USHAHIDI GUIDE

A STEP-BY-STEP GUIDE ON HOW TO USE THE USHAHIDI PLATFORM

Part II: Customizing your platform

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Ushahidi

The first Ushahidi platform was launched during Kenya's post-election violence in January 2008. Ushahidi means "witness" in Swahili. The Ushahidi platform is free and open source. The software allows individuals and groups to collaborate in creating live multi-media maps for all kinds of projects. For example, the Ushahidi platform has been used for projects focusing on local governance, environmental monitoring, public health mapping, human rights monitoring, citizen-based election observation, nonviolent protests, disaster response and crisis mapping.

We recently launched the second version of the Ushahidi platform (Ushahidi 2.0), which allows for the use of apps or plugins to further extend and customize the platform. We also added geometry mapping so you can map infrastructure or areas and not just dots.

This guide will give you a step-by-step overview on how to set up your own Ushahidi map and how to make full use of all the features that the Ushahidi software offers. If you'd like to learn more, we have additional resources available online for you:

http://forums.ushahidi.com

http://community.ushahidi.com

http://wiki.ushahidi.com/doku.php

http://www.ushahidi.com/get-involved/resources

This guide will be updated based on the feedback we receive for from you. So please do get in touch with any suggestions or questions you may have. Finally, a big thank you to Anahi Ayala Iacucci for authoring this much needed guide for the community.

About this Guide

This is a guide on how to use the Ushahidi platform. Within, we will explain how to download and install the Ushahidi platform, review the platform's administrative capabilities, and briefly introduce the more advanced options for customizing and extending your deployment through plugins and themes. The guide will then introduce the main features of the Ushahidi platform, explaining all the tabs and functions that your users will interact with once your map is live on the web.

As we cover Ushahidi's administrative section we will explain how to manage the platform and will describe the different settings that users can use to can customize the platform, i.e. choosing the most appropriate base map for your project, syncing the platform with FrontlineSMS or other external systems for receiving and processing SMS messages, setting up the email address, and so on.

This guide is meant to be a comprehensive learning guide for brand new users of the Ushahidi platform as well as a reference for those who are more technically savvy or have used it in the past in an administrative capacity. That said, we have some recommendations on where to start in this book given your level of expertise. Note that the Ushahidi community is a very active community and that you can always find someone to help you out if you have any problem not mentioned in this guide. If you are looking for guidance or help, please see the following guides and join these dedicated Skype chat groups:

1. Channel for Deployers, Researchers and Non-Tech volunteers - Share your best practices & Tips List: http://list.ushahidi.com/?1

2. Ushahidi Developer Chat. 1. What you are working on 2. Any challenges? 3. What would you like to work on next?. List at: http://list.ushahidi.com/

- IF YOU ARE A USER GO TO SECTION 4. THE USER INTERACE
- IF YOU ARE AN ADMINISTRATOR AND WANT TO PROCESS MESSAGES COMING INTO YOUR PLATFORM GO TO SECTION 3. THE ADMINISTRATION SECTION
- IF YOU ARE AN ADMINISTRATOR AND WANT TO CUSTOMIZE YOUR PLATFORM OR CHANGE SETTINGS, GO TO SECTION 2. HOW TO CUSTOMIZE YOUR PLATFORM
- IF YOU HAVE ANY PROBLEM AND NEED SOME GUIDANCE OR HELP GO TO SECTION 2.5 GET HELP BOX

2. Customizing your platform

Like many popular blogging platforms, Ushahidi comes with a complete administration section to manage the general platform settings and process user-contributed reports. Now that your Ushahidi instance is installed and ready to go, let's start by looking into how this works and the available functionality.

The Administrator of the Ushahidi platform has two main tasks. The first is to perform the final check on the submitted reports before they areis published on the website. We'll discuss task in more detail in chapter three. The second task that the administrator performs is the customization of the platform, from the setting up of the map to the SMS number. This task is explained in this section of the guide.

[Overall I think this second paragraph is too much detail for two points that are covered later in the guide. I removed a big chunk of it as such but still feel that this introduction should cover, in order, what is listed in the table of contents, not pointing out a couple of the features covered much later. –rob]

2.1 Logging in

If your website is www.yourdomain.com, the administration login would be available at http://yourdomain.com/admin, or http://yourdomain.com/login. It will look like this:


Enter the username and the password to access the Admin page. If this is your first time logging in, use "admin" for both the username and password, which you'll want to be sure to change once you're logged in.

Now that we're logged in, let's look at the available options on the administration page to manage the incoming information in your platform:

1. Dashboard
2. Reports
3. Messages
4. Stats

5. Addons

In addition, there are three additional tabs on the top right side of the page related to the customization and the settings of the platform: Settings[6], Manage[7], and Users[8]. Also, on the very top of the page you can see buttons that allow you to go back to the website, to see your profile or to logout. Under these buttons there is the Get Help[9] box and the Search box[10].
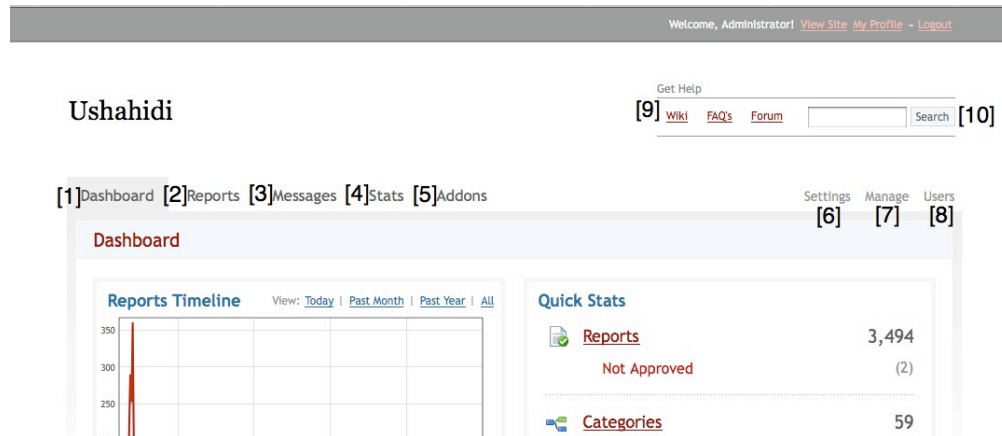
2.2 The Settings Section

The Settings section is the page where the administrator can set up all the settings to customize the Ushahidi platform based on the project they are working on. This section of the Ushahidi platform is the first one that needs to be customized once the platform is installed and allows for the main components of the platform, such as the map and the email address, to be set up by the administrator.

