Define an Activity

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DevResults offers several tools for defining activities:

1. **Create** or **edit** a single activity
2. **Create** or **edit** multiple activities using an **Excel upload**
3. **Edit** multiple activities from the **activity index**

> **Note:** Any user whose group includes **View & Edit** permissions for **Activity Overview** can create new activities.

Create an activity

To add a new activity in DevResults go to **Program Info > Activities** from any page.
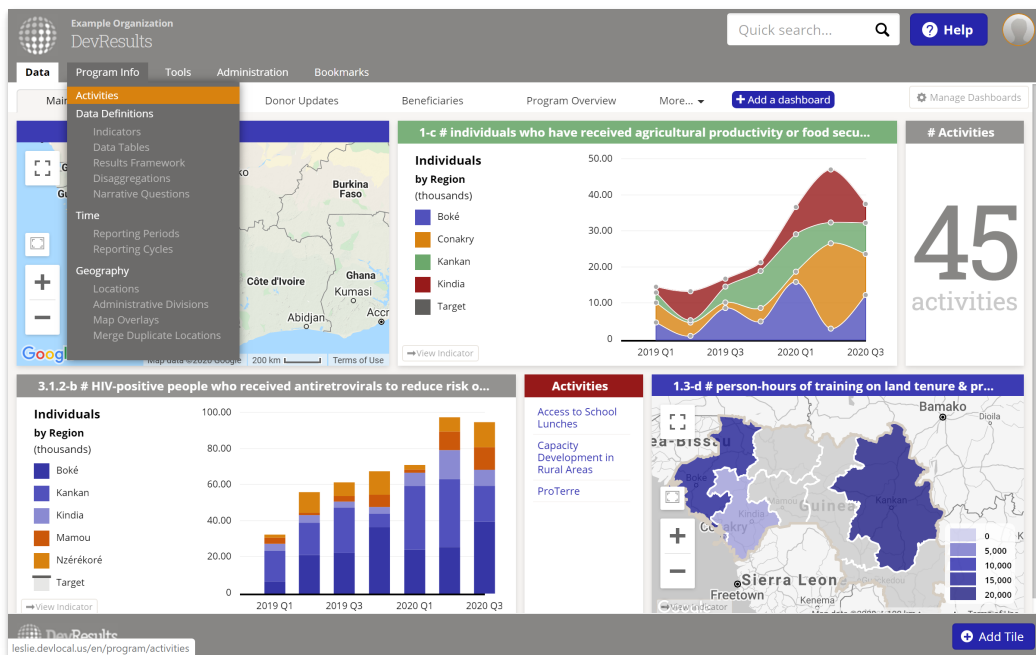
This will open the activities index page. To create a new activity, click the **+ New Activity** button in the lower right.

In the **Create New Activity** pop-up, type the name of the new activity and click the **+ Create Activity** button.

You will be taken to the new activity's **Overview** tab where you can add other information about the activity.

This includes reference information, including:

- **Short Name** - such as the name everyone uses when speaking about the activity
- **Reference Number** - such as the grant number
- **Code** - such as an additional internal code for the activity

And descriptive information. If you'd like to change, add to, or remove the fields in this section, you can do so by going to **Administration > Custom Fields**. Read more about **custom fields for activities**.

To configure a new activity in DevResults for reporting indicator results, the activity must be assigned a number of other elements. These elements include:

- **Status:** You must select a status to find this activity when filtering by status.
- **Mechanism:** You must select a mechanism to find this activity when filtering by mechanism.
- **Dates:** You must add dates in order for this activity to appear on the timeline or to find this activity when searching by date.
- **Reporting Periods:** You must add the reporting periods for which this activity will report indicator results or narrative results.

- **Results and Indicators:** You must assign the results and indicators for which this activity reports data. You can look at the **Assign an Indicator to an Activity** page for more information.

Organization Info: You must add the partner organization that will manage this activity in order to enable that organization's DevResults users to report indicator results and narrative results for this activity.

