

Training Topics

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DevResults has a ton of cool features that go beyond entering indicator results and managing projects. Below, we've provided a comprehensive list of topics that a trained DevResults expert can do and explain. When we do a training with your team, we train staff on as many of these topics as we can, with an emphasis on the tools most relevant to your workflows.

Get Ready for Training:

1. **Download Chrome:** Other browsers (like Internet Explorer) do not support DevResults' complex mapping and data querying tools.
2. Make sure your **training site** account works. Most likely, we will use your training site rather than your live DevResults site for all training. Contact your site administrator if you cannot access your training site.
3. Get a Headset: For remote training, it is extremely difficult for us to communicate with folks unless they are wearing headphones and using their own microphone. We simply can't hear very well if you play our audio on speakers or have a single microphone in a room with several people.

List of DevResults Topics:

- **Add a project:** Learn to set up a project from scratch. DevResults sets up new programs with their current information already built-in, but users will need to understand this configuration in order to update and maintain this information going forward. This extends to:
 - Frameworks: See how to **create a new results framework**.
 - Organizations: See information on **projects and organizations**.
 - Locations: Learn how to **add a location**.
 - Users: See how to **add a new user**, understand user access with a **permissions overview**, and learn to **change a group's permissions**.
- **Add an indicator:** Review all aspects of indicator definitions covered in our **indicator guidebook** including:
 - **Disaggregations**, including cross- and parallel-disaggregations
 - Geographic disaggregations (see **geographies**)
 - **Data sources**
 - Data types
 - Data formats
- **Aggregation of Data:** Understanding how data is aggregated automatically by geographic level and what it means for data to be associated with a point (city/hospital) or a shape (region/country)
 - **Geographic configuration for administrative divisions & locations/facilities:** How to configure the places where a project reports data
 - **Data Source: From a Formula:** How to configure computed indicators, plus why and when to use them
 - **Create a Data Table:** How to add an edit data tables (data tables use individual-level records to populate indicator results)
 - **Data Source: Populate from a data table:** How to configure indicators that are populated with data from data tables
- **Entering Data: Partners:** How partners should report data using the online templates or DevResults Excel templates
- **Troubleshooting Checklist:** How to troubleshoot common problems partners have with reporting data
- **Enter Narrative Results:** How to add narrative reporting in DevResults
- **MultiMatrix reports:** How to create custom reports of indicator results across multiple indicators/disaggregations/geographies
- **How to use forms:** How to create custom Word documents from DevResults with project and indicator information
- **Create a Logic Check:** How to create logic checks for indicator results
- **Program Management:**
 - How to create and manage **checklists**

- How to create and use [checklist templates](#)
- How to manage project- and program-level calendars
- How to use the timeline
- **Dashboard Configuration:** learn about tile options and how to [edit a dashboard](#)
- **Search Box:** What the search feature does and doesn't do
- **Documents:** How to upload documents
 - The workflows the documents feature is good for
 - The workflows the documents feature is not good for
- **Communicating in DevResults:**
 - How partners can submit data and communicate about their indicator results
 - How staff can return data to partners for clarifications/edits
 - How staff can use DevResults to communicate internally
- **Finance:** Advice on use of financial features
- **Exchange Rates:** Add and use exchange rates

Helpful Materials

We strongly recommend setting up established internal workflows for who's responsible for which tasks within DevResults. To help you with this process, we provide a [Change Management Toolkit](#) with a number of useful resources.

For any topic here not linked to a help page: We're adding additional how-to pages as fast as we can, but [let us know](#) if you'd like to jump on a conference call to review any tools or features in the meantime.

Didn't answer your question? Please email us at thelp@devresults.com.

Related Articles