To access the Settings Page the administrator just needs to click on the Settings tab, on the top right of the Dashboard page.

Once opened, the Settings page has a toolbar with seven tabs, each one of them allows for the customization of the relative setting:

1. Website
2. Map
3. SMS
4. Email
5. Themes
6. Clean URLs
7. API
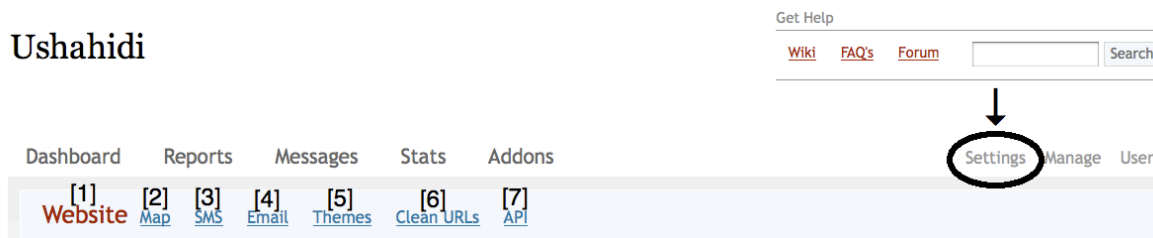
2.2.1 Website

The Website page is the one where the administrator chooses the main appearance settings of the Ushahidi platform, mainly the characteristics of the homepage, the main navigation, and the contact information.

1. Site Name

This is the main title that appears on the right side of the your homepage and it is normally the title of your project.

2. Site tagline

This is the tagline that appears below the title on the home page, which normally gives more detailed description of what the platform is about or what the platform intends to monitor or show.

3. Site Email Address

This is the email address that will be shown in the Information Box on the home page, which is the one that users will use to email you information or reports. *This email address will be publicly displayed on the website,* so it is recommended that you create an email address specifically for this, and not to use a personal one.

To have this function working you need to configure the email account settings by clicking on the "configure your email account settings" or just by clicking on the Toolbar tab Email.[1]

4. Alert Email Address

This is the address that will send the Alerts via email. It is possible to use the same address configured in the Site Email Address section above. In this case, remember that the POP function of the email account needs to be allowed in order to be able to send outgoing messages.[2]

5. Site Message

The Site Message is an optional message that you can add on the top of your user page and that can be used for different purposes: you can use it to advertise your short code, if you have one; to put a disclaimer of responsibility, or anything else you want to let people know straight forward. An example is the following:
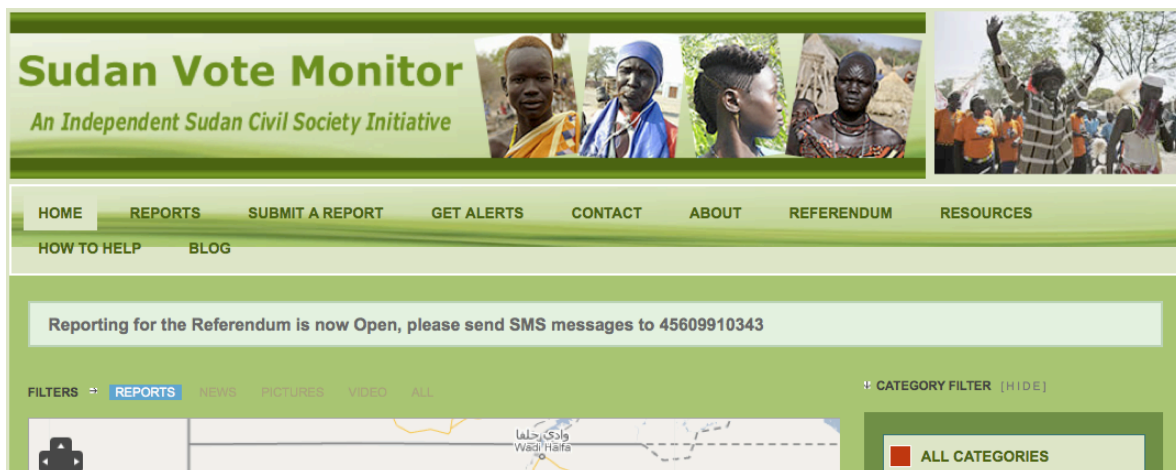
6. Site Copyright Message

The Copyright message is where you can let you users know what kind of copyright license your platform submitted is under. The message will appear on the bottom of the homepage.

7. Site Language

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[1] See section 2.2.4 to see how to configure the email account settings and section 3.3.2 to see how to process incoming emails
[2] Ibid.

Here is where you decided the language for your Ushahidi platform. This function will not translate the admin part of the platform, but only the homepage and the users settings.[3]

[POSSIBLE ABSTRACT: Brian's work on the new translation project? How to create translation files (with link to the wiki)? –rob]

8. Display Contact Page

Here is where you can decide to have the Contact page in the main Toolbar in the homepage[4]. If "No" is selected, the page will not be available for users to contact the administrators of the Platform, but they will still be able to send emails to the address showed on the homepage if configured.[5]

9. Item per page – Front End

This is where you can choose how many items will be displayed in the pages opened by the user, such as the Reports page or the News Feeds page.

10. Item per Page – Admin

This is where you can choose how many items will be displayed in the Admin page, like the Reports page or the Message page.

11. Allow Users to Summit Reports

You can decide to have the Submit Reports in the main toolbar on the homepage to allow users to submit report using the online form. If the NO is selected, the page will not be available for users to submit reports directly on line[6], but they will still be able to send emails to the address showed on the homepage or to send SMS if configured.

12. Allow Users to Submit Comments to Reports

Here is where you can decide to have the Comments function in the Report page. If the "no" is selected, the users will not be able to comments on reports uploaded in the Ushahidi platform.[7]

13. Include RSS News Feed on the Website

This is where you can decide if you want to have the RSS Feeds Box displayed on the homepage.[8]

14. Enable Statistics (Stored on Ushahidi's server)

Hit statistics are stored on a server controlled by Ushahidi. By enabling this option, you gain access to hit statistics directly in your admin panel. By disabling it, you will stop

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[3] See section 4.7.1 for how to change languages from the homepage
[4] See section 4.5 to see more on the Contact Page
[5] See section 2.2.4 for how to set up your e-mail address
[6] See section 4.3 to see how to submit a report using the online form and section 3.2 to see how to process incoming reports submitted via the online form.
[7] See section 3.2.3 to see how to manage incoming reports
[8] See section 2.3.5 to se how to set up incoming feeds in your platform and section 4.1.7 to see how to use the Incoming Feeds box from the Homepage

collecting statistics and will be unable to recover traffic stats collected while this is turned off.

