Anti-Trans Violence Reporting Tool

Uwazi Guidelines for
Trans Rights Advocacy

TGEU

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TGEU (Transgender Europe) is a trans-led non-profit for the rights and wellbeing of trans people. TGEU represents 215 member organisations across 50 countries in Europe and Central Asia.

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Background: Unveiling Uwazi to monitor human rights violations of trans people

Human rights activists often face the challenge of collecting and organising data on human rights violations. Some of these violations constitude governments that discriminate against minorities in the employment, health or education sectors, or industries that do not pay sufficient minimum wage to their employees. Civil society organisations, made of civilians committed to equality and equity, have historically risen up to demand for more humane and dignified conditions for oppressed minorities. However, monitoring, reporting, and collecting data on these topics can be a difficult task. On one hand, the reporting platforms must be ubiquitous enough to be accessible for their users, and on the other, they must provide a high degree of data security due to the sensitive nature of the cases reported. At Transgender Europe (TGEU), we have solved that challenge by partnering with Human Rights Information and Documentation Systems (HURIDOCS), a Swiss NGO that helps human rights groups to gather, organise, and use information to create positive change in the world. HURIDOCS provides tools and strategies, such as the open-source software tool Uwazi, to collect information on evidence, laws and the latest research, in order to advocate for justice and accountability.

The online platform Uwazi embodies TGEU's commitment to transparency, accessibility, and efficiency. It is a revolutionary tool for human rights activists, researchers, and organisations striving to create lasting change by leveraging the potential of data and documentation.

This comprehensive set of guidelines aims to empower you with the knowledge needed to navigate and harness Uwazi's full potential. Whether you are new to the platform or seeking to deepen your understanding, these guidelines will serve as a roadmap to help you effectively organise, analyse, and share critical information on human rights violations, thereby advancing the cause of human rights.

Contents

Empower yourself with the knowledge contained within these guidelines, and become a collaborator on TGEU's anti-trans violence project, helping us monitor and report cases of violence, discrimination, and harassment against trans people throughout the region.

1. Introduction

What is Uwazi and what can you use it for?

Uwazi, which means 'open' in Swahili, is an innovative online platform designed to serve as a powerful tool for human rights advocates, researchers, and organisations to manage, analyse, collaborate, and share information and documents related to human rights issues.

Key Features and Uses of Uwazi:

1. Document Management: Uwazi allows users to upload, organise, and manage a wide range of documents, including reports, legal documents, case studies, testimonies, and multimedia files. It offers features such as tagging, metadata addition, and keyword search to enhance document discoverability and accessibility.

2. Collections: Users can create collections to categorise and group related documents and connect metadata contained within these documents, based on specific human rights topics, regions, or projects. This helps in better organisation and retrieval of information.

3. Collaboration: Uwazi facilitates collaboration among human rights advocates and organisations by enabling the creation of collaborative spaces. Users can invite team members to collaborate on collections, documents, and analysis, enhancing collective efforts towards human rights advocacy.

4. Data Analysis and Visualisation: The platform provides tools for data analysis and visualisation, allowing users to generate reports, charts, graphs, and maps based on the documents and data uploaded. This feature aids in deriving insights, identifying trends, and presenting information effectively.

5. Advanced Search: Uwazi offers advanced search capabilities, enabling users to search for specific keywords, phrases, or metadata within documents and collections. This feature streamlines the process of finding relevant information.

6. Geospatial Mapping: Users can visualise geographic data and document locations on interactive maps. This is particularly useful for analysing human rights issues within specific regions and understanding their spatial and geographic context.

7. Security and Access Control: Uwazi includes features to ensure data security and privacy, such as two-factor authentication (2FA). Users can implement access controls to restrict document visibility and collaboration to specific individuals or groups.

As mentioned above, Uwazi serves as a centralised repository for human rights-related documents. Through the platform, human rights organisations and advocates can collaborate on research, investigations, and campaigns by sharing documents, insights, and resources. This simplifies monitoring and reporting of human rights violations and other cases of violence, discrimination, and harassment against oppressed minorities, such as trans communities. Uwazi can be used to monitor human rights violations, document abuses, and compile evidence for reporting to international bodies, governments, and the public. The platform also enables data-driven advocacy by allowing users to analyse patterns, trends, and statistics by extracting pivotal data from the uploaded documents, which can strengthen advocacy strategies. At the same time, Uwazi promotes knowledge sharing within the affected communities, allowing practitioners to exchange information, best practices, and lessons learned.

In essence, Uwazi empowers human rights defenders to leverage the power of information and documentation to drive positive change, raise awareness, and advocate for justice in the face of human rights challenges.

How is Uwazi used to organise human rights information?

In regards to the organisation of the platform, Uwazi is designed to efficiently organise human rights information, making it easier for advocates, researchers, and organisations to manage, access, and collaborate on critical data. Users can upload a variety of human rights-related documents, such as reports, legal documents, case studies, and multimedia files, to the Uwazi platform. During the upload process, users can add **metadata**, which includes information like document title, author, date, source, and keywords. This metadata enhances document discoverability – how easy it is for other users to discover this document – and categorisation.

Users can also tag documents with relevant keywords and categories. **Tags** can represent human rights issues, themes, locations, or any other relevant criteria. This tagging system helps group related documents and allows for efficient retrieval during searches. The platform offers **customisation** options, allowing users to tailor metadata fields, tags, and workflows to match their specific human rights documentation needs.

Another way to organise your data in Uwazi is by creating collections of documents around specific human rights topics, geographical regions, projects, or campaigns. **Collections** act as containers that hold related documents together, making it easier to manage and navigate information.

Finally, users can establish **relationships** between documents, creating links that connect related information. This feature aids in building narratives and understanding complex human rights issues. To establish a relationship between two documents or pieces of information contained within the documents, you can create a link that connects them. This link can signify various types of relationships, such as *cause* and *effect*, *correlation*, *involvement*, or *context*. When viewing a document, you can see the relationships it has with other documents. This helps provide context and a broader understanding of the topic at hand. By following a relationship link, you can navigate to the related document, allowing you to explore the interconnected information and gain a more holistic perspective on human rights issues.

