ARCHIVED: Setup Template Instructions

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Note: As of 2024, DevResults offers a new, more flexible system for creating a new DevResults site. Please see our revised **Setup Instructions** for information about the current setup process.

Overview

The **DevResults Setup Template** forms the structural foundation of your DevResults site. DevResults is happy to help organize this information, but ultimately, you are responsible for the content provided. This Excel file has thirteen tabs, each with several columns of information required to set up DevResults reporting tools. The columns are color-coded:

Green: Required information

Blue: Optional information for enabling filtering tools and fleshing out program details

Grey: Required depending on what's in the previous column(s)

It is important that only a single copy of this template is edited. If you send updates to DevResults for us to add to your website, then you cannot make additional edits until we've returned our copy to you. This is because we often have to make a few edits or corrections to the template in the process of importing information to our databases, and we should avoid the need to merge two edited copies.

This template does not capture 100% of information that will comprise your new DevResults site. We generally develop customized strategies to handle budget information, indicator targets, and historical data for each site. There are additional configuration options not covered here, such as adding customized user permissions and configuring individual-level indicators. This template is intended to collect essential program information: if the green columns in each tab of this template are complete and accurate, your DevResults site will be fully functional for entering and managing data.

If you do not have some of the requested information, we can help with things like establishing codes for identifying indicators or finding coordinates for the locations for which your activities report data. Please don't hesitate to get in touch about anything that is unclear. Everyone organizes and manages their information a little differently, and we can help figure out how to structure that information DevResults.

Jump to a tab:

Activities

ActivityShortName

- The ActivityShortName is the unique identifier for each activity. Each activity must have a different ActivityShortName.
- This abbreviation will be used throughout the setup template to match information to each activity.
- You might want to use the abbreviation that people already commonly use to refer to each activity.

ActivityName

- An "Activity" in DevResults is a central organizing feature of the system. It is up to you to decide what an activity means to you. Activities might be internal projects managed by different teams, or sub-grantees or external projects managed by other organizations who report data to you, or some combination of the two.
- Most folks use the general guideline that one grant or award number = one activity. There are a variety of tools for grouping related activities.
- Activities are generally not single events, but are ongoing programs or implementing mechanisms that report indicator results each reporting period.

ReferenceNumber, ActivityCode (max for each is 100 characters)

- Reference numbers, such as grant or award numbers, can be added if you have them.
- If you don't already use additional codes to refer to activities, you might just want to repeat the ActivityShortName here, but the option is available to include an additional identifier for the activity.

OrgShortName

- The organization that oversees each activity (whether it is your organization or an external organization) must be identified.
- Use the OrgShortName to identify the organization. This is the unique identifier for each organization in the "Organizations" tab.

Status

- Provide the status of each activity.
- Default status options include: Active, Completed, Not Started, Open, Suspended, Terminated, and Expired. You can change or add these options if required.

StartDate, EndDate

- Provide the start and end dates for each activity.
- If you do not have this information, leave it blank, but at least provide the status in the status column.
- This information determines which reporting periods the activity will be assigned.

Sectors

- You have the option to label activities in DevResults by sector. You can create as many sectors as you'd like. Sectors can help identify activities by their main areas of focus, like "health" or "education".
- List all of an activity's sectors separated by commas. There is no limit to how many sectors you can assign to an activity.
- Indicators can also be labeled with sectors.

Tags

- Tags are a flexible tool in DevResults for labeling and sorting information. Tags can be anything you like. These tags can help identify types of information that cut across different parts of your results frameworks, like "climate" or "gender" or "local capacity".
- List all of an activity's tags separated by commas. There is no limit to how many tags you can assign to an activity.

- Other sets of information in the system that can be tagged include: Organizations, Indicators, and Locations. You can use the same tags for those pieces of information, or different ones.

PrimaryContactEmail

- You can list the email of the primary contact for each activity.
- This person must be listed in the Users tab with that email address.

AwardAmount

- You can add the total award amount for each activity's life of party.

Mechanism

- You can add the mechanism for each activity/award such as "contract", "grant", or "purchase order".

AwardingOrgShortName

- You can add the organization that awarded funds for each activity.
- Use the OrgShortName from the Organizations tab to identify each activity's awarding organization.