- **Partner Type**: You can select a Partner Type to indicate what type of partner relationship this is.
- **Primary Contact:** You can optionally add the primary contact for this activity.
- To add organizations, users, or partner types, click the relevant buttons below the grid. Once you've added them, clicking the Done button will bring you back to this screen.

- **Staff Roles:** You must **assign users** in order for those users to be included in emails generated by DevResults about reporting activity and from communication in the Discussion tab. **Partner users cannot access an activity unless they are assigned to it in this table**.

Finally, for this activity to be completely set up for reporting indicator results and narratives for each of its reporting periods, you must **Assign a Geography to an Activity.**

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Edit an activity

To edit an activity, go to **Program Info > Activities** from any page. This will open the activities index page.

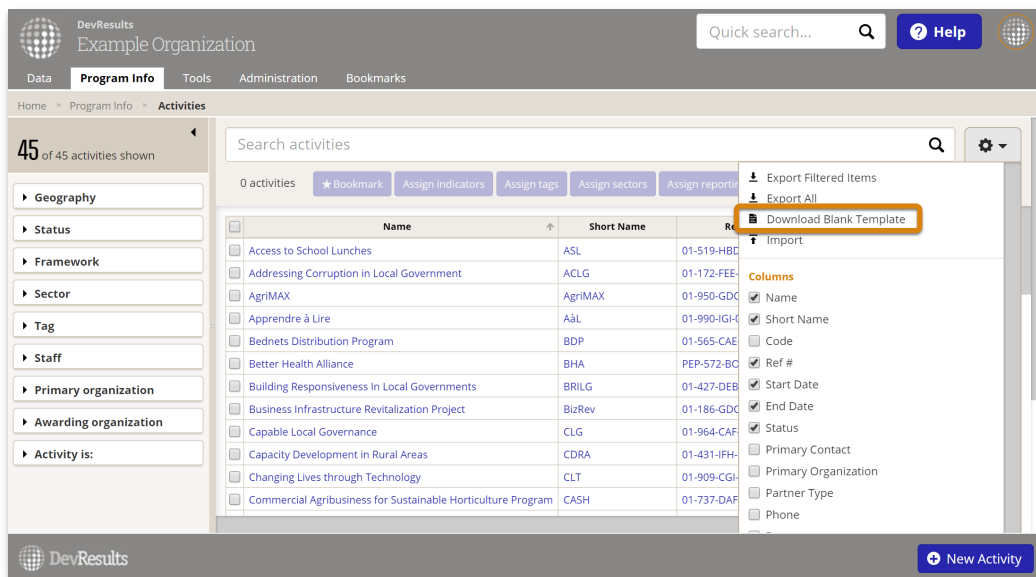Click on the activity you'd like to edit. Make desired changes.

> **Note:** You can change information in the **Reference** and **Description** sections without affecting indicator results. Unassigning reporting periods, indicators, or geographies will delete any data reported for those elements for this activity.

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Upload new activities

To add many new activities at once, you can upload a spreadsheet containing their details instead of creating each activity individually. First, go to **Program Info > Activities** to open the activity index.

On this page, click on the gear icon and then click **Download Blank Template** to get an Excel template.

Edit the Excel file by adding the list of activities you'd like to upload.

Awarding Organization needs to reference an organization that already exists in your site.

- You can enter multiple **Sectors** separated by commas, for example: "Health, Education".
- You can enter multiple **Tags** separated by commas, for example: "Training, Engagement".
- For **Status**, **Mechanism**, **Sectors**, and **Tags**:
  - If you **have permission** to edit these elements, **you can add new values in the template** and they will be created when you import the new file.
  - If you do **not** have permission to edit these elements, **the template must reference values that already exist in the site**, or the import will be rejected.

Save your spreadsheet, click the gear icon again, and select **Import**.

This will open a pop-up window to walk you through the upload process. Choose your file and make sure the summary shows you the expected number of new activities. If there are any errors in the file, you'll get a message explaining what they are. If everything looks good, click **Continue**.

You'll get a message saying that the activities were imported. Once you click **Done**, your activity index page will refresh and you'll see your new activities there!