15. Cluster Reports on Map

This is the function that combines the individual report markers in the same area on the map to display as a clustered dot displaying the number of individual reports in said cluster. This function allows one to see how a certain area is affected as compared to other areas. Once the user zooms in on the map the clustering disappears, while the more you zoom out the more the dots get clustered together.

Note that this function has some known problems with the KML and KMZ files that carry data and that display areas, so if you have those files on your platform you may have to disable the clustering to have the areas display correctly on the map.

16. Default Color for All Categories

This is the color of the All Categories tab. As default this color is set on CC0000, which is red. To change the color just click on the tab and use the pop up window that will appear to chose another color.

17. Cache Pages

The administrator may decide whether to cache pages and reports on the website, speeding up loading time. This is particularly helpful when working with low-bandwidth audiences.

18. Cache Pages Lifetime

If caching is enabled, here the administrator may set how long the pages are cached for before users visiting pages on the website should be served a new version of the page rather than the cached version saved on their personal computer.

19. Google Analytics

This function allows the administrator to sync the platform with Google Analytics by inserting the proper ID.[9]

20. Twitter Search Terms

This tab allows you to enter the Twitter hashtags connected with the platform. It is possible to choose more than one hashtag, separated by a comma. It is recommended that a short and clear hashtag be chosen. This hashtag will also appear on the Information Box on the homepage so that people can use it to post on Twitter messages related to your platform. All the twitter messages that will be posted on line with the hashtag(s) inserted here will also appear in the admin page on the Messages section/Twitter so that they can be transformed into reports directly by the admin.[10]

21. Akismet Key

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[9] For more on Google Analytic see here: http://www.google.com/analytics/index.html
[10] To see how to process Twitter messages go to section 3.3.3

The Akismet Key allows the administrator to have Akismet pre-screening the messages coming in to look for spam. To be able to use this function the administrator needs to be registered for a WordPress account and get a free API key.[11]

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[11] For more on Akismet see here: http://akismet.com

Site Settings

Site Name ?

[1] Ushahidi

Site Tagline ?

[2] My Ushahidi Deployment

Site Email Address ?

In order to receive reports by email, please configure your email account settings.

[3] myemail@myhost.com

Alerts Email Address ?

[4]

Site Message ?

[5]

Site Copyright Statement ?

[6]

Site Language ? (Locale)

[7] English (US)

Display Contact Page ?

[8] YES

Items Per Page - Front End ?

[9] 20 Items

Items Per Page - Admin ?

[10] 20 Items

Allow Users To Submit Reports ?

[11] YES

Allow Users to Submit Comments to Reports ?

[12] YES - AUTO APPROVE

Include RSS News Feed on Website ?

[13] YES

Enable Statistics (Stored on Ushahidi's server) ?

[14] YES

Cluster Reports on Map ?

[15] YES

Default Color For All Categories ?

[16] CC0000

Cache Pages ?

[17] NO

Cache Pages Lifetime ?

[18] 30 Minutes

Google Analytics ?

[19]   Web Property ID - Formato: UA-XXXXX-XX

Twitter Search Terms ?

[20] #ushahidiguide   Hashtags - Separate with commas

Akismet Key

Prevent comment spam using Akismet from Automattic.
You can get a free API key by registering for a WordPress.com user account.

[21]

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2.2.2 Map

The default base map for the Ushahidi platform is a Google Map of Kenya. To change the map and have it set on another country, and to set up which base map to be displayed and how, you can click on the Map tab on the Settings page.

The Map Setting page has three main components:

1. Default Location
2. Map provider
3. Configure Map

Default Location

Here is where you can set up the country that you want your map to display in the homepage. The scroll down menu allows you to select a country[1].

Below the scroll down menu you can set up your Ushahidi platform to include different countries [3] and you can also retrieve cities from geo-names to have them displayed in the scroll down menu in your report form[2].

Map provider

This section allows you to select which type of base map you want for your project. This section guides you step by step in the setting up of the base map.

- Step 1: There are four default providers: Google map, Yahoo Map, OpenStreetMap and Visual Earth[1].
- Step 2: If you chose a Google Map you need to get an API key and to put this key into API box. By clicking on Get API you will be forwarded to the page where the provider will give you the API key. Normally to get the key the provider requests the URL of the website. [2]
- Step 3: Once you've obtained the API, just copy and paste it into the "Enter your new API Key" box.[3]

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Before adding the API key, you can see what the differences between the different maps are just by choosing one of them and looking at the map on the right of the screen.

Configure Map

This section of the Map page allows you to choose the default zoom of the map appearing in the main homepage. To choose the default zoom level, move the indicator on the bar [1] and wait for image below to show the map relative to that zoom level[2]. Once the zoom level has been chosen no other action is required other than to leave the marker on the right position in the bar[3].

On the right side of the zoom level bar there are two boxes indicating the GPS coordinates[4] of the red marker in the map[5]. This is where the red marker will appear to the user who is submitting a report from the web form, and can be set to the main city of the country for example, or left as default in the center of the country. Note that a user who subsequently submits a report will not be constrained to the exact location of the default marker.
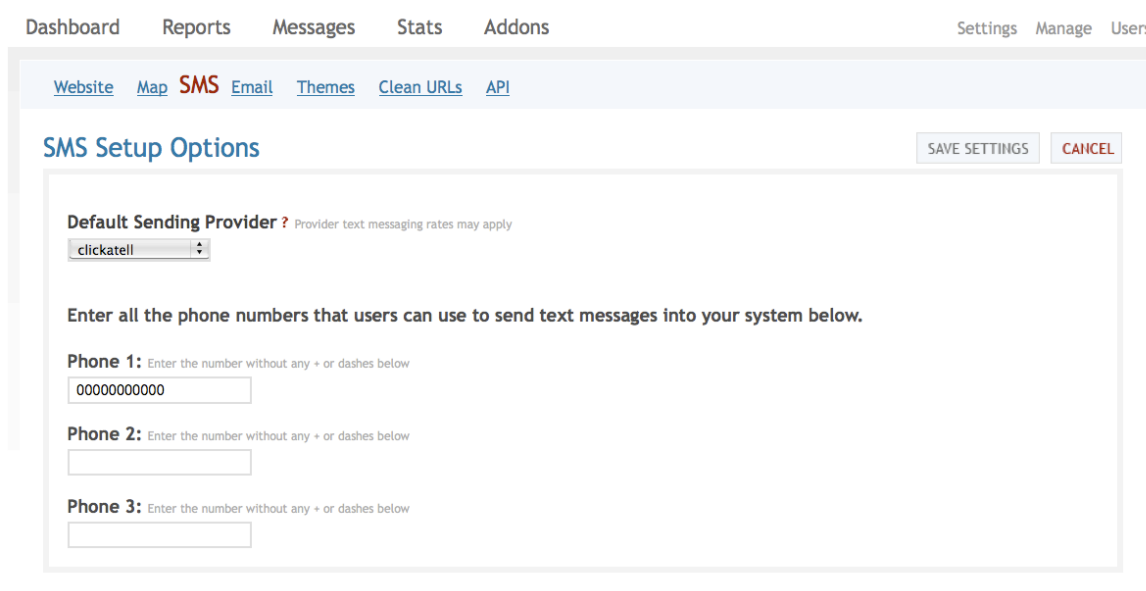
To change the default location of the marker, insert the GPS coordinates in the two boxes in decimal format.