Context, Objectives, ActivitySummary, ExpectedResults, BeneficiaryDescription, DeliverablesAndReporting

- These columns provide the opportunity to add descriptive information about each activity. These fields will appear on the activity's overview page.
- The titles for these six fields are merely defaults/suggestions. You can change them, remove fields, or add fields to store descriptive information about your activity. Read more about **custom fields for activities**.
- This information is not required and can be easily added or updated once you are using your live DevResults site.

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Organizations

OrgShortName

- The OrgShortName is the unique identifier for each organization. Each organization must have a different OrgShortName.
- This abbreviation will be used throughout the setup template to match information to each organization.
- You might want to use the abbreviation that people already commonly use to refer to each organization.

OrganizationName

- Please list all organizations that manage activities for your program or awarded funds for your activities. Include your own organization.

Phone, Fax, Address, City, State, Zip, Country, Website

- You can add additional information about each organization in these columns.
- For the Country column, please use the two-character abbreviation for the country (e.g. United States is US).

PrimaryContactEmail

- You can list the email of the primary contact for each organization.
- This person must be listed in the Users tab with that email address.

Tags

- Tags are a flexible tool in DevResults for sorting information. Tags can be anything you like. These tags can help identify types of information that cut across different parts of your results frameworks, like "climate" or "gender" or "local capacity".

- List all of an organization's tags separated by commas. There is no limit to how many tags you can assign to an organization.
- Other sets of information in the system that can be tagged include: Activities, Indicators, and Locations. You can use the same tags for those pieces of information, or different ones.

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Frameworks

Framework

- Each row in this table should capture a separate results framework component.
- In this column, label each component with the names for the (one or more) results frameworks that apply to your program information. You might just have one framework for your program, or you might also organize indicators under other frameworks such as the Foreign Assistance Framework, the PEPFAR framework, etc.

ResultCode

- Assign result codes that use periods to denote hierarchy. For example, "AB.1" means that this framework component is nested under the broader category, "AB".
- The system reads all ResultCode periods as indications of organizational hierarchy, so only use periods to denote this structure.
- Although the template will allow, DevResults only accepts letters, numbers, periods, and dashes. Using spaces, commas, slashes, or other special characters will result in an error.
- Ideally, all ResultCodes are unique. ResultCodes must at least be unique within each framework. If you need to use the same code in different frameworks, please get in touch with DevResults to change the layout of the Indicator tab.

ResultShortName

- Provide the name of the framework component or technical area.

ResultDescription

- You can add a longer name/description for each framework component.

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Indicators

ResultCodes

- Each indicator must be classified by one or more parts of your Results Framework(s). For each indicator, list its ResultCode(s) from the ResultsFrameworks tab, separated by commas.
- Indicators might be classified under one ResultCode, multiple ResultCodes for a single results framework, or ResultCodes for multiple ResultsFrameworks.

IndicatorCode (max length of 50 characters)

- The IndicatorCode is the unique identifier for each indicator. Each indicator must have a different IndicatorCode.
- This abbreviation will be used throughout the setup template to match information to each indicator.
- You might want to use the codes that people already commonly use to refer to each indicator. If you don't use any codes to identify indicators, we advise you to come up with a coding system that relates to the way you think about how these indicators are organized, such as referencing the results frameworks, sectors, or indicator types.

IndicatorName (max length of 1000 characters)

- Clearly state the thing you are measuring. Phrases like "Increase in certifications" or "Level of support" are not indicators. The indicator names would instead be something like "# trainees certified" or "Average support score on a scale of 1-10".
- We have found that it is faster and easier to read through indicators that are abbreviated with "#" for "Number of", "%" for "Percentage of", and "$" for "Value of".

DataSource

- "DataSource" refers to how data will be entered into the system. The options are "Entry", "Formula", and "Data Table" (previously "dynamic table").
- Entry: For an indicator like "# schools refurbished" for which you simply want to type in the actual number (like "105"), you would write "Entry".
- Formula: Use formulas for computed indicators. Computed indicators allow you to automatically generate an indicator result based on other indicator results entered into DevResults. Please see "Formula" below for more details.
- Data Table: However, you could also enter data by uploading a spreadsheet to DevResults that lists all the schools that have been refurbished, when they were refurbished, where they are and what activity executed the refurbishments, plus all the disaggregations for those schools such as primary/secondary. DevResults could automatically compute the indicator result from that underlying spreadsheet and save all the detailed information. In this case you would write "Data Table" for DataSource. Please get in touch with DevResults to discuss data tables on a case-by-case basis.

