User’s Guide

This guide describes how to get started with the online Reverse Osmosis (RO) Market Trends Quarterly Data Reporting site.

View the following pages for illustrated descriptions on how to enter data, view question comparisons and run dynamic reports.

Website: https://rotrends.wqa.org

Questions: rotrends@wqa.org
About the Program

Quarterly Program for RO Manufacturers

The WQA Reverse Osmosis Market Trends Report is a report that will track quarterly sales trends for residential reverse osmosis (RO) systems and replacement RO membrane cartridges that are manufactured, then sold to the U.S. and/or Canada. This report will track the number of RO systems and replacement membrane cartridges sold, not revenue. Individual company responses will be kept confidential, and results will only be displayed in aggregate. Results are expected to be made available to participants 90 days after site opens for data collection. Questions or comments on the report should be directed to rotrends@wqa.org.

Data to be Reported

Companies **SHOULD** report:
- Residential RO systems and replacement RO membrane cartridges your company manufacturers, then sells into the U.S. and/or Canada.
- Residential RO systems that your company assembles from pre-manufactured parts, then sells into the U.S. and/or Canada.

Companies **SHOULD NOT** report:
- Commercial or industrial RO systems.
- Residential RO systems or replacement RO membrane cartridges sold to countries outside of the U.S. or Canada.
- Residential RO systems or replacement RO membrane cartridges that your company buys from other manufacturers, then re-sells.

Testimonials

"Key market players are joining forces to create a report like no other. The RO Market trends reports will give us a unique trending view of the RO Market."

*Claudia Milliron, Kinetico and WQA RO Market Trends Report Task Force Chair*

“RO Manufacturers have been interested in this for years. In order to be able to give the best and most accurate information possible, it’s going to be imperative that all our [RO] manufacturer members submit their information quarterly.”

*DJ Shannahan, 2020-21 WQA President, August 2020 President's Chat*
**Secure:** The platform, powered by Dynamic Benchmarking, uses industry best encryption to protect your user ID and password. All data submissions and the delivery of results are protected using multiple layers of security and encryption. Your response data is encrypted and protected by SSL when in transit from your browser to the Dynamic Benchmarking databases. You can see this SSL certification by putting your mouse on the lock next to the HTTPS part of the URL.

**Confidential:** Individual responses are not accessible to the WQA staff. Survey responses are only released as aggregated data that cannot be traced back to specific companies, facilities or individuals. To ensure data anonymity, all results are displayed in the aggregate and a pre-determined minimum number of responses are required for results to be displayed.

**Trustworthy:** Dynamic Benchmarking stands by their pledge to strive to execute well-researched, tested surveys that use statistically valid survey techniques. Their aggregation methodologies and data analysis are continually tested, reviewed and updated to ensure validity.

### Supported Browsers

All current browser versions are fully supported as follows (*older versions of browsers may work but will not provide the best experience*):

- Use the recommended browser settings for security and cookie settings.
  - Cookies must be enabled to support the logging in process.
- Chrome/Firefox/Safari – these browsers auto-update so the latest version should be used.
- Internet Explorer 11 - support for IE is going to be phased out when Windows 7 is no longer supported by Microsoft.
- Microsoft Edge – browser that comes with Windows 10.

### Data Reporting Schedule

<table>
<thead>
<tr>
<th>Reporting Period</th>
<th>Data Submission Period</th>
<th>Reports Available*</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Quarter (Q1):</td>
<td>April 1 – May 31</td>
<td>July 1st</td>
</tr>
<tr>
<td>January 1 – March 31</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Second Quarter (Q2):</td>
<td>July 1 – August 31</td>
<td>October 1st</td>
</tr>
<tr>
<td>April 1 – June 30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Third Quarter (Q3):</td>
<td>October 1 – November 30</td>
<td>January 1st</td>
</tr>
<tr>
<td>July 1 – September 30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fourth Quarter (Q4):</td>
<td>January 1 – February 28/29</td>
<td>April 1st</td>
</tr>
<tr>
<td>October 1 – December 31</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*The release date of industry-wide results each quarter is dependent on EVERY reporting company providing data in a timely and consistent manner each quarter.*
On the “My Account” page, Users can:

- Update your information – name/email.
  
  - To change a username, contact WQA support.
- Change your password.
  
  - Passwords must include: lowercase, uppercase, number and non-alphanumeric characters, and must be at least eight (8) characters long.
- Add/manage account users.
  
