

# Define a Reporting Period

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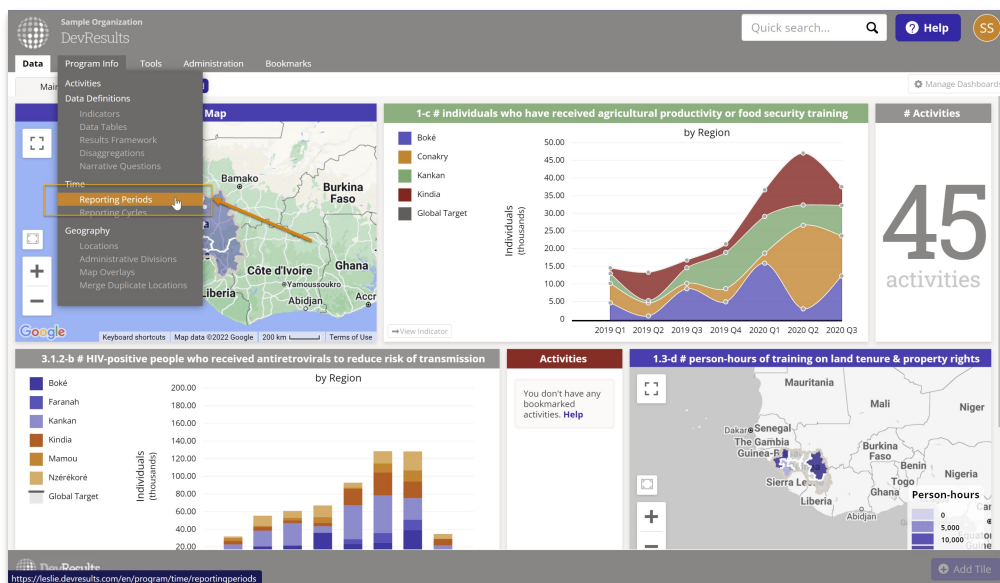
DevResults offers several tools for defining reporting periods:

1. **Create** or **edit** a single reporting period
2. **Create** or **edit** multiple reporting periods using an **Excel upload**

**Note:** Any user whose group includes **View & Edit** permissions for **Reporting Periods** can create new reporting periods.

## Create a reporting period

To add a new Reporting Period, hover over the **Program Info** tab at the top of any screen and select **Reporting Periods**.



This will open the reporting periods index page. To create a new reporting period, click the **+ New Reporting Period** button in the lower right.

Name	Start Date	End Date	Submission Start Date	Submission End Date	% Complete	Reporting Cycle
2030 Annual	1 Oct 2029	30 Sep 2030	1 Oct 2030	31 Oct 2030	0%	Annual
2030 Q4	1 Jul 2030	30 Sep 2030	1 Oct 2030	31 Oct 2030	0%	Quarterly
2030 Q3	1 Apr 2030	30 Jun 2030	1 Jul 2030	31 Jul 2030	0%	Quarterly
2030 Q2	1 Jan 2030	31 Mar 2030	1 Apr 2030	30 Apr 2030	0%	Quarterly
2030 Q1	1 Oct 2029	31 Dec 2029	1 Jan 2030	31 Jan 2030	0%	Quarterly
2029 Annual	1 Oct 2028	30 Sep 2029	1 Oct 2029	31 Oct 2029	0%	Annual
2029 Q4	1 Jul 2029	30 Sep 2029	1 Oct 2029	31 Oct 2029	0%	Quarterly
2029 Q3	1 Apr 2029	30 Jun 2029	1 Jul 2029	31 Jul 2029	0%	Quarterly
2029 Q2	1 Jan 2029	31 Mar 2029	1 Apr 2029	30 Apr 2029	0%	Quarterly
2029 Q1	1 Oct 2028	31 Dec 2028	1 Jan 2029	31 Jan 2029	0%	Quarterly
2028 Annual	1 Oct 2027	30 Sep 2028	1 Oct 2028	31 Oct 2028	0%	Annual
2028 Q4	1 Jul 2028	30 Sep 2028	1 Oct 2028	31 Oct 2028	0%	Quarterly
2028 Q3	1 Apr 2028	30 Jun 2028	1 Jul 2028	31 Jul 2028	0%	Quarterly
2028 Q2	1 Jan 2028	31 Mar 2028	1 Apr 2028	30 Apr 2028	0%	Quarterly
2028 Q1	1 Oct 2027	31 Dec 2027	1 Jan 2028	31 Jan 2028	0%	Quarterly
2027 Annual	1 Oct 2026	30 Sep 2027	1 Oct 2027	31 Oct 2027	0%	Annual
2027 Q4	1 Jul 2027	30 Sep 2027	1 Oct 2027	31 Oct 2027	0%	Quarterly

