Overview

This user manual aims to help user navigate the [HeRAMS (https://herams.org/login)](https://herams.org/login) platform.

1. Login & User Profile

Login

To access the HeRAMS platfrom, follow the instruction below.

1. Open the link https://herams.org in your browser.

<img src=" images/icon_tip.png" height="30" align="top" alt='tip'></img>
<i> Tip: It is recommended to user either FireFox or Chrome. </i>

2. A pop-up window will appear prompting you to enter your username (email) and password. For new users, please follow the instruction here to create your account.
3. Enter you username (email) and password in the designated fields and click the <img src=" images/bt_login.png" height="20" align="top" ></img> button.
4. Click the <img src=" images/bt_submit_en.png" height="20" align="top" alt="Submit"></img> to login.

<p align="center">
</img>
</p>

New User

New users without an existing account, will have to create an account before being able to log on to HeRAMS.
To create your user account in [HeRAMS (https://herams.org/login)](https://herams.org/login), follow the instruction in section Register.

Rest Password

1.To reset your password, open the link [https://herams.org (https://herams.org)](https://herams.org) in your browser.

2. On the sign in page, click the [Reset password (https://herams.org/user/forgot)](https://herams.org/user/forgot) link.
3. Enter your email address in the top field.
4. Now type the characters displayed in the image below the *Email* field into the lower field.
5. Click the <img src=" images/bt_submit_en.png" height="20" align="top" alt="Submit"></img> button.
6. An automated email will be sent to your account containing a link that allows you to enter a new password.

<img src=" images/icon_tip.png" height="30" align="top" alt='tip'></img>
<i> Tip: If you haven't received your email, make sure to check your spam folder.</i>

7. Open the link and enter your new password.
8. Click the <img src=" images/bt_submit_en.png" height="20" align="top" alt="Submit"></img> button to confirm your new passowrd.
9. To login into HeRAMS, return to the [sign in page (https://herams.org/user/login)](https://herams.org/user/login).

<p align="center">
</img>
</p>

Logout

To logout, click the <img src=" images/bt_logout.png" height="20" align="top" alt="Log out"></img> button in the top right corner of your screen.

User Profile

Register (Create a User Account)

1. To regist as a new user, open the link [https://herams.org (https://herams.org)](https://herams.org) in your browser.
2. On the sign-in page, click on the [sign-up (https://herams.org/user/register)](https://herams.org/user/register) link.
3. On the page that opens, enter your name, email and passowrd.

<img src=" images/icon_info.png" height="20" align="top" alt='tip'></img>
<i> Note that your email acts as username.</i>

4. Submit your information by clicking the <img src=" images/bt_sign_up.png" height="20" align="top"></img> button.
5. A confirmation email will be sent to the email address you use to register with.

<img src=" images/icon_tip.png" height="30" align="top" alt='tip'></img>
<i> Tip: If you haven't received your email, make sure to check your spam folder.</i>

6. Confirm your registration by clicking on the link in your email.

<p align="center">
</img>
</p>

Update you User Profile

To update your user profile or account details (i.e. email and password), click on your username on the top right corner of the screen.
This opens your [user profile (https://herams.org/user/settings/profile)](https://herams.org/user/settings/profile) and allows you to change your personal information such as your name, organization and contact details.

<img src=" images/icon_info.png" height="20" align="top" alt='info'></img>
<i> Please note that first name, last name and organization are mandatory.</i>

Add a Profile Picture

You can further personalize your account by adding a profile picture. In order for your profile picutre to appear, you will have to register your email address at [Gravatar (https://en.gravatar.com/)](https://en.gravatar.com/).

<img src=" images/icon_info.png" height="20" align="top" alt='info'></img>
<i> For more information on Gravatar, click [here (https://fr.gravatar.com/support/what-is-gravatar/)](https://fr.gravatar.com/support/what-is-gravatar/)</i>

1. Open you user profile by clicking on your name in the upper right corner of your screen.
2. Click on [Gravatar (https://en.gravatar.com/)](https://en.gravatar.com/) link shown in the image below.

