

Data Table Row Locking

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DevResults provides a **data submission and approval process** that ensures that after *direct entry* indicator data has been submitted and approved, it can no longer be edited by users with limited permissions.

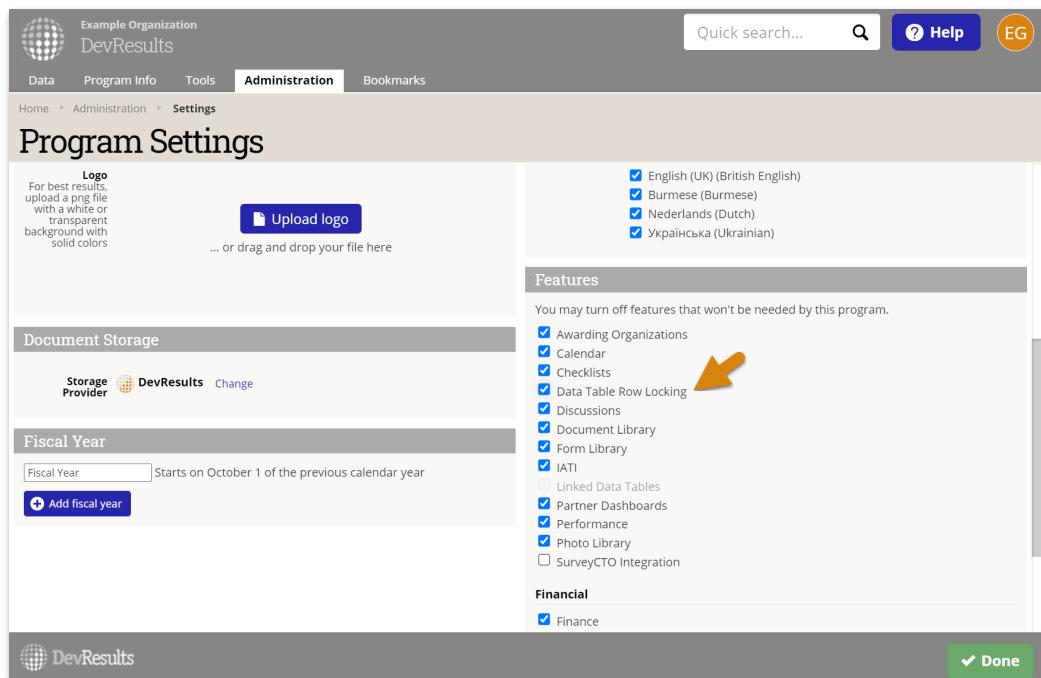
With the **data table row locking feature**, this functionality can also be enabled for *data tables*. Topics in this article:

- **How to enable data table row locking**
- **What happens when a row is locked?**
- **How can I tell if a row is locked?**
- **What are the differences between the row locking and direct entry workflows?**
- **How does data table row locking work?**

Note: Currently, data table row locking is incompatible with the **linked data tables** feature.

How to enable data table row locking

To turn this feature on, go to **Administration > Settings**. In the **Features** section, add a checkmark next to **Data Table Row Locking**. Once you see the "Your change has been saved" message, the feature is enabled.



The screenshot shows the 'Program Settings' page in DevResults. At the top, there is a navigation bar with 'Administration' selected. Below the navigation, there are sections for 'Logo' (with a placeholder for a logo file), 'Document Storage' (with a 'Storage Provider' dropdown and a 'Change' link), and 'Fiscal Year' (with a 'Starts on October 1 of the previous calendar year' input and a '+ Add fiscal year' button). On the right side, there is a 'Features' section. An orange arrow points to the 'Data Table Row Locking' checkbox, which is checked. Other checked features include 'Awarding Organizations', 'Calendar', 'Checklists', 'Discussions', 'Document Library', 'Form Library', 'IATI', 'Linked Data Tables', 'Partner Dashboards', 'Performance', 'Photo Library', and 'SurveyCTO Integration'. The 'Finance' section is also visible. At the bottom right of the page is a green 'Done' button.

Note: This process may take up to a minute to complete while the system evaluates all existing data to apply locks.

What happens when a row is locked?

Locked rows cannot be edited or deleted except by users who belong to a permission group with the **Owner** or **Results Data Approver** roles enabled.

In addition, users without those permissions cannot create new rows for dates that fall within locked project reporting periods.

How can I tell if a row is locked?

With data table row locking enabled, every data table will display one new column: **Locked?** If the row is locked, a lock icon will appear in this row. Clicking on that icon will provide a pop-up with details on the reporting period(s) locking it with links to take you directly to that project reporting period:

The screenshot shows a data table with columns: Key, Value, Locked?, Date, Activity, Location, Trainee ID, Sex, Age, Training Topic, and Training Type. The 'Locked?' column contains lock icons for rows 12,609, 12,608, 12,607, 12,606, 12,605, 12,604, 12,603, 12,602, 12,601, 12,600, 12,599, and 12,598. Row 12,609 is highlighted with a green background and a lock icon. A tooltip box appears over the lock icon with the text: 'Row Locked' and 'This row is locked according to the status of these reporting periods for this activity: 2020 Q3'.

If a user (without the owner or results data approver roles) tries to edit a row of data, they will see a warning when they try to save the change. The change will not be saved.

The screenshot shows a 'Data Form' for 'Capacity Development'. The form includes fields for Date (29 Jun 2020), Location (École Primaire de Kotouba Dgninta (Siguiri, Kankan)), Trainee ID (C-822907), Sex (Female), Age (0-14 (Children)), Training Topic (Education), Training Type (Advocacy), Initial Test Score (50 %), Final Test Score (82 %), and Points Improved (32 %). A warning box at the top right says: 'Failed to save changes. Cannot modify row data because it is locked.' The 'Locked?' column in the data table below also shows lock icons for the same rows as the screenshot above.

What are the differences between this workflow and the direct entry workflow?

Data table rows can always be entered for *future* reporting period submission windows, while **direct entry data** can only be entered once a reporting period's submission window is open. Since data tables often capture current data

on a weekly or monthly basis, we do not enforce the requirement that the *submission* window be open for information to be added to data tables.

How does data table row locking work?

With data table row locking enabled, each row in a data table is evaluated to see if it should be editable or not based on these criteria:

1. Is the data table used by any indicators?
 - **No:** data table rows are never locked
 - **Yes:** data table rows are evaluated for locking based on the indicators' defined date and project columns
2. What permissions does this user have?
 - Users who belong to permissions groups with the **Results Data Approver** or **Owner** roles can always add/edit data table data.
 - For anyone else, editing permissions depend on the criteria below.
3. What is the project reporting period's status?
 - **No Data or In Progress or Returned:**
 - Submission window is upcoming or open: rows falling within this project reporting period are editable by anyone with **View & Edit** permission for **Indicator Results**.
 - Submission window closed in the past: new rows cannot be added and existing rows are locked from editing (except by users with the **Results Data Approver** or **Owner** roles).
 - **Submitted:**
 - Rows falling within this project reporting period are only editable by those with the **Results Data Approver** or **Owner** roles.
 - **Approved:**
 - Rows falling within this project reporting period are only editable by those with the **Owner** roles.

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