In the **Create New Reporting Period** pop-up, type the name of the new reporting period and click the **+ Create Reporting Period** button.

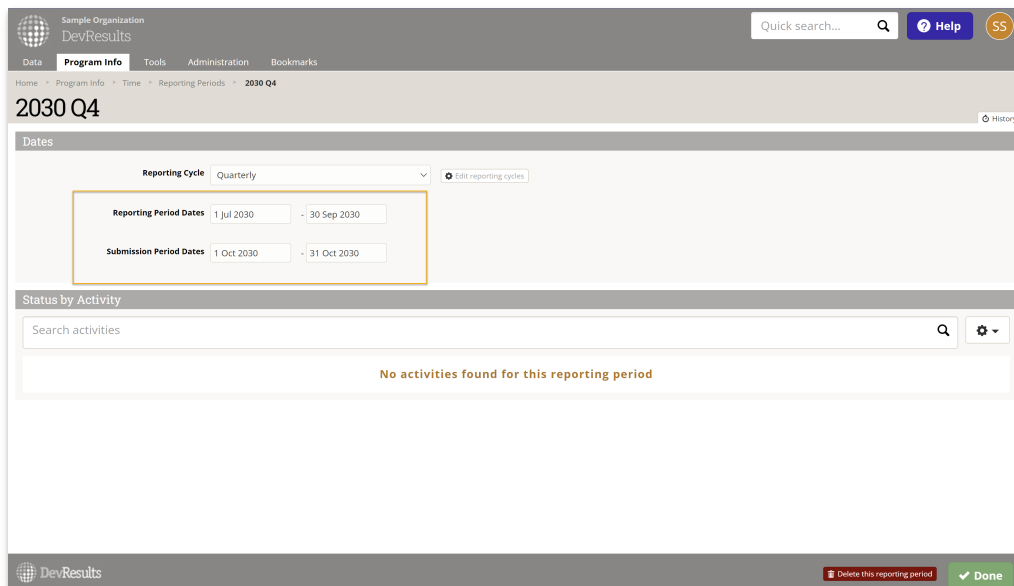
### Create New Reporting Period

Please enter a name for the new reporting period.

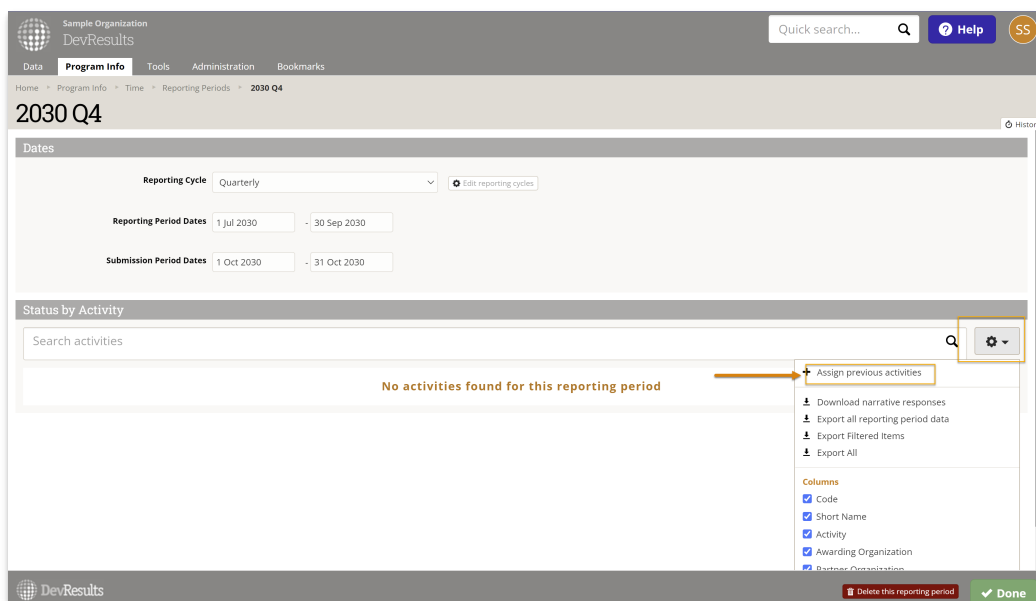
[+ Create Reporting Period](#)