<p align="center">
</img>
</p>

3. You will be prompted to login to your [Worldpress (https://wordpress.com/log-in)](https://wordpress.com/log-in) account. If you don't already have a Wroldpress account, follow the instructions to create a new account.
4. Once logged in, open the **Manage Gavatars** tab and upload your image.
5. In the **My Gavatars** tab you should now be able to assing the image to your email address. add your name and details on the **My Profile** tab.

<img src=" images/icon_info.png" height="20" align="top" alt='info'></img>
<i> Note: It might take a few minutes before your gavatar appears on your HeRAMS profile.</i>

Change Password

1. To alter your password, click on your username on the top right corner of the screen.
2. Click on the [account (https://herams.org/user/settings/account)](https://herams.org/user/settings/account) link to access your account information.
3. You should now be able to change your email address and enter a new password.
4. Make sure to click the <img src=" images/bt_submit_en.png" height="20" align="top" alt="Submit"></img> button to confirm your changes.

<p align="center">
</img>
</p>

2. Explore Data

Worldview

Upon login in, you should see a world map. Each blue dot on the map represents a single HeRAMS project. On the right you see the navigation pane listing all available projects.
You can also see the list of all available projects in the navigation pane on the left.
In addition, a brief summary on the number of projects availble in HeRAMS, the total number contributros and health facilities is shown on the buttom left corner.

1. To learn more about a proje.ct, either click on the blue dot on the world map or select the project from the navigation pane on the left.
2. You should now see a pop-up window displaying an overview of the selected project. In the upper part of the pop-up you see the project name, the number of health facilities assessed and the number of contributors.
   In the lower part of the pop-up window you cann see a brief summary on the distribution of Health Facility types, their funcationality and service availability.
3. For further details, click the <img src=" images/bt_details.png" height="20" align="top" alt="details"></img> button. This will open the project specific dashboard.

<p align="center">
<img src=" images/HeRAMS_worldview.png" alt="HeRAMS Worldview" height="300"></img>
</p>

Dashboard

Each project in HeRAMS has a custom dashabord that permits yours to gain detailed insights.

1. To display a dashboard, first open the project summary by selecting your project either form the navigation pane on the left or by clicking on the corresponding dot on the world map.
2. In the pop-up window, click the <img src=" images/bt_details.png" height="20" align="top" alt="details"></img> button. This will open the project dashbaord.
3. You should now see a page similar to the one shown below. In the navigation pane on the left you see all available pages of the dashbaord. Click on the name of the page to open the page.

<p align="center">
</img>
</p>

<img src=" images/icon_tip.png" height="30" align="top" alt='tip'></img>
<i> Tip: Some page may contain subpages, indicated by a **>** next to the page's name.</i>

4. To retrun to a previous page, you can either select the page in the navigation pane on the left, or use the breadcrumb trail on top of the dashbaord.
   For example, the image below displays a sub-page of the Nigera dashboard. To return to the first page of the dashbaord, click on *Niveria* in the naviagation pane.

<p align="center">
</img>
</p>

Customizing the dashboard

This section provides a few tips and tricks on how to customize the dashboard (e.g. by applying filters or limit the number of structures displayed on a map).

- ***Pop-ups***: If you hover over a point on the map or the chart, you will see a pop-up appearing displaying further information.
- ***Customize the maps***: To gain a better insight in the spatial distribution of health facilities, you can limit the type of structres disyplayed. Click on the circle in the legend. This will remove the slected type. To add it again, simply click the circle again.
- ***Apply filters***: Further explore the data by applying custom filters.
    1. Click the <img src=" images/bt_filter.png" height="20" align="top" alt='filter'></img> button in the top right corner of the dashboard.
    2. You should now see the filter configuration page. Use the drop-down list to select your filter criteria.
    3. Click the <img src=" images/bt_apply_filter.png" height="20" align="top" alt='apply'></img> buton to activate your filter.

<p align="center">
</img>
</p>

Default dashboard pages

The below section provides an overivew of the standard pages that are present in each dashboard.
Each page refers to a HeRAMS standard information pillar. However, adapdation might have been made based on local needs. Your dashboard might therefore be substantially different from the default pages presented here.

