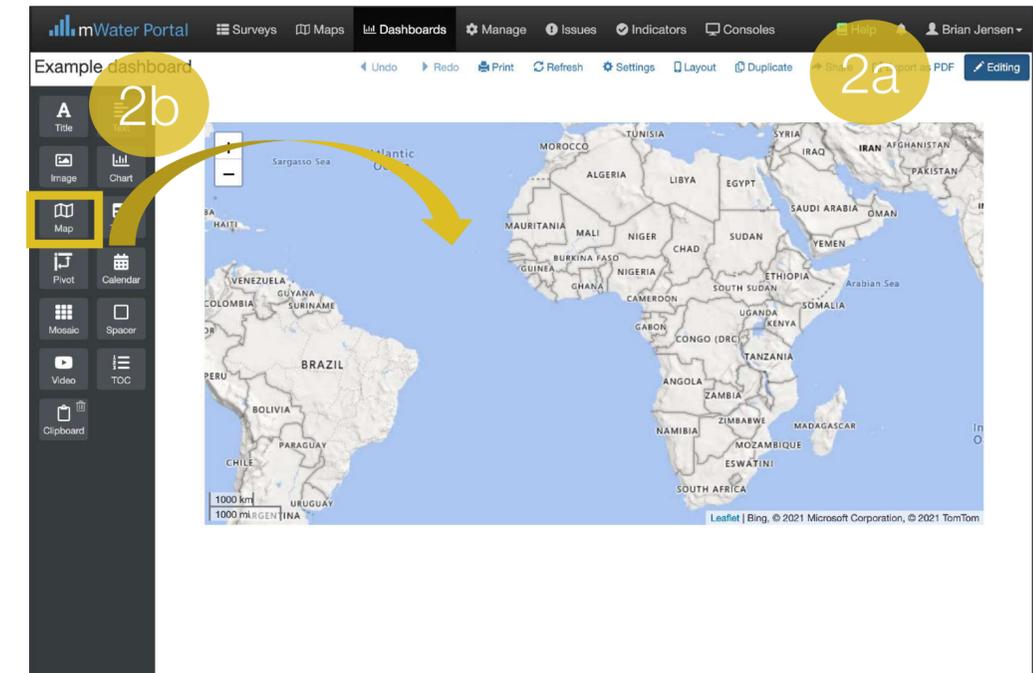
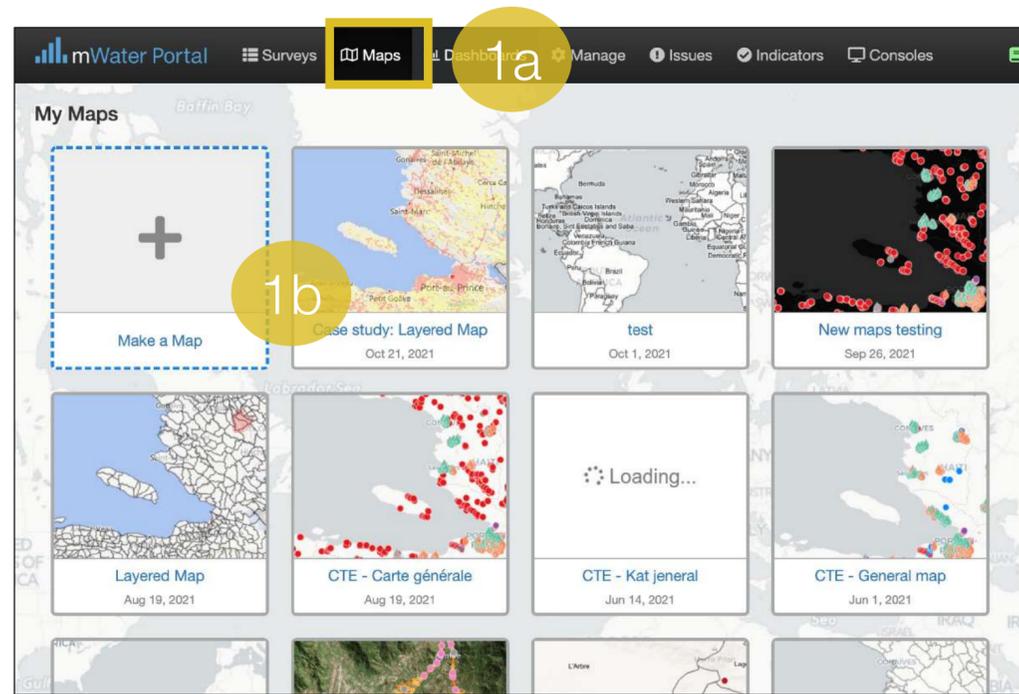
- 1a) Select the Maps tab
- 1b) Click the + Add icon

To add a map widget to a dashboard:

- 2a) Click the Edit button
- 2b) Drag the map icon from the left onto the white work space

To add a full-page map to a console:

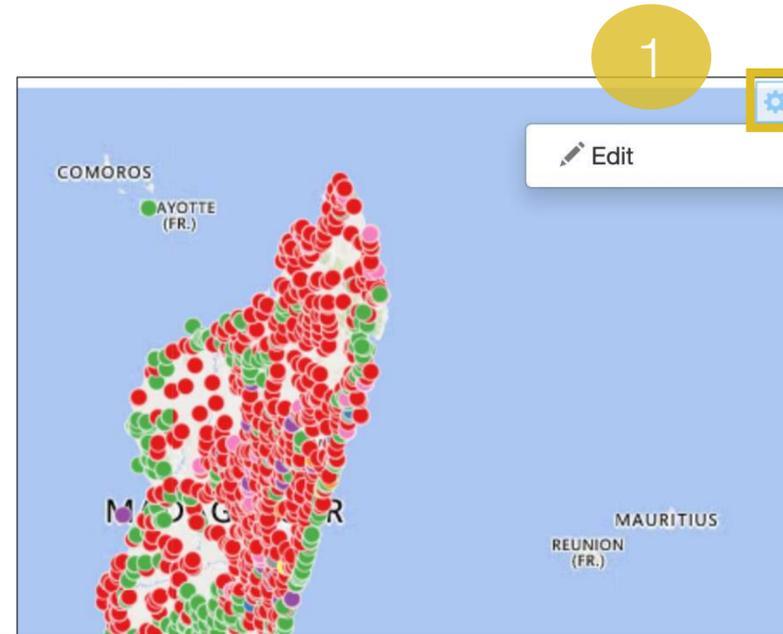
- 3a) Select the + icon
- 3b) Click Map for a blank map or Import Existing to import an existing full-page map
- 3c) Choose Map from the menu, select the map to import, and click import.



# Editing a map

1. Click the edit button at the top right of the map widget
2. Add data using the section “What else do you want to map?”. This allows users to add
  - Sites – Locations monitoring over time
  - Surveys –
  - Choropleths – Colored regions
  - Circles – User-defined radius around points
  - Cluster – Many points concentrate into a cluster based on proximity
  - Grid – Colored grid cells
  - Markers and shapefiles – View point, line, or polygons which were imported as shapefiles
  - Population density – Displays a grid of population density
  - Tile URL – Displays any tiled data source from outside mWater
3. To edit an existing data layer, click the blue “Customize” button

**Note:** A single map can have many different data layers which can be turned on and off by the user



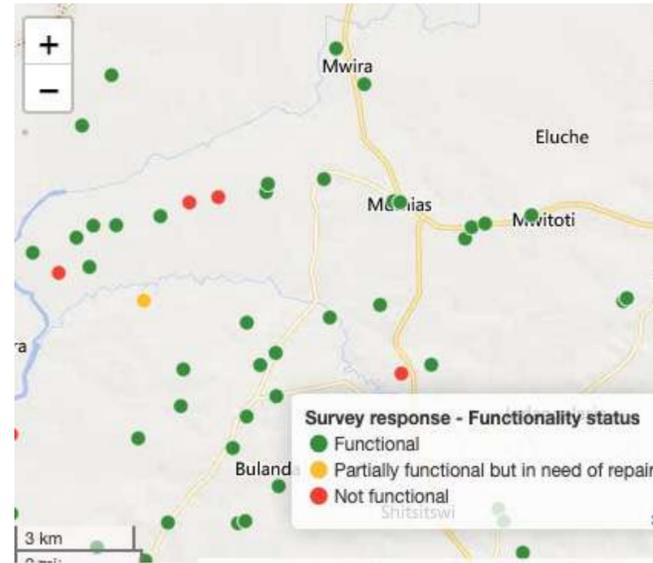
The screenshot shows the mWater interface with a map of Madagascar. The legend is open, showing various water point types: Protected dug well (red), Unprotected dug well (blue), Borehole or tubewell (green), Protected spring (purple), Unprotected spring (orange), Rainwater (yellow), Surface water (brown), Piped into dwelling (pink), Piped into yard/plot (grey), Piped into public tap / standpipe / basin (red), Bottled water (blue), Tanker truck (green), Cart with small tank/drum (purple), Other (orange), Water kiosk (yellow), and None (grey). The sidebar on the right shows the 'Water point' layer selected, and the 'What else do you want to map?' section with options like Sites, Surveys, and Advanced. The 'Advanced' section includes options for Choropleth (color regions), Circles (radius map), Cluster, Grid, Markers and Shapefiles, Population Density, and Tile URL. A 'Water Point Mapper Wizard' button is also visible.

# Types of map data layers

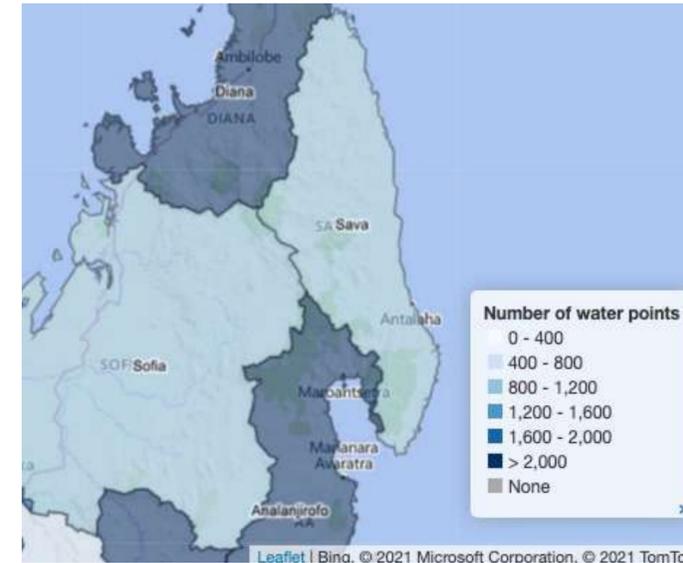
Various other map layers are available including:

- **Markers** – Individual points displayed on a map. This can also include lines and polygon shapefiles, depending on the data source.
- **Choropleth** – Displays aggregate data for each administrative region
- **Circles** – Displays a circle of a specific radius around a point
- **Population density** – Displays a grid of the number of people per 30m x 30m grid
- **Grid map** – Aggregates point data into a grid
- **Cluster map** – Combines point data into clusters with the number of points on them. Zooming in will provide more detailed clusters.

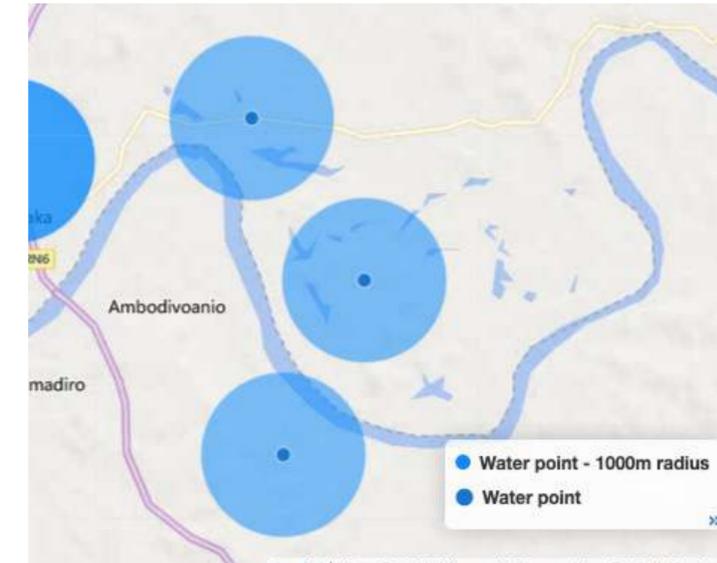
1) Markers (points)



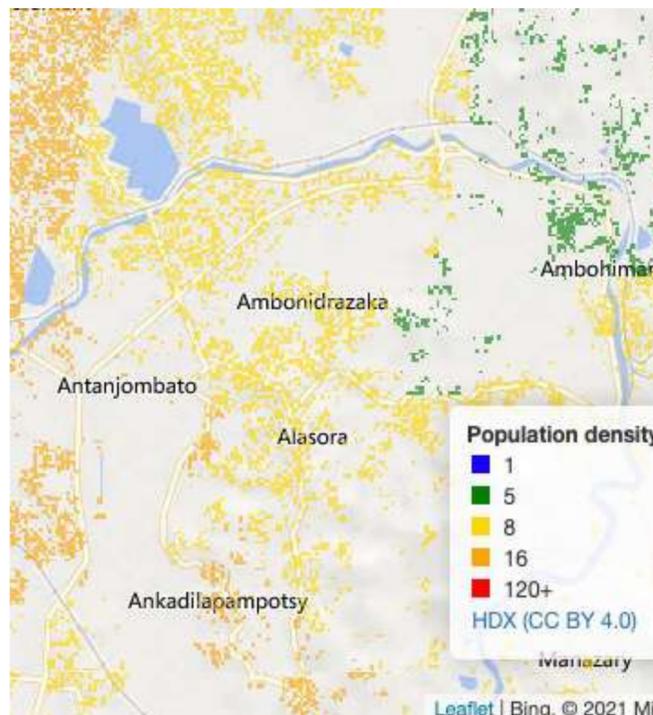
2) Choropleth (color regions)



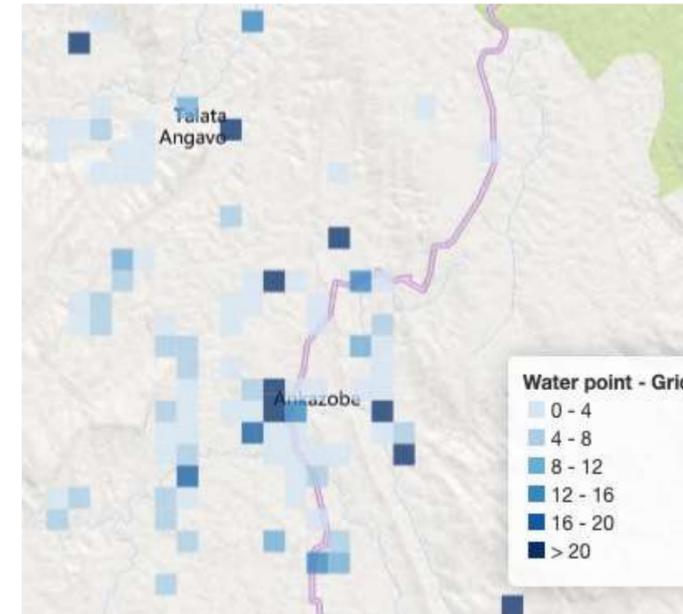
3) Circles (radius map)



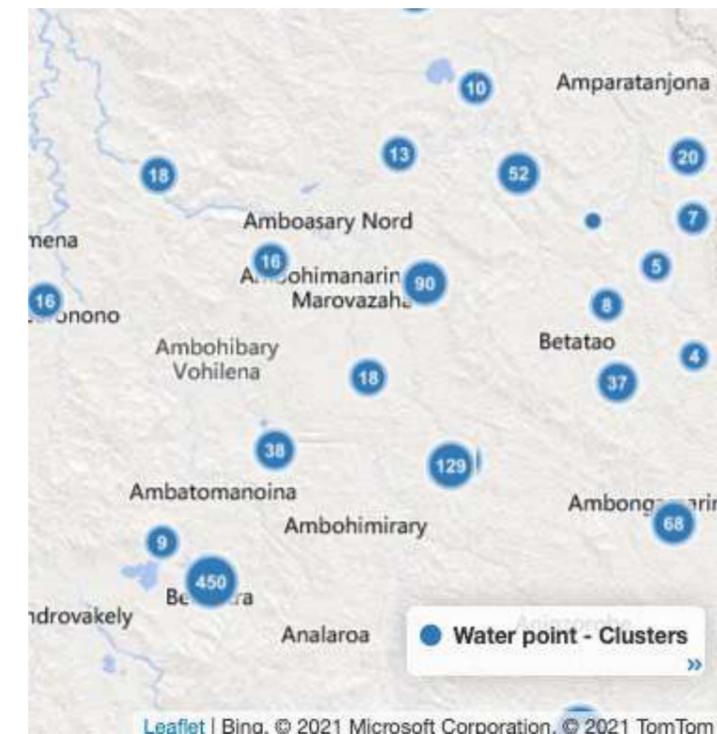
4) Population density



5) Grid map (square)



6) Cluster



# Creating a point map layer

1a) Click a Site type from the list

1b) Select which subset of sites you'd like to map: All, Created by Me, or managed by a certain organization

OR

2a) Select My Surveys or Public surveys

2b) Select a Survey to map and choose which survey question to use as the location and color by parameter.