As mentioned above, the **advanced search** feature provides a robust search functionality that enables users to search for specific keywords, phrases, tags, or metadata across all uploaded documents and collections. The **geospatial mapping** feature allows users to visualise the geographical locations associated with documents, unveiling the spatial distribution of human rights issues and incidents in map format.

Types of users in Uwazi

An important feature provided by the platform is the **access control** to the data uploaded. Uwazi allows users to control access to documents and collections. Users can define who can view, edit, or contribute to specific content, ensuring sensitive information remains secure.

There are typically three types of users, each with specific abilities and roles within the platform. These user types are designed to facilitate collaboration, control access, and ensure that the right individuals have the appropriate permissions to carry out their tasks effectively. The three main types of users in Uwazi are:

1. **Administrator:** Administrators have the highest level of control and authority within the Uwazi platform. Their responsibilities include:
    - User Management: Administrators can invite new users to join the platform and manage user roles and permissions.
    - Configuration: They can customise the platform settings, including metadata fields, workflows, and access controls.
    - Integration: Administrators can integrate Uwazi with external tools or systems to enhance functionality.
    - Data Security: They ensure the security and privacy of documents and data by setting up access controls and managing user permissions.
    - Troubleshooting: Administrators are responsible for addressing technical issues and providing support to other users.

2. **Editor:** Editors have the ability to create, edit, and manage documents and collections within the platform. Their responsibilities include:
   - Document Management: Editors can upload, edit, and organise documents, including adding metadata, tags, and descriptions.
   - Collection Management: They can create and manage collections, grouping related documents around specific human rights topics or projects.
   - Relationships: Editors can establish relationships between documents to show connections and dependencies.

3. **Viewer/Collaborator:** Viewers or collaborators have more limited access compared to administrators and editors. Their main role is to access and view documents and collections. Responsibilities of viewers include:
   - Document Access: Viewers can search for and view documents and collections available to them based on their permissions.
   - Searching and Browsing: They can use advanced search and filtering options to locate specific documents or topics.
   - Collaboration: Depending on platform configuration, viewers may also be able to participate in discussions or comment on documents within collaborative spaces.

It's important to note that the specific abilities of each user type may vary based on how the platform's administrators configure permissions and roles. Uwazi is designed to provide flexibility in assigning roles and permissions, ensuring that users have the appropriate level of access based on their responsibilities and contributions to human rights advocacy efforts. This user hierarchy facilitates efficient collaboration, enhances data security, and empowers users to effectively manage and share human rights information.

How to prepare and organise your data

Organising data is crucial for meaningful analysis, accurate decision-making, and efficient information retrieval. When data is organised systematically, it becomes easier to discern patterns, trends, and insights, turning raw data into actionable knowledge. Building a data model is a comprehensive process that enables organisations or individuals to structure, relate, and understand their data effectively. It's a foundational step for designing databases, reporting systems, and many other data-related projects. Begin by identifying where your data comes from and what type of data it is. Different types of data require different organisation methods.

1. **Quantitative Data (Continuous):** Numerical data that can be measured and counted. Examples include height, weight, or age. Quantitative data is often objective and can be organised into tables, charts, or matrices and can be analysed using statistical methods such as regression analysis, t-tests, and chi-square tests.

2. **Qualitative Data (Categorical):** Descriptive data that can be observed but not measured. Examples include race, migration status, and personal experiences. Qualitative data is often subjective and based on personal perceptions, feelings, or interpretations. Qualitative data is often analysed through methods like thematic analysis, grounded theory, or content analysis.

3. **Temporal Data:** Data that is time-dependent. Examples include time series data like stock prices over time or event logs.

4. **Spatial Data:** Data with a geographical or spatial aspect. Examples include locations, boundaries, and distances.

Now that you have identified the type of data you have, check for consistency, completeness, accuracy, and relevancy. Data anomalies, missing values, duplicates, and inconsistencies should be noted. Always keep in mind the goal of your project and your data model. If you are trying to provide empirical evidence to influence policy makers on the creation of laws that protect the trans communities from violence, you will want to group and present your data according to the communities that are the most affected, for example trans feminine people or Black trans people. This means you will have to plan a data model that allows you to segregate data points according to race, gender, and other socio-demographic characteristics.

Data can be organised to help make informed political decisions. For sectors like human rights, spotting trends is essential. In some cases, data is organised primarily for reporting purposes, like annual human rights violations. Researchers might organise data to explore new phenomena or test hypotheses. Understanding your goal will guide you in how to structure, prioritise, and present your data. It will also help you to identify your audience.

Knowing the intended audience or purpose will further refine how you organise and analyse your data. Technical stakeholders, like healthcare authorities, might prefer raw data or detailed breakdowns, while non-technical stakeholders, such as politicians, might benefit from summaries, charts, and graphs. Data for the public might need to be anonymised or generalised, while internal data can be more detailed.

Once you have clarified the type of data and the intended audience, you must organise your data in a consistent way, with a clear format and labelling process. If you are reporting human rights violations, it is important that the terminology used to describe an incident is consistent. For example, when recording the race of trans victims in a project, we must agree to group all races into clear, arbitrary categories that everybody follows (Black, brown, white, for example). Otherwise, it will become difficult to detect trends of violence against racial minorities.

Where possible, centralise data sources to avoid duplications and inconsistencies. Use only one collecting system, instead of several Microsoft Excel Sheets, where different people might be

reporting the same incident several times. It is also important to use the appropriate tools to organise your data. Tools like Microsoft Excel or Google Sheets can work for smaller datasets. But for big datasets, Uwazi offers better organisation, relationship, and visualisation tools.

Organising data is a fundamental step in making it usable and actionable. By understanding the type of data you're working with, defining clear goals for its use, and tailoring its organisation to its intended audience or purpose, you can derive much more value from the data. For this purpose, you must create a data model that is comprehensive.

In order to do that, prioritise the questions you would like your project to answer: What is the primary objective of the project? Based on the goals, list down the questions you'd want to answer. For our anti-trans violence project, questions might include:
-   Do trans people of colour experience different amounts of violence than white trans people?
-   Which region has the highest reports of anti-trans violence?
-   What gender experiences X type of violence the most?

