

Define an Activity

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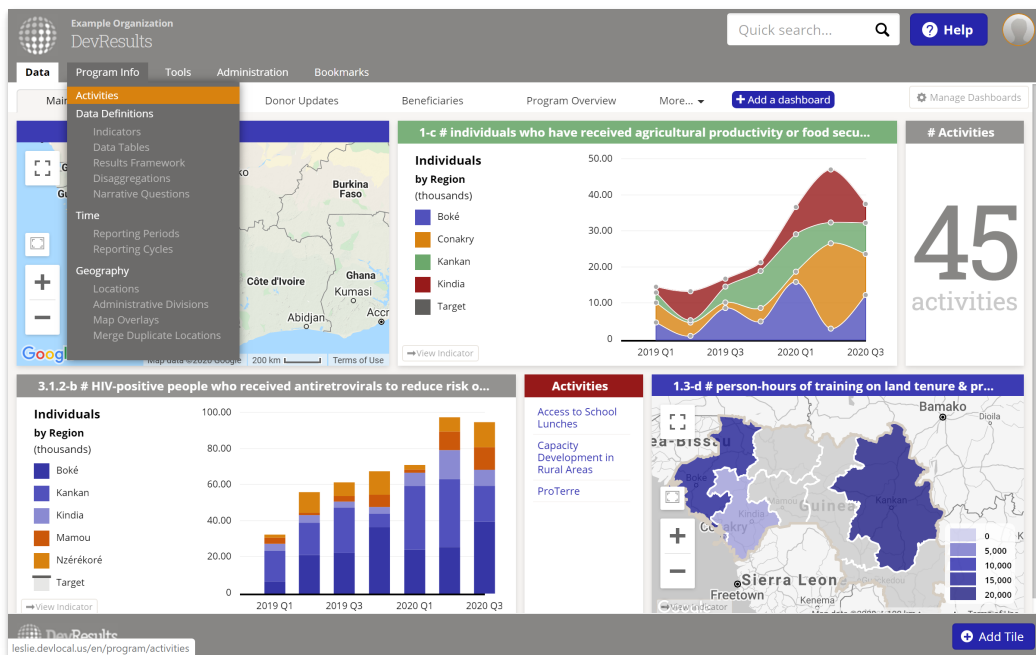
DevResults offers several tools for defining activities:

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.

Example Organization
DevResults

Quick search...

Data Program Info Tools Administration Bookmarks

Home Program Info Activities

45 of 45 activities shown

Search activities

0 activities

Name	Ref #	Start Date	Status
Access to School Lunches	01-519-HBD-00-5414	22 Dec 2015	Active
Addressing Corruption in Local Government	01-172-FEE-00-6674	16 Apr 2018	Active
AgrIMAX	01-950-GDC-00-4751	19 Sep 2017	Active
Apprendre à Lire	01-990-IGI-00-8510	12 Feb 2020	Active
Bednets Distribution Program	01-565-CAE-00-8178	14 Oct 2016	Active
Better Health Alliance	PEP-572-BOE-00-7494	5 May 2016	Active
Building Responsiveness In Local Governments	01-427-DEB-00-4262	21 Apr 2018	Active
Business Infrastructure Revitalization Project	01-186-GDC-00-4253	27 Jan 2018	Active
Capable Local Governance	01-964-CAF-00-6343	8 Jan 2016	Active
Capacity Development in Rural Areas	01-431-IFH-00-1952	19 Jan 2016	Active
Changing Lives through Technology	01-909-CGI-00-4613	5 Jul 2018	Active
Commercial Agribusiness for Sustainable Horticulture Program	01-737-DAF-00-4603	21 Jul 2018	Active
Communities of Hope	01-873-HBB-00-8378	17 Aug 2018	Active
Community Health Services Strengthening	PEP-925-FHC-00-4867	27 Nov 2017	Active
Community Relief and Mitigation Project	01-835-EEE-00-4373	7 Feb 2016	Active

DevResults

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

Create New Activity

Name

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

Example Organization
DevResults

Quick search...

Data Program Info Tools Administration Bookmarks

Home Activities Improving Public Works

Improving Public Works

Overview Performance Finance Geography Checklists Forms Documents Calendar Photos Discussion IATI

Reference

Name

Short Name

Reference #

Code

Details

Status

Mechanism

Description

Context
Background on the development issues creating a need for this activity.

Objectives
Objectives of this activity.

Activity Summary
Key steps that will achieve the objectives of this activity.

Expected Results
Key outcomes anticipated from this activity.

Beneficiary Description
Brief description of the beneficiaries of this activity.

Deliverables & Reporting
Summary of specific deliverables that the partner organization is asked to produce, and reporting requirements.