You will be taken to the new reporting period's page where you can define the reporting period.

- If your site has more than one reporting cycle, you must select the appropriate **Reporting Cycle** for this reporting period. (If your site only has one reporting cycle, you won't see this option.)
- Define the start end end of the reporting period with the **Reporting Period Dates**.
- Define the submission window (when data may be entered for the period) with the **Submission Period Dates**.



If you are creating the next reporting period in a cycle that already has activities assigned to the previous period, you can use the **Assign previous activities** button to automatically assign all the activities that reported on the previous reporting period to this one. For example, in creating a FY 2019 Q1 reporting period, clicking this button will assign all the activities that were assigned to the FY 2018 Q4 reporting period. Select the gear on the left hand side and select **Assign previous activities** from the drop down menu.



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## Edit a reporting period

To add a new Reporting Period, hover over the **Results** tab at the top of any screen and select **Reporting Periods**. This will open the reporting periods index page.

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

**Note:** Reporting period start and end dates should generally not be changed for reporting periods that have data. If data was reported for a January-March reporting period and you changed the dates to April-June, all the data for that reporting period would be moved to April-June.

The same rule applies to reporting period names. If you change a reporting period name from 2019 Q1 to 2019 Q2, all the data for the Q1 reporting period will be re-defined as belonging to Q2.

It is appropriate to change reporting period start and end dates if they were incorrect, and it's appropriate to change reporting period names to something synonymous, like changing "2019 Annual" to "2019".

Changing the submission window dates can be changed without affecting any indicator data. This only changes when activity partners are able to enter data for a given reporting period.

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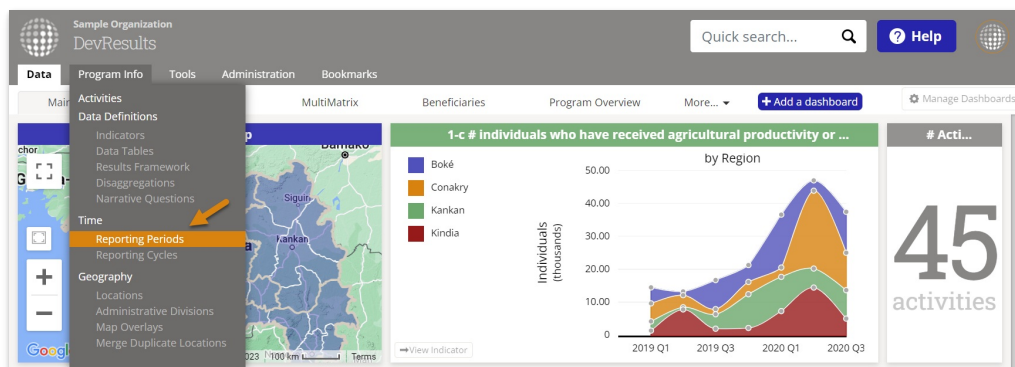
## Upload new reporting periods

To add many new reporting periods at once, you can upload a spreadsheet containing their definitions instead of creating each reporting period individually. There are three approaches to creating a spreadsheet with the desired list of reporting periods.