<img src=" images/icon_info.png" height="20" align="top" alt='info'></img>
<i> Please note that the order and the content of dashbaords is customized based on the needs for individual projects. Your dashbaord might therefore by substantially different from the example pages displayed below. </i>

<details>
<summary><i>Page 1: Overview</i>
</summary>

The overview page provides a summary, in form of:

- A map to spot the distribution and number of health facilities by level of care (e.g.
    - secondary and tertiary care: hospitals
    - primary health Care: health centres, clinics and health posts, camp and mobile clinic)
- Donut charts to summarize different indicators, such as level of damage, functionality status, accessibility and service availability in the assessed MoSDs, which is country specific

<p align="center">
<img src=" images/HeRAMS_dashboard_overview.png" alt="Overview" height="300"></img>
</p>
</details>

<details>
<summary><i>Page 2: Infastructure</i>
</summary>

The Infrastructure page, displays a descriptive analysis, including:

- A map to spot the distribution and number of health facilities by type
- Donut charts to illustrate
    - MoSDs per type
    - The modality of the building structure (permanent vs. temporary)
- A table to illustrate reported accessibility barriers

<p align="center">
<img src=" images/HeRAMS_dashboard_infastructure.png" alt="Infastructure" height="300"></img>
</p>
</details>

<details>
<summary><i>Page 3: Condition</i>
</summary>

The condition page displays the level of reported damage to MoDS buildings following a standard classification and scale (Not Damaged to Fully Damaged). Information is visualised as:

- A map to spot the distribution and number of health facilities according to the level of builduing damage (i.e. condition)
- Donut charts summarizing
    - The reported level of builduing damage by level of severity
    - The distribution of MoDS by type
- A table to provide the name of the prioritized localities in terms of damage and their main causes

<p align="center">
<img src=" images/HeRAMS_dashboard_condition.png" alt="Condition" height="300"></img>
</p>
</details>

<details>
<summary><i>Page 4: Functionality</i>
</summary>

The functionality page displays the level of functionality status of the MoSDs following a standard classification and scale (Fully Functioning to Not Functioning) respresented as:

- A map to spot the distribution and number of MoSDs according to the functionality status
- Donut charts to summarize
    - The level of functionality
    - Main causes of non-functinality
- A table displays the list of priority areas in terms of non-functional health facilities and reported causes.

<p align="center">
<img src=" images/HeRAMS_dashboard_functionality.png" alt="Functionality" height="300"></img>
</p>
</details>

<details>
<summary><i>Page 5: Accessability</i>
</summary>

The accessibility page displays the level of accessibility to the MoSDs following a standard classification and scale (Fully Accessible to Not Accessible) in the form of:

- A map to spot the distribution and number of MoSDs according to the accessibility status
- Donut charts to summarize
    - The level of accessibility per number of MoSDs
    - The reported causes of inaccessibility per number of MoSDs
- A table displays the list of priority areas with inaccessible MoSDs and the main reported cause of inaccessibility

<p align="center">
<img src=" images/HeRAMS_dashboard_accessability.png" alt="Accessability" height="300"></img>
</p>
</details>

<details>
<summary><i>Page 6: Management & Support</i>
</summary>

The management & support page displays information on the management of the MoSDs and the level of support provided by partners. Ths information is illustrated in terms of:

- Ownership
  - A map to spot the distribution of MoSDs according to their ownership (i.e., public, private, private-faith-based, NGO/iNGO)
  - A donut chart to highlighting the categories of ownership as a percentage of the total number of MoSDs
- External support:
  - A donut chart to illustrate the level of support provided by partners

<p align="center">
<img src=" images/HeRAMS_dashboard_management_support.png" alt="Management & Support" height="300"></img>
</p>
</details>

<details>
<summary><i>Page 7: Basic Amenities</i>
</summary>

The Basic Amenities page presents a series of donut charts displaying information of core areas such as:

- The principle source of water and power
- Ther percentage of MoDS with sufficient water and power supplies

<p align="center">
<img src=" images/HeRAMS_dashboard_basic_amenities.png" alt="Basic Amenitites" height="300"></img>
</p>
</details>

<details>
<summary><i>Page 8: Service Availability</i>
</summary>

The Service Availability page displays multiple pages per type of service. Each page displays:

- A map to spot the distribution of the MoSDs providing the selected health service
- Donut charts to summarize
  - The level of service availability
  - The underlying causes of unavailability of the service
- A table displays the list of priority areas per service unavailability and the main reported underlying cause

<p align="center">
<img src=" images/HeRAMS_dashboard_service_availability.png" alt="Service Availability" height="300"></img>
</p>
</details>

Download data

For more in-depth analysis, data of individual workspaces can be donwloaded as CSV files.