Not all questions are of equal importance. Rank them based on their relevance to the project's goals, the stakeholders' needs, and the potential impact of the answers. Ensure that you have the necessary data to answer these questions. If there's a gap, you might need to collect more data or adjust your questions.

How to develop a conceptual data model

Developing a conceptual data model is an important step in the process of designing a database or information system. It involves creating a high-level representation of the data entities, their attributes, and the relationships between them. Here's a general guideline on how to develop a conceptual data model:

1. **Understand the Requirements:** Begin by thoroughly understanding the requirements of the system or application you are designing. This includes identifying the key entities, their attributes, and the relationships between them.

2. **Identify Entities:** List the main entities (objects, concepts, or things) that need to be represented in the data model. These are the primary 'nouns' in your system.

3. **Define Attributes:** For each entity, define the attributes (properties or characteristics) that describe it. Attributes are the 'adjectives' that provide more information about the entities.

4. **Determine Relationships:** Analyse how the entities are related to each other. Relationships can be one-to-one, one-to-many, or many-to-many. Determine which entities are connected and how they interact.

5. **Create an Entity-Relationship Diagram (ERD):** An ERD is a visual representation of the conceptual data model. Use boxes to represent entities, ovals for attributes, and lines to show relationships. Label the lines with verbs that describe the relationship (e.g., 'has', 'belongs to').

6. **Refine and Normalise:** Review the ERD for clarity, accuracy, and completeness. Refine the model to eliminate redundancy and ensure that each piece of information is represented only once. Normalise the model to minimise data duplication and improve data integrity.

7. **Validate with Stakeholders:** Share the conceptual data model with stakeholders, including end-users, developers, and subject matter experts. Gather feedback and make necessary adjustments based on their input.

8. **Document the Model:** Document the conceptual data model, describing the purpose of each entity, its attributes, and its relationships. This documentation serves as a reference for future development phases.

9. **Iterate and Revise:** The conceptual data model is an iterative process. As you gain a deeper understanding of the system and its requirements, you may need to revise and refine the model.

10. **Transition to Logical and Physical Models:** Once the conceptual data model is well-defined, it serves as the foundation for creating more detailed logical and physical data models. The logical model defines the structure of the database without considering specific database management system (DBMS) features, while the physical model specifies how the database will be implemented in a specific DBMS. In the specific case of TGEU's research, our Physical Model and DBMS is Uwazi.

Remember that developing a conceptual data model requires collaboration and communication with various stakeholders to ensure that the model accurately represents the real-world domain and meets the needs of the system or application being developed.

Take the anti-trans violence project as an example. Our conceptual data model includes entities such as emotional, psychological, or physical violence; people; or even countries and regions. The attributes that surround these entities are categorical variables, such as the socio-demographic characteristics of the victims of violence: race, migration status, gender, gender identity, sexual orientation, and others. Finally, the relationships between these entities are often 'was victim of'.

2. Getting Started with Uwazi

Summary

Before diving deeper into how to use Uwazi, there are a few terms that you must be familiar with.

An **instance**, for example, is your specific copy of the Uwazi software. It refers to an independent installation of the Uwazi platform, typically set up for a specific organisation or project. Each instance functions as a separate and distinct environment, allowing different organisations or projects to manage their documents, data, metadata, and information independently. Each instance has its own database, configuration settings, and users. It provides a private space for an organisation or project to organise, search, and share their human rights-related content.

This content can be organised in the form of a **collection**, which in Uwazi refers to a thematic or subject-based grouping of documents or entities. It is a way to categorise and organise related content within an instance. Collections allow users to group similar documents together, making it easier to manage, search, and navigate through the content. For instance, an organisation might have collections related to different human rights issues, regions, or types of documents.

Collections are made out of **entities**. An entity in Uwazi refers to a single document, report, or piece of content that is managed within the platform. It could be a human rights report, legal document, case study, or any other piece of information that the organisation wishes to manage and share. Entities are typically associated with metadata, which includes information such as the document's title, author, publication date, keywords, and other relevant attributes. By using **metadata**, entities can be categorised, searched, and filtered based on specific criteria.

An entity contains **properties**, and can hold primary documents and/or supporting files, and can have **relationships** to other entities. A **property** is a descriptive attribute that is assigned to entities (e.g. author, significance, status, etc.); while a **relationship** allows entities to be connected to each other. We sometimes use the term **connection** to describe the same feature. 'Harrassed by' is an example of a relationship between two fictional entities involved in a hate crime, '*Jimena Jimenez*, Colombian Trans Woman' and *'Rasmus Rasmussen, Danish Cis Man'*. It would be expressed as: '*Jimena Jimenez was harassed by Rasmus Rasmussen*'. The relationships are very useful, as they can provide insight into the broader picture in monitoring hate crimes. For example, if the fictional character, Rasmus Rasmussen, harassed three other trans women, by reviewing the relationships linked to that entity, you can detect a trend.

For better organisation of collections, you can build different **templates** in Uwazi. A **template** is a starting point for new entities. They can be built and customised with different properties for each type of entity. In the case of TGEU's instance, we have two templates (for two different research

projects), which work as questionnaires. On these templates we ask for essential socio-demographic information about the victims of violence, such as race, age, migration status, and others, in order to make intersectional analysis of the data possible.

These templates contain a series of **thesauri** (single **thesaurus**). In Uwazi, a **thesauri/thesaurus** refers to a controlled vocabulary, or a structured list of terms that helps standardise and categorise the language used to describe documents, topics, or concepts within the platform. Thesauri play a crucial role in improving the consistency and accuracy of metadata, tags, and other descriptive elements associated with documents and collections. They enable users to select appropriate terms from a predefined list, which enhances searchability, discoverability, and data organisation. Thesauri are especially valuable in ensuring that the terminology used aligns with established standards and terminology in a specific domain or field. Thesauri often have a hierarchical structure, where terms are organised into broader categories (broader terms) and more specific terms (narrower terms). Thesauri may include synonyms and related terms that users can choose to describe the same concept. This ensures that different variations of terminology are accounted for and linked to the same concept, however users are encouraged to choose preferred terms to maintain consistency and accuracy in the description of documents. Thesauri can be developed in multiple languages to accommodate users who work with documents and data in different languages. An example of a thesaurus would be the region, sub-region, and country variables in our templates, which are predetermined to make sure that all the data follows the same type of language.