2c) Click the +Create button

OR

3a) Under **Advanced**, select **Markers and Shapefiles\***

\*This same option can be used to map shapefiles uploaded via custom tables.

The screenshot shows the mWater interface. On the left is a map of Madagascar with numerous blue dots representing water points. On the right is a sidebar with the following sections:

- Layers**, **Filters**, **Options**
- What do you want to map?**
  - Sites**
    - Water point (1a)
    - + All (1b)
    - + Created by Me
    - + Organization: Afar Region
  - Water system
  - Water installation
  - Pipe
  - Household
  - Sanitation facility
- Surveys**
  - My Surveys (2a)
    - Search...
    - Myanmar ASWA II - Community Sanitation and Hygiene
    - TWP Water Point Survey-v2 (2b)
      - Location to map
      - Water Point:
      - Answer to visualize: None
      - + Create (2c)
    - Technical Support Survey
    - COVID-19 Household survey - MTRA (Mozambique)
    - Public Surveys
  - Advanced**
    - + Choropleth (color regions) (?)
    - + Circles (radius map) (?)
    - + Cluster (?)
    - + Grid (?)
    - + Markers and Shapefiles (3a)
    - + Population Density (?)
    - + Tile URL
- Water Point Mapper Wizard**

# Customize a point map layer

Each map layer has various parameters which can be set:

- a) **Data source** - Select the Data source to display
- b) **Location** - Select which Location question to use to display the point on the map
- c) **Color** - Change the symbol color
- d) **Color by Data** - Color the data based on the responses to a specific question e.g. Water point type
- e) **Symbol** - Select the Symbol to use to represent each point
- f) **Marker size** - Select the size of each point
- g) **Line width** - Only for shapes, not points. Select the width of shape lines.
- h) **Filters** – Add a filter to the data source to only view specific points e.g. Type is Borehole or tubewell
- i) **Customize popup** – Use a dashboard-like editor to create a custom popup which appears for each point clicked
- j) **Advanced options** – Define the zoom levels at which the points will appear
- k) **Opacity** – Define the opacity/transparency of the points on the map
- l) **Hide legend** – This map layer will show on the map, but not the legend
- m) **Group** – Use this feature to group similar map layers so that turning one layer off will turn the other layer on

The screenshot shows the configuration panel for a 'Water point' map layer. The panel includes the following sections and options:

- Data Source:** Water point
- Location:** GPS Location
- Color:** A blue color swatch.
- Color By Data:** Select...
- Symbol:** Circle
- Marker Size:** Normal
- Line Width (for shapes):** 3 pixels
- Filters:** + Add Filter
- Customize Popup:** Advanced options... (marked with 'j')
- Opacity:** 100% (with a slider)
- Hide Legend:**
- Group:** None (marked with 'm')

Callout letters a through m are placed next to their corresponding settings in the panel.

# Add a choropleth layer

Choropleth maps display administrative regions which can be colored by various data fields.

A choropleth map layer has various parameters which can be set:

- Name** – This is the name which will appear in the legend
- Mode**
  - Single color** – All regions are displayed with the same color
  - Color by Data** – Regions are displayed in various colors depending on the data source's value
  - Advanced** – Regions are displayed in various colors, but the data sources is fixed to Administrative Regions.
- Region to map** – Select a country to map
- Detail level** – Select which level of admin region to display
- Display region names** – This option will add the region name as a label on the map
- Color by Data** – Select which question to map and the colors which represent each value
- Fill opacity** – Choose the level of opacity of the region's color fill
- Border color** – Choose the color of the line which represents the admin region borders
- Filters** – Use the filter to select only a subset of the data
- Customize popup** – Use a dashboard-like interface to create a custom popup which appears when the region is clicked
- Advanced options** – Choose the zoom levels at which this layer will appear
- Opacity** – Choose the opacity of the choropleth as a whole, including the line and fill
- Hide legend** – Select this option to show the legend on the map, but not on the legend
- Group** – Use this feature to group similar map layers so that turning one layer off will turn the other layer on

The image shows a map of Madagascar with a choropleth layer. The map is divided into administrative regions, and a legend on the right shows a color scale for population density. A settings panel is open, showing options for the layer's mode, regions type, region to map, detail level, display region names, color by data, fill opacity, border color, filters, and opacity.

**Legend (Untitled Layer):**

- < 0
- 0 - 2,000
- 2,000 - 4,000
- 4,000 - 6,000
- 6,000 - 8,000
- 8,000 - 10,000
- > 10,000
- None

**Settings Panel (Untitled Layer):**

- Mode:**  Single Color  Color By Data  Advanced
- Regions Type:** Administrative Regions (from mWater global database)
- Region to Map:** All Countries
- Detail Level:** Countries
- Display Region Names
- Color By Data:** Select...
- Fill Opacity:** 56%
- Border Color:** [Black]
- Filters:** + Add Filter
- Advanced options:** Customize Popup, Remove Popup, Advanced Popup Options
- Opacity:** 100%
- Hide Legend
- Group:** None

# Dashboards

Dashboards are used for sharing data visualizations and text together to create data-driven analyses. They are made up of any number of modules called widgets.

Widgets can be added/modified in edit mode by clicking the Edit button.

Widgets include:

1. Table of contents – Click an item to navigate to that section
2. Text – Add formatted text and dynamic data calculations
3. Tables – Show a table of individual records
4. Maps – Display geospatial data
5. Charts – Display data in a graphical format
6. Pivot tables – Display a summary of the dataset
7. Calendars – Displays data by date, month, year, ect
8. Images – Displays a single image
9. Image mosaics – Displays multiple images
10. Embedded videos – Plays an embedded video

Example dashboard

- Title
- Text
- Image
- Chart
- Map
- Table
- Pivot
- Calendar
- Mosaic
- Spacer
- Video
- TOC
- Clipboard

**Contents**

- Pivot table widget
- Chart widget
- Map widget
- Calendar widget
- Image widget
- Mosaic widget
- Video widget

**Table widget**

Name	Type	Administrative region
Kagera	Borehole or tubewell	
WP intégré dans site FSM et OM	Piped into public tap / standpipe / basin	Morondava
Patel p r	Borehole or tubewell	Danta
PO intégré dans B10	Piped into	Morondava
PO intégré dans B10	Piped into yard/plot	Morondava
Sous Ti Mari	Unprotected	2e Section Lociane

**Pivot table widget**

Type	Functionality	
	Functional	Not functional
Protected dug well	19,287	4,406
Unprotected dug well	6,169	436
Borehole or tubewell	68,655	15,093
Protected spring	3,742	424
Unprotected spring	8,174	200
Piped into public tap / standpipe / basin	50,331	16,941

**Water point functionality summary**

Total water points: **472,618**

**Chart widget**

**Map widget**

**Calendar widget**

**Image widget**

**Mosaic widget**

**Video widget**

# Adding text and dynamic fields

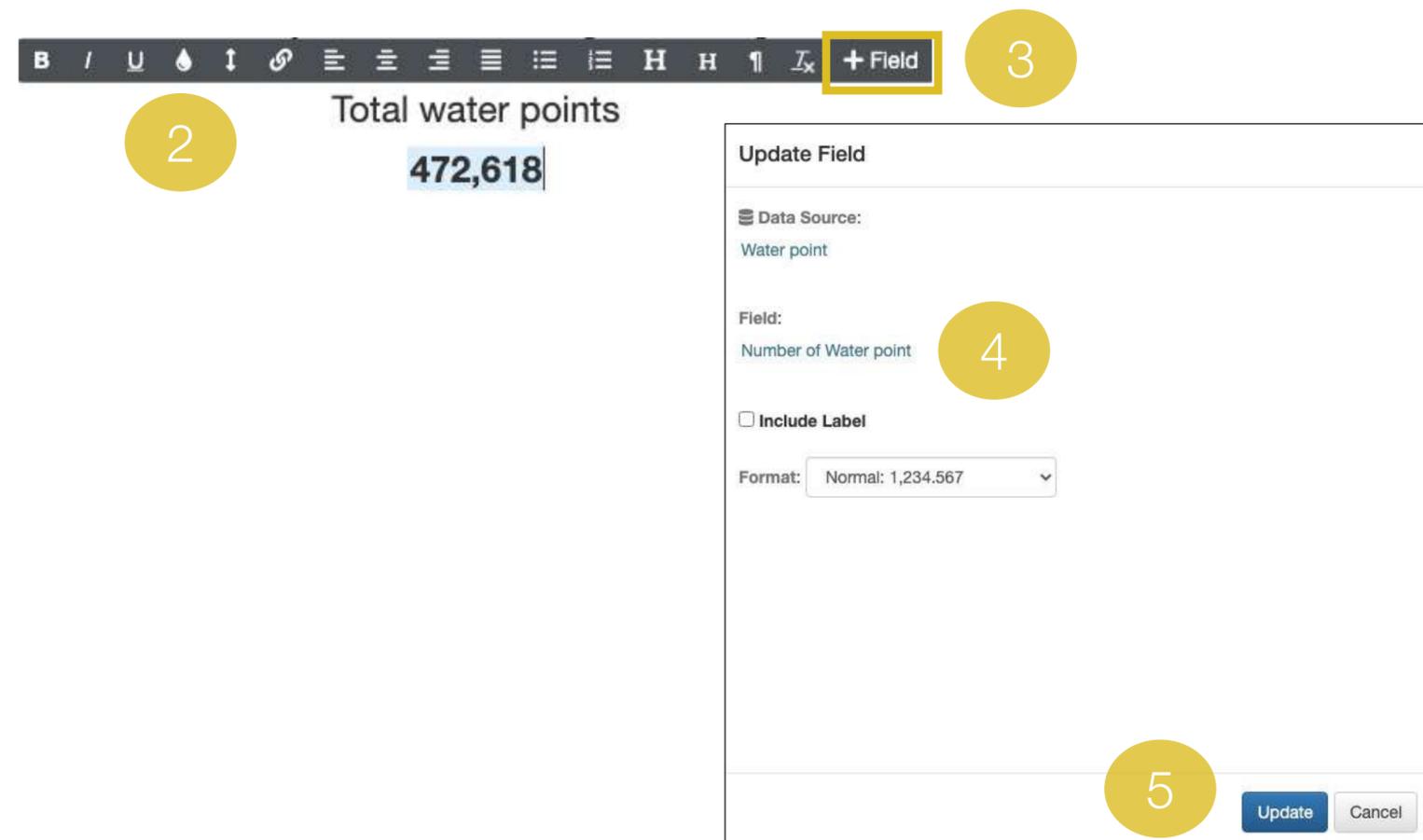
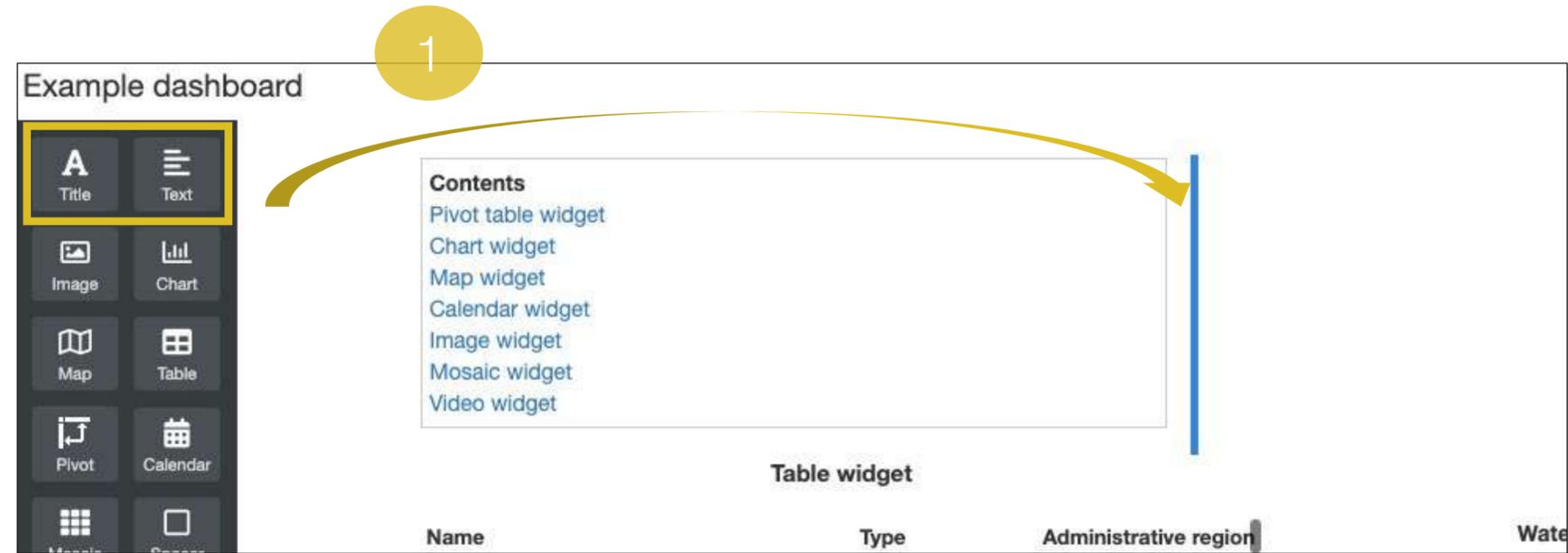
Text widgets allow users to add any formatted text alongside calculations.

To add a text field:

1. Drag the Text or Title widget on to the dashboard
2. Type and format the text

To add dynamic calculated text

3. Click the +Field button in the text formatting bar
4. Select a data field to display e.g. Number of water points
5. Click Insert



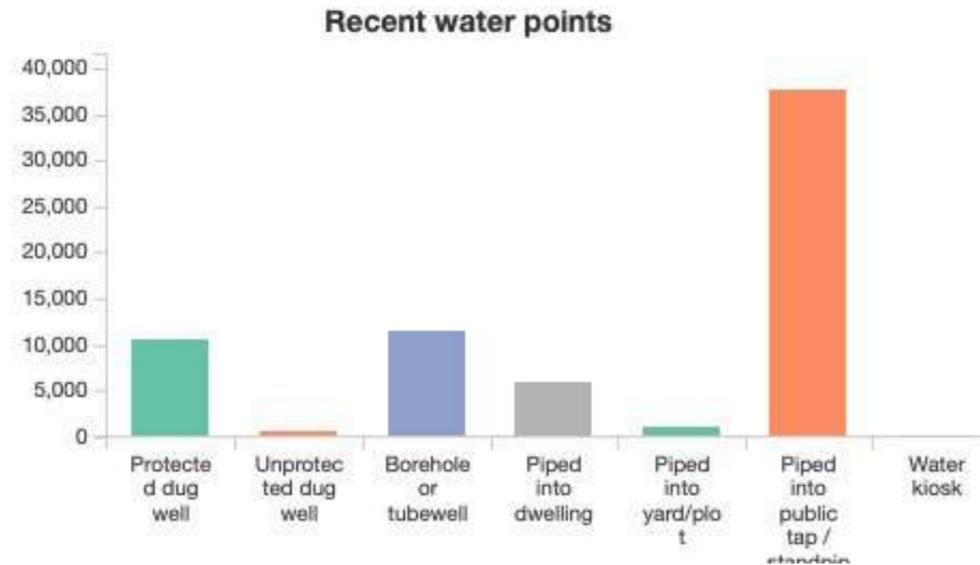
# Charts - Types of Charts

Dashboards and consoles allow users to add various types of charts to visualize their data.