<p>
<img src=" images/icon_info.png" height="20" align="top" alt='info'></img>
<i> Note: In order to download data, you will require access to the corresponding workspace. Contact your system administrator to change your access rights if needed.</i>
</p>

1. Go to the workspace page of your project(see [Access the Data Edit Interface](#Access the Data Edit Interface) steps 1-4 for detailed instructions).
2. In the rightmost column, click the <img src=" images/icon_download.png" height="20" align="top" alt='New record'></img> button. This will download all records (MoDS) of this workspace.

<img src=" images/icon_tip.png" height="30" align="top" alt='tip'></img>
<i> Tip: For surveys that not in English make sure correctly define the encoding when opening the data in Excel (see Data Encoding in Excel for details).</i>

Download the entire dataset

Coming soon

<img src=" images/icon_tip.png" height="30" align="top" alt='tip'></img>
<i> Note: Users are adviced to downlaod data for individual workspace as outlined above. The ability to download the entire data set is restricted to few users. Contact your system administrator for further information.</i>

Data Encoding in Excel

When you open your data in Excel, it is important to select the correct encoding.

<img src=" images/icon_tip.png" height="30" align="top" alt='tip'></img>
<i> Tip: An indication of the wrong encoding is if your data contains weir character such as *Ã©*. For examples instead of *camp de réfugiés* you get *Camp de rÃ©fugiÃ©s*.
</i>

1. Open a new Excel file.

2. On the Data tab, in the **Get & Transform Data** group, click **From Text/CSV**.
3. In the **Import Data** dialog box, locate and double-click the text file that you want to import, and click **Import**.
4. In the top left corner of the pop-up window that opens, change the encoding type to **UTF-8**, and click Import.

<p align="center">
<img src=" videos/HeRAMS_excel_encoding.gif" alt="data update interface" height="300"></img>
</p>

3. Edit Data

The following section provides an step-by-step guide on how to access the data edit interface, create, edit and delete health facilities.
<p>
<img src=" images/icon_info.png" height="20" align="top" alt='info'></img>
<i> Please not that access to the data edit interface is limited to data data managers responsible to update the data.
Should your role require you to contact any of the functions described in this sections, contact your system administrator in order for your permissions to be adjusted accordingly.</i>
</p>

Access the Data Edit Interface

The below steps guide through though the admin interface to access the data editing interface.

1. Open the admin interface, by clicking the <img src=" images/icon_settings.png" height="20" align="top" alt='settings'></img> button on the top right corner next to your name.
2. From the navigation pane on the left, select [Projects]
3. You should now see a table of all available projects. For each project, the table displays the number workspaces, contributors, and health facilities.
4. In the rightmost column, click the workspace <img src=" images/icon_workspace.png" height="20" align="top" alt='workspace'></img> icon. This will open the list of available workspace.

<img src=" images/icon_info.png" height="20" align="top" alt='info'></img>
<i> Note:Workspace are used in HeRAMS to manage access permission to data. A workspace might for example constitute a specific organization or a geographic region. This system allows to tailor access rights for individual purposes. For more information on workspace click [here].</i>

5. To view the health facilities that are part of a specific workspace, click the <img src=" images/icon_update_data.png" height="20" align="top" alt='Edit data'> </img> icon in the *Action* column.

<img src=" images/icon_tip.png" height="30" align="top" alt='tip'></img>
<i> Tip: Be aware that a workspace might have multiple pages. Use the **>>** to move to the next page or filter the workspaces by typing the workspace name in the field below the header row.</i>

<p align="center">
<img src=" images/HeRAMS_workspace_filter.png" alt="HeRAMS Worldview" height="300"></img>
</p>

6. You should now see a table with all the health facilities of the selected workspace.

<p align="center">
<img src=" videos/HeRAMS_data_update_interface.gif" alt="data update interface" height="300"></img>
</p>

Edit a Health Facility

<img src=" images/icon_info.png" height="20" align="top" alt='info'></img>
<i> Please note that editing a record will override the existing record. If you would like to update the status of a MoDS while keeping a record of the changes might, follow the instructions in the section below.</i>

1. To edit a record click the <img src=" images/icon_pencil_blue.png" height="20" align="top" alt='pencil'></img> icon in the left most column.