IndicatorType

- The IndicatorType describes how the data will be handled. The options are "Sum", "Average", and "Yes/No".
- Sum: Counts of things created or accomplished should be summed across locations and over time, such as, "# children vaccinated". Use a sum to generate totals of all indicator results reported.
- Average: Percentages, indexes, scores, and mean values should be averaged between locations and over time. For an indicator like "% administrators trained," you wouldn't want to add 70% from quarter 1 to 90% from quarter two. In this case, you would use an average.
- Yes/No: Indicator results can also have binary, yes/no values. Take the indicator, "% locations audited" when this indicator is reported for each location. Each location was either audited or not. The aggregate result in the system for all locations shows the percent of locations that were recorded with "yes".

Formula

- Use formulas to denote computed indicators. Computed indicators allow you to automatically generate an indicator result based on other indicator results entered into DevResults. You only need to enter a formula if you have defined the indicator's DataSource as "Formula".
- Ideally, all percentage indicators in DevResults are generated from computed indicators (such as "% administrators trained). An exception might be where the data, at its most basic level, is already a percentage (such as a grade on a test). Computed percentages mean that numerators and denominators are entered as separate indicators, and DevResults generates an automatic, up-to-date percentage result. This gives more accurate aggregate information and means that staff don't need to separately report both counts and percentages for indicators.
- Examine the example "% administrators trained". If one region trained 1 out of 2 administrators, and another region trained 99 out of 100, an average of those percentages would be (50%+99%)/2=74.5%. In most cases it would be more accurate to think of the aggregate percentage as all the administrators trained (100) divided by all the administrators (102) giving 100/102=98.04%.
  - In this case, you'd define one indicator as Ind-01n: # administrators trained and Ind-01d: # administrators. The percentage formula would be [Ind-01n]/[Ind-01d].
- To indicate a formula, put the component indicator's IndicatorCode in square brackets and use any algebraic functions between, such as:
  - Compute a percentage: [Ind-01n]/[Ind-01d]
  - Compute an aggregate sum: [Ind-01]+[Ind-02]+[Ind-03]

NumberFormat

- An indicator's number format describes how the data should be displayed. The options are "Whole Number", "Percentage", and "Decimal".

- Whole Number: Use "Whole Number" to express integers for indicators where you don't deal in fractions of units, such as counts of individuals.
- Percentage: Percentages are displayed as portions of 100, so if you have a result of "80%" for an indicator, you will enter "80" and not "0.8".
- Decimal: Decimals show two digits after the decimal and should be used for things like scores an indexes to show something like 7.45 on a scale of 1-10.
- Indicators can only have one number format. If you wish to keep track of both the number and percent result for an indicator, these must be two separate indicators.

Unit

- The indicator's unit is the thing that you are counting, such as individuals, households, schools, policies, jobs, kilometers, cubic meters, USD, organizations, visits, assessments, studies, initiatives, events, stock items, etc.
- Percentages, indexes, and scores do not have units.

GeographicDisaggregation

- All indicators must be defined with a single GeographicDisaggregation.
- If your indicator is not disaggregated geographically, you still need to list "Country" or "World" as the GeographicDisaggregation to indicate that results for this indicator refer to your whole geographic scope.
- The options for GeographicDisaggregation are "Location" plus each of your country's administrative divisions, such as "Province", "District", "Country", and maybe "World".
- Locations are points on a map with a single set of coordinates. Locations might include cities, villages, schools, NGOs, hospitals, training centers, construction sites, etc.
- Administrative divisions, including the whole country, are shapes on a map. Please see the AdminDivisions tab for a list of your administrative divisions. DevResults generally acquires this information from the publicly available files at www.gadm.org. If this information is inaccurate or out of date, it is your responsibility to provide the .kml or shape files with the information you want to use on your site.

Disaggregations

- List the disaggregations for each indicator (if any) separated by commas. An indicator might have no disaggregations, one disaggregation, or many disaggregations.
- Do not include the disaggregation categories here. For example, if the disaggregation is "sex", then the disaggregation categories are "male" and "female". The disaggregation categories must be included in the Disaggregations tab, but not in this column.
- Do not include geographic disaggregations here. See above for any geographic disaggregations.