TGEU has its own instance for Uwazi. Our instance is currently private and users can only access it after an administrator creates an account for them. In the near future, after we have finished the first wave of data collection from our two main research projects, TGEU will create a public instance. This instance will display some of the data collected on human rights violations against trans people, accompanied by figures and graphics to better illustrate the information. The entire collection of data will not be shared in the public instance, as we aim to protect the confidentiality of the victims of violence.

Registering and creating an account in Uwazi

In order to become a viewer/collaborator, one must be invited by an existing user or an administrator who has the necessary permissions to manage collaborators. After an administrator has sent you an invitation to become a collaborator via email, follow the provided link or instructions to accept the invitation. If you don't already have a Uwazi account, you'll need to create one during the acceptance process. If you already have an account, you may be prompted to log in. After doing so, you may be directed to a confirmation page that verifies your collaboration status. This page might provide more details about the collaboration and any associated permissions. Once you have accepted the invitation and confirmed your collaboration, you will likely gain access to the specific

documents, collections, or projects that you are collaborating on. Your privileges and permissions will depend on the role assigned to you by the inviting user or administrator. With your collaborator status confirmed, you can start working with other team members on documents, collections, discussions, or any other collaborative activities within the Uwazi instance.

It's important to note that the exact steps and process for becoming a collaborator in an Uwazi instance may vary based on how the specific instance is set up, any customisations, and any updates. If you receive an invitation to collaborate in Uwazi, carefully follow the instructions provided in the invitation email for the most accurate and up-to-date guidance. For the specific case of TGEU's instance, the HIV Research and Advocacy Officer, *Amanita Calderon-Cifuentes*, is the administrator delegated to create and manage all the accounts. If it is in your interests to become a collaborator for any TGEU projects, please contact Amanita at the following email: *amanita@tgeu.org*.
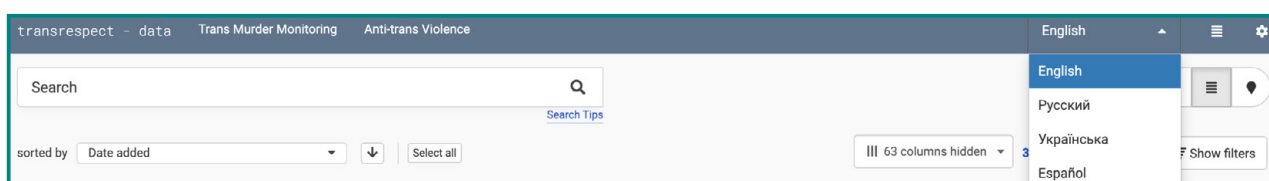
Navigating the dashboard in Uwazi

A typical Uwazi dashboard structure includes a navigation bar, a home or landing page, the collection, a collaboration section, a search bar, and the user profile. TGEU's instance does not have a collaboration section at the moment.

Our landing page sends you directly to our collection, which includes the entities uploaded through the templates **Anti-Trans Violence** and **Trans Murder Monitoring**. A link to both templates is located in the upper-left side of the landing page of our Instance, next to the link **transrespect - data**, which leads you back to the home page. The collection can be sorted according to different variables such as the 'Name of the victim/survivor'. Each entity can be visualised as **cards**, **tables**, or in a **map**. To select the view, choose one of the icons located in the middle-left side of the collection.
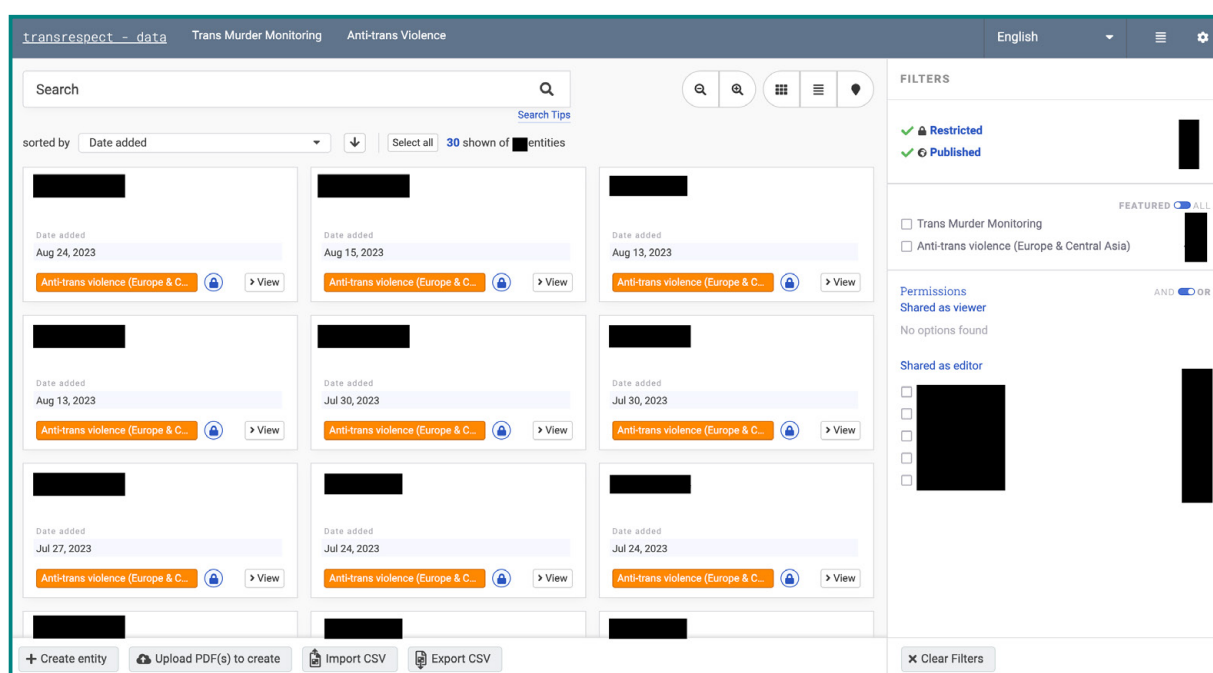
In the upper-right side of the screen you will find the language menu from which you can select English, Spanish, Russian, or Ukrainian. Next to it, you will find an icon with four horizontal lines that links to our **library**. This is where all of our data is found, with information about the date each entity was added, the last time it was modified, and the template it belongs to. You can also sort the data by title, sex assigned at birth, age, and other socio-demographics. In the top-right corner you will find a gear icon that will direct you to the settings. This section is one of the most important for administrators.