DevResults Created by Leslie Sage 124 Mar 2020

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

Reference

Name: Improving Public Works

Short Name: IPW

Reference #: US-001-30-GW25

Code: IPW2015

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](#).

Description

Context
Background on the development issues creating a need for this activity.

Objectives
Objectives of this activity.

Activity Summary
Key steps that will achieve the objectives of this activity.

Expected Results
Key outcomes anticipated from this activity.

Description of Beneficiaries
Brief description of the beneficiaries of this activity.

Deliverables & Reporting
Summary of specific deliverables that the partner organization is asked to produce, and reporting requirements.

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.

Details

Status: Active

Mechanism: Indefinite Delivery

Dates: 15 Dec 2012 - 13 Aug 2019

Reporting Periods	Name	Start Date	End Date	Status
	FY 2013	1 Oct 2012	30 Sep 2013	Approved
	FY 2014	1 Oct 2013	30 Sep 2014	Approved
	FY 2015	1 Oct 2014	30 Sep 2015	Approved
	FY 2016	1 Oct 2015	30 Sep 2016	Submitted
	FY 2017	1 Oct 2016	30 Sep 2017	No Data

+ Add Reporting Periods

- **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.

Classification

Results and Indicators **Indicators 2** **Results 2**

Indicator	Reporting Cycle
1.2-a # kilometers of roads improved or construct...	FY Annual
1.4-a % gross margin per kg of tubers	FY Annual

+ Select Indicators... Allow reporting cycles to vary over time

Technical Sector

- Agriculture
- Education
- + Add a sector...

Tags

- Climate
- Rural
- + Add a tag...

Partner Organization

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.

Partner Organization

Organization Info

Partner Organization	Partner Type	Primary Contact	
Kunkle Associates		Abdoulaye Agbo	Details
<i>Click to add...</i>			

Note: In reports, all data for this activity will be attributed to the first (primary) organization listed here.

[Manage Organizations](#) [Manage Partner Types](#) [Manage Users](#)

- **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.**

Staff Roles and Partner Access

Person ↑	Role	Title	Organization	Permissions
Profile Aasit Nanavati				Owners
Profile Aboubacar Diallo	Reviewer	Finance & Administration Direc...	USAID	Owners
Profile Aicha Zeinab	Reviewer	Grants Specialist	Gates Foundation	Partner Managers
Profile Aissata Diop	M&E Specialist	Cy/Pmtct Study Specialist	Kunkle Associates	Partner Managers
Profile Alhassane Senghor		M&E And Research Specialist		Partner Managers
Profile Bo Goldberg	Primary Contact	Clinical Services Director	Kunkle Associates	Partner Managers
Profile Dafu Wen		Team Leader		Managers
Profile Isabelle Mbagboué	Approver	Deputy Executive Director	USAID	Owners
Profile Leslie Sage	Project Manager			Owners
Profile Peter Johnson	M&E Specialist	Senior Virologist	Kunkle Associates	Partner Managers

+ Assign Users

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.

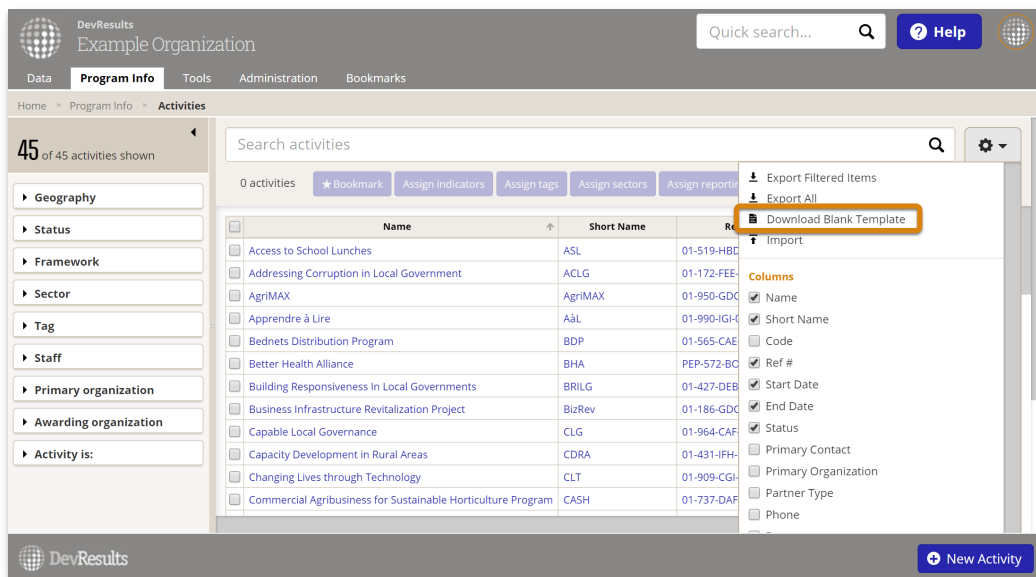
Note: You can change information in the **Reference** and **Description** sections without affecting indicator results. Unassigning reporting periods, indicators, or geographies will delete any data reported for those elements for this activity.