These include:

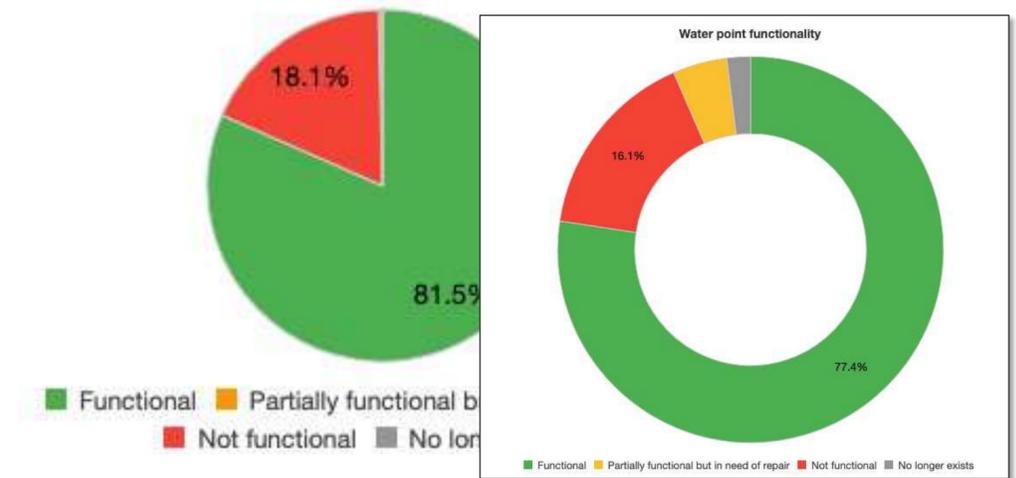
- Bar charts – used for values by category or bin
- Pie and doughnut charts – Used for visualizing proportions by category or bin
- Line charts – Used for plotting values vs time
- Scatter plots – Used for showing
- Smoothed line charts – Used for plotting values vs time
- Area charts – Used for showing proportions over time

Bar chart

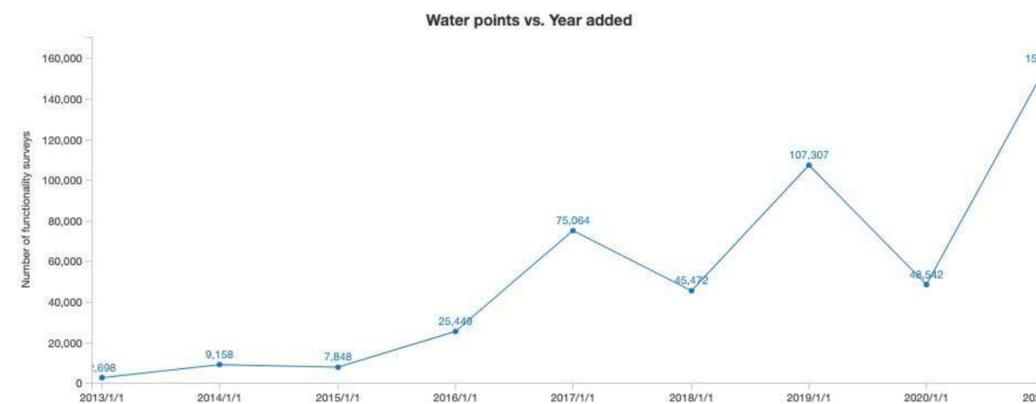


Pie chart

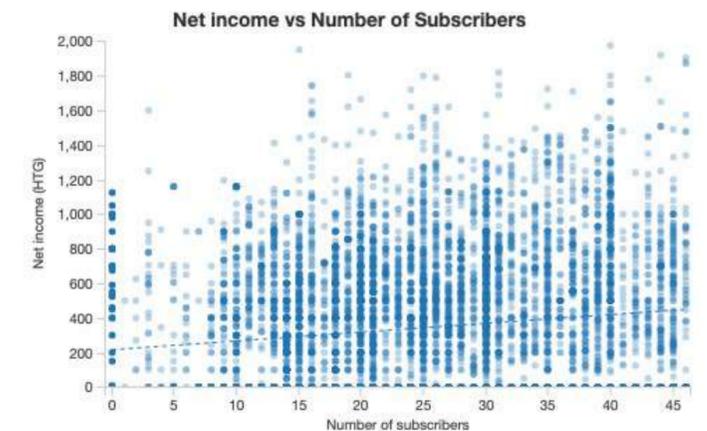
Recent water point functionality Donut chart



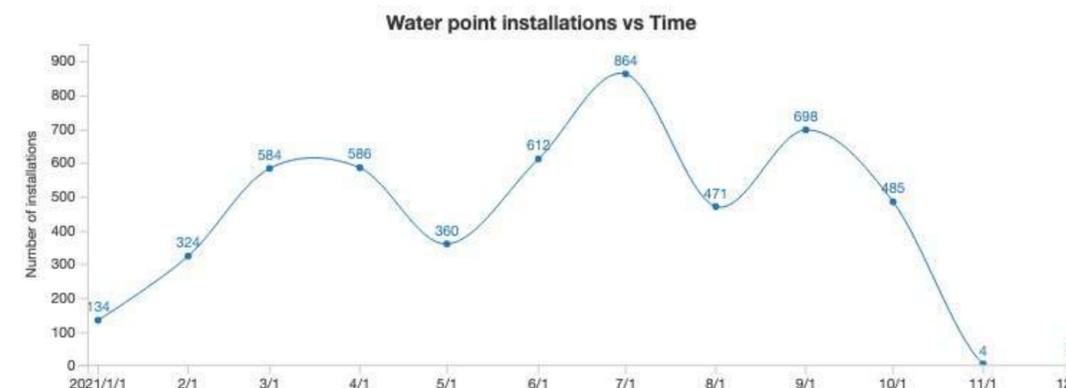
Line chart



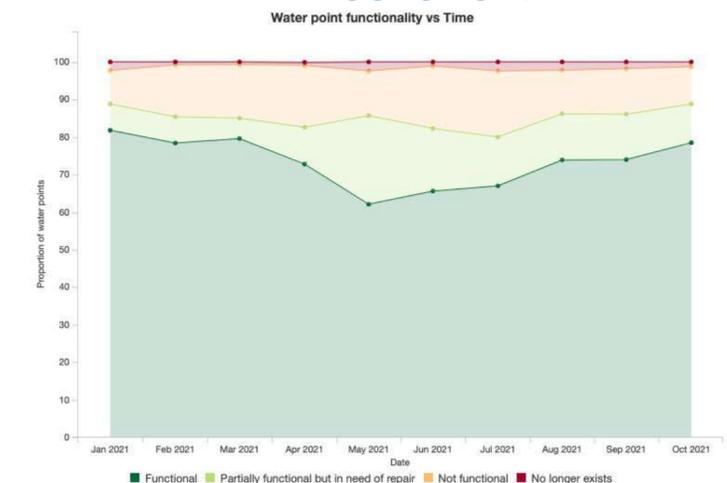
Scatter plot



Smoothed line chart



Area chart



# Adding and editing a chart

To add and edit a chart:

1. Click **Edit** on the dashboard or console
2. Drag and drop the **Chart** widget from the side menu
3. Click the **Gear** icon of the widget and select **Edit**
4. Edit the parameters of the chart

The screenshot illustrates the steps for adding and editing a chart in the mWater Portal. The main dashboard displays a bar chart titled "Recent water points" with a y-axis ranging from 0 to 40,000. The chart shows data for various water point types: Protected dug well (10,000), Unprotected dug well (0), Borehole or tubewell (12,000), Piped into dwelling (6,000), Piped into yard/plot (1,000), Piped into public tap/standpipe (38,000), and Water kiosk (0). The side menu on the left contains various widget options, with "Chart" highlighted. The top right of the dashboard has an "Editing" button. The edit panel on the right shows the "Chart Type" dropdown set to "Bar", with options for "Horizontal" and "Show Values". The "Data Source" is set to "Water point". The "Horizontal Axis" is set to "Select...". The "Color" section has a color picker. The "Filters" section shows "Date added is in last 30 days". The "Y Axis Range" section has "Min: Auto" and "Max: Auto".

Water Point Type	Value
Protected dug well	10,000
Unprotected dug well	0
Borehole or tubewell	12,000
Piped into dwelling	6,000
Piped into yard/plot	1,000
Piped into public tap/standpipe	38,000
Water kiosk	0

# Chart parameters

Charts have various parameters which help the user configure it to their needs.

These include:

1. **Chart type** – Defines the overall type of the chart
2. Check boxes:
  - **Horizontal** – Switch the axes directions
  - **Show values** – Display the numerical values over the graph symbols
  - **Proportional** – Makes the vertical axis equal to 100% and each series is proportional to the whole
  - **Stack** – Puts each series on top of the previous one
3. **Data source** – The site/survey/other table to chart values. Each series can use a different data source.
4. **Horizontal/vertical axis** – The question to use for the horizontal axis. Once the axes are selected, additional menu options will appear to configure them.
5. **Color** – Select the colors for each category or bin
6. **Filters** – Add a filter to display a subset of the data
7. **Value** – The name of the series in the legend
8. **Add another series** – Creates an additional series
9. **Y threshold lines** – Creates Horizontal dashed lines. Can also be used to change color of any values which exceed the line's value.
10. **Y axis range** – Defines the minimum and maximum Y axis range
11. **Labels** – Set the X and Y axis labels

The image shows a configuration panel for a chart, divided into two tabs: 'Design' and 'Labels'. The 'Labels' tab is active, indicated by a yellow circle with the number '1'. The panel contains several sections, each with a numbered callout (yellow circles with numbers 1-9) pointing to specific elements:

- 1** points to the 'Chart Type' section, which includes a 'Bar' option and two checkboxes: 'Horizontal' (with callout 2) and 'Show Values'.
- 2** points to the 'Data Source' section, which has a dropdown menu currently showing 'Water point'.
- 3** points to the 'Horizontal Axis' section, which has a dropdown menu currently showing 'Select...'.
- 4** points to the 'Color' section, which has a color selection icon.
- 5** points to the 'Filters' section, which shows a filter: 'Date added is in last 30 days' and a '+ Add Filter' button.
- 6** points to a text input field labeled 'Value'.
- 7** points to a '+ Add Another Series' button.
- 8** points to the 'Y Threshold Lines' section, which has a '+ Add Y Threshold' button.
- 9** points to the 'Y Axis Range' section, which has 'Min:' and 'Max:' labels, each followed by a text input field containing the word 'Auto'.

# Data tables

Tables display individual sites or survey response in each row. These can be added to any dashboard or console by:

To add and edit a table:

1. Click **Edit** on the dashboard or console
2. Drag and drop the Table widget from the side menu
3. Click the Gear icon of the widget and select **Edit**
4. Edit the parameters of the chart

The screenshot shows the mWater Portal interface. At the top, there is a navigation bar with options like Surveys, Maps, Dashboards, Manage, Issues, Indicators, Consoles, Help, and a user profile for Brian Jensen. Below the navigation bar, there is a toolbar with options like Undo, Redo, Print, Refresh, Settings, Layout, Duplicate, Share, Export as PDF, and an **Editing** button (labeled 1). The main content area displays a table of water points (labeled 2). The table has columns for Name, Type, GPS Location, and Administrative region. A gear icon (labeled 3) is visible in the top right corner of the table. A side menu on the left contains various widget options, including Title, Text, Image, Chart, Map, Table, Pivot, Calendar, Mosaic, Spacer, Video, TOC, and Clipboard. The configuration panel for the table is open, showing the Data Source (Water point), Column 1 (Name), Column 2 (Type), and Column 3 (GPS Location). The panel also includes options for Add Column, Ordering, Filters, and Maximum Number of Rows (up to 1000). The title of the table is set to 'Untitled' (labeled 4).

Name	Type	GPS Location	Administrative region >
W... intégré dans site FSM... OM	Piped into public tap / standpipe / basin	-20.312295, 44.294093	Morondava
Sous Ti Mari	Unprotected spring	19.034125, -71.803077	2e Section Lociane
Pwi Nan Mase	Unprotected dug well	19.034608, -71.808717	2e Section Lociane
Sous Rene #1	Unprotected spring	19.026764, -71.801867	2e Section Lociane
Sous R...			
Sous N...			
Boreho...			
Sabon j...			
Sous W...			
Sous N...			
Sous N...			
Sous N...			
Mukonka village borehole 6		-15.184226, 29.227576	
Chipoka health post water system	Borehole or tubewell	-9.092652, 31.765117	
Bashi Vanessa tap	Piped into yard/plot	-10.194445, 31.189478	
Pozo profundo	Borehole or tubewell	13.537549, -88.349774	

# Table parameters

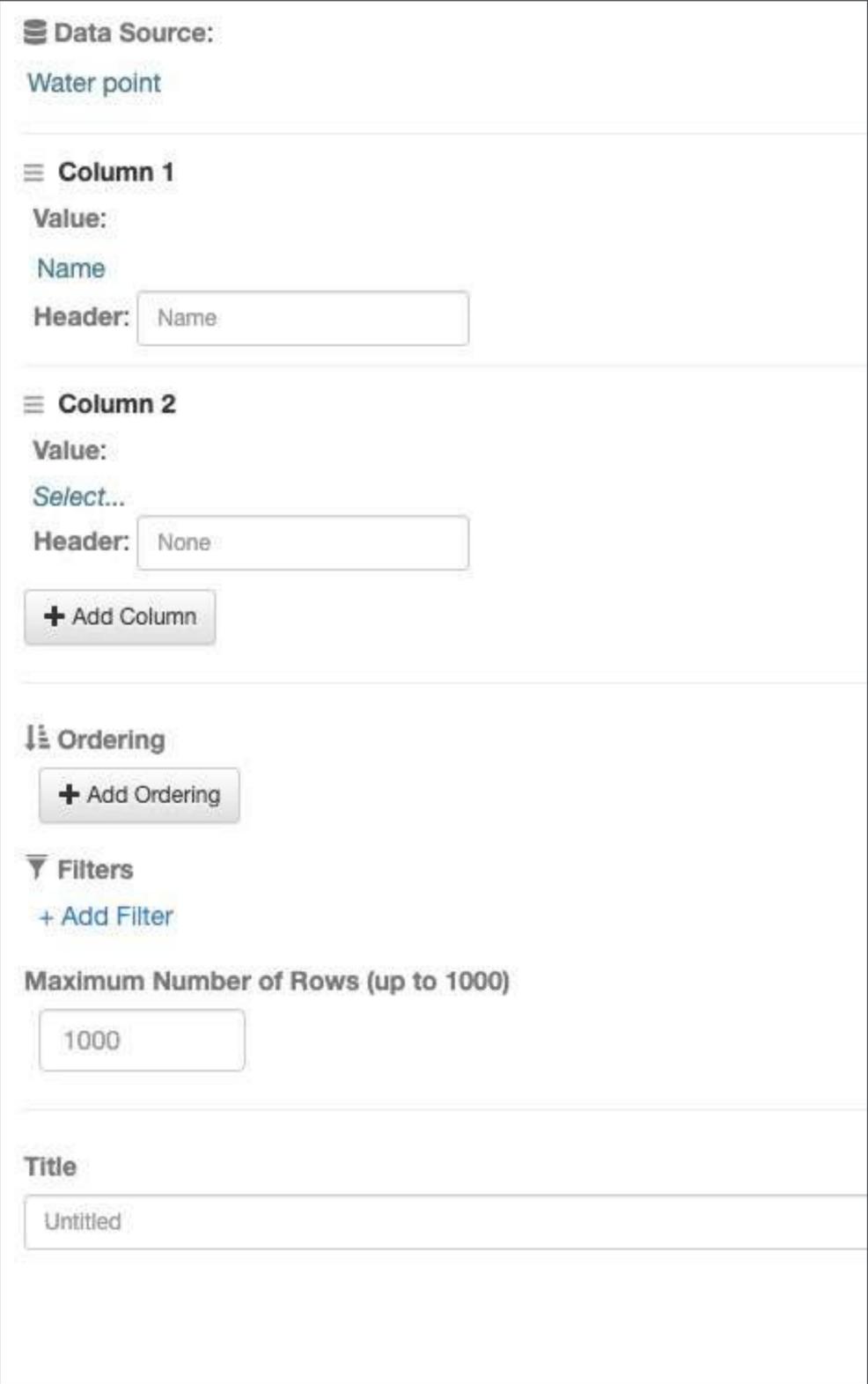
Tables have various parameters which help the user configure it to their needs.