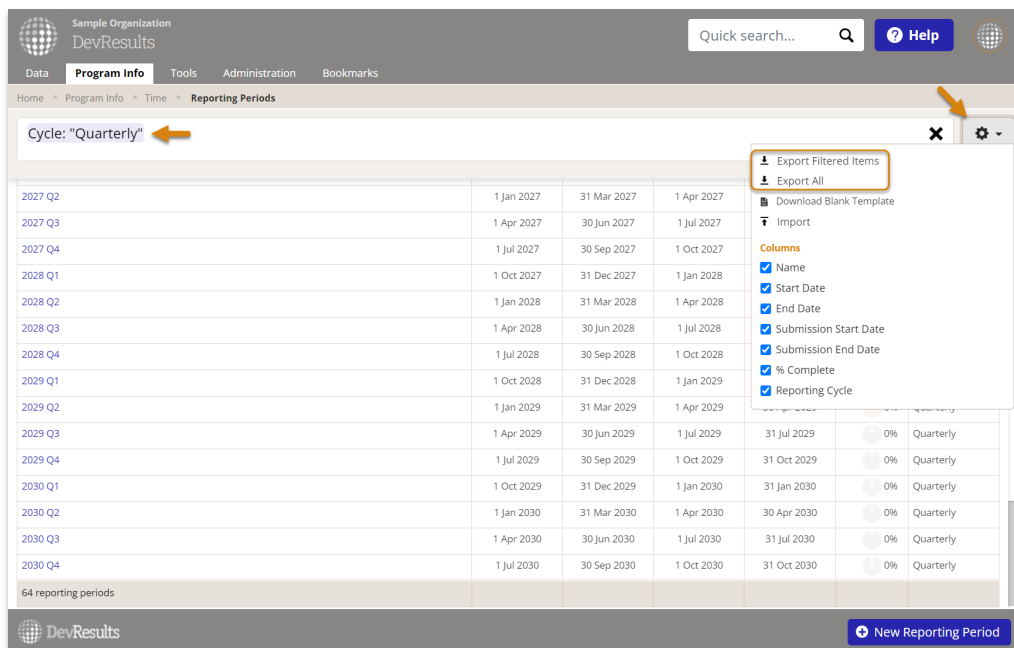
### Approach #1: Export existing reporting periods and extend the pattern

This approach works well if you're merely extending the pattern of dates for your current set of reporting periods into the future.

First, navigate to the reporting period index (**Program Info > Time / Reporting Periods**).



On this page, click on the gearbox menu in the upper right and then click **Export All** to get an Excel template of all your existing reporting periods. If you only want to add reporting periods for a certain reporting cycle (e.g. Quarterly), you can use the search bar to filter for that cycle only and then **Export Filtered Items** instead.



In Excel, start by sorting the list of reporting periods by Name or by Start Date to put them in a logical first-to-last, earliest-to-latest order. If you choose to **Export All** reporting periods from multiple reporting cycles, you may need to filter for one reporting cycle at a time.

There's a bit of an art to 'teaching' Excel the pattern and getting it to follow long. The trick is to highlight enough rows for it to see what you want, for every column *except* the reportingPeriodID column. Then, grab the "fill handle" (the small black square in the bottom right corner of the highlighted cells) and drag it down for as many new rows as you need. For instance, for annual reporting periods, highlighting two rows to start should be enough to show Excel that you want each row to add one year to the previous. For quarterly reporting periods, highlighting four rows to start is best (so that Excel can see how the naming convention repeats in sets of four).