Those two actions, setting the zoom level and the position of the red marker, can be done also just by using the mouse and clicking on the map. It is possible to position the red marker by double clicking on the right location. By grabbing the map and moving it, you can decide which section of the map will be visible to the user on the homepage.

Once all the settings in the map page have been set, they can be saved by clicking on the "Save Settings" tab on the bottom of the page. Every time one of the settings is changed it is required to save the settings again.

2.2.3 SMS

This page of the Settings allows you to write the phone numbers that you have set up for your platform to receive SMS messages from users. We will explain here how to set up your phone numbers providers.

There are three possible ways to set up the Ushahidi platform to receive SMS directly into the platform:

1. Using FrontlineSMS
2. Using an SMS Gateway like Clickatel
3. Using a Short Code

Those three methods have significant differences and require additional investment in terms of PHP skills, economical resources and time.

Using FrontlineSMS is easy and fast. FrontlineSMS is free and open source and it is possible to download it from their website[12]. The software allows for sending and receiving SMS by just having a computer and a laptop, or a computer and a GSM modem connected to it. You do not need to have Internet connection to use FrontlineSMS. The Ushahidi platform already has step-by-step instruction on how to sync it with the Ushahidi platform – see below.

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[12] The FrontlineSMS website from where to download the platform here: http://www.frontlinesms.com

The SMS Gateway is also easy to set up. This does require a bit of money because it is necessary to buy a local, 12-digit number within the country you're focusing on, or a short code (normally 4 digits). The advantage of using an SMS gateway is that you don't need to have a phone connected to the computer but you normally pay a monthly charge for the number and an activation fee. The Ushahidi platform already has step-by-step instructions on how to sync it – see below.

Setting up an SMS short code is often the most effective way to use SMS with the Ushahidi platform. This is because a 3-5 digits number is a lot easier to remember and to advertise. That said, getting a short code could be a challenge because you need to obtain an agreement with the mobile companies. The short code can be synced with the Ushahidi platform but this does require having a PHP developer to set up. One advantage of using short codes is that you don't need Internet connection, mobile phones, or GSM modem.

Option 1: Use FrontlineSMS

To configure FrontlineSMS as your SMS system in the Ushahidi platform you need to go to Addons section in the main toolbar[1], activate the FrontlineSMS plugin[2] and click on "Settings" on the site of the Plugin name[3].
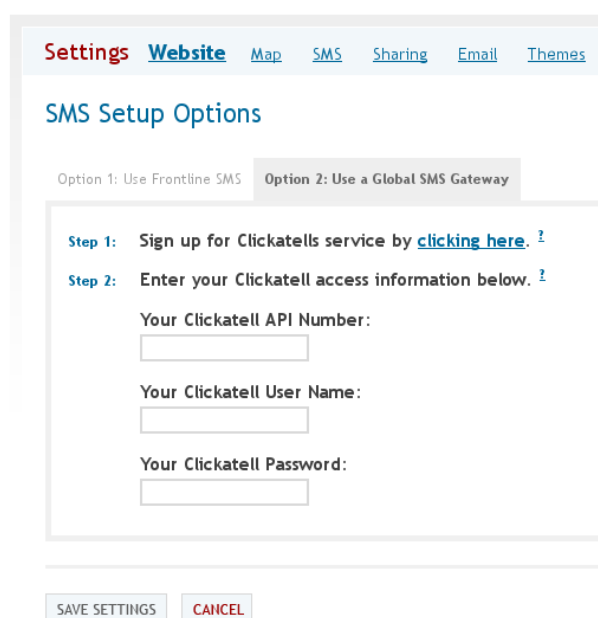
This page will give you a step-by-step guide to sync the Ushahidi platform with FrontlineSMS.

Step 1: Download and install FrontlineSMS on your computer. Open the program and check that the software is able to see the phone or modem connected to it. This process may require a couple of minutes. We suggest you test it by sending and receiving a couple of SMS text messages from your FrontlineSMS software.

Step 2: In the admin section of your Ushahidi installation, click on the settings link on the right hand side, and then select the SMS tab. In this section click on Option 1: Use FontlineSMS. Remember that this is only for *outgoing* messages.

Step 3: Enter the phone numbers you have connected to FrontlineSMS then copy the "FrontlineSMS HTTP Post LINK" provided.
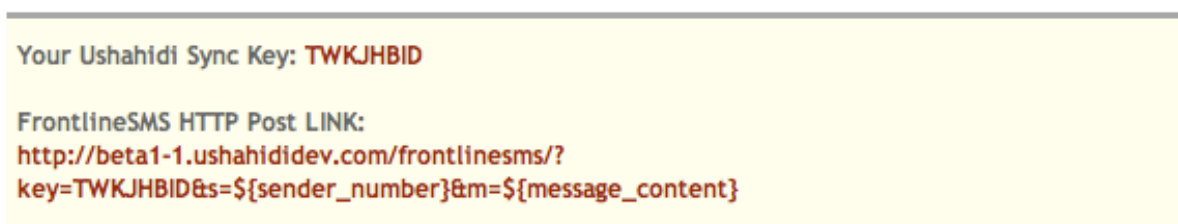
Step 4: In FrontlineSMS, open the Keywords tab, select the "<BLANK>" keyword in the list on the left. Please note that with new version of FrontlineSMS "<BLANK>" has been renamed to "<NONE>".
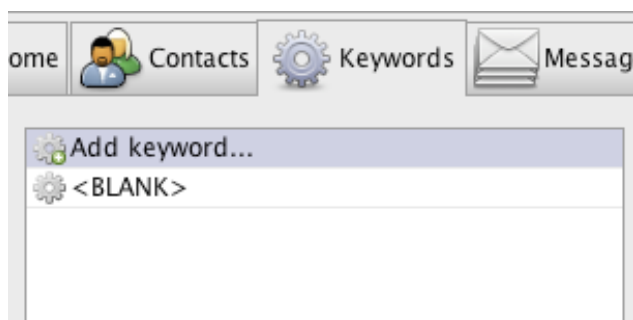
Next, click on the "click here to go to advanced view" link on the right below the "Keyword Actions" section.