These include:

1. **Data source** – Select the site or survey form to use in the table
2. **Column 1** – Click Select... to choose a question from the data source. Use the Header text box to change the Column name.
3. Click +Add column for additional columns
4. Add ordering – Choose a question to use for a sorting/ordering the table
5. Add filter – Set a filter to display a subset of the data
6. Maximum number of rows – Define the maximum number of rows in the table. The table will only display that number of rows.
7. Title – Add a title to the data table

Note: Drag and drop the  symbol to reorder the columns.

Note Use the  button to delete a column.



The screenshot shows a configuration panel for a table. It is divided into several sections:

- Data Source:** A dropdown menu showing "Water point".
- Column 1:** A section with a "Value:" label, a "Name" dropdown menu, and a "Header:" text box containing "Name".
- Column 2:** A section with a "Value:" label, a "Select..." dropdown menu, and a "Header:" text box containing "None".
- + Add Column:** A button to add more columns.
- Ordering:** A section with a "Ordering" label and a "+ Add Ordering" button.
- Filters:** A section with a "Filters" label and a "+ Add Filter" button.
- Maximum Number of Rows (up to 1000):** A text box containing "1000".
- Title:** A text box containing "Untitled".

Numbered callouts (1-7) are placed on the left side of the interface, corresponding to the steps in the text:

- 1: Points to the Data Source dropdown.
- 2: Points to the Column 1 Name dropdown.
- 3: Points to the + Add Column button.
- 4: Points to the + Add Ordering button.
- 5: Points to the + Add Filter button.
- 6: Points to the Maximum Number of Rows text box.
- 7: Points to the Title text box.

# Pivot tables

Pivot tables display summary data in a tabular format. Each row represents multiple sites or surveys, aggregated together.

To add and edit a pivot table:

1. Click **Edit** on the dashboard or console
2. Drag and drop the **Pivot** widget from the side menu
3. Click the **Gear** icon of the widget and select **Edit**
4. Edit the parameters of the pivot table

Each cell in a pivot table contains an expression which defines how to calculate that value. Expressions can be Aggregate (e.g. number of surveys, total of revenue, latest where..., etc) or individual values (e.g. revenue, name, etc)

The screenshot shows the mWater Portal interface. The dashboard title is "Example dashboard". The top navigation bar includes "Surveys", "Maps", "Dashboards", "Manage", "Issues", "Indicators", "Consoles", "Help", and a user profile "Brian Jensen". The dashboard contains a pivot table with the following data:

Type	Functionality			
	Functional	Partially functional but in need of repair	Not functional	Not exists
Protected dug well	19,284	3,125	4,403	1,235
Unprotected dug well	6,169	462	436	131
Borehole or tubewell	68,623	16,143	15,094	3,360
Protected spring	3,728	799	424	49
Unprotected spring	8,174	497	200	21
Rainwater	1,609			
Surface water	836			
Piped into public tap / standpipe / basin	50,246			
Water kiosk	145			

The configuration dialog for the pivot table is open, showing the following settings:

- Data Source:** Water point
- Columns:** Water point functional status > Latest Functional status
- Map Values:** (Empty field)
- Rows:** Type
- Value:** Number of Water point
- Format:** Normal: 1,234.567
- Field show in cells:** (Empty field)
- Filters:** + Add Filter
- Striping:**  None  Columns  Rows

Numbered callouts in the image indicate the following steps:

1. Click **Edit** on the dashboard or console
2. Drag and drop the **Pivot** widget from the side menu
3. Click the **Gear** icon of the widget and select **Edit**
4. Edit the parameters of the pivot table

# Pivot table parameters

1. **Data source** – Select the site or survey form to use in the table
2. **Columns** – Either leave this blank (for a single column) or select a question for multiple columns
3. **Rows** – Either leave this blank (for a single rows) or select a question for multiple rows
4. **Value** – Select the value which will be displayed in the cells of the table e.g. number of water point, % of total, etc
5. **Format** – Choose the number format for these values
6. **Filters** – Create a filter to view a subset of the data
7. **Striping** – Add alternating grey/white stripes to ealy distinguish data

1 **Data Source:**  
Water point

2 **Columns**  
Water point functional status > Latest Functional status

3 **Map Values**  
Field to optionally make columns out of

**Rows**  
Type  
Field to optionally make rows out of

4 **Value**  
Number of Water point

5 **Format:** Normal: 1,234.567

Field show in cells

6 **Filters**  
+ Add Filter

7 **Striping**  
 None  Columns  Rows

# Additional Pivot Table Functions

1. Click the **+** icon to add an extra row or column to the table
2. Click the **x** button to delete a row or column

**Note:** Adding a column to the right or bottom of the table will display Summarize option to total all values.

Users can add multiple layers of diaggregation to split the data into smaller sub categories.

Click to Edit

Type	Functionality				
	Functional	Partially functional but in need of repair	Not functional	No longer exists	None
Protected dug well	19,284	3,125	4,403	1,235	20,601
Unprotected dug well	6,169	462	436	131	15,601
Borehole or tubewell	68,623	16,143	15,094	3,360	51,795
Protected spring	3,728	799	424	49	6,202
Unprotected spring	8,174	497	200	21	5,823
Rainwater	1,609	139	181	13	8,218
Surface water	836	64	55	13	5,744
Piped into dwelling	7,340	166	381	23	25,240

Type	Edit
Protected dug well	Edit
Unprotected dug well	
Borehole or tubewell	
Protected spring	
Unprotected spring	
Rainwater	
Surface water	
Piped into dwelling	

Functionality					Edit / Summarize
Functional	Partially functional but in need of repair	Not functional	No longer exists	None	

# Expressions

The mWater portal has a sophisticated Expression Builder which allows users to choose how to calculate values from their data. Expressions are also used for creating filtering and sorting data.

The expression builder will open anytime the user clicks the **Select...** icon.

The expression builder displays:

1. **[Data Source] Fields tab** – Shows all data fields within the chosen data source.
2. **Formula tab** – Displays functions which can be used to calculate values from the data.
3. **Value** – Allows users to enter in a data value manually.

**Insert Field**

**Data Source:**  
Water point

**Field:**  
Select...

**Select Field, Formula or Value**

Water point Field (1)   Formula (2)   Value (3)

Search Fields...

Number of Water point

Insert   Cancel

# Data Source Fields

The first tab in the Expression builder displays the data source fields e.g. Water point Field.

This tab includes:

- a) A full-text search bar for data fields
- b) An automatically calculated field for the Number of rows in the data source e.g. Number of water points
- c) Each blue field is selectable
- d) Each black field with a  icon is a section which can be expanded
- e) Related data sources like Surveys, Indicators, and Entities (Sites)

**Select Field, Formula or Value**

Water point Field  Formula  Value

Search Fields...

**Number of Water point**  
Name - Name used locally to refer to the water point

**Description** - Additional information to help locate or describe the water point

**Type** - Technology or design that allows users to access water (based on JMP definitions)

**Location** - GPS coordinates, administrative region (country, state/province, district, etc.), altitude, accuracy

**Unique ID** - Unique number automatically assigned when mapping a site

**Custom ID** - Identification code assigned by government or implementing organization (not guaranteed to be unique)

**Custom ID assigned by** - Name of the government or organization that assigned the custom ID

**Related Surveys** - Surveys that are linked by a question to Water point

**FRAPE Water Point Monitoring**  
[+ Add Related Survey](#)

**Related Indicators** - Indicators are standardized information that are related to this site

**Related Entities**

# Formula

The Formula option in Expression Builder allows users to calculate values from base data. Each formula takes one or more input and calculates a single output value.

This includes:

- **Logical functions** – Display different data depending on which logical statements are true
- **Conversion functions** – Converts data from one type/format to another
- **Date and time functions** – Converts date/time data to different formats
- **Aggregate functions** – Define how to combine multiple values together into a single value
- **Geospatial functions** – Calculates a value based on the geospatial location information of the data

Type	Name	Description
Logical functions	If/then	Choose different values based on a condition
	Score	Assign scores to different choices of a field and find total.
	Not	Opposite of a value
Conversion functions	Convert to text	Advanced: convert a choice, text list, or number type to a text value
	Convert to date	Convert a datetime to a date
	Convert to number	Convert a text value to a number or null if not valid number
	Round	Round a number to closest whole number
	Floor	Round a number down
	Ceiling	Round a number up
Date and time functions	Make list of	Converts a multi-check into a single, comma-separated list
	Days between	Get the number of days between two dates
	Months between	Get the number of months between two dates
	Years between	Get the number of years between two dates
	Days since	Get number of days from a date to the present
	Month	Month of year
	Year and Month	Date of start of month
	Year	Date of start of year
	Week of month	Week within the month
	Day of month	Day within the month (1-31)
	Year/Quarter	Year and quarter of a date
	Year/Week	Year and week of a date
	Week	Week of a date
	Today	Advanced: current date. Do not use in comparisons
Now	Advanced: current datetime. Do not use in comparisons	

Type	Name	Description
Aggregation functions	Latest	Get latest value when there are multiple
	Latest where	Get latest value that matches a condition
	Is latest for each	Only include latest item for each of something
	First	Get first value when there are multiple
	First where	Get first value that matches a condition
	Previous	Get 2nd latest value when there are multiple
	Number where	Get number of items that match a condition
	Number of unique	Count number of unique values
	Number of values in	Advanced: number of values selected in a multi-choice field
	Total	Add all values together
	Total Number	Get total number of items
	Total where	Add together only values that match a condition
	Percent of Total	Percent of all items
	Percent where	Get percent of items that match a condition
	Average	Average all values together
	Least of	Takes the smallest of several numbers
	Greatest of	Takes the largest of several numbers
	Minimum	Get smallest value
	Minimum where	Get smallest value that matches a condition
	Maximum	Get largest value
Maximum where	Get largest value that matches a condition	
Geospatial functions	Latitude of	Get latitude in degrees of a location
	Longitude of	Get longitude in degrees of a location
	Distance between	Get distance in meters between two locations
	Length of line	Length of a line shape in meters
	Spatial Join	Advanced: Join to another table based on location distances
	Population Within	Advanced: Estimates population within certain number of meters of location(s)

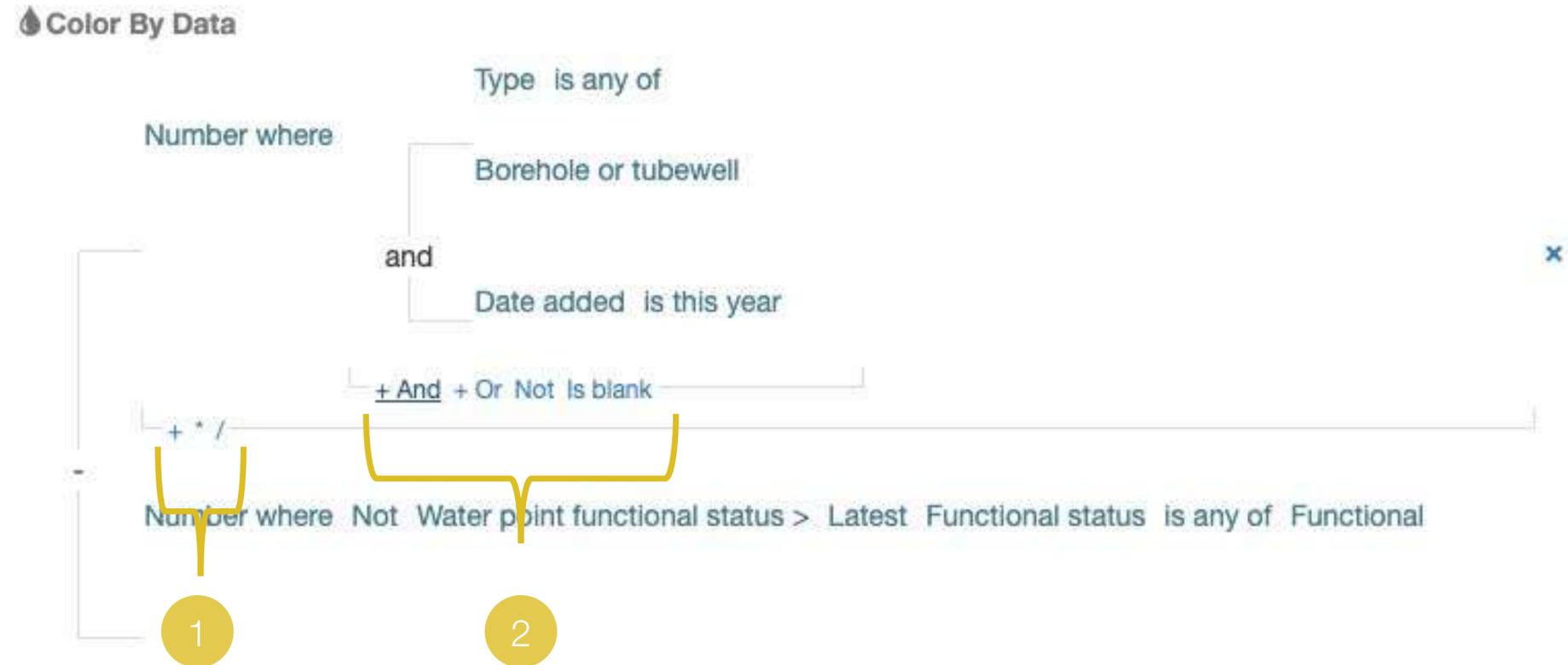
# Quick formula

In addition to the options shown in the Formula tab, mWater has various logical and mathematical functions which can be performed on each value.

By hovering the cursor over any expression, mWater will display applicable formulae which can be added to the expression like:

1. **Arithmetic functions** – Addition (+), Subtraction (-), Multiplication (\*), Division (/)
2. **Logical functions** – And, Or, Not, Is blank, etc.

**Note:** Clicking on any part of the expression will allow the user to remove or replace that field, operator, or value with a similar one.



**And** – If both of the expressions are true, it will be true  
**Or** – If either of the expressions is true, it will be true  
**Not** – Negates the expression which follows it  
**Is blank** – If the field has a blank value, it will be true

# Filters

Dashboards, consoles, maps, and datagrids can all use filters to display subsets of any data set.

The diagrams at right show the same visualization widgets with and without filters applied.

Filters are statements which define which records in a data source to display. If the statement is True, then the record will be displayed.

Filters have the following components:

1. A data field
2. An operator
3. A value

## Filters

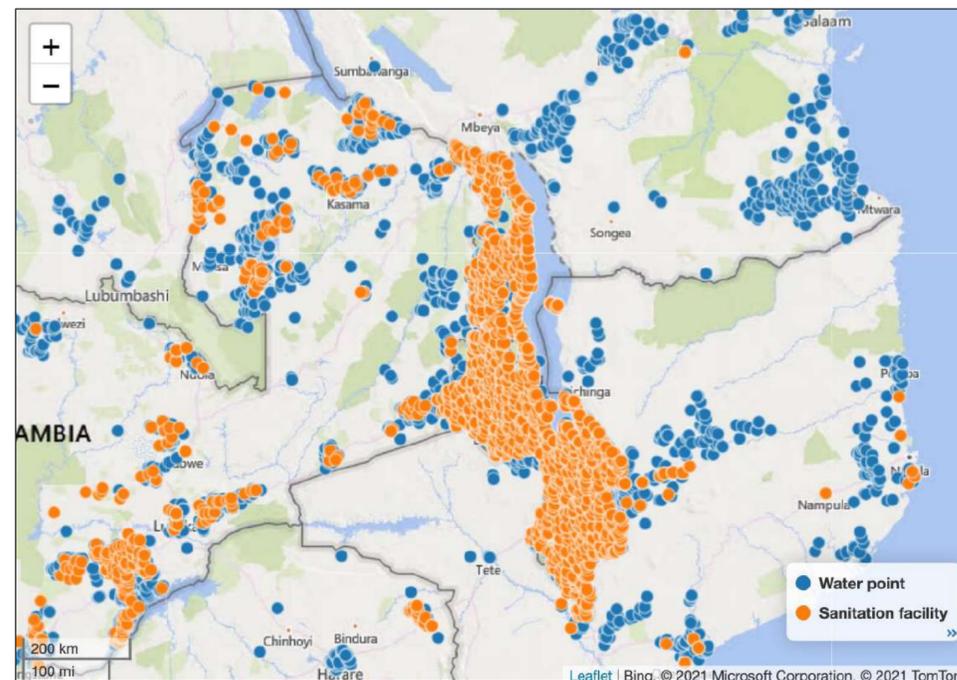
Filters are built in to the dashboard and cannot be changed by viewers of the dashboard.