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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.

	A	B	C	D	E	F	G	H	I	J
1	Name	Short Name	Ref #	Code	Status	Mechanism	Start Date	End Date	Sectors	Tags
2	Safe Routes to School	SRS	01-644-ACA-00-8664	ED-06	Active	Grant (Fixed Obligation)	12/20/2017	1/30/2024	Education	Gender, Infrastructure
3	Providing Access to Mosquito Nets	Nets	01-533-FAH-00-5836	HE-10	Completed	Contract (Cost Reimbursement)	9/17/2017	11/22/2019	Health	Children, Rural
4	National Interventions in Health and Education	NIHE	01-459-HAG-00-4055	ED-01	Active	Memorandum of Understanding	2/1/2016	4/24/2022	Education, Health	Infrastructure
5	Water, Sanitation, and Health	WaSH	01-847-CHG-00-8288	HE-02	Completed	Grant (Public-Private Partnership)	6/10/2016	8/16/2019	Health	Children

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**.

The screenshot shows the 'Activities' page in the DevResults system. A search bar at the top indicates '0 activities' are found. A dropdown menu is open, showing options like 'Export Filtered Items', 'Export All', 'Download Blank Template', and 'Import'. The 'Import' option is highlighted. Below the menu is a table of activities:

Name	Short Name	Ref #
Access to School Lunches	ASL	01-519-HB
Addressing Corruption in Local Government	ACLG	01-172-FEE
AgriMAX	AgriMAX	01-950-GDC
Apprendre à Lire	AàL	01-990-IGI
Bednets Distribution Program	BDP	01-565-CAE
Better Health Alliance	BHA	PEP-572-BC
Building Responsiveness In Local Governments	BRILG	01-427-DEB
Business Infrastructure Revitalization Project	BizRev	01-186-GDC
Capable Local Governance	CLG	01-964-CAF
Capacity Development in Rural Areas	CDRA	01-431-IFH
Changing Lives through Technology	CLT	01-909-CGI
Commercial Agribusiness for Sustainable Horticulture Program	CASH	01-737-DAF

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**.

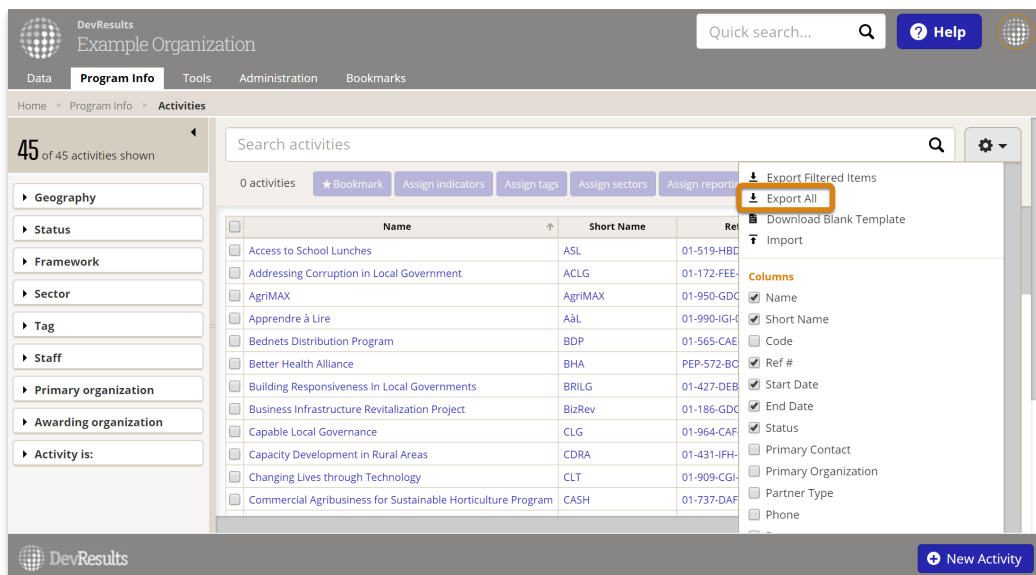
The 'Import' pop-up window is shown in two steps. Step 1, 'Upload file', shows a file named 'Activities.xlsx' (23 KB) selected. Step 2, 'Preview', shows a green progress bar with a checkmark and the text 'Importing 8 Activities'. A 'Continue' button is visible at the bottom right of the preview area.