<img src=" images/icon_tip.png" height="30" align="top" alt='tip'></img>
<i> Tip: Be aware that a table might have multiple pages. Use the button in the button left corner to go to the next page. You can also reduce the number of records displayed by applying filters.</i>

<p align="center">
<img src=" images/HeRAMS_data_update_interface.png" alt="HeRAMS Worldview" height="300"></img>
</p>

2. Use the two buttons on the <img src=" images/bt_new_record_en.png" height="20" align="top" alt='next'></img> buttons on the lower right to move to the next page of the questionnaire or return to the previous page. You can also use the navigation pane on the left to access a specfic section of the questionnaire.
3. To save your changes, navigate to the last page **Validate** and click the <img src=" images/bt_submit_en.png" height="20" align="top" alt='send'></img>.
4. If you would like to discard your edits, click the <img src=" images/bt_clear.png" height="20" align="top" alt='exit'></img> button.

Update a Health Facility

If HeRAMS is used as a monitoring tool, you can update the record without losing the records history.

<img src=" images/icon_info.png" height="20" align="top" alt='info'></img>
<i> Please note that the ability to update records is not enabled in all projects. Contact your system administrator for further information.</i>

1. To update the status of a Health Facility, use the <img src=" images/icon_update_blue.png" height="20" align="top" alt='update'></img> button to open the

record.
2. Use the two button on the buttom right side to move to the next page of the questionnaire or return to the previous page. You can also use the navigation pane on the left to access a specfic section of the questionnaire.
3. To save your changes, navigate to the last page **Validate** and click <img src=" images/bt_submit_en.png" height="20" align="top" alt='submit'></img>.
4. If you would like to discard your edits, click the <img src=" images/bt_clear.png" height="20" align="top" alt='exit'></img> button

Register a new Health Facility

1. To create a new record, click the button <img src=" images/bt_new_record_en.png" height="20" align="top" alt='new record'></img>.
2. Use the two button on the buttom right side to move to the next page of the questionnaire or return to the previous page. You can also use the navigation pane on the left to access a specfic section of the questionnaire.
3. To save your changes, navigate to the last page **Validate** and click <img src=" images/bt_send_en.png" height="20" align="top" alt='Edit data'></img>.
4. If you would like to discard your edits, click the <img src=" images/bt_new_record_en.png" height="20" align="top" alt='exit'></img> button

Delete a Health Facility

1. To delete a record, click the <img src=" images/icon_delete_blue.png" height="20" align="top" alt='delete'></img>.

<img src=" images/icon_warning.png" height="20" align="top" alt='warning'></img>
<i> Note: Deleting records cannot be undone. Be careful when deleting a record.</i>

4. HeRAMS Administration

This chapter aims to provide an overview of the admin pages in HeRMAS and provides step-by-step instruction for common tasks conducted by advanced users and local administrators.
The first part of the chapter is dedicated to the concept and management of Workspaces while the second part focuses on project level administration as well as the configuration of project specific dashboards.

<img src=" images/icon_info.png" height="20" align="top" alt='info'></img>
<i> Note: Access to each of the sub-sections of this chapter are depending on the tasks a users is expected to complete. If you require your permissions to be changed, please contact your system administrator.</i>

Workspaces

HeRAMS uses the concept of workspaces to manage user permissions. Each workspace consists of several health facilities and has a dedicated focal point responsible for updating these records.
A workspace might for example include all health facilities of a geographical region, health facilities managed by a specific partner or any other logical category.
Thus, the use of workspaces in combination with different levels of permission (see below) assures granular, role-based access control to a project and workspaces.
While most users only have access to a single workspace, local administrators might have access to several or all workspace and are responsible to add new users to a workspace, change a user's permission or to create additional workspace.