### Water point

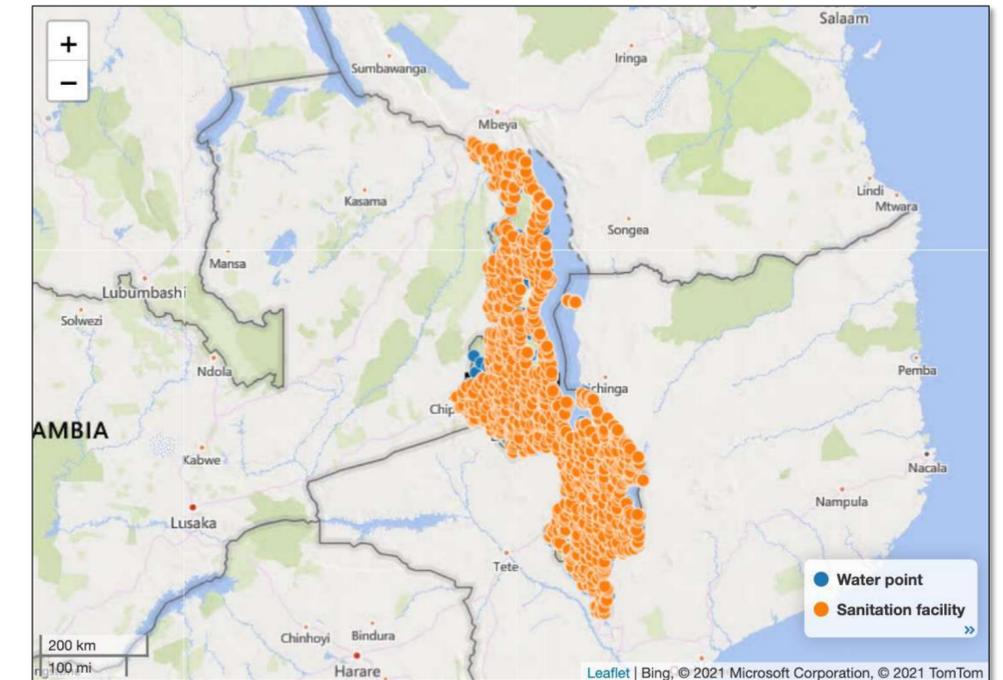
Administrative region is within Malawi



## Unfiltered



## Filtered



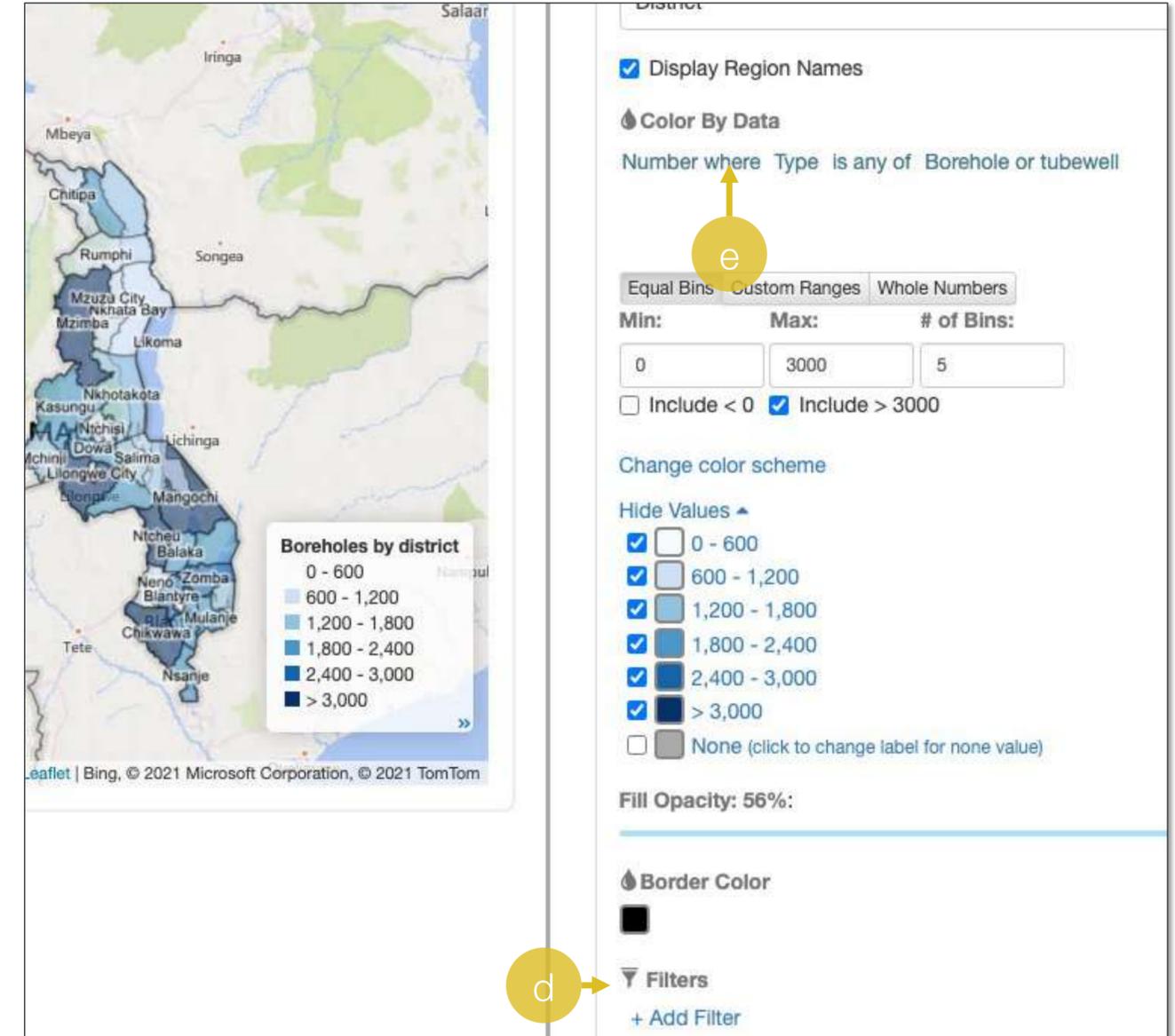
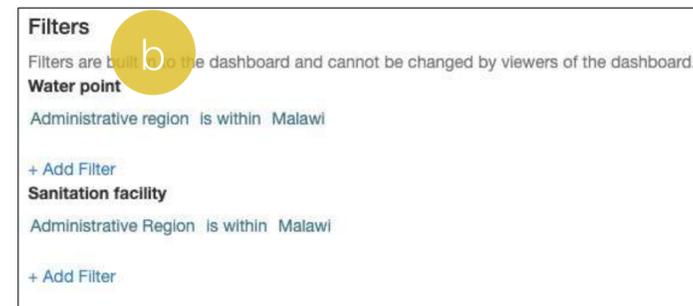
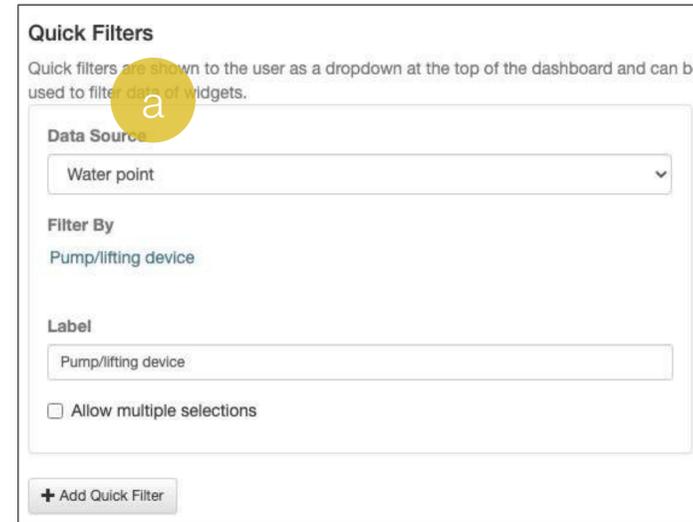
# Types of Filters

1. Page level filters – Filters which apply to all widgets on the page. Click Settings to access the menu.

- a) Quick filters – Filters displayed on the dashboard itself, that can be used by all users.
- b) Filters – Filters set by administrators via the settings menu.
- c) Global filters – Filters set by the administrator which applies to all sites on the page. This only includes Managed by and Admin region filters.

2. Widget level filters – Filters which apply to only one widget. Click Edit on the widget to access the menu.

- d) Widget – Filter which applies only to a specific widget or data layer.
- e) Formula with "where..." clause – Filter which applies to an expression formula.



# Consoles

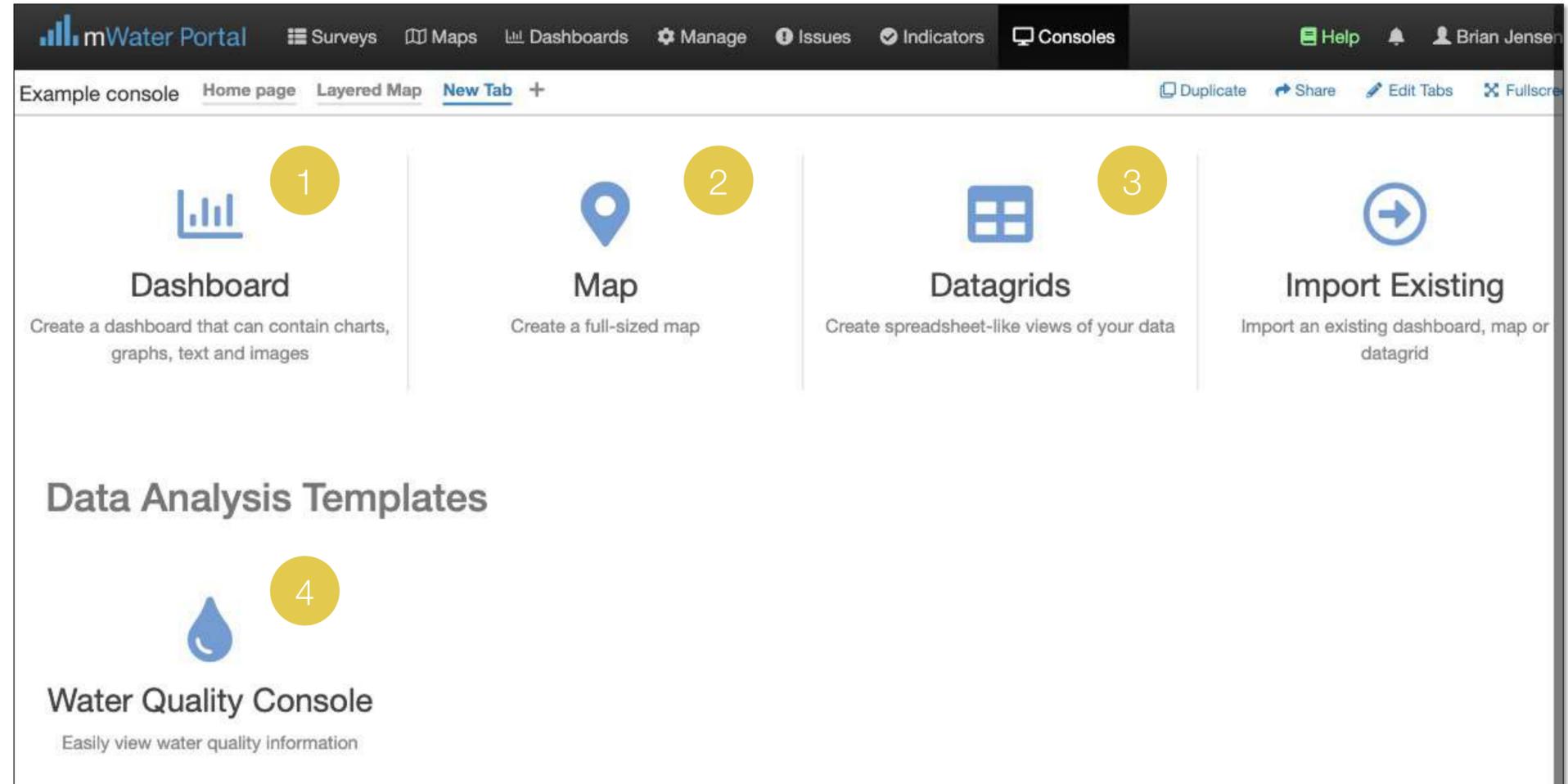
Consoles allow user to bring together many different visualization types into a single, tabbed interface.

These can incorporate:

1. Dashboards
2. Maps
3. Datagrids
4. Water quality – A pre-configured visualization page focusing on water quality parameters

Each of these items can either be created a blank copy or imported from existing visualizations. Importing an existing visualization copies its contents to the console.

To add a new tab click the  icon



# Managing tabs

Consoles can contain as many tabs as needed.

The edit tabs button includes

1. A button to add new tabs
2. An  button to delete existing tabs
3. A  icon to reorder the tabs
4. A Use compact mode at width parameter to set the resolution below which the tabs will collapse into a dropdown list. This is especially important for mobile devices like tablets and smartphones.

## Edit Tabs

### Console Tabs Options

**Use Compact Mode At Width**

<= 800px (Tablet) ▾

**Edit Tabs**

 Home page	
 Layered Map	
 New Tab	

[+ Add Tab](#)

**Save** **Cancel**

## Standard mode



## Compact mode



# Dashboard layouts

By clicking on the Layouts button, users can change the format and mobile responsive parameters of the dashboard.

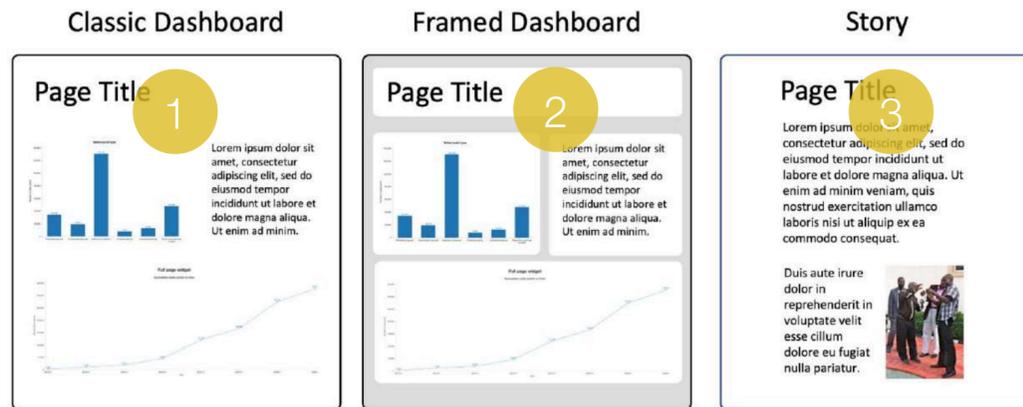
Themes:

1. Classic Dashboard - Has a white background that is optimized for data visualizations with minimal text.
2. Framed Dashboard - The same as the classic theme except that the background of the page is grey.
3. Story Dashboard - Has a white background on a page that is optimized for text and photos. The width of the text will only fill the screen at resolutions of laptop sizes or below (<1000pixels).

Setting mobile friendly parameters will adjust how the layout is presented on different screen sizes.