	A	B	C	D	E	F	G	H	I
1	reportingPeriodID	Name	Start Date	End Date	Submission Start Date	Submission End Date	% Complete	Reporting Cycle	
61	25301	2029 Q4	7/1/2029	9/30/2029	10/1/2029	10/31/2029	0	Quarterly	
62	25302	2030 Q1	10/1/2029	12/31/2029	1/1/2030	1/31/2030	0	Quarterly	
63	25303	2030 Q2	1/1/2030	3/31/2030	4/1/2030	4/30/2030	0	Quarterly	
64	25304	2030 Q3	4/1/2030	6/30/2030	7/1/2030	7/31/2030	0	Quarterly	
65	25305	2030 Q4	7/1/2030	9/30/2030	10/1/2030	10/31/2030	0	Quarterly	
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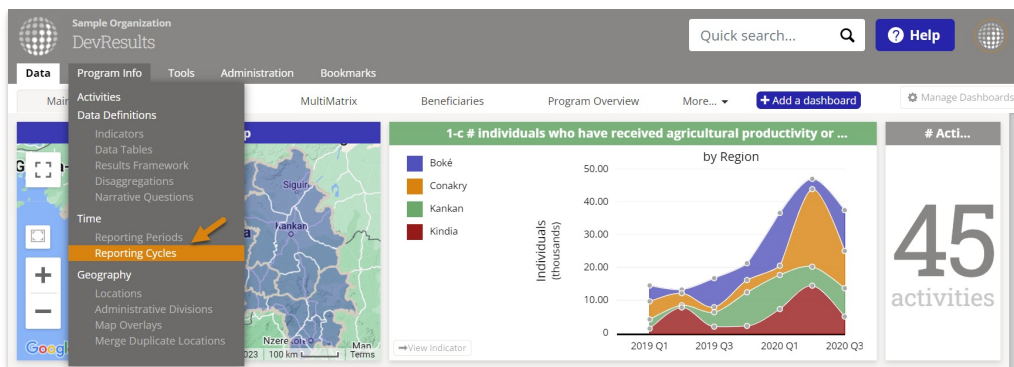
Double check that all start and end dates, naming conventions, etc. have been carried forward as you would expect. Sometimes Excel may not recognize the pattern, in which case you will have to edit those fields manually.

**Skip to the end of this section to see how to import your list of reporting periods.**

## Approach #2: Generate a list of reporting periods from DevResults

If your reporting periods are fairly standard and/or you do not yet have a set of reporting periods to use as a template for Approach #1, you can generate one from the **Reporting Cycles** page.

Navigate to **Program Info > Time / Reporting Cycles** If you do not already have a reporting cycle (e.g. Annual, Quarterly, etc.) for the reporting periods you want to add, you can **define a Reporting Cycle** on this page.



Once at least one reporting cycle exists, a white **Generate Reporting Periods** button will appear. Click this to open a window that will prompt you to choose a reporting cycle and enter a start and end date for the range of reporting periods you want to create. By using the interval and the submission window you defined for the selected reporting cycle, DevResults will produce a table of reporting periods. You may choose to add names and even edit various dates manually in this table in the app, or do so later in Excel.

Name	Start Date	End Date	Submission Start Date	Submission End Date
	1 Oct 2030	31 Dec 2030	1 Jan 2031	31 Jan 2031
	1 Jan 2031	31 Mar 2031	1 Apr 2031	30 Apr 2031
	1 Apr 2031	30 Jun 2031	1 Jul 2031	31 Jul 2031
	1 Jul 2031	30 Sep 2031	1 Oct 2031	31 Oct 2031
	1 Oct 2031	31 Dec 2031	1 Jan 2032	31 Jan 2032
	1 Jan 2032	31 Mar 2032	1 Apr 2032	30 Apr 2032
	1 Apr 2032	30 Jun 2032	1 Jul 2032	31 Jul 2032
	1 Jul 2032	30 Sep 2032	1 Oct 2032	31 Oct 2032
	1 Oct 2032	31 Dec 2032	1 Jan 2033	31 Jan 2033
	1 Jan 2033	31 Mar 2033	1 Apr 2033	30 Apr 2033

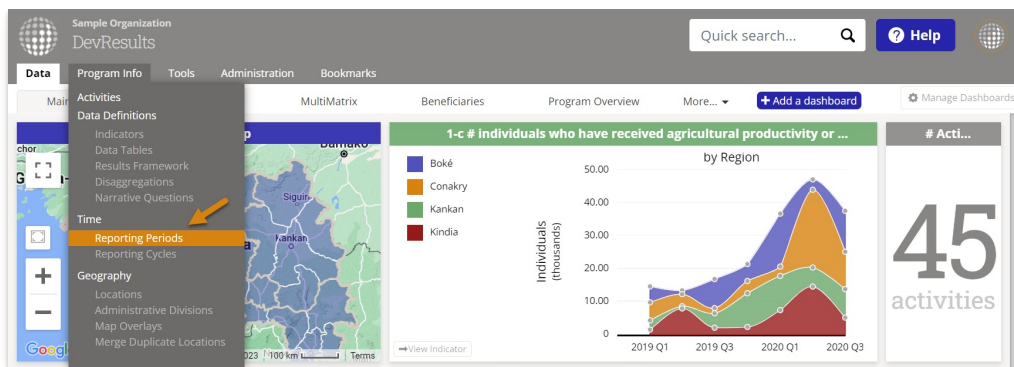
When you are ready, click on the green **Create Reporting Periods** button. Note that this does not automatically add them to DevResults yet, but only creates the Excel template for you to upload on the Reporting Periods index page.