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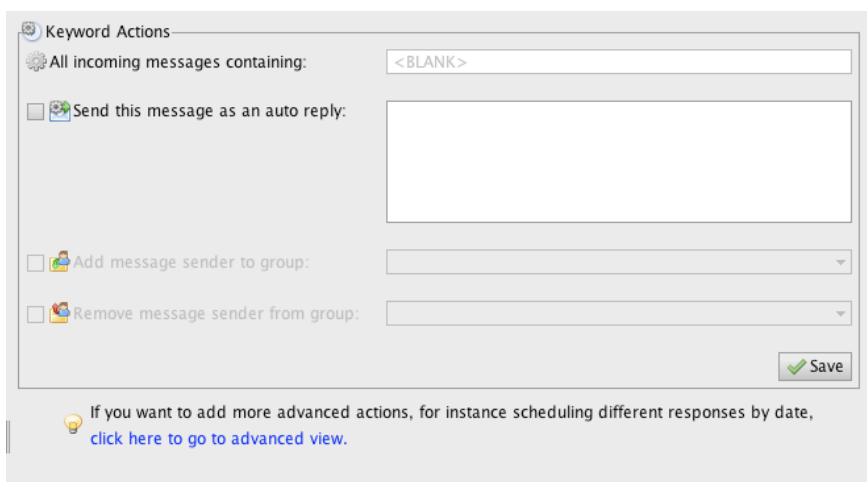
At the bottom of the screen, click on "Auto Reply" and in the menu that pops up select the "External Command" option, then click the edit button to the immediate right.
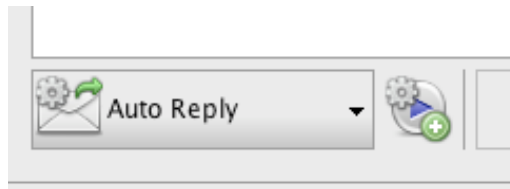
Step 5: In the window that opens, select "HTTP Request" as the execution type, paste the URL you copied from your Ushahidi deployment above into the command text field that is in the "Execution Details" section and select the "Do Not Wait For Response" button. Leave all the other fields untouched.

Step 6: Click on "Done" and that is it, any SMS messages sent to FrontlineSMS will also be forwarded to the admin page of your Ushahidi platform.

Keep in mind that FrontlineSMS will not retry the HTTP Request if it fails for whatever reason. This means that any SMS messages that come into FrontlineSMS while your Internet connection is down will not be automatically forwarded to your Ushahidi deployment. For a quick fix to this (while the FrontlineSMS programmers are sorting out

the issue), have a look at the Ushahidi Wiki.[13] Remember that your phone may freeze occasionally or the connection to the phone may be lost, so you need to keep an eye out for this and restart the phone and/or the computer to fix this.[14]

Option 2: Use a Global SMS Gateway

To configure Clickatell as your SMS system in the Ushahidi platform you need to go to Addons section in the main toolbar[1], activate the Clickatell plugin[2] and click on "Settings" on the site of the Plugin name[3].

Image 1

Step 1: Sign up for Clickatell service by following the link on the page[15] and get an API key.

Step 2: Go back to the Ushahidi SMS page and enter your Clickatell API number that you received after signing up for Clickatell service.

Step 3: Enter your Clickatell Username.

Step 4: Enter your Clickatell Password. You should get it from Clickatell

Step 5: Click on Save Settings button to save the entries.

The Clikatell plugin will allow you to use Clickatell for outgoing messages (like the SMS alerts system). If you want to use Clickatell also to receive SMS messages, you need a 2-way number from Clickatell, but once you have it you need to make some changes in the

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[13] http://wiki.ushahidi.com/doku.php
[14] For more on this see also: http://frontlinesms.ning.com/forum/topics/can-flsm-recover-messages-that?xg_source=activity
[15] http://www.clickatell.com

Ushahidi code to make this work for you. Please see the Ushahidi Wiki for instructions on how to do this.[16]

2.2.4 Email

This page is where you can set up the email settings to be able to receive emails from users. To do so, you must have an email account already set up with Google, Yahoo or whatever domain.

1. Mail Server Username

This is where you can enter the email address you want to use to receive and send emails. It is recommended to set up an separate email address for this purpose, preferably one that has lot of available space to avoid the account getting full in a short time, especially if the platform will be receiving a lot of submission via email.

2. Mail Server password

In this section you should put the password of the email account inserted above.

3. Mail Server Port

In this box you have to put the port that the email account chosen uses for incoming emails. This port is normally listed in the settings of the email account itself, and under the box there are some suggestions for the most common ports used.

4. Mail Server Host

This is where you need to insert the mail server host. Under the box there are several suggestions on what those hosts can be. To verify which Mail server host you have, please look at the Settings page of your email account.

5. Mail Server Type

Here is where you can insert the server type. The most common used are POP3 and IMAP, but again, the settings page of the email account chosen will list the correct server type.

6. Mail Server SSL Support

In this box you should insert the data related the support of SSL from the server you are using for his email account. This information too is available in the setting page of the email account in use.

Now you can just save the settings by clicking on the "Save Settings" tab, and all the data inserted will be saved. Every time something will be changed in those settings you need to click again on the "Save Settings" tab to have those changes saved. It is suggested to test the settings every time something is changed in this page to be sure that the new account is working properly.

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[16] http://wiki.ushahidi.com/doku.php

2.2.5 Themes

Themes Settings

In this page you can to choose or change the main theme of the platform. As default there are two main themes here, Default Ushahidi Theme and Terra by David Cobia, but it is possible to add as many themes as the administrator likes. It is suggested not to change themes once the platform is already working, because there is the risk to have some settings reformatted once the theme is changed[17].