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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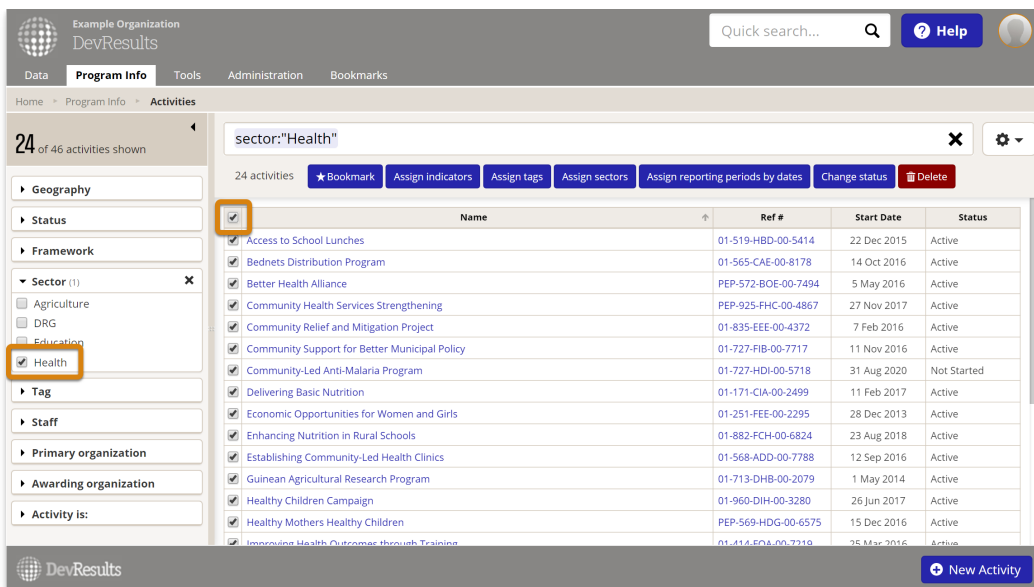
Edit multiple activities from the activity index

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:

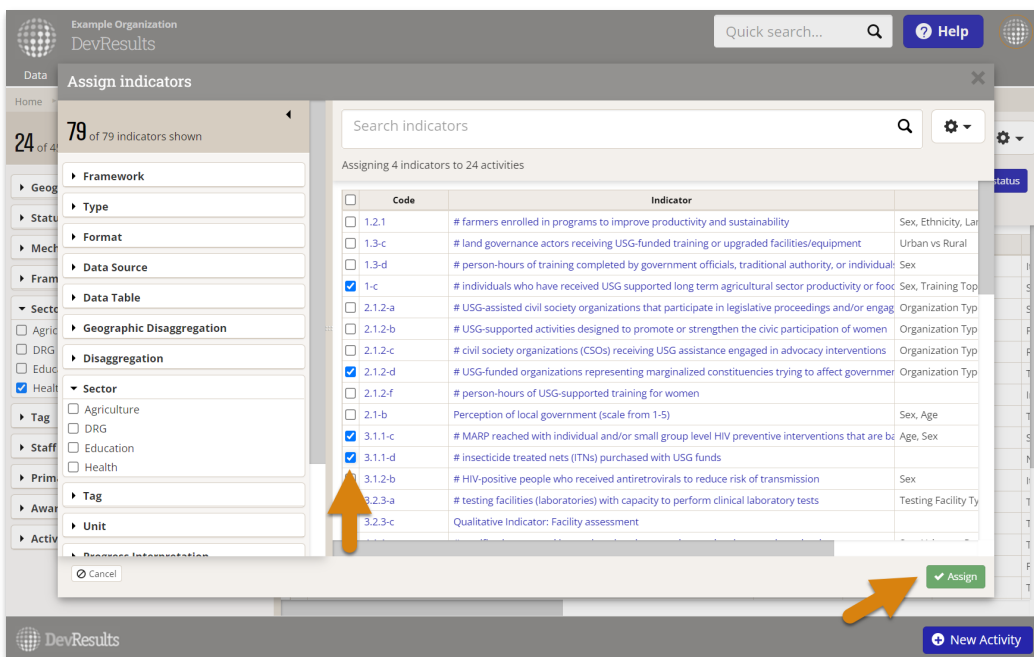
- Bookmarking activities
- Assigning indicators
- Assigning tags
- Assigning sectors
- Assigning reporting periods by dates
- Changing status
- Deleting activities (don't worry -- we'll check with you to confirm this is really what you want to do!)

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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