**Skip to the end of this section to see how to import your list of reporting periods.**

### Approach #3: Download a blank template and produce your own list of reporting periods

This is the most difficult approach, but it may be best if your reporting periods are irregular, or if you have above-average levels of familiarity with Excel date formulas!

First, navigate to the reporting period index ( **Program Info > Time / Reporting Periods** ).



On this page, click on the gearbox menu in the upper right and then click **Download Blank Template** to get an empty Excel template with all required columns. You're on your own from here!

Reporting Period	Start Date	End Date	Submission Start Date	Submission End Date	% Complete	Reporting Cycle
2027 Q2	1 Jan 2027	31 Mar 2027	1 Apr 2027			
2027 Q3	1 Apr 2027	30 Jun 2027	1 Jul 2027			
2027 Q4	1 Jul 2027	30 Sep 2027	1 Oct 2027			
2028 Q1	1 Oct 2027	31 Dec 2027	1 Jan 2028			
2028 Q2	1 Jan 2028	31 Mar 2028	1 Apr 2028			
2028 Q3	1 Apr 2028	30 Jun 2028	1 Jul 2028			
2028 Q4	1 Jul 2028	30 Sep 2028	1 Oct 2028			
2029 Q1	1 Oct 2028	31 Dec 2028	1 Jan 2029			
2029 Q2	1 Jan 2029	31 Mar 2029	1 Apr 2029			
2029 Q3	1 Apr 2029	30 Jun 2029	1 Jul 2029	31 Jul 2029	0%	Quarterly
2029 Q4	1 Jul 2029	30 Sep 2029	1 Oct 2029	31 Oct 2029	0%	Quarterly
2030 Q1	1 Oct 2029	31 Dec 2029	1 Jan 2030	31 Jan 2030	0%	Quarterly
2030 Q2	1 Jan 2030	31 Mar 2030	1 Apr 2030	30 Apr 2030	0%	Quarterly
2030 Q3	1 Apr 2030	30 Jun 2030	1 Jul 2030	31 Jul 2030	0%	Quarterly
2030 Q4	1 Jul 2030	30 Sep 2030	1 Oct 2030	31 Oct 2030	0%	Quarterly

**Skip to the end of this section to see how to import your list of reporting periods.**

**Note:** Regardless of your preferred approach, the reportingPeriodID column **MUST** be left blank for all new reporting periods. This will be assigned by the app automatically. For new rows in the spreadsheet, **Reporting Cycles** must reference cycles that already exist in the system. To add new Reporting Cycles, see [Manage Reporting Cycles](#).