- <img src=" images/icon_refresh.png" height="20" align="top" alt='refresh'></img> **Data Refresh**: This button allows users to manually refresh the data cache of a workspace.
- <img src=" images/icon_edit.png" height="20" align="top" alt='edit'></img> **Update Workspace** allows to change the title or token of a worksapce.
- <img src=" images/icon_share.png" height="20" align="top" alt='share'></img> **Share Workspace**:Access to workspaces is granted by sharing a workspace with users. For more information on how to add users to a workspace see here.
- <img src=" images/icon_delete_black.png" height="20" align="top" alt='delete'></img> **Delete Workspace** See Delete Worksapces for further information
- <img src=" images/icon_download.png" height="20" align="top" alt='download'></img>**Download Data**: Downloads all data associated with the workspace. See *chapter 2* for more informatio on data download.
- <img src=" images/icon_pencil_black.png" height="20" align="top" alt='edit data'></img>**Data Update**: This opens the data edit interface. More infomration on data editing and updating is available in the previous chapter.

<img src=" images/icon_info.png" height="20" align="top" alt='info'></img>
<i> The number of buttons visible to you depend on your access rights and might vary from one workspace to another.</i>

Workspace Permissions

There are two permission levels that a user can be granted to a workspace. Users with the role of **Data Editor** have access to update the response data (option 1) while **Workspace Owners** might be given elevated permission (option 2) allowing them to add additional users to their workspace.1. Manage the underlying response data

1. Manage the underlying response data
2. Full access, includes editing the workspace properties, token and response data

Add a User to a Workspace

1. To grant a user access to a workspace, open the admin interface by clicking the <img src=" images/icon_settings.png" height="20" align="top" alt='settings'></img> button in the top right corner of the screen.
2. In the navigation pane on the left, click Projects (https://herams.org/project/index) to open the project overview page.
3. In the rightmost column of the table, you should see several action buttons. Click the <img src=" images/icon_workspace.png" height="20" align="top" alt='worksapce'></img> icon. This will open the workspace of the selected project.
4. You should now see a table with all workspaces. For each worksapce the table provides information on the last time data was synced with the underlying database, the number of contributors, health facilities and responses. Alike the project table, the las column contains several action button.
5. To add a new user, you have to share the workspace with the user. In the **Actions** column of the workspace you would like to share, click the <img src=" images/icon_share.png" height="20" align="top" alt='share'></img> icon
6. You should now see something similar to the image below. On the buttom half of the screen you can see a list of all users currently having access to this workspace and their permission level.

<p align="center">
<img src=" images/HeRAMS_worksapce_share.png alt="share worksapce" height="300"></img>
</p>

7. In the top half the page you have the option to add a user. Start typing the users name in the top field. You will notice that the list of users is dynamically filtering. Select the user you would like to add.

<img src=" images/icon_tip.png" height="30" align="top" alt='tip'></img>
<i>Tip: You can add multiple users add once as shown in the image above.</i>

8. Use the checkboxes to assign appropriate permission rights. See the previous section for further details on [Workspace Permissions](#).
9. Click the <img src=" images/bt_share.png" height="20" align="top" alt='share'></img> button to share the access permission with the selected users.

<p align="center">
<img src=" videos/HeRAMS_workspace_share.gif" alt="Overview" height="300"></img>
</p>

Remove a User from a Workspace

1. To remove a user from a workspace, follow the steps 1-5 outlined in the [previous section](#) to access the workspace from which you would like to remove a user.
2. On the second half of the screen you should now see a list of all users having access to the workspace. Click the <img src=" images/icon_delete_red.png" height="20" align="top" alt='bin'></img> icon to remove the user permanently.

Change a User's Workspace Permission

1. To change a user's permission, remove the user from the workspace as outlined [above](#).
2. Now add the user again using the new permission level envisioned (see section [Add a User to a Workspace](#) for details).