CrossDisaggregated?

- If any indicator is defined with more than one disaggregation, you must indicate whether or not the indicator is cross-disaggregated ("Yes" or "No"). Read more about **cross-disaggregation versus parallel disaggregation**.

DefaultReportingCycle

- Indicate how frequently this indicator should be reported, e.g. Quarterly, Monthly, Annual, Semi-Annual.
- You can change this later if different Activities report a particular indicator at different frequencies.
- This only refers to how often data should be entered for an indicator, not how often you need to make a report about the data.
- Any ReportingCycle listed here should also appear in the ReportingCycles tab.

PerActivity?

- If indicator results are reported by one or more activities, then enter "Yes". For indicator results that pertain to your whole program (such as national statistics like literacy rate, GDP per capita, or infant mortality rate), then enter "No".

TargetsCumulative?

- Cumulative: If you plan to enter indicator result targets that refer to what you want to have accomplished since

the beginning of the activity's work (the cumulative goal at any given point), then enter "Yes".
- Incremental: If you plan to enter indicator result targets that refer to only what you want to accomplish for each reporting period, then enter "No".

Sectors

- You have the option to label indicators in DevResults by sector. You can create as many sectors as you'd like. Sectors can help identify indicators by their main theme, like "health" or "education".
- List all of an indicator's sectors separated by commas. There is no limit to how many sectors you can assign to an indicator.
- Activities can also be labeled with sectors.

Tags

- Tags are a flexible tool in DevResults for sorting information. Tags can be anything you like. These tags can help identify types of information that cut across different parts of your results frameworks, like "climate" or "gender" or "local capacity".
- List all of an indicator's tags separated by commas. There is no limit to how many tags you can assign to an indicator.
- Other sets of information in the system that can be tagged include: Activities, Organizations, and Locations. You can use the same tags for those pieces of information, or different ones.

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Disaggregations

See **video tutorial on how to define disaggregations**.

Disaggregation

- Every disaggregation listed in the Disaggregations column of the Indicators tab must be listed here.
- Repeat the disaggregation name in this column for however many disaggregation categories each disaggregation has.

DisaggregationCategory

- For each disaggregation, list all disaggregation categories, one per row. For example, if "Sex" is one of your disaggregations, it should be listed twice with "Male" and "Female" listed in this column.
- These disaggregation categories should be fixed, unchanging parts of the indicator definition so that examining indicator results over time yield valid comparisons of the same measurements. Changing the disaggregations of an indicator changes the indicator.

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AdminDivisions

- Administrative divisions, including the whole country, are shapes on a map.
- DevResults generally acquires this information from the publicly available files at www.gadm.org. This tab is for reference only; you cannot change which administrative divisions included on your site by editing this page. If the information we have provided is inaccurate or out of date, it is your responsibility to provide the .kml or shape files with the geographic information you want to use on your site. If you wish to simply re-name any admindivisions, you can add a column to this tab that includes the new name. This will not change which administrative divisions are included, or how they are shaped, or where they are located.
- The information in this tab is arranged to show the hierarchy of administrative divisions in your country: for example, which districts are in which provinces.

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Locations

LocationName

- Provide a unique name for each location.
- Locations are points on a map with a single set of coordinates.
- Locations might include cities, villages, schools, NGOs, hospitals, training centers, construction sites, etc.

LocationCode

- If you use codes to identify your locations, such as P-codes or hospital IDs, you can add them here.

Latitude, Longitude

- Provide the latitude and longitude (in decimal format) for each location.
- If you do not have this information, we can help you find it with some simple online tools, so make sure to ask us before you dedicate a significant amount of time determining location coordinates.
- Though we are happy to help find location coordinates, it is ultimately your responsibility to provide this information if our options for estimating coordinates are not accurate enough for your purposes.

Notes

- You have the option to add notes about locations.

Tags

- Tags are a flexible tool in DevResults for sorting information. Tags can be anything you like. These tags can help identify types of information that cut across different parts of your results frameworks, like "climate" or "gender" or "local capacity".
- List all of a location's tags separated by commas. There is no limit to how many tags you can assign to a location.
- Other sets of information in the system that can be tagged include: Activities, Organizations and Indicators. You can use the same tags for those pieces of information, or different ones.