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Edit multiple activities using an Excel upload

You can also use Excel to update multiple activities. To do so, use the same instructions as above, but instead of downloading a blank template, choose **Export All**.
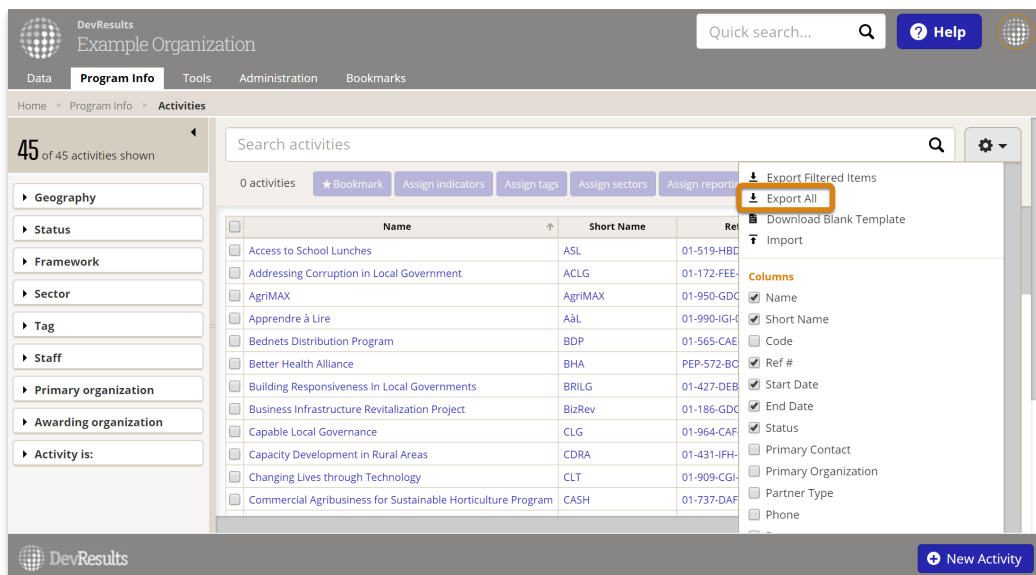
Then edit the spreadsheet that you downloaded -- for example, to add a new sector or tag.

> **Note:** To edit existing activities, DO NOT delete or change the awardID. This is the only way the system knows which activity should be updated.

When you import the Excel file, existing activities will be updated with any changes to the spreadsheet.

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Edit multiple activities from the activity index

To make managing activities easier and faster, we offer the ability to edit multiple activities at once right from the activity index. Currently, the edits you can make this way are:

- Bookmarking activities
- Assigning indicators
- Assigning tags
- Assigning sectors
- Assigning reporting periods by dates
- Changing status
- Deleting activities (don't worry -- we'll check with you to confirm this is really what you want to do!)

First, go to the activities index page by clicking **Activities** at the top of any DevResults page.