Parameters:

- a) Collapse to single column – On smaller screens, horizontal widgets will be placed vertically instead
- b) Hide quickfilters – On smaller screens, quickfilters will collapse to a button to save screen space
- c) Minimum width – Defines the resolution below which the widgets will start to scroll or scale
- d) Scroll/scale – Scrolling will keep the original size of the widgets and add a scroll bar. Scaling will make the widgets smaller to match the smaller screen size.
- e) Maximum width – If the maximum width of the page is exceeded mWater will insert blank padding on either side



Preview As: Phone (360x640) Tablet (768x1024) Laptop (1000x800) Desktop (1280x1024)

← Close

**Theme**

- Classic Dashboard**  
Ideal for data display with minimal text
- Framed Dashboard  
Each widget is white on a grey background
- Story  
Ideal for data-driven storytelling with lots of text

**Advanced**

**Collapse to Single Column** [Reset to Defaults](#)

< 600px (Small tablet) ▼

**Hide Quickfilters**

< 600px (Small tablet) ▼

**Minimum Width (before scrolling or scaling)**

< 600px (Small tablet) ▼

**When Below Minimum Width**

Scroll **Scale**

**Maximum Width (before padding)**

> 1600px (Wide Desktop) ▼

**Contents**

- Pivot table widget
- Chart widget
- Map widget
- Calendar widget
- Image widget
- Mosaic widget
- Video widget

**Water point functionality summary**

Total water points  
**472,618**

Table widget

Name	Type	Administrative region
Kagera A, Geita	Borehole or tubewell	
WP intégré dans site FSM et OM	Piped into public tap / standpipe / basin	Morondava
Patel p r	Borehole or tubewell	Danta
PO intégré dans B10	Piped into yard/plot	Morondava

Pivot table widget

Type	Functionality	
	Functional	Not functional
Protected dug well	19,287	4,406
Unprotected dug well	6,169	436
Borehole or tubewell	68,655	15,093
Protected spring	3,742	424
Unprotected spring	8,174	200

# Using datagrids

Datagrids are mWater's version of spreadsheets where an entire page is filled with tabular data. These are the same as tables in dashboards, but are better for larger quantities of data and more columns.

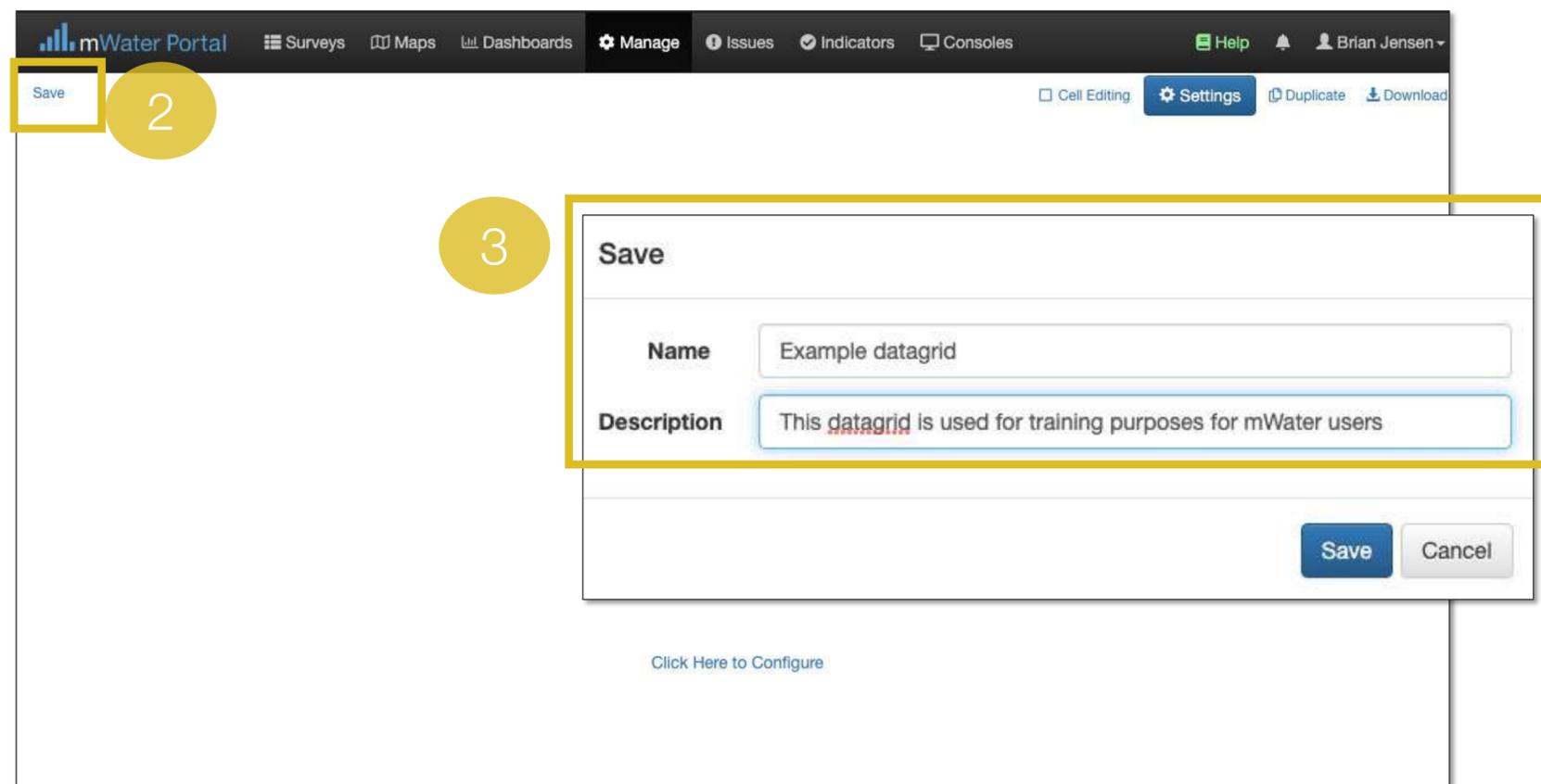
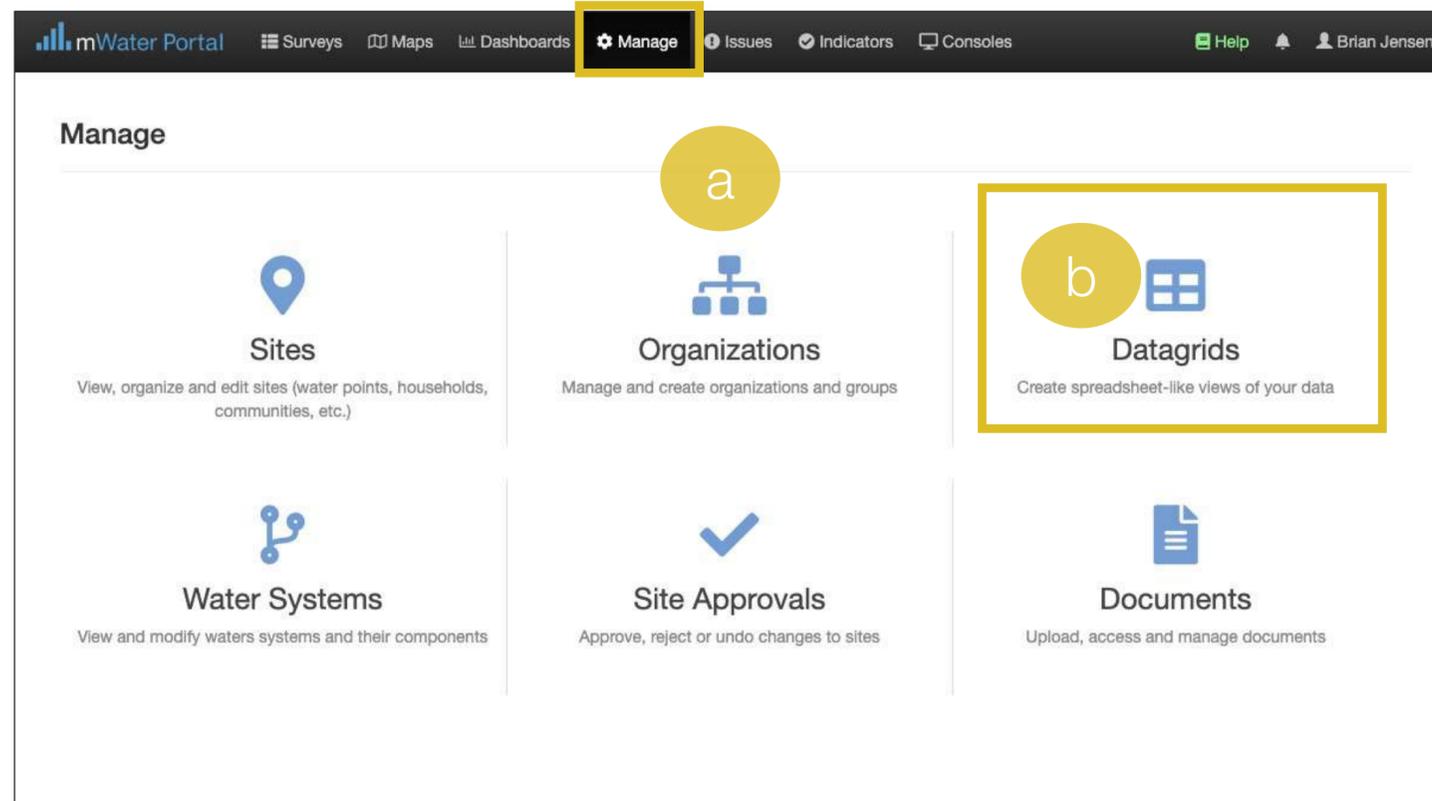
To make a datagrid:

1. Add a new datagrid

- a) Click Manage
- b) Select Datagrids
- c) Make a datagrid

2. Click the Save button

3. Add a name and description for the datagrid



# Configuring a datagrid

To configure a datagrid:

1. Click the Settings button
2. Select a data source
3. Add columns one by one, or add all columns in the data source via the +Add default columns button
4. Modify the columns by naming, rearranging, deleting columns
5. Add filters, sort ordering, quickfilters or options like line numbering

1 **Settings** Duplicate Download

Select Data Source

Select data from sites, surveys or an advanced category below. Indicate

Sites Surveys Indicators Issues T

**Water point**  
Location where people gather or access water for drinking, domes

**Sanitation facility**  
Toilet, latrine, or other place used by people to meet sanitation need

**Household**

**Data Source:**  
Water point

Columns Filter Sorting Quickfilters Options

+ Add Default Columns Remove All Columns

+ Add Column + Add Unique Id (advanced)

**Data Source:**  
Water point

Columns Filter Sorting Quickfilters Options

Name	Name	×
Description	Description	×
Type	Type	×
GPS Location	GPS Location	×
Administrative region > Full Name	Administrative region > Full Name	×
Education District > Name	Education District > Name	×
Guinea Bissau Admin Boundary > Name	Guinea Bissau Admin Boundary > Nam	×
Malawi Water Resource Area > Name	Malawi Water Resource Area > Name	×
Malawi Region > Name	Malawi Region > Name	×
Somali Region > Name	Somali Region > Name	×
Location Accuracy	Location Accuracy	×

Format: Latitude, Longitude

Format: Normal: 1,234,567

# Section Visualizations - Advanced

Advanced topics:

- Visualizing related tables (e.g. sites and surveys)
- Spatial joins and population within (a distance)

# Related data sources

Any time that a related data source is chosen, the user must define how to aggregate the related records into a single output value.

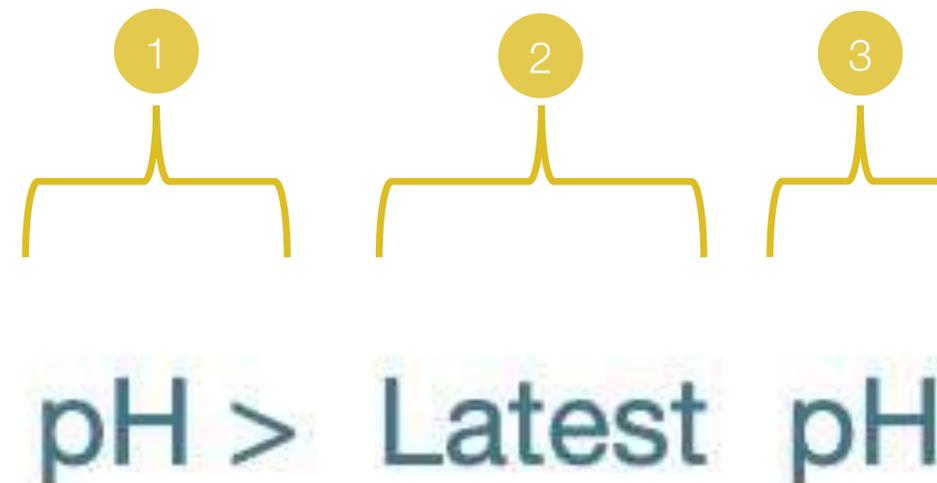
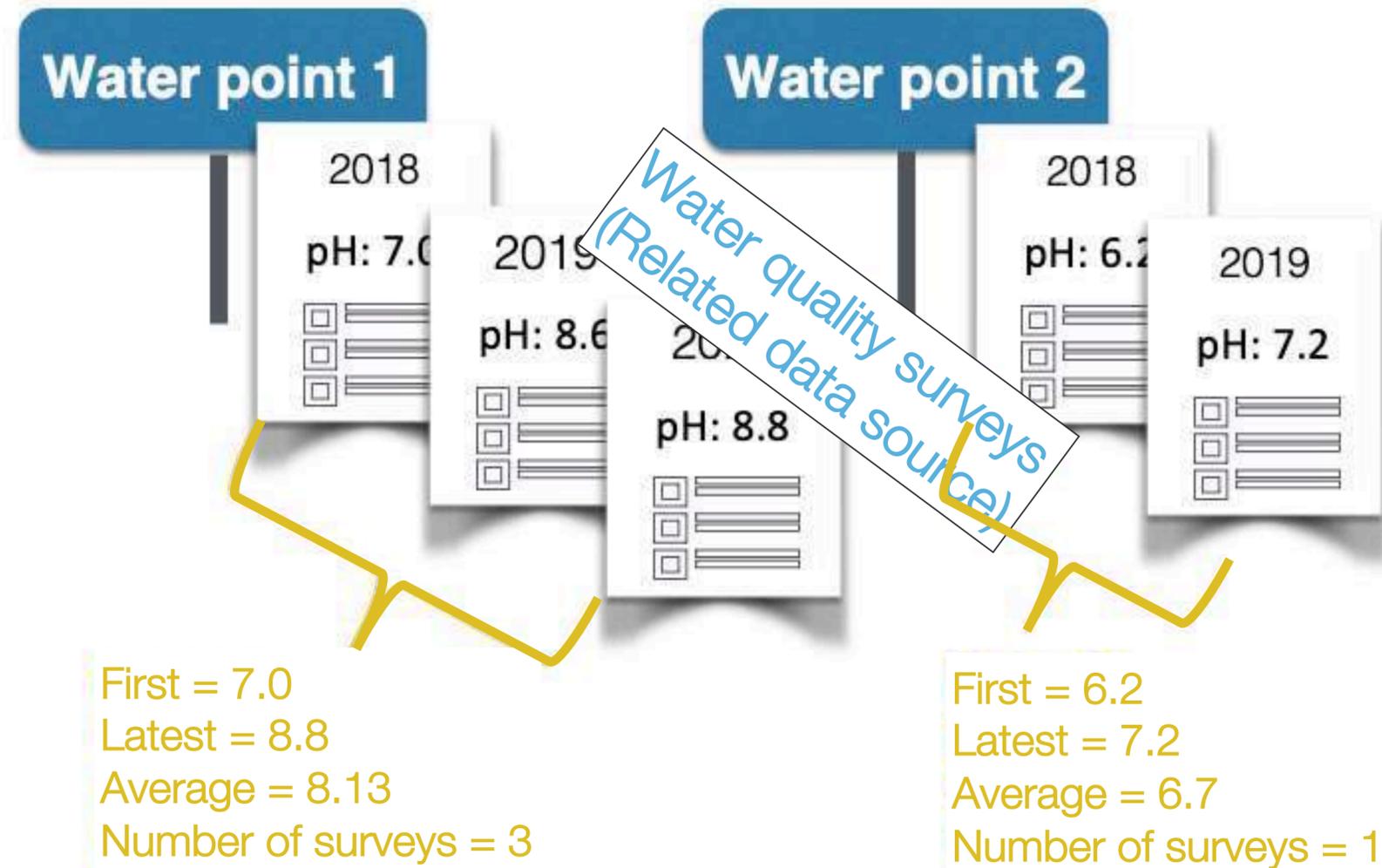
This follow the format:

[Related data source] > [Aggregator]  
[Data field]

1. **Related data source** – The data source which is linked to the original data source e.g. the pH survey is linked to Water points
2. **Aggregator** – A calculation which combines many data records into one value e.g. the Latest response
3. **Data field** – The field whose value will aggregated to produce the output value e.g. the pH question

There are many types of aggregators which can be used.