Do not delete the Default Ushahidi Theme under any circumstance, even if you have selected a different theme for your deployment. Without getting overly technical in this guide, additional themes build off of the templates (or "views") in this theme. Each additional theme built for the Ushahidi application pulls its base views form the default view. Deleting the default theme will cause your other themes, and the website, to break. Should you delete this theme, you can restore your website by dragging the "default" folder back to within the "themes" folder. without having to reinstall and start over.

2.2.6 Clean URLs

Enable Clean URLs

This function allows the platform to be reachable by users even if they don't type 'index.php' in the address. This way it will be easier for the users to find the platform on line if they know the name used in the URL but not the exact address. By choosing YES in

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[17] See also section 3.5.2 to see more on Themes

[1] the scroll down menu you will allow for this function to be in place. After you click "Yes" or "No", click on the "Save Settings" tab[2].

2.2.7 API

Applications with an Application Programming Interface (API) are fairly common these days. Ushahidi's API allows for other online tools to securely access incident reports and application settings such as locations and categories via an API key.

While this is a fairly technical process, the settings here are fairly straightforward: you may limit the amount of calls other tools may make to the system, generally or specifically (by IP address). If you would like to read more about the technical aspects of Ushahidi's API, more information is available on our wiki at:

http://wiki.ushahidi.com/doku.php?id=ushahidi_api

2.3 The Manage Section

The manage section is the section that allows you to set up the main characteristics of the platform as related specifically to your project. The Manage page is accessible from the Admin page on the right end of the page.

When accessing the Manage page a Toolbar will show the eight pages from which the following settings can be modified and customized:

1. Categories
2. Forms
3. Sharing
4. Pages
5. News Feeds
6. Layers
7. Scheduler
8. Cloudvox

2.3.1 Categories

The Categories page is where the categories of the reports can be set up. The default Ushahidi page has default categories set up which can be deleted and substituted with the ones chosen by the administrator of the project.[18]

The categories list shows the name of the category[1], the description below the name[2], the color of the category on the side or the icon[3] and on the far end of the raw the actions that could be done: Edit[4], Visible[5], and Delete[6].

To delete a category just click on the Delete tab, and a confirmation message will appear: by confirming the action the category will be permanently deleted.

To edit a category click on the Edit tab, and the characteristic of the selected category will appear on the far end of the page, in the section called Add/Edit. It's possible to change [7] the name of the category[7], the description[8], the color[9], the parental relationship with other categories[10] and icon[11]. Click on Save to save the new characteristic of the category[12].

To create a new category fill the boxes in the Add/Edit section and then save the settings. It is also possible to do this by clicking on the Add New tab on the side of the Category tab on the Toolbar[13]. All the fields are required except for the Icon one.

The Parental Category tab allows you to create sub-categories: if left on "Top Level Category" the category will be a main one, and be shown as such in the homepage under all categories.

If you want to create a sub-category, you need to select in the scroll down menu the Top Category under which you wants to add as sub-category. The sub-categories will not show up in the category list on the homepage automatically, but only when the user selects the Top Level Category under which the sub-one is listed.

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[18] See section 4.1.2 for info on how to see reports by category in the Homepage

You can add as many categories or sub-categories as you wish, but only one level of sub-category is allow. The Ushahidi platform will list the categories in alphabetical order: to choose a different order, add a number in front of the category name, or a letter, and the system will automatically order the numbers/letters in ascendant order.

After having inserted, deleted or edited the categories on this page, save the settings by clicking on the Save tab at the bottom of the page.

2.3.2 Forms

The Forms page allows you to change the page where users fill in their reports after clicking on the "Submit a Report" tab. This form is set as default with a predefined number of fields, but it is possible to add other forms (surveys) or to edit the default one.

The default form can be Edited[1], Deleted[2] or made Inactive by clicking on one of the tabs at the end of the row[3]. The fields of the default forms can be edited also by clicking on the [4] Edit Form Fields tab on the side of Default Form.

Editing the existing form

Click on Edit Form to have a tab appear on the bottom, just above the Create/Edit Field, called Add New Field[5]. Click on this tab and a box will appear, allowing you to create a new field in the default form.

To add a new field you first need to decide if the field will be a Text Area Field[6], which means that the user can insert free text in it, or a preselected Field, which means that specific text has to be inserted – like for example only a number. As a second step you have to insert the Field Name[7], which indicates what information is required in that specific field, then the default value required has to be inserted in the second box on the side of the Field Name box[8] – if left blank it will allow everything to be inserted in the new field.

In addition to this, you can decide if the new field will be required[9], meaning that the users inserting the report will not be allowed to send the report until they fill that particular box, and also decide a limit of characters allowed for that specific field[10] and if it is a data field or not[11]. Once done, click on the Save tab to have all the changes saved[12] .

Add a New Form

To create an entirely new form there is a box at the bottom of the page, [1] Create/Edit Form. After inserting the Name of the new form[2] and the Description[3], which will not appear in the users interface, and clicking Save[4], the New Form will appear listed under the default one[5]. This new form will have all the fields existing in the Default Form, because those fields cannot be deleted. To add new fields to this new Form follow the steps explained above, starting from selecting Edit at the and of the row corresponding to the new form created[6]. You can add as many Forms as you'd like. Those Forms will be accessible by the users in a scroll down menu on the top of the Title in the Submit a Report page.

2.3.3 Sharing

This function will allow you to share your platform with other Ushahidi websites or to have those websites sharing their platforms with you. If you want to share platforms, click on [1] Add/Edit, then just insert the name of the website[2], the URL[3] and decide the color of their reports on your map[4]. After clicking on Save your URL[5], an email address will be sent to them. In the list you can see all the Sharing Ushahidi platforms you added to your platform [6]and you can decide to edit them[7], making them invisible or visible[8] or delete them[9].

2.3.4 Pages

The Pages section is the page that allows you to add other pages in additions to the ones already existing in the main Toolbar in the homepage. From here it is also possible to [1] edit[1] or delete the About Us page[2], or make it invisible which is a default page in the main Toolbar[3].

To edit the About Us page, just click on the Edit tab under Actions, and then fill the blank in the page Description Box[6]. After clicking the Save tab, the page will be available to be read by users in the About Us page from the homepage.

To add other pages, fill the boxes relative to the Page Title[4], Page Tab name[5] and Page Description[6]. Once saved this page will be listed in the main Toolbar in the Homepage and be accessible – if visible – to the users[7].