Click the checkbox next to the activities to edit. You can either scroll through the list to find what you need, or use the left hand filters to narrow the list (and then select all). In this example, we've selected all activities in the Health sector.
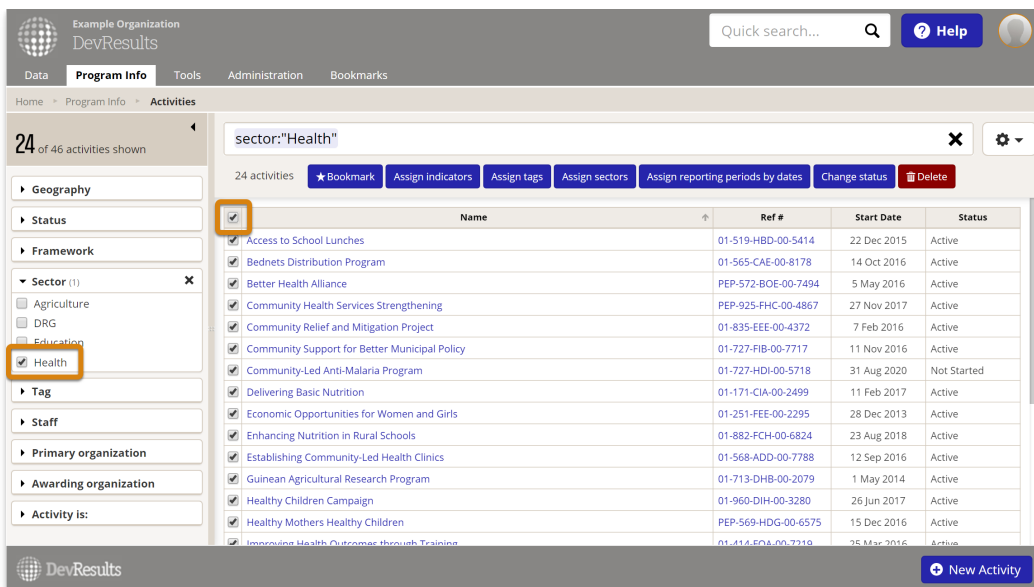
Next, click the button for the edit you'd like to complete. This will open a pop-up to help you complete that action. In this example, we're assigning four indicators to the selected activities.
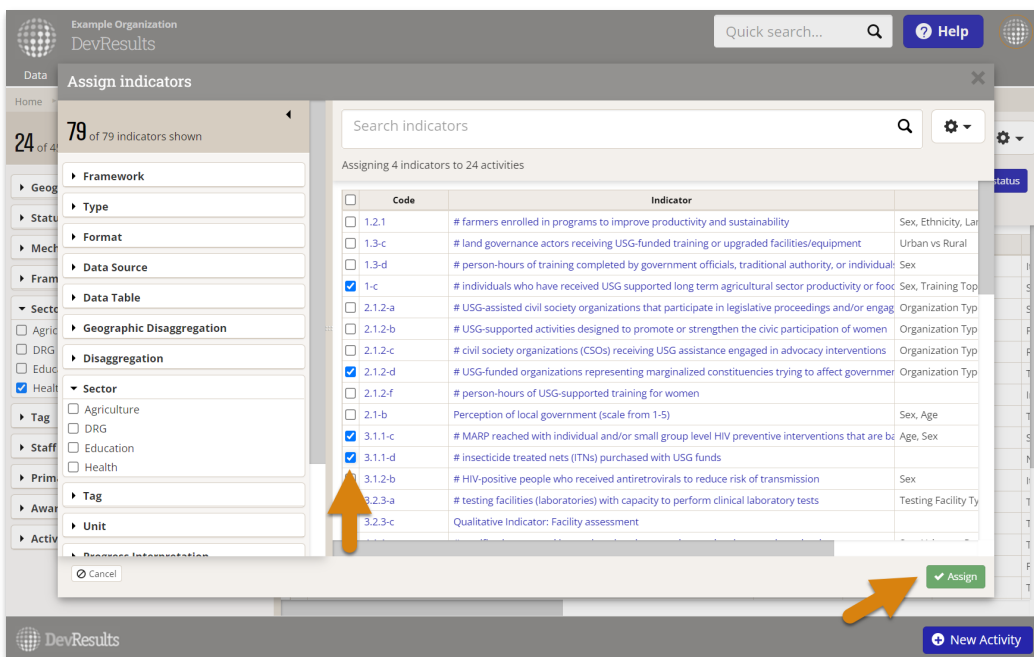
Notes on specific tools

- **Bookmarks:** **Bookmarked activities** appear on your dashboard in the "Bookmarked Activities" tile. Every user has their own set of bookmarks; this does not edit anyone else's bookmarked activities or dashboard.
- **Assign indicators:** Each activity-indicator assignment comes with the indicator's default reporting cycle, such as "quarterly" or "annual". To edit the reporting frequency for any particular activity-indicator assignment, go to the activity's overview page.
- **Assign reporting periods by dates:** This action assigns reporting periods from all reporting cycles based on the start and end dates for the activity. If the span of the activity overlaps with the span of a reporting period, even by just one day, then that reporting period will be included. If an activity is missing a start or end date, this action will not affect that activity. No duplicate assignments are created, so it's ok to include activities that might already have some or all reporting periods assigned. You can always go to an activity overview page to add or remove reporting periods as needed.

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