## Water points (Original Data Source)

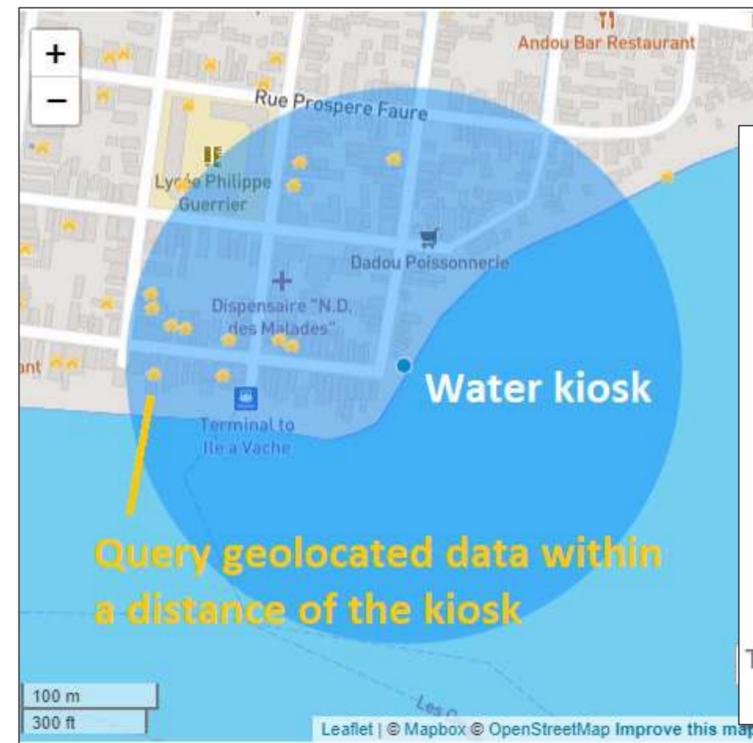


# Spatial joins and population within

The mWater portal includes geospatial (Location) analysis features like:

1. Spatial join – Summarizes data from data source, based on its relative location to data in another data source
2. Population within – Calculates the estimated population within a certain distance of a shape e.g. within 500 meters of a water point

## Spatial join



**Column 3**  
**Value:**  
**Spatial join** Edit  
 Distance: 100 meters

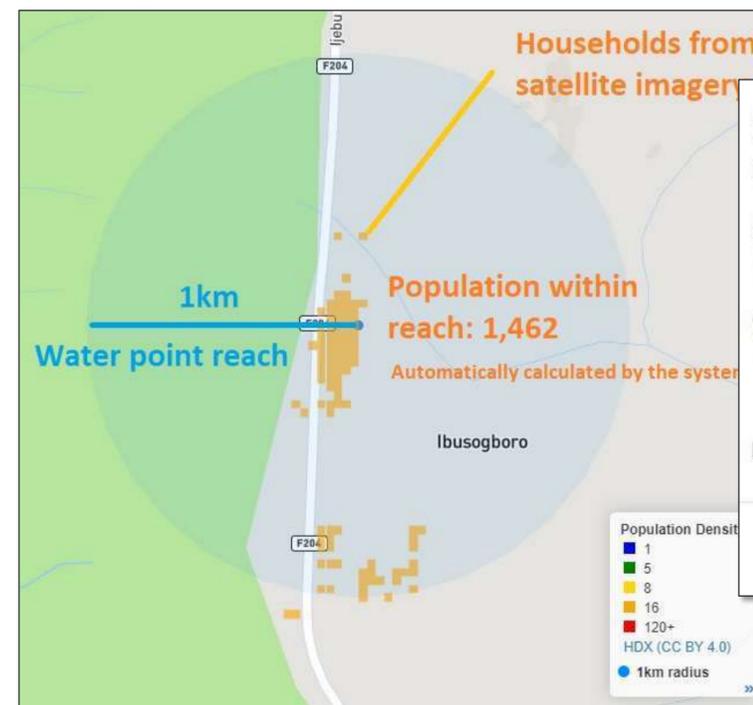
**From Table**  
 Data Source: Water point  
 Location: GPS Location

**To Table**  
 Data Source: Water point  
 Location: GPS Location  
 Value: Number of Water point  
 Filters: Type is any of Piped into dwelling, Piped into yard

The target table is filtered to only the relevant domestic points

Kiosk Name	Est. households within 100m
Kiosk K11-1	14
Kiosk K11-2	11
Kiosk K11-3	47
Kiosk K11-4	49
Kiosk K11-6	33
Kiosk K-243a	11
Kiosk K4-3	27
Kiosk K5-2	58
Kiosk K6-1	47
Kiosk K6-3	30
Kiosk K6-5	41
Kiosk K8-3	71
Kiosk K9-1	63

## Population within



**Population Within**  
 Counts population within a certain distance of a location

**Location** - GPS coordinates  
 GPS Location

**Within a distance of (meters)**  
 1000

Aggregate results (combines all circles together and counts to avoid duplicates)

Name	Population within 1000 meters of GPS Location
Nalongo tap	2,364
St Lwanga borehole	2,246
Ewa kigobe opposite	2,187
Nabakoza spring	2,185

Save Cancel

Section

# 8

# Organizations

Basic Topics:

- About organizations
- Managing users
- Managing deployments

Advanced topics:

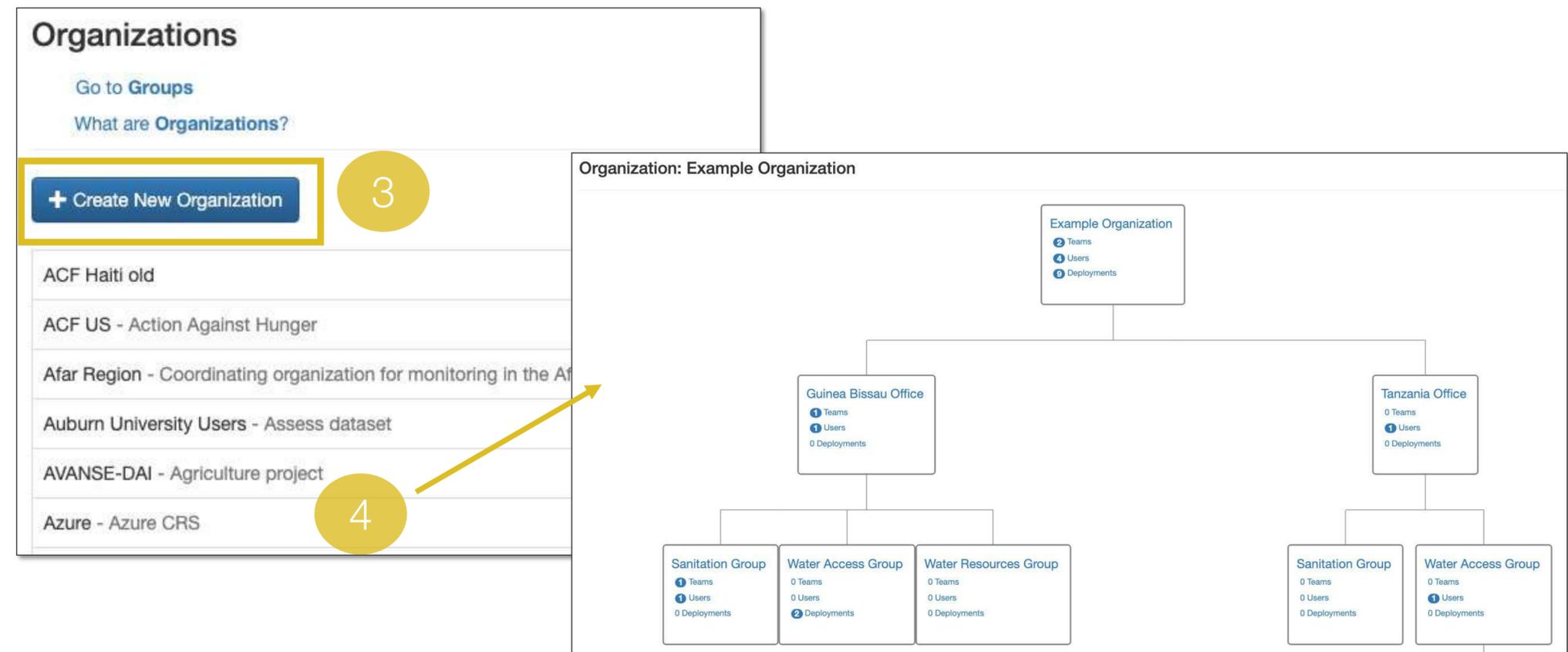
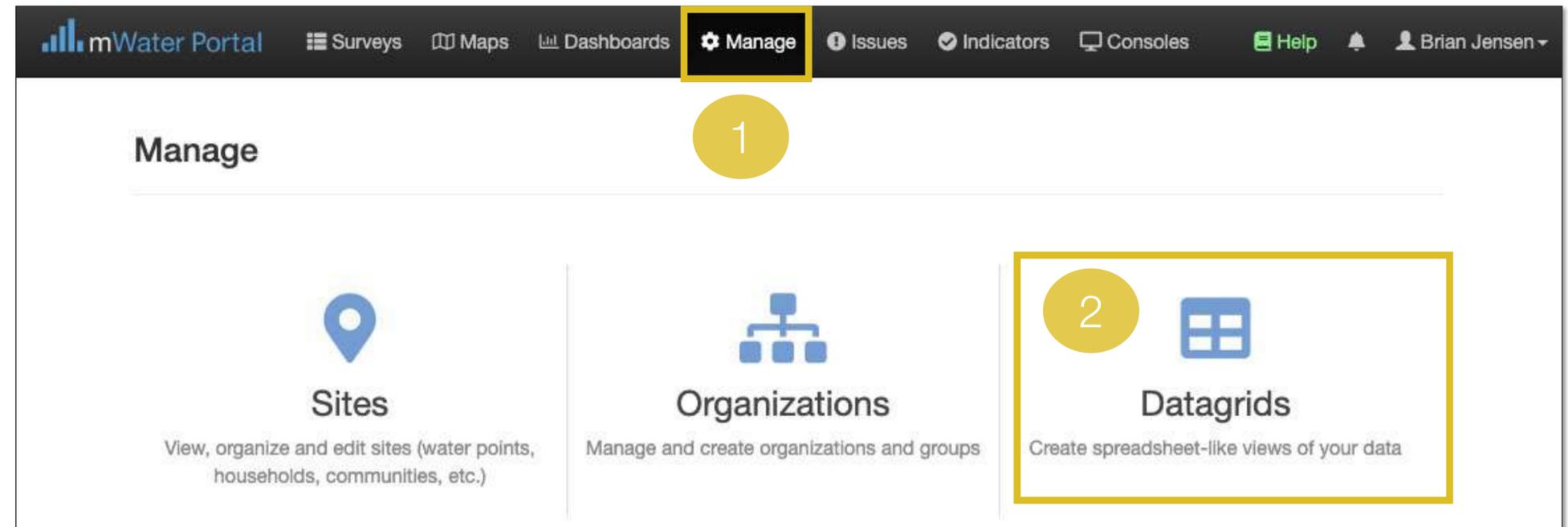
- Settings

# Organizations

The organizations feature makes user management at scale much easier via a tree-like hierarchy where users are added to individual branches.

To access Organizations:

1. Select the Manage tab
2. Click Organizations
3. Create a new organization  
OR
4. Select an existing one



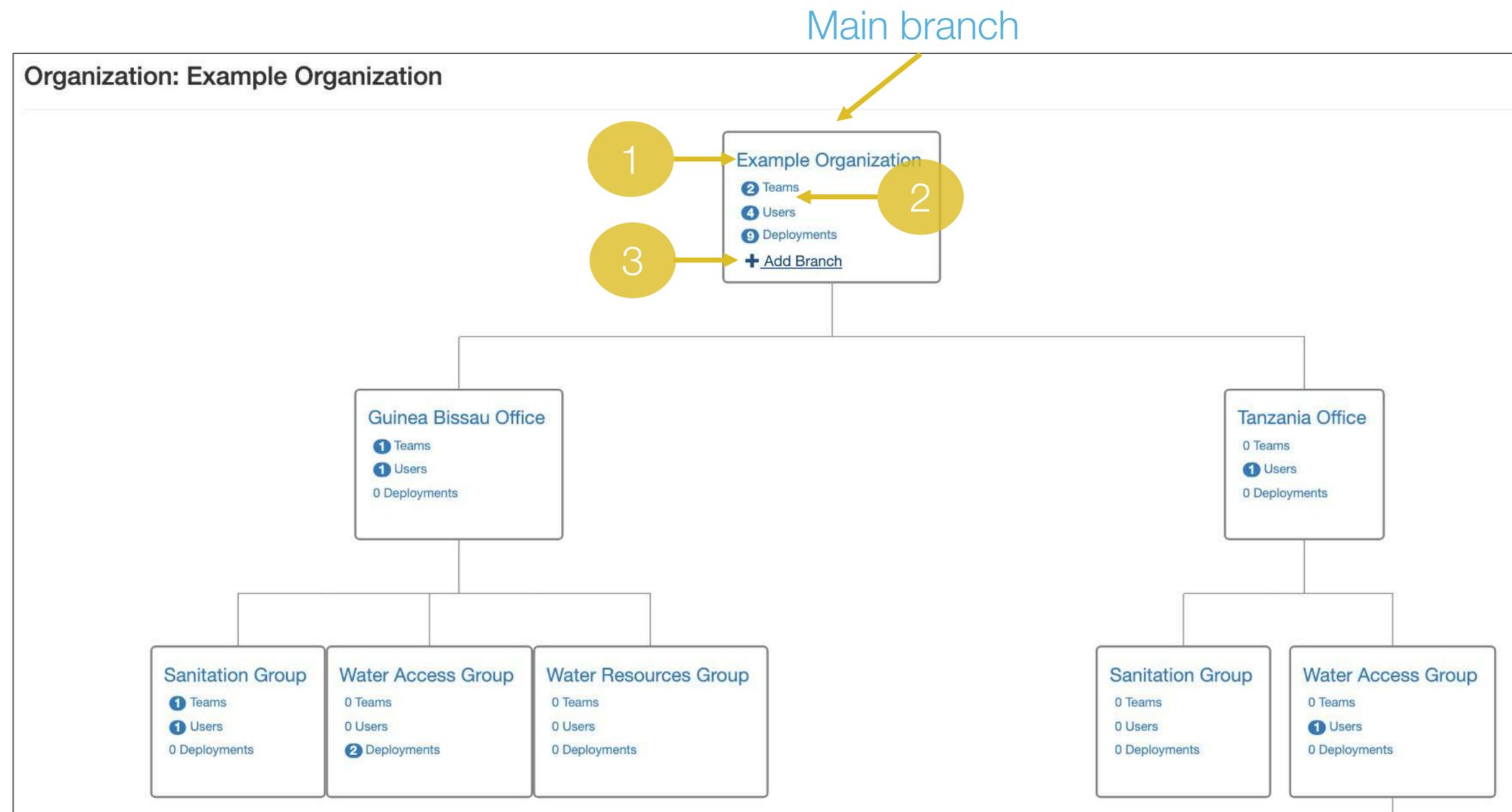
# Organizational chart

The organizational chart is made up of hierarchical branches. The main branch is at the top.

Each branch has

1. Clickable name for detailed management
2. A summary of the teams, users, and deployments which are a part of that branch
3. An **+Add** branch button which appears when the user hovers their cursor over the branch

**Note:** Administrators of the head branch are automatically admins of the sub-branches.



# Branch management

By clicking on a branch, users can view the many parameters for the branch.

This includes:

1. **Teams** – This page is for adding users to the branch's standard roles (admin, managers, viewers) or user created Teams
2. **Users** – Provides a table of each user in the branch and their level of permissions
3. **Collaborators** – Allows the organization to add other organizations to be able to view and collect data as though they were a part of this branch
4. **Activity summary** – Displays a table of users and information on their use of the app and portal
5. **Activity log** - Displays data activities done by users within the organization e.g. Sites/surveys added/deleted/approve
6. **Deployments** – Displays all deployments managed by this organizations
7. **Documents** – Allows admins to add, view. and share documents of any time
8. **Settings** – Contains advanced parameters like organization access code, site approvers, and data backups

Click to return to org chart

**Example Organization**

Teams Users Collaborators Activity Summary Activity Log Deployments Documents Settings

**Admins** can add or remove branches, create or remove teams, and assign users to teams. Admins of head office are also admins of all branches

- Aidan Feighery
- Brian Jensen
- example user

Add: Select...