Create a New Worksapce

1. To create a new workspace, access to the workspace page of your project (see section [Add a User to a Workspace](#) for details).
2. On the upper left corner, you should see a button

<img src=" images/icon_info.png" height="20" align="top" alt='tip'></img>
<i>Note: Adding health facilities to a workspace requires to change the token in the responses. Contact your system administrator for guidance on how to change a record's token.</i>

Import Worksapaces

1. In rare cases, the workspace tokens might have already been create by your administrator. In this case, use the <img src=" images/bt_workspace_import_white.png" height="20" align="top" alt='import workspaces'></img> import workspace button instead.
2. Use the **Title** field to select the list of workspace you would like to import the tokens from.
3. If tokens are available for import a list of tokens should display. Click the checkboxes next to the tokens you would like to import.
4. Click the <img src=" images/bt_workspace_import_blue.png" height="20" align="top" alt='import workspaces'></img> button to create the workspaces.

<img src=" images/icon_info.png" height="20" align="top" alt='tip'></img>
<i>Note: Adding health facilities to a workspace requires to change the token in the responses. Contact your system administrator for guidance on how to change a record's token.</i>

Delete Worksapces

1. You can remove a workspace by clicking the <img src=" images/icon_delete_black.png" height="20" align="top" alt='bin'></img> icon in the action column next to the workspace in question.

<img src=" images/icon_info.png" height="20" align="top" alt='tip'></img>
<i>Note: Deleting workspace will not affect the underlying data. See the section on deleting record for details on how to permanently remove health facilities.</i>

Projects

The [project](#) page provides a brief overview of all project available on the HeRAMS platform.

<p align="center">
<img src=" images/HeRAMS_projects.png" alt="project page" height="300"></img>
</p>

For each project the number of workspace, contributors, health facilities, and responses is displayed. The last column provides a series of action buttons.

- <img src=" images/icon_workspace.png" height="20" align="top" alt='workspace'></img>Access a project's [Worksapaces](#)
- <img src=" images/icon_dashboard.png" height="20" align="top" alt='dashboard'></img>View the project [Dashboard](#)
- <img src=" images/icon_edit.png" height="20" align="top" alt='update project'></img>[Edit](#) the project
- <img src=" images/icon_check_data.png" height="20" align="top" alt='check data'></img>[Check Data](#)
- <img src=" images/icon_share.png" height="20" align="top" alt='share'></img>[Share](#) the entire project

<img src=" images/icon_info.png" height="20" align="top" alt='tip'></img>
<i>Note: The number of buttons visible to you depend on your access rights to a specific project is likely to vary from one project to another</i>

Project Permissions

Tere are three permission levels that a user can be granted to a project.

1. Allow access to the project dashboard from the world map
2. Allows full access to all workspaces in this project as well as creating new ones or deleting existing ones
3. Allow everything

Add a User to a Project

1. To grant a user access to a specific project, open the admin interface by clicking the <img src=" images/icon_settings.png" height="20" align="top" alt='settings'> </img> button in the top right corner of the screen.
2. In the navigation pane on the left, click [Projects (https://herams.org/project/index)](https://herams.org/project/index) to open a page displaying all availble projects.
3. In the rightmost column of the table, you should see several action buttons. Click the <img src=" images/icon_share.png" height="20" align="top" alt='share'> </img> icon.
4. You should now see something similar to the image below. On the buttom half of the screen you can see a list of all users currently having access to this workspace and their permission level.
   <p align="center">
   <img src=" images/HeRAMS_project_share.png alt="share worksapce" height="300"></img>
   </p>
5. In the top half the page you have the option to add a user. Start typing the users name in the top field. You will notice that the list of users is dynamically filtering. Select the user you would like to add.

<img src=" images/icon_tip.png" height="30" align="top" alt='tip'></img>
<i>Tip: You can add multiple users add once as shown in the image above.</i>

5. Use the checkboxes to assign appropriate permission rights. See[Project Permissions]() for further information on the different permission levels available.
6. Click the <img src=" images/bt_share.png" height="20" align="top" alt='share'></img> button to share the access permission with the selected users.

<p align="center">
<img src=" videos/HeRAMS_project_share.gif" alt="Overview" height="300"></img>
</p>

Remove a User from a Project

1. To remove a user from a Project, follow the steps 1-3 outlined in the [previous section]() to access the project from which you would like to remove a user.
2. On the second half of the screen you should now see a list of all users having access to the workspace. Click the <img src=" images/icon_delete_red.png" height="20" align="top" alt='bin'></img> icon to remove the user permanently.