  - Account administrators can add new users as well as manage existing users in your account through the My Account link at the top of the home page. The Users section of this page will only display if you have administrator permissions for your account.
  - Add new user contact information and set user permissions:
    - **Administrator**: Company Setup access, as well as read-write permission.
    - **Read-Write User**: Can enter data & access results.
    - **Read-Only User**: Can view results but cannot add or edit data.
    - **Write-Only User**: Can add or edit data but cannot access results.
  - New users will immediately receive an email with their user name and log-in instructions. Occasionally these emails are caught by spam filters, so be sure to check spam/junk folders.
- Review the Terms of Use, Privacy Policy, and Cookie Policy.
- Review the Communication preferences and choose opt-in to receive platform emails and reminder messages about important dates.
- Once all updates/edits are complete, simply click **DONE** to continue.

**PLEASE NOTE:** Automated site emails, including new temporary passwords, are sent from mail@dynbench.com. Be sure to have all new users add ADD mail@dynbench.com to their safe senders list to ensure emails are not blocked or sent to your junk/spam email folder.
The site is divided into sections. “My Data” is where you will enter/report quarterly data. Results are accessed through the “Results: By Question”, “Results: Download Reports” and “Results: RO Market Trends Report” tabs. The WQA Market Trends Report will include aggregate comparisons (displayed in percentiles) and total industry unit sales across all reporting companies. This data will released when all data has been reported.

Status icons next to each subcategory indicate your progress and warn you when you have missed a required question or when you have a numeric value outside of the expected range.

Your overall completion rate can be tracked through the progress graph & messaging at the bottom of the page.

The site will default to the current quarter available for data entry. To switch to a different quarter or year, click on the Year and Quarter dropdowns in the blue toolbar to activate a different quarter. Data entry will be open for Quarterly Reporting for 60 days (to report data for the previous quarter, starting for Q1, 2021).

To navigate back to the Welcome Message, view the My Account Page, view the Support Page or Logout, click on the appropriate link.
As you enter data, the entry box turns green, indicating that new data has been entered and must be saved by clicking the **Save** or **Save & Next** button at the bottom of the page.

To abandon or discard newly entered data, click **Cancel**.

Required questions are noted with a large, red asterisk (*).

Some questions have the option of checking **n/a**, indicating that the question does not apply to you. For example, you might not sell Countertop Units in the US, so checking **n/a** for this question is the appropriate response.

Some numeric questions are set with expected answer ranges and data checks to assist with ensuring data has been entered correctly. If you enter a value outside of the expected range, you will see a warning sign appear. You will be able to save this data, but it will be flagged as being out of the expected range.
The following results are available:

- **Results: By Question**: Accessed from the 2nd tab on your home page, question-by-question comparisons allow you to see how you compare to other participants for every question in the survey (this data displays aggregate results in percentiles).

- **Results: Download Reports**: Accessed from the 3rd tab on your home page, personalized, dynamic reports provide you with a collection of results information presented in either chart or table format (data in these reports is displayed in the aggregate in percentiles).

  - **A consolidated summary (RO Market Trends Report)** is also available in the site. This report displays the “total” industry unit sales based on data entered each quarter by all manufacturers reporting data.

  - To ensure data anonymity, all results are aggregated and a minimum of 5 data points is required for the aggregate data to be displayed.

    - Numeric results are presented in quartiles, values that divide a list of numbers into quarters:
      - 25th Percentile/first quartile: 25% of the data fall below this percentile.
      - 50th Percentile/median: The median represents the middle number where 50% of answers are lower and 50% are higher.
      - 75th Percentile/third quartile: 75% of the data fall below this percentile.

    - Multiple Choice results are reported with the percentage of answers associated with each response option for that question.

    - Unless a chart is presenting multiple pieces of data (such as in a pie chart), your entered data/responses will be represented in a different color.

**Results: By Question (when available)**

- From the **Results: By Question** tab, click on any question group or sub-group to begin viewing comparisons.

- Click on the icon to the right of each comparison result to view the data in a chart, which can then be saved as either PDF or PPT.

**Personalized, Dynamic Reports (when available)**

- From your reports tab, click on a report name to download your personalized report.
  - **PowerPoint** reports display data in charts and graphs.
  - **Excel** reports display data in spreadsheet/tabular format.
• On the Results: RO Market Trends tab, users can download the latest report available.

• Data in the report is still being determined and will be based on companies reporting data for each category. An example report is shown below.