2.3.5 News feeds

From this page you can set up the Feeds that will appear in the 'Official and Mainstream News' box in the Homepage. To add a new RSS Feed click on the Add New tab on the side of the New Feeds title on the Toolbar[1], or just go on the Add/Edit box at the bottom of the page.

The save an RSS Feed and have it appearing in the Homepage insert the name of the Feed[2] and the URL[3] After having saved the new Feed[6], the number of items coming in will be visible[4] after clicking on the Refresh Feed tab on the top of the page[5].

The actions tabs on the side of each Feed allow you to delete[7], edit[8] or made Invisible an RSS Feed[9].

To see the items of each feed you need to click on the name of the View Items of each Feed[10] and you will be directed to a page where all the items from that Feed are listed. For each item coming in you can delete it[11] or create a report out of it[12]. To see all the Feeds coming in there is also the Feed Items tab on the top of the page, where all the items coming from all the Feeds URLs are listed together. For each Feed Item coming in you will see if the geo-location is available, [14]the source[14] and a preview of the item[15].
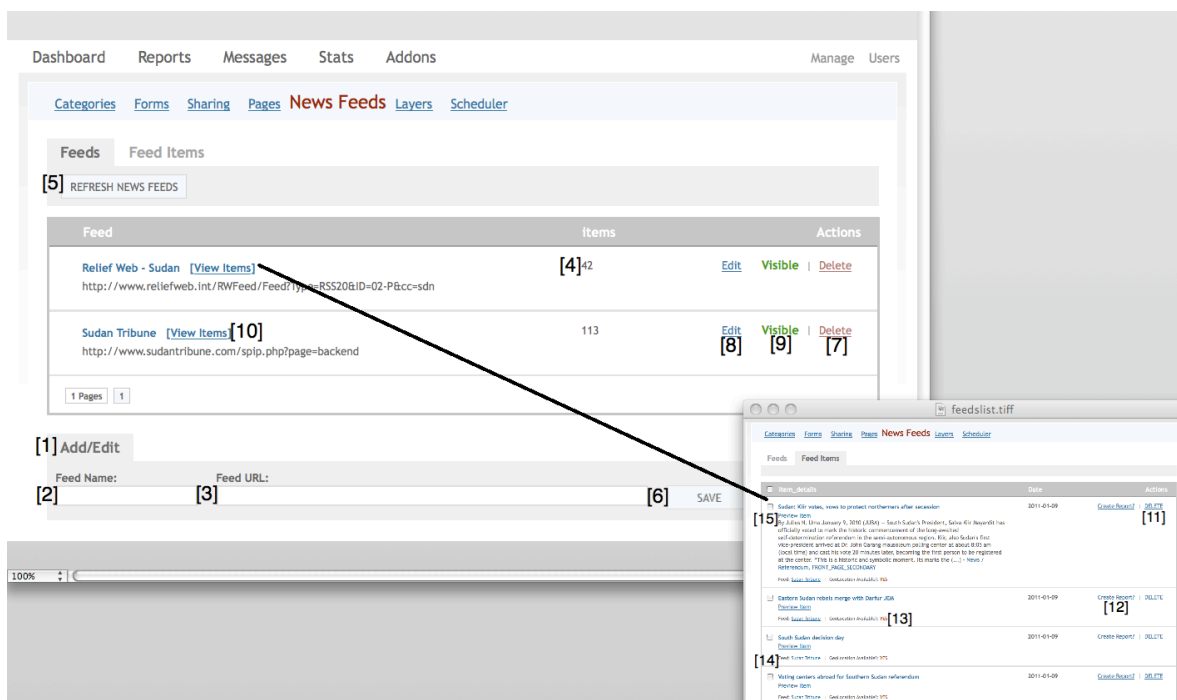
2.3.6 Layers

In this section of the Manage section you can insert the static layers that will appear on the users Homepage under the Map. Those static layers are in the format of KMZ or KML Files and can display points or areas.

To add a new Static layer use the Add/Edit box on the bottom of the page[1]. After inserting the layer Name[2], the Layer URL if existing[3], and the color[4], you can upload the file in the Upload KMZ/KML File section[5] and then Save[6].

Once saved, the Layer will appear in the list at the top of the page[7] and from there can be Edited[8], deleted[9] or made invisible[10]. If the layer is visible it will automatically appear in the Homepage, where users will be able to see it by clicking on it.
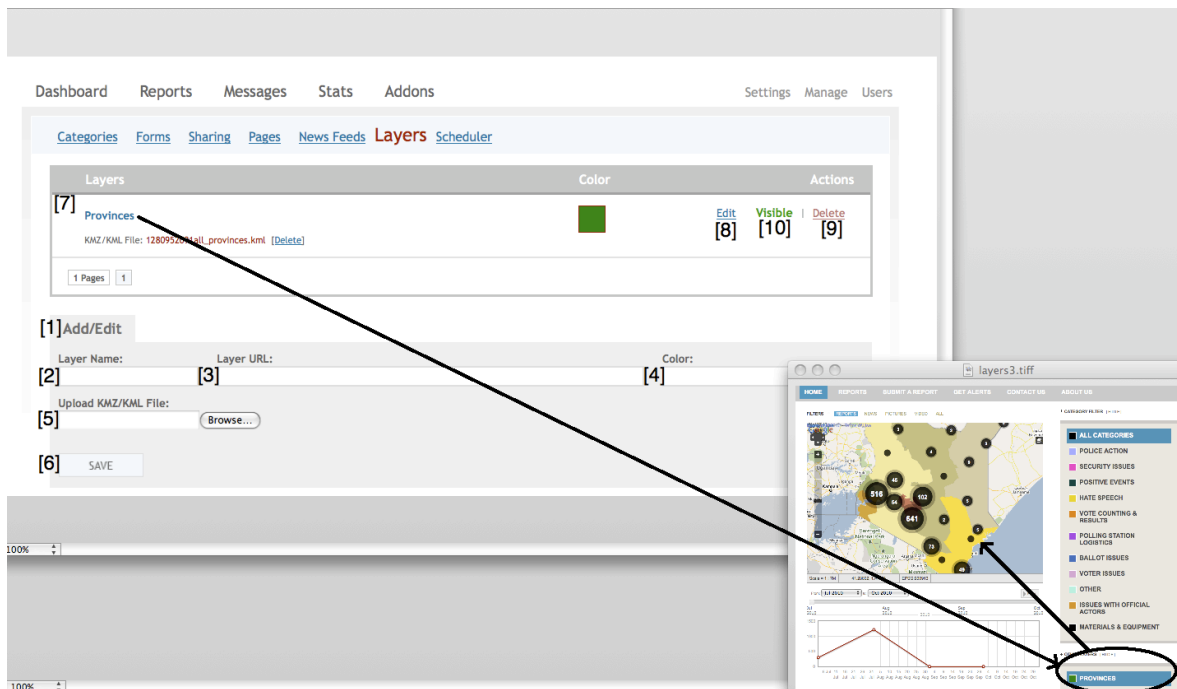
2.3.7 Scheduler

This function of the Manage section allows you to schedule actions related to Alerts[1], Email[2], Feeds[3], Sharing[4] and Twitter[5].