**Managers** are automatically added to the Manager role when a deployment is made from this branch. Managers of head office are also managers of all branches

- Brian Jensen

Add: Select...

**Viewers** are automatically added to the Viewer role when a deployment is made from this branch. Viewers of head office are also viewers of all branches

Add: Select...

**Teams** are a special kind of group that is managed by this branch.

- Field staff
  - example user
- example user 2

Add: Select... + New Team

+ New Team

Import Legacy Group

# Teams

The teams page allows administrators to add users to different roles within the organization.

Default roles are Admin, Managers, and Viewers.

To add a user to the role:

- Click the dropdown list
- Type a user's name or username
- Select them from the list

Teams are used to group users together. These teams can be added to any survey, deployment, and visualization so users don't have to be added individually.

The screenshot shows the 'Example Organization' interface with a navigation bar containing 'Teams', 'Users', 'Collaborators', 'Activity Summary', 'Activity Log', 'Deployments', 'Documents', and 'Settings'. The 'Teams' tab is active. Below the navigation bar, there are three sections for adding users to different roles:

- Admins:** A section titled 'Admins can add or remove branches, create or remove teams, and assign users to teams. Admins of head office are also admins of all branches'. It shows a tree structure with 'mWater Staff' and 'example user'. An 'Add:' dropdown menu is open, showing a search for 'John Doe' and a list of results: 'Bellantigne (John Doe)', 'John Doe (John Doe)', and 'John Doe 1 (John Doe)'. The first result is selected.
- Managers:** A section titled 'Managers are automatically added to the Manager role when a deployment is made from this branch. Managers of head office are also managers of all branches'. It shows a tree structure with 'mWater Staff' and 'example user'. An 'Add:' dropdown menu is open, showing a search for 'John Doe' and a list of results: 'Bellantigne (John Doe)', 'John Doe (John Doe)', and 'John Doe 1 (John Doe)'. The first result is selected.
- Viewers:** A section titled 'Viewers are automatically added to the Viewer role when a deployment is made from this branch. Viewers of head office are also viewers of all branches'. It shows a tree structure with 'mWater Staff' and 'example user'. An 'Add:' dropdown menu is open, showing a search for 'John Doe' and a list of results: 'Bellantigne (John Doe)', 'John Doe (John Doe)', and 'John Doe 1 (John Doe)'. The first result is selected.

At the bottom of the interface, there is a 'Teams' section with a tree structure showing 'mWater Staff', 'Field staff', and 'example user 2'. Each level has an 'Add:' dropdown menu and a '+ New Team' button. At the very bottom, there is an 'Import Legacy Group' button.

## Organization (Structured group of users)

### Admin

Can create lower level branches and teams, add/remove users, change settings

### Managers

Automatically added as managers to new deployments

### Viewer

Automatically added as viewers to new deployments

# Users

The Users tab displays a list of each user, including those in sub-branches.

The table contains:

1. Username – There is one line for each instance of a user in a branch
2. Branch - The name of the branch to which that user belongs. Each sub-branch is separated by a -> sign e.g. Example organization -> Tanzania office
3. Teams – Displays a list of teams to which that user belongs
4. Admin, manager, view – A check box is shown with the roles for each user.

**Note:** Users can be a member of any number of branches or teams

 **Example Organization**

Teams Users Collaborators Activity Summary Activity Log Deployments Documents Settings

Username	Branch	Teams	Admin	Manager	Viewer
example user	Example Organization	Field staff	<input checked="" type="checkbox"/>		
John Doe	Example Organization -> Tanzania Office -> Water Access Group -> Example water utility org	Staff	<input checked="" type="checkbox"/>		
	Example Organization -> Guinea Bissau Office -> Sanitation Group	Staff			<input checked="" type="checkbox"/>
example user 2	Example Organization	Staff			

# Activity summary

This page shows all users and their recent mWater activity. This table can be downloaded by using the Download as CSV button.

 **Example Organization**

Teams Users Collaborators Activity Summary Activity Log Deployments Documents Settings

[Download as CSV](#)

Username	Last activity	App activities in last 7 days	Portal activities in last 7 days	Country	Region
John Doe	7 minutes ago	17	201	United States	Minnesota
example user	a month ago	0	0	United States	Minnesota
example user 2	a month ago	0	0	Finland	Uusimaa

# Activity log

The activity log displays information on every data modification made by users in the organization.

Each entry follows the format:

[Date] [Data\_type] [Change\_type]  
by [Username] [Survey\_URL]

Data types include Sites, Surveys, Responses, and User

Change types include created, updated, and deleted

**Example Organization**

Teams Users Collaborators Activity Summary **Activity Log** Deployments Documents Settings

**Filters:**  Site  Surveys  Response  User

- Oct 27, 2021 9:47 AM Form updated by John Doe Retailers information - MERL Madagascar (brouillon)
- Oct 26, 2021 6:02 PM Water point created by John Doe
- Oct 26, 2021 5:58 PM Water point created by John Doe
- Oct 26, 2021 5:55 PM Water point created by Example user2
- Oct 26, 2021 5:49 PM Water point created by Example user2
- Oct 26, 2021 5:34 PM Water point created by Example user2
- Oct 26, 2021 5:30 PM Response updated by Example user2 Drilling Report - draft
- Oct 26, 2021 5:30 PM Water point created by Example user2
- Oct 26, 2021 5:30 PM Water point created by Example user2
- Oct 26, 2021 5:26 PM Response created by John Doe Drilling Report - draft
- Oct 26, 2021 5:26 PM Response updated by John Doe Indonesia WaterCredit Model Survey V3.0 - draft
- Oct 26, 2021 5:25 PM Response created by John Doe Indonesia WaterCredit Model Survey V3.0 - draft
- Oct 26, 2021 5:24 PM Water point created by John Doe
- Oct 26, 2021 5:19 PM Response deleted by John Doe 1 Water point survey
- Oct 22, 2021 2:37 PM Form updated by Example user Retailers information - MERL Madagascar (brouillon)
- Oct 21, 2021 10:37 AM Form updated by Example user Suivi des communautés - EPAH - MERL Madagascar
- Oct 21, 2021 10:37 AM Form updated by Example user Suivi des communautés - EPAH - MERL Madagascar
- Oct 21, 2021 10:37 AM Form updated by Example user Suivi des communautés - EPAH - MERL Madagascar
- Oct 21, 2021 10:37 AM Form updated by Example user Suivi des communautés - EPAH - MERL Madagascar
- Oct 21, 2021 10:37 AM Form updated by Example user Suivi des communautés - EPAH - MERL Madagascar
- Oct 21, 2021 10:36 AM Form updated by Example user Suivi des communautés - EPAH - MERL Madagascar
- Oct 21, 2021 10:36 AM Form updated by Example user Suivi des communautés - EPAH - MERL Madagascar
- Oct 21, 2021 10:36 AM Form updated by Example user Suivi des communautés - EPAH - MERL Madagascar
- Oct 21, 2021 10:36 AM Form updated by Example user Suivi des communautés - EPAH - MERL Madagascar
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# Deployments

The deployments tab displays all survey deployments managed by this organization. For large organization it's recommended to deploy surveys directly from the Organization page.

The deployment page includes:

1. A button to deploy a new survey
2. A section for each survey managed by the organization. Clicking the title will open the survey's design page.
3. A section for each deployment. Clicking the title will open the survey deployment page.
4. A summary of the permissions for the deployment
5. A summary of existing responses in the deployment

**Example Organization**

Teams Users Collaborators Activity Summary Activity Log **Deployments** Documents Settings

1 Deploy new survey

2 Water point survey

3 Water point update 2021 **Active**

5 5 Responses 0 Draft 4 Pending 1 Final 0 Rejected

**Enumerators:** Example Organization -> Field staff Brian Jensen

**Approval Stage 1:** example user

**Viewers:** Example Organization

**Managers:** example user

# Documents

The documents tab allows users to add, view, download, and share documents of any type.

The page includes:

1. Buttons to add a folder or document
2. A button to share the current folder with other users or via a shareable link
3. A list of all:
  - a) Folders – Contain documents
  - b) Sub-branches and their documents
  - c) Documents – Files of any type

**Note:** Individuals are able to store 100MB and organizations can store 1GB of files

The screenshot shows the 'Documents' tab of an 'Example Organization' interface. At the top, there are navigation tabs: Teams, Users, Collaborators, Activity Summary, Activity Log, Deployments, Documents, and Settings. The 'Documents' tab is active. Below the tabs, there are buttons for '+ Add Folder' and 'Upload Document', along with a storage indicator '4MB of 1024MB used' and a search bar. A 'Share' button is located in the top right corner. A table lists the contents of the folder:

Name ^	Size	Extension	Modified On
Policy documents			
Guinea Bissau Office			
Tanzania Office			
Personnel contacts.xlsx	10.5 KB	xlsx	Oct 28, 2021 4:48 PM

Annotations: A yellow circle with the number '1' points to the 'Users' tab. A yellow circle with the number '2' points to the 'Share' button. Yellow circles with letters 'a', 'b', and 'v' point to the 'Policy documents', 'Guinea Bissau Office', and 'Personnel contacts.xlsx' items respectively.

# Advanced -Settings

The settings page has general settings for the organization.

This page allows administrators to:

1. Change the organization name and description
2. Set whether the organization is publicly visible to all users
3. Set up site management, approvals and approvers. Every site that is added or modified by users in the organization will be marked as Pending approvals until these site approvers review and approve the changes.
4. Generate an access code - Users can enter on signup to automatically join the group.
5. Download organization data – Downloads all surveys, responses, sites, and visualizations
6. Delete organization – Completely deletes the organization

## Example Organization

Teams Users Collaborators Activity Summary Activity Log Deployments Documents **Settings**

**Save** **Cancel**

**Group Name:**  
Example Organization

**Group Description:**  
This organization was generated to provide examples for training materials

Organization is publicly visible

Can manage sites (Advanced Setting)

Enable approving of sites ?

**Site approvers**  
Users or teams who will be notified of site changes and will be able to approve, reject or undo them

example user (John Doe) x example user 2 (Example User 2) x

**Access code: 488294197**  
Access code is a secret code that allows users of the app to easily join this group

[Remove Access Code](#)

Download organization data

**Delete Organization**

Section

9

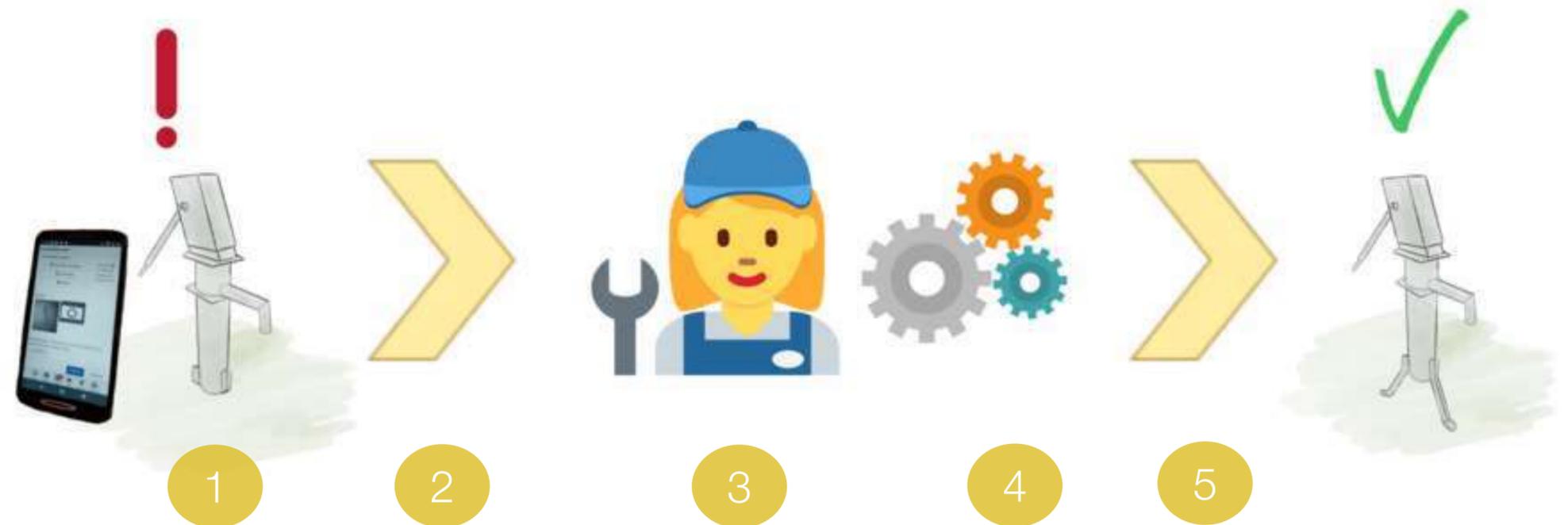
Issues

# Issues

Issues are a feature in mWater to help handle operations and maintenance by allowing users to report, track and resolve tickets e.g. pipe leaks or broken water points.

Issues have states and actions to transition between states:

1. Open – Identify and report the problem
  - a) State: Open
2. Assign – Managers can assign issues to technicians
  - a) State: Open
3. Update - Issue is not yet resolved but important information can be added
  - a) State: Open
4. Resolve – Report when and how the problem was resolved
  - a) State: Resolved
5. Close - Issue has been confirmed as resolved
  - a) State: Closed



# Managing issues in the Portal

Issues can be managed from the issues tab.

This page includes:

1. A button to open a new issue
2. Dropdowns to filter the issues to a specific type or step
3. A list of all issues

Clicking on an issue allows users to view, modify, assign, update, resolve, comment and close an issue. The entire history of that issue can be viewed from the issue's page.

The screenshot displays the mWater Portal interface for managing issues. The top navigation bar includes 'mWater Portal', 'Surveys', 'Maps', 'Dashboards', 'Manage', 'Issues', 'Indicators', 'Consoles', 'Help', and a user profile for Brian Jensen. The main content area is titled 'Issues' and includes a sub-header 'Track operational and maintenance issues. Learn More.' Below this, there is a '+ Open New Issue' button and a dropdown menu for 'Type' set to 'Water Point Functionality Issue'. A table lists several issues, with columns for 'Type', 'Status', 'Priority', 'Description', and 'Opened by'. A detailed view of a 'Water Point Functionality Issue' is shown on the right, including its status ('Open'), assigned user ('Unassigned'), and location details (GPS coordinates, administrative region, and location accuracy). The detailed view also includes a 'Question' section with the text 'Water point linked to this issue' and an 'Answer' section with detailed location information and photos of the water point. At the bottom of the detailed view, there are buttons for 'Resolve Issue', 'Update Issue', 'Add Comment', and 'Delete Issue'.

Type	Status	Priority	Description	Opened by
Health Facility functionality issue				
Leak				
Maintenance Issue				
WASH FIT Hazard				
Water Point Functionality Issue	open	None	Insufficient water supplied	timtetw
Water Point Functionality Issue	open	None	Poor water quality	jakabw
Water Point Functionality Issue	open	None	Insufficient water supplied	jakabw
Water Point Functionality Issue	open	None	Maintenance required	jakabw
Water Point Functionality Issue	open	None	Maintenance required	jakabw
Water Point Functionality Issue	open	None	Maintenance required	jakabw

**Water Point Functionality Issue**

Status: Open Assigned to: Unassigned → Reassign Issue Watch Issue

Opened - Oct 22, 2021 by jakabwai\_wvug Edit

Question	Answer
Water point linked to this issue	Name: Rugarama2 bore hole Description: Near Rugarama sda Type: Borehole or tubewell <b>Location</b> GPS Location: 0.132089, 30.502777 Administrative region: Kabambiro, Kamwenge, Uganda Location Accuracy: 5.175000190734863 Location Altitude: 1211.4934788401474 Location Metadata: method: gps accuracy: 5.175000190734863 Unique ID: 304703935 Photos:  
Type of Issue	Other (please specify)Hard pump
Description of problem	Difficult in pumping water
Photos of problem (optional)	

Resolve Issue Update Issue Add Comment Delete Issue