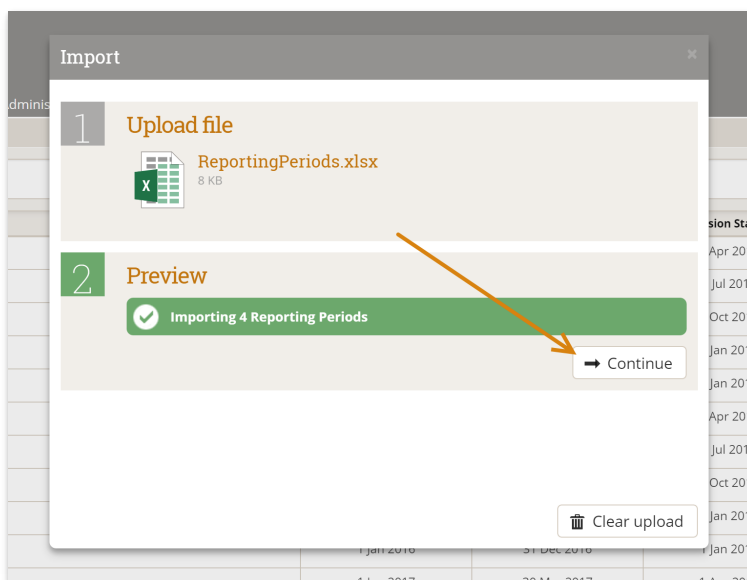
	A	B	C	D	E	F	G	H
1	reportingPeriodID	Name	Start Date	End Date	Submission Start Date	Submission End Date	Reporting Cycle	
2		2021 Q1	1/1/2021	3/30/2021	4/1/2021	4/30/2021	Quarterly	
3		2021 Q2	4/1/2021	6/30/2021	7/1/2021	7/31/2021	Quarterly	
4		2021 Q3	7/1/2021	9/30/2021	10/1/2021	10/31/2021	Quarterly	
5		2021 Q4	10/1/2021	12/31/2021	1/1/2022	1/31/2022	Quarterly	
6								
7								

## Importing reporting periods

Once you have your spreadsheet updated and saved with the new reporting periods you want to add, click the gear icon again and select **Import**.

Name	Start Date	End Date	Submission Start Date	Submission End Date
2015 Q1	1 Jan 2015	30 Mar 2015	1 Apr 2015	30 Apr 2015
2015 Q2	1 Apr 2015	30 Jun 2015	1 Jul 2015	31 Jul 2015
2015 Q3	1 Jul 2015	30 Sep 2015	1 Oct 2015	31 Oct 2015
2015 Q4	1 Oct 2015	31 Dec 2015	1 Jan 2016	31 Jan 2016
2015 Year	1 Jan 2015	31 Dec 2015	1 Jan 2016	31 Jan 2016
2016 Q1	1 Jan 2016	30 Mar 2016	1 Apr 2016	30 Apr 2016
2016 Q2	1 Apr 2016	30 Jun 2016	1 Jul 2016	31 Jul 2016
2016 Q3	1 Jul 2016	30 Sep 2016	1 Oct 2016	31 Oct 2016
2016 Q4	1 Oct 2016	31 Dec 2016	1 Jan 2017	31 Jan 2017
2016 Year	1 Jan 2016	31 Dec 2016	1 Jan 2017	31 Jan 2017
2017 Q1	1 Jan 2017	30 Mar 2017	1 Apr 2017	30 Apr 2017
2017 Q2	1 Apr 2017	30 Jun 2017	1 Jul 2017	31 Jul 2017
2017 Q3	1 Jul 2017	30 Sep 2017	1 Oct 2017	31 Oct 2017
2017 Q4	1 Oct 2017	31 Dec 2017	1 Jan 2018	31 Jan 2018
2017 Year	1 Jan 2017	31 Dec 2017	1 Jan 2018	31 Jan 2018
2018 Q1	1 Jan 2018	30 Mar 2018	1 Apr 2018	30 Apr 2018
2018 Q2	1 Apr 2018	30 Jun 2018	1 Jul 2018	31 Jul 2018
2018 Q3	1 Jul 2018	30 Sep 2018	1 Oct 2018	31 Oct 2018
2018 Q4	1 Oct 2018	31 Dec 2018	1 Jan 2019	31 Jan 2019

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 reporting periods. 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 reporting periods were imported. Once you click **Done**, your reporting period index page will refresh and you'll see your new reporting periods there!

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## Edit multiple reporting periods using an Excel upload

You can also use this tool to complete bulk updates to existing reporting periods. To do so, follow the first few steps in the previous section to download your reporting period index into Excel. Then edit the spreadsheet that you downloaded -- for example, to change the submission window for multiple reporting periods.

**Note:** To edit existing reporting periods, DO NOT delete or change the reportingPeriodID. This is the only way the system knows which reporting period should be updated.



When you import the spreadsheet, existing reporting periods will be updated with any changes to the spreadsheet.

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