The Alert section allows admins to schedule when and how often the Alert system will send out alerts to the users subscribed. For the Email, Feeds, Sharing and Twitter it allows to schedule the automatic refresh of the information coming into the platform.

By default, all those Schedules are set on automatic refresh every day, every hour and every minute. To change those settings there is the Edit tab on the side of each item[6], which open a box at the bottom of the page where it is possible to change those settings according to Day of the Week[7], Day[8], Hour[9] and Minute[10]. The scroll down menu allows the administrator to choose in between All, or a particular day, hour or minute. Once done you need to save the settings[11].

If you have any issue you can also Force to Run the scheduler to refresh automatically all the incoming information[12][19]. You can also decide to activate or deactivate a particular schedule for a specific incoming feed[13].

2.3.8 Cloudvox

This page shows the Cloudvox messages that form the Voice menu[20]. Once installed Cloudvox will show here a standard menu[1], but this one can be edited and customized.

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[19] If you are having problems in receiving incoming messages from any source, try to use this function because most of the times this is the problem.

The first thing that can be changed is the menu content itself, by adding or removing any of the listed messages. To do this click on Edit[2] and edit the text of the message in the bottom window that will open[3].

The second thing that can be changed is the sounds file: the custom file is an automatic voice reading your written message. This voice can be substituted with a recorded message as MP3 file. To do so you can use the Editing tab again and upload the MP3 file in the apposite field[4].

2.4 The Users Section

2.4.1 View User

The User section[1] is the page where you can see the Accounts set up in your platform, change and create accounts by setting up Passwords and User names, in addition to setting up the roles of the administrators, users and reporters of your platform.

As we mentioned in the beginning of this guide, when Ushahidi is first, the default username and password for the administrator account "admin". Again, it is strongly recommended that you change those settings immediately after having download and installed the platform by using the Edit button[2].

2.4.2 Add/Edit User

To change the user settings the Administrator can go to Add/Edit User[1] and just insert the Username[2], Full name[3], email[4], password[5], and then choose the level of administration access allowed[6] and activate or not the notification system[7]. This last system if activated by setting it on "yes" will send a notification to the User every time a new report is submitted to the platform.

The drop down menu on the level of administration allows the administrator to choose in between three different roles[6]: None, Administrator and Super Administrator. Remember to click on Save Settings once you are done[7].

The Admin status allows the person holding it to access and process all the Messages in addition to edit and access the Manage section of the platform.

The Super-Admin can do all the above function and in addition to that can access and edit the Settings page.

2.4.3 Manage Roles and Permissions

Ushahidi 2.0 introduced much more advanced role creation with the ability to specific permissions for each role as well. Each user role can be created and edited by the Admin and Super Admin users at any time by going on the Manage Roles and Permission page[1] and clicking on Add/Edit[2]. On this page it is also possible to create specific roles[3] (like reporter, viewer, observer) and give to each one of them specific permissions to see or edit information inside the platform[4]. In this section you can also delete a role[5] or edit it[6].

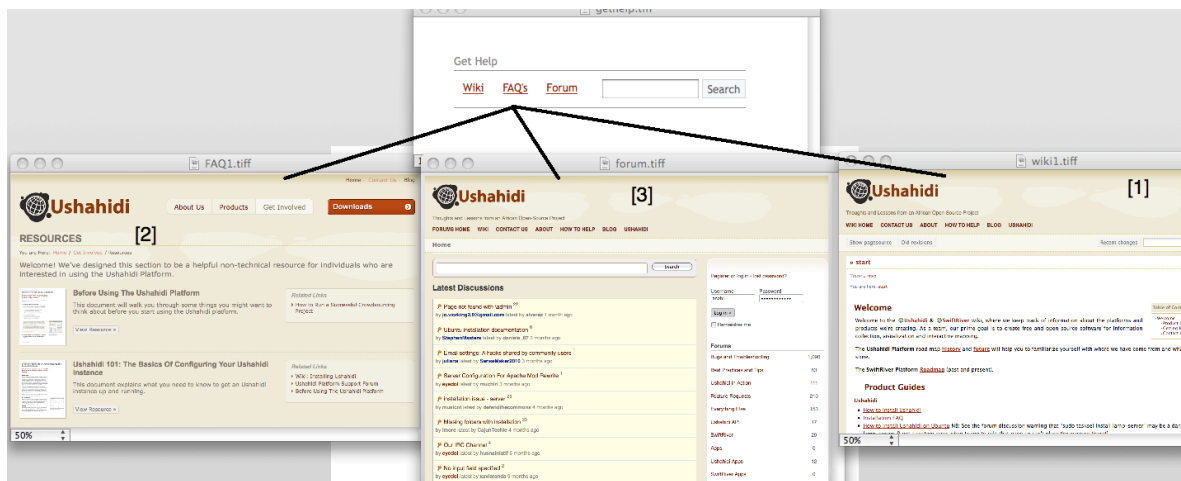## 2.5 Get Help Box

The Get Help box is always located on the top right side of the page. From here it is possible to access the following three sections on the main Ushahidi website: the Wiki[1], the FAQ's section[2] and the Forum[3]. Those three sections are an invaluable resource for whatever problem the administrator should encounter in customizing or working on the platform.

The Wiki[21] is recommended for PHP developers and for more technical problems. The Forum[22] is a very good resource for management questions and known bugs. The FAQ's section[23] is a very good starting point for questions on how to use certain functions or the general background of the platform and the organization.

2.6 Search

The Search function of the Get Help box allows you to look for specific reports into the Ushahidi platform. By typing into the box the key word the system will show all the reports, in chronological order, starting form the most recent one, that contain that word. If you are looking for a specific report you can type in the exact title or the number of the report, if you know either. You can look for report of an event by a specific day, or related to a specific category, or in a specific place.

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[21] http://wiki.ushahidi.com/doku.php
[22] http://forums.ushahidi.com
[23] http://ushahidi.com/get-involved/resources