In the middle section of the dashboard you will find advanced filter options to select the entities that you want to visualise. You will also be able to separate the data according to the collaborator who added the entity, or the template that the entity belongs to. The documentation is accessible directly from each entity.

Since the dashboard layout and features can vary, it's best to refer to any provided documentation. For help navigating or using TGEU's instance, you can contact TGEU's support team (*tgeu@tgeu.org*) for specific instructions.

3. Data Management: Uploading and Organising

Uploading entities and adding metadata

If you are a collaborator, you can select any of the available templates and fill out the questionnaire, in order to upload a new entity. Templates define the structure and attributes for the type of entity you want to upload, and typically include predefined metadata fields and attributes. TGEU's templates are predetermined to create 'Case Report' entities, which is why they contain fields for case number, date, location, summary, etc. If your entity involves files (such as documents, images, etc.), you can attach these files to the entity during the upload process by following the prompts. Review the information you've entered to ensure accuracy and make any necessary adjustments. If you have additional entities to upload using the same template, repeat the above steps for each entity.

Uwazi also provides an 'Import CSV' option that allows editors to upload multiple entities at once using a CSV (Comma-Separated Values) file. This can be a convenient way to add a batch of entities to the platform simultaneously. The 'Import CSV' feature is located in the bottom part of the dashboard between 'Export CSV' and 'Upload PDFs to create'. It is only available for Editors and Administrators. In order to use this feature, you'll need to create a CSV file (UTF-8) that contains the metadata for the entities you want to upload. Each row in the CSV file represents a single entity, and each column corresponds to a metadata field defined in your Uwazi instance. Once this is ready, click on the 'Import CSV' option to start the process. You'll be prompted to choose the CSV file from your computer. After the import is complete, review the entities that were added to ensure accuracy and completeness. Make any necessary adjustments or edits if needed.

Uwazi will give you an error warning if the language used does not match the one of the interface. In order to avoid confusion, TGEU has prepared an Excel template which contains macros for you to select from the available thesaurus. Macros in Excel are essentially a set of recorded actions or custom scripts that can be run automatically to perform specific tasks. They are often used to automate repetitive procedures, saving time and minimising the potential for errors. In this template, you can find the Macros directly in the cells. By pressing the arrow, a menu will drop down, offering you different options to choose from, reducing the language to a selected group of words. The template also has the language used to fill each column in a separate tab. By following the correct language, and directly organising your data in this template, you can upload hundreds of entities at once. You can also upload as many templates as you want.

If you want to edit the metadata of any entity, use the **edit** option. This is available only for Editors and Administrators, make the necessary changes and then save them. Using the **edit** feature, you can also add **relationships**, using the icon located on the right side of the screen. When reporting cases of violence, such as for TGEU's project on discrimination or harassment of trans people, using the relationships might be ideal when more than one case happened in the same incident: for

example the murders of two trans women. It is however important that you create a separate entity for each murder.

Using advance search and filters

Uwazi provides advanced search and filtering options to help users refine their search queries and find specific documents or entities on the platform.

To use Uwazi's search function, start by entering a keyword or phrase into the search bar and then press 'enter' or click the search icon. This will perform a basic search and display a list of results. For a more accurate search, you can go to the right side of the dashboard where the 'filter' section is located, and select either the template where the entity belongs, or the collaborator that uploaded the case. In the advanced search panel, you'll typically see various filtering options that allow you to narrow down your search results. Common filtering criteria include the metadata fields and the thesauri used to create the entity, such as name of the victim/survivor, sex assigned at birth, race, migration status, and others. Select the desired filter criteria by checking boxes, entering values, or making selections. As you apply filters, the search results will update in real-time to reflect the refined criteria.

After applying filters, review the updated search results to see documents or entities that match the specified criteria. This way, you can, for example, visualise all the reported cases of discrimination that happened to nonbinary people of colour in 2023. If needed, you can clear the applied filters to return to a broader search. Look for an option to clear filters or reset the search criteria. There are options to export search results, save searches, or take other actions based on your findings. You can modify the filter criteria, add or remove filters, and iterate your search until you find the desired documents or entities.

4. Data Analysis and Visualisation

Extracting insights with Uwazi's tools

While Uwazi provides tools for managing and searching documents, it might not offer advanced data analysis. However, you can use Uwazi's tools in conjunction with other data analysis tools to interpret the information you've collected and organised within the platform. Start by using Uwazi's tools to upload and organise your documents, add metadata, and apply consistent tags and attributes. This ensures that your data is well-structured and ready for analysis. Then, explore your documents and collections in Uwazi to understand the scope and content. Use your collection to

detect specific trends and tendencies. An example of this could be an increasing number of human rights violations against trans migrants and trans refugees since 2021 in Eastern Europe, which could be linked to Russia's occupation of Ukraine.

After unravelling the general scope of specific issues, use Uwazi's search and filtering features to locate relevant documents based on specific criteria. Then, export the relevant data in a format that can be used for further analysis, such as a CSV file. Once you have your exported data, you can use other data analysis tools to extract insights. This could involve using software like Microsoft Excel, data visualisation tools like Tableau or Power BI, or programming languages like Python/R for more advanced analysis. Remember that if your documents contain textual content, you might explore text mining and natural language processing techniques to extract keywords, sentiments, and patterns from the text. Tools like Python's NLTK or spaCy could be helpful for this purpose.

With Uwazi, you can also create visualisations, graphs, and reports based on your analysis. Visual representations can help you identify trends, patterns, and relationships in your data. You can complement or improve your figures and graphics using other visualisation tools. If you have specific data analysis needs, you might need to export data from Uwazi and use external tools to conduct the analysis and create visualisations. Here is a list of recommended tools:

1. Microsoft Excel: A powerful spreadsheet tool that allows you to perform basic data analysis, create charts, graphs, and pivot tables.