Description

- You have the option to add descriptions of locations.

ContactName

- You have the option to add the name of a contact person for each location.

Phone, Address

- You have the option to add phone numbers and addresses for locations.

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Users

Email

- In DevResults, a person's email is their unique identifier.
- Two people cannot share one email address.
- One person cannot have more than one email address.
- Enter all of your program's staff, any partner staff who will use DevResults to report information to you, and any primary contacts listed in the Activities, Organizations, or Locations tab.

FirstName, LastName, JobTitle

- Enter each person's name and job title as you would like it to appear in the list of DevResults users.

OrgShortName

- The organization that employs each user (whether it is your organization or an external organization) must be identified.
- Use the OrgShortName to identify each user's organization. This is the unique identifier for each organization in the "Organizations" tab.

Department

- You have the option of adding a user's department.

Phone, Address

- You have the option of adding additional contact details.

Permission

- Each user must be assigned one permission level. Your DevResults site comes with default user groups with standard permission settings, but you have the ability to add user groups and modify their permission settings. Please get in touch with DevResults if you would like to customize DevResults user permissions during setup. The default options are:
- Owner - Can do anything: Create new users, new user groups, assign permissions, configure results frameworks, add indicators, and add activities.
- Manager - Can't create new users or assign permissions, but they can sign off on performance data, mark it as approved, and can sign off on checklist items.
- User - Standard access: Can edit activities, change activity overview information, post notes, and upload documents.
- Viewer - Read-only access.
- Partner Manager - Partners are limited to their own activities: uploading, editing, and viewing their own data prior to submission each reporting period.
- Partner - Same as partner managers with the exception that they are restricted from submitting final indicator results / narratives each quarter.
- No Access - When someone leaves the organization, their access is shut off without removing the audit trail.

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ActivityIndicators

The ActivityIndicators tab aims to capture relational information. This means that it's a map that matches activities to their indicators. We have an Activities tab and an Indicators tab. This tab is where we establish which activity reports on which indicators. Each row represents a single pair of one activity to one indicator.

ActivityShortName

- Enter each activity's ActivityShortName in this column for every indicator that the activity reports on. For example, if activity "CSCL" reports on two indicators, list "CSCL" in this column twice.

IndicatorCode

- For each activity, list the indicator's IndicatorCode for all of the indicators that the activity reports on. Use one row for each activity-indicator pair.

ReportingCycle

- For each activity-indicator pair, specify how frequently the activity should report on the indicator, *e.g.* Quarterly. Each ReportingCycle included in this tab should be defined in the ReportingCycles tab.

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ActivityAdminDivisions

The ActivityAdminDivisions tab aims to capture relational information. This means that this tab is a map that matches activities to their administrative divisions. We have an Activities tab and an AdminDivisions tab. This tab is where we establish which activity reports indicator results for which administrative divisions.

ActivityShortName

- Enter each activity's ActivityShortName in this column for every administrative division for which the activity reports data. For example, if activity "CSCL" reports indicator results for only one administrative division, list "CSCL" in this column once.

AdminDivisionName

- For each activity, list the administrative division's AdminDivisionName for all of the administrative divisions for which the activity reports data. Use one row for each activity-administrative division pair.

AdminDivisionLevel

- One AdminDivisionName might refer to different administrative divisions in different administrative division levels. For example, "Conakry" refers to both a region and a prefecture in Guinea.
- Thus, for each AdminDivisionName, specify the AdminDivisionLevel in this column.

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ActivityLocations

The ActivityLocations tab aims to capture relational information. This means that it's a map that matches activities to their locations. We have an Activities tab and a Locations tab. This tab is where we establish which activity reports indicator results for which locations.

ActivityShortName

- Enter each activity's ActivityShortName in this column for every location that the activity reports on. For example, if activity "BetterBetter" reports indicator results at two locations, list "BetterBetter" in this column twice.

LocationName

- For each activity, list the LocationName for all of the locations for which the activity reports data. Use one row for each activity-location pair.

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ActivityUsers

The ActivityUsers tab aims to capture relational information. This means that it's a map that matches activities to the people associated with those activities. We have an Activities tab and a Users tab. This tab is where we establish which person is associated with which activity.

ActivityShortName

- Enter each activity's ActivityShortName in this column for each person associated with this activity. For example, if activity "