Change a User's Project Permission

1. To change a user's permission, remove the user from the project as outlined [above]().
2. Now add the user again using the new permission level envisioned (see section [Add a User to a Project]() for details).

Edit Project Settings

1. To update the general settings of a project, open the admin interface by clicking the <img src=" images/icon_settings.png" height="20" align="top" alt='settings'> </img> button in the top right corner of the screen.
2. In the navigation pane on the left, click [Projects (https://herams.org/project/index)](https://herams.org/project/index) to open the project overview page.
3. To open the project settings, click the <img src=" images/icon_edit.png" height="20" align="top" alt='bin'></img> icon in the last column of your project.
4. You should now see a page similar to the one displayed below, which permits you to
   - Update the project title
   - Alter the survey linked to this project
   - Change the centroid (latitude and longitude) used on the world map.
   - Update the status of the project
   - Configure the pop-up information displayed on the main page.
   - Congifure the project dashboard. Additional information on how to configure the project dashboard is available [here]().
5. Make sure you save your changes by clicking the <img src=" images/bt_update_project.png" height="20" align="top" alt='update project'></img> button.

Configure the Project Dashboard

For each project, a dedicated dashbaord is available to provide users an instand an indepth view of the data. To alter a project dashabord, follow the instructions below.

1. Open the project settings page as outlined above(#edit-project-settings)
2. In the lower half of the page you see a table if the various dashbaord pages

<p align="center">
<img src=" videos/HeRAMS_dashboard_pages.png" alt="dashboard pages" height="300"></img>
</p>

Add a New Page

1. To create a new page, return to the project settings page. Click the <img src=" images/bt_create_page.png" height="20" align="top" alt='create page'></img> button.
2. You should now see a page similar to the one displayed below.
3. Enter the page name in the top field.

<p align="center">
<img src=" images/HeRAMS_dashboard_create_page.png" alt="create new page" height="300"></img>
</p>

4. The **Parent Id** field is only required if you intend to create a sub-page. From the drop-down select the page to which you would like to add a subpage.
5. The **Sort** index indicates the position of the new page. E.g. the first page of dashboard should have a sort index of **1**.
6. Click the button to add the page to the dashboard.
7. If you return to the previous page, you will that your page was added to the list of pages.

<img src=" images/icon_info.png" height="20" align="top" alt='tip'></img>
<i>Note: you only create an empty page. To add elements to your page, see section [Add an Element to a Page]().</i>

Update a Dashboard Page

To alter an existing page, click the <img src=" images/icon_pencil_black.png" height="20" align="top" alt='pencil '></img> icon next to the page's name. This will open the page's setting page. You are now able to change the title and the order of the page. See above for further details.

Add an Element to a Page

To add an

Remove an elements or pages from the dashboard

5. FAQ

This section aims to help users troubleshoot frequently encountered issues. In case you encounter an issue that is not addressed here, please post it in the comment section. We will periodically update this section to

<details>
<summary>I did not recieve an email when register/resting my password
</summary>

If you did not receive an email upon registering or resetting your password, follow the steps below to troubleshoot the issue.

1. Refresh your inbox. It might take a few minutes for email to appear.
2. Check your spam/junk folder.
3. Try to register again. You might have made a mistake typing your email.
4. If that still does not work, try contacting, contact your administrator for help.
   </details>

<details>
<summary>How can I reset my password?
</summary>

Passwords can be reset by navigating to your account (https://herams.org/user/settings/profile) and click the account (https://herams.org/user/settings/account) link. For more details, follow the instructions here.
In case you forgot your password you can use the Reset password (https://herams.org/user/forgot) link on the sign in page. See here for more details.

</details>
<details>
<summary>Data export is unreadable or contains weird characters</summary>

If open your data in Excel, you might experience an issue with special characters not displaying properly. For example, instead of *camp de réfugiés* you get *Camp de rÃ©fugiÃ©s*. The reason for this is that Excel not using the correct encoding type to read you date. To correct the issue, follow the instruction outlined here.
</details>

<details>
<summary>How can see if I have access to a specific dashboard</summary>
coming soon
</details>

<details>
<summary>Where can I see the list of workspaces</summary>
coming soon
</details>

<details>
<summary>Title</summary>
coming soon
</details>

<details>
<summary>Title</summary>
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