2. Tableau: A data visualisation tool that allows you to create interactive and shareable dashboards and reports.

3. R: A programming language and software environment for statistical computing and graphics. R offers a wide range of packages for data analysis and visualisation.

4. Python: A versatile programming language commonly used for data analysis and manipulation, with libraries like pandas, NumPy, and matplotlib.

5. SPSS: A software package for statistical analysis that is widely used in social science research.

Integrating Uwazi with external tools

Integrating Uwazi with external tools can enhance its functionality and extend its capabilities. The specific integrations and methods, however, may vary based on the instance of Uwazi and the external tools you're using. Common integration scenarios include connecting with document management systems, data analysis tools, visualisation platforms, collaboration tools, and more. Check whether your Uwazi instance provides pre-built integrations or plugins for the external tools you're interested in. Uwazi might offer integrations through APIs (Application Programming Interfaces), plugins, or third-party connectors. For example, you can add charts and other data

visualisation elements to pages and rich text fields using code snippets and accessing TGEU's API. To give you an idea of what is possible in Uwazi, take a look at the former *Anti-Trans Hate Crime* (*https://tgeu.uwazi.io/*) website created by TGEU. Please note that creating this website required some technical proficiency in working with HTML, CSS, and Javascript.

If your Uwazi instance offers APIs, you can use them to develop custom integrations with external tools. APIs allow different software applications to communicate and exchange data. You would need to develop scripts or applications that use the Uwazi API to interact with the platform's data, then set up and configure the external tool according to your requirements. This might involve creating accounts, generating API keys, or configuring authentication. Depending on your technical expertise and the tools you're integrating, you might need to develop custom connectors or scripts to facilitate the data exchange between Uwazi and the external tool. Following the configuration, you then need to implement data transfer and synchronisation mechanisms between both interfaces. For example, this could involve exporting data from Uwazi in a compatible format and importing it into the external tool. Following this, you will have to thoroughly test the integration to ensure that data is being transferred accurately and that the integration works as expected. Address any issues or errors that arise during testing. Pay attention to security considerations and ensure that data access and permissions are appropriately managed during the integration process. Regularly monitor the integration to ensure its continued functionality. As your systems evolve, updates or changes may be needed to maintain the integration's effectiveness. Document the integration process, including setup steps, configurations, and troubleshooting guides. Provide training or documentation to relevant users who will be interacting with the integrated tools.

We recommended consulting Uwazi's official documentation, support resources, and possibly involving technical experts for a successful integration. You can find these at this link: *https://github.com/huridocs/uwazi-documentation/blob/master/admin-docs/analysing-and-visualising-your-collection.md*.

Using geospatial mapping with Uwazi

Uwazi provides support for geospatial mapping to enhance the visualisation and analysis of document and metadata information on maps. Geospatial mapping can help you understand the geographic distribution of data and identify patterns or trends based on location. The geospatial mapping feature is accessible from the 'Maps' section, or as part of the document or collection view. In order to use geospatial mapping, you'll need to have documents or metadata with geospatial information. This includes attributes like latitude, longitude, addresses, or geospatial boundaries.
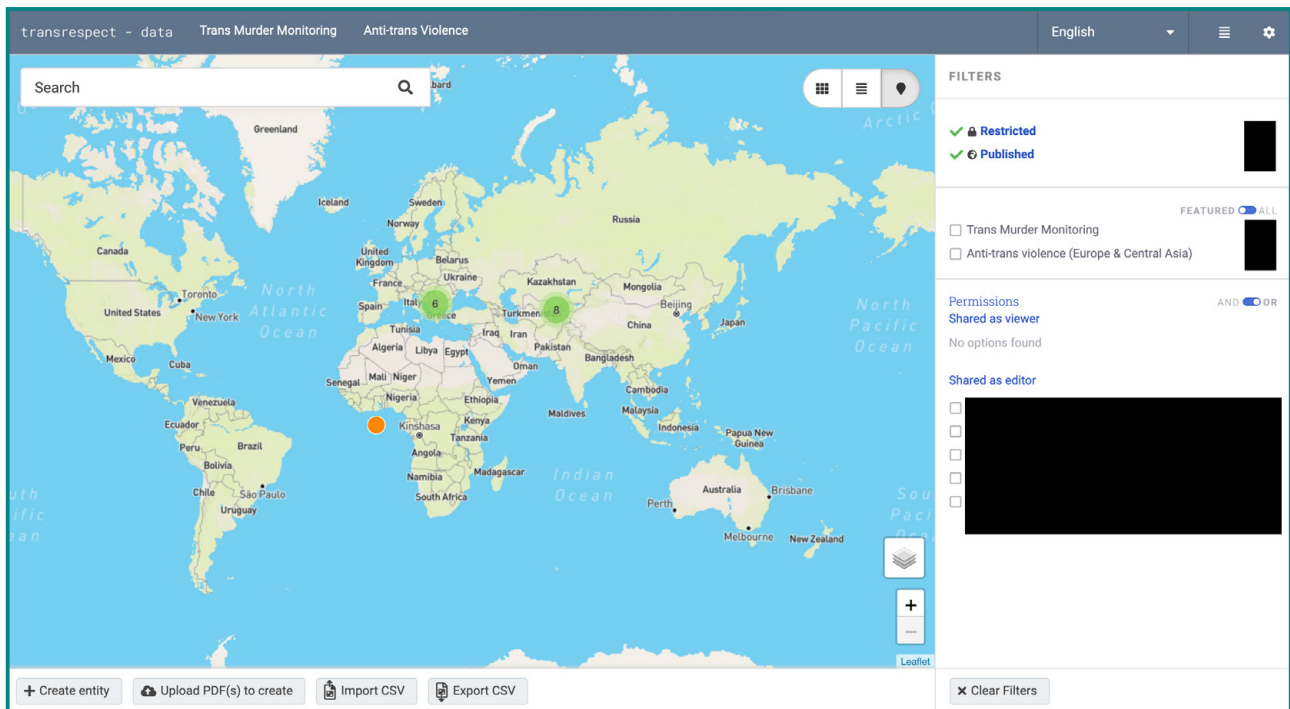
Access the geospatial mapping feature to view your data on a map. You can interact with the map visualisation by zooming in and out, clicking on markers to view more details about the associated documents, or applying filters to focus on specific regions or attributes. Use the geospatial map to analyse your data and identify patterns, clusters, or trends based on location. This can help you gain insights into the geographic distribution of the information you're managing. You can also export the geospatial map or share it with others. This can be particularly useful for presenting your findings or collaborating with colleagues.

5. Best Practices for Document Security and Privacy

Ensuring data security

Given the nature of the data Uwazi might handle, security and privacy are crucial concerns. Uwazi's platform is open-source, which allows organisations and developers to review, modify, and extend its code according to their needs. The open-source codebase makes the platform transparent. However, this means that only Uwazi's code, and not the data stored on Uwazi, is publicly available. This transparency means that developers and security experts can inspect the code for vulnerabilities, ensuring that the platform remains robust against potential threats. As a result, Uwazi's software regularly undergoes security audits and updates that secure the safety of the data.

To protect the security of the data stored on Uwazi, Uwazi provides detailed user roles and permissions. These allow Administrators to determine who can see or modify specific datasets. This provides an added layer of security against unauthorised access. Administrators can set up backup systems to prevent data loss, ensuring data is backed up regularly and can be easily restored. If specific personal or sensitive data needs to be kept confidential, Uwazi users can anonymise or redact this information before uploading, or ensure that it is only visible to trusted individuals. It's also standard practice to use HTTPS for secure data transfer, ensuring that any data moved between the client and server is encrypted and protected against eavesdropping.

Guidelines and best practices for securing your instance, including recommended server configurations, firewall setups, and more are included in the documentation for the platform. Finally, Uwazi can be self-hosted, which means organisations can have complete control over their data, where it's stored, and who has access, rather than relying on a third-party provider.

It's essential to note that no system can guarantee 100% security. The effectiveness of Uwazi's security measures depends on how it is set up, maintained, and used. Administrators should be proactive, keep the system updated, and consider additional security measures like regular penetration testing and employing best practices for server security and maintenance.

Implementing access controls

As mentioned before, Uwazi provides the ability to manage access rights and permissions for users. Here's a basic outline based on that information to help you implement access controls in Uwazi:

To begin with, administrators must set up user accounts and roles, such as 'admin', 'editor', 'collaborator', etc. Each role will have predefined permissions. Uwazi also allows the creation of user groups. If this feature is available, you can group users by teams or departments. Once you've set up groups, assign users to these groups per their function or department. When uploading a document or after it's uploaded, go to the document's settings or permissions section. Here, specify which roles or groups can view the document. You might have options like 'public', 'only admin', 'only editors', 'specific groups', etc. Assign the necessary permissions based on your organisation's needs. Similar to permissions for documents, you can set which roles or groups can view or edit entities or templates. You can also organise your entities into collections with specific permissions.

Periodically review the permissions to ensure they're still in line with your organisational needs. Roles and requirements can change over time. All users must understand how permissions work within Uwazi. They should be aware of the implications of sharing documents outside the platform and should know how important it is to keep login details private.

Remember, even with all these access controls in place, it's essential to ensure the overall security of an Uwazi instance. This includes keeping software updated, using strong passwords, enabling HTTPS, and routinely backing up data.

Lastly, as software platforms like Uwazi evolve, new features and settings may be introduced. Always refer to the latest official documentation or reach out to the Uwazi community for current and detailed guidance on access controls and other functionalities.

6. Continuous Learning and Support

Accessing help resources and tutorials

HURIDOCS offers several avenues for users to access help, resources, documentation, and tutorials:

1. **Official Documentation:** HURIDOCS offers comprehensive documentation that guides users through setup, basic functionalities, advanced features, and troubleshooting. This guideline, for example, is specifically designed for TGEU's instance.
2. **Official Website:** The official website has sections dedicated to tutorials, FAQ, and other educational resources. Visit the Uwazi or HURIDOCS website for such resources: *https://huridocs. org/technology/uwazi*.
3. **GitHub Repository:** The primary platform for discussion and collaboration about Uwazi developments. To engage with the Uwazi community, visit Uwazi's official GitHub repository. The repository includes a README file, wiki, and other documentation that provides insights into using and customising the platform. Here, you can raise issues, submit feature requests, or review ongoing discussions. To contribute or participate actively, the 'watch' repository has updates, and 'star' to find it faster in the future. Also, consider the 'forking' repository if you wish to make your own changes and potentially submit them back to the main project. The 'discussions' tab on the GitHub repository acts as a community forum where you can ask questions, share ideas, or engage with other users and developers: *https://github.com/huridocs/uwazi*.
4. **Community Forums:** Many open-source projects foster communities where users and developers discuss the platform, share knowledge, ask questions, and provide solutions. Look for community forums or discussion boards associated with Uwazi or HURIDOCS.
5. **Online Courses or Webinars**: Sometimes, the organisations behind such platforms (like HURIDOCS) might offer online courses, webinars, or workshops. TGEU offers online trainings for our members and partners of specific research projects, such as the Anti-Trans Violence project partners.
6. **YouTube Channels:** Video tutorials can be extremely helpful. HURIDOCS has a YouTube channel with tutorials or demonstrations related to Uwazi: *https://www.youtube.com/@ HURIDOCS1982/videos*.

7. **Social Media:** HURIDOCS has active social media profiles on platforms like *Twitter*, *Facebook*, or *LinkedIn*. These can be excellent places to ask questions, get updates, and interact with the community.

8. **User Groups:** There might be user groups or meetups (either online or offline) where Uwazi users gather to discuss the platform, share experiences, and learn from one another. You can also reach out to other members of TGEU who are committed to the reporting of trans rights violations and exchange insights with them.

7. Case Studies: Realising Impact through Uwazi

The Anti-Trans Violence Project

Transgender Europe (TGEU) has been at the forefront of advocating for the rights and wellbeing of transgender people in Europe and Central Asia since 2005. One of our prominent initiatives has been tracking and monitoring violence against the transgender community, emphasising the severity of the issues faced by further marginalised members of our community (BIPOC, migrants and refugees, sex workers, trans people living with HIV, disabled trans people, neurodivergent trans people, trans youth, trans elders, trans people living in poverty or in homelessness, and trans people in the prison system).

The ProTrans project was an initiative by TGEU that specifically addressed anti-transgender hate crime and violence. Eventually, the ProTrans project turned into the *Anti-Trans Violence project* (**ATV**). In association with HURIDOCS, our ATV project uses Uwazi to monitor human rights violations against trans people in Europe and Central Asia.

ATV aims to strengthen the professional capacities of transgender organisations in Europe to record and report anti-trans violence. It was designed to counteract the underreporting and misreporting of this violence, which often occurs due to mistrust in the police, fear of double victimisation, and a lack of recognition or understanding of anti-trans motives behind certain crimes. As part of the project, TGEU developed methodologies to gather data on anti-trans violence. We rely on partnerships with local transgender organisations, which help in recording and documenting instances of violence, discrimination, harassment and other hate crimes against trans people.

By systematically recording and publishing data on violence against transgender people, TGEU is able to present hard evidence to policymakers, law enforcement agencies, and the general public about the gravity of the problem. Regularly updated statistics and reports paint a grim picture of

the dangers the transgender community face, making it harder for policymakers to ignore or dismiss the issue.

ATV provides training to transgender organisations on how to monitor and document anti-trans violence effectively using Uwazi. This ensures that data is collected consistently and accurately across different regions and contexts. The project also aims to build trust between the transgender community and law enforcement. By facilitating dialogue and understanding between the two, the hope is to encourage more victims to come forward and report incidents of violence. Collaborations also extend to other NGOs, legal professionals, and media, amplifying the advocacy efforts.

Using the data collected, TGEU is able to raise awareness of anti-trans violence among the general public. And through media campaigns, public statements, and other outreach efforts, we highlight the challenges and dangers faced by transgender individuals in Europe and Central Asia. Now, armed with empirical data, TGEU is in a position to make specific policy recommendations to European and Central Asian governments. We have advocated for legal reforms, better law enforcement training, and greater recognition of anti-trans violence as a distinct category of hate crime.

By gathering concrete data on anti-trans violence and using it as the foundation for our advocacy efforts, TGEU's ATV project brings greater visibility to the threats and challenges faced by the trans and nonbinary communities, with an emphasis on further marginalised members. The initiative underscores the importance of evidence-based advocacy in pushing for meaningful policy changes and social reform.

The Trans Murder Monitoring Project

The *Trans Murder Monitoring (TMM)* project is an integral initiative by Transgender Europe (TGEU) that systematically monitors, collects, and analyses reported killings of transgender and gender-diverse people worldwide. The project highlights the shocking extent of violence against this community and is crucial in drawing global attention to this severe human rights issue.

The primary goal of TMM is to provide a comprehensive and periodically updated source of data on the murders of transgender and gender-diverse people due to hate crimes and prejudice. The project gathers data from multiple sources, including local and national news stories, transgender organisations' reports, and community submissions. TGEU collaborates with various partners globally to ensure that the data is as exhaustive and accurate as possible. Since its inception in 2009, the TMM project has been continuously updating and maintaining its database, making it one of the most long-standing and detailed sources of information on trans-related homicides. While TGEU is a European-focused organisation, the TMM project has a global scope, capturing data on murders of transgender people from all continents.

Each year, TGEU releases an update of the TMM data, specifically in the days leading up to the Trans Day of Remembrance, which is commemorated on November 20th. This day memorialises those who have been murdered as a result of transphobia. To make the data more accessible and impactful, TGEU often presents the information in the form of infographics, charts, videos, and maps. These visuals depict the number of reported killings in different countries, regional trends, and other pertinent data points. We also provide an analysis founded in the intersections between the different socio-demographic characteristics of the victims, highlighting the importance of race and gender in the global phenomena. And, because it's essential to humanise the data, alongside the numbers, the names of known victims are often read aloud or displayed during TDoR events. In some cases, brief stories or contexts behind the murders are also shared, bringing to light the grim realities faced by the community.

The data from TMM is disseminated widely across social media platforms, news outlets, and through partner organisations. This global outreach ensures that the issue gets attention from policymakers, activists, and the general public alike. And from 2022, Uwazi started playing an essential role in the documentation and data collection process of TMM.

The presentation of data isn't just an act of remembrance. It's also a call to action. By showing the scale of the problem, TGEU and other organisations use the data to push for policy changes, improved legal protections, and better support systems for the transgender community. In summary, TGEU's Trans Murder Monitoring project plays a vital role in shining a spotlight on the violence faced by the trans and gender-diverse community worldwide. By presenting this data annually on the Trans Day of Remembrance, TGEU ensures that the lives lost are remembered, and the urgency of addressing this violence is reinforced on a global scale.

8. Conclusion

The guidelines provided on leveraging the Uwazi platform for trans rights advocacy by TGEU offer a comprehensive roadmap for activists and organisations alike. With the intersection of technology and advocacy, Uwazi emerges as a potent tool to enhance visibility, streamline data management, and bolster advocacy efforts. The platform's unique features, combined with the specified guidelines, empower users to systematise, and present data on trans rights violations in a compelling and impactful manner. As we move into an era where data-driven narratives become increasingly influential, harnessing platforms like Uwazi is not just recommended, but essential. TGEU's dedicated efforts in outlining this guide underline the importance of integrating modern tools with advocacy to foster a more inclusive and equitable future for trans individuals worldwide.

Through these guidelines, the potent synergy between the Uwazi platform and TGEU's pivotal projects, ATV and TMM, become clear. The Uwazi platform, with its cutting-edge features, serves as a backbone for collating, managing, and presenting data critical to the trans rights advocacy efforts. The ATV project – focusing on illuminating violence against transgender people – and the TMM project – which diligently tracks trans-targeted murders worldwide — both benefit profoundly from Uwazi's functionalities. The intertwining of these projects with Uwazi reiterates that in the fight for trans rights, the combination of passion, dedication, and modern tools can pave the way for transformative change.

TGEU

TGEU (Transgender Europe) is a trans-led non-profit for the rights and wellbeing of trans people. TGEU represents 215 member organisations across 50 countries in Europe and Central Asia.

For more publications and important news on trans rights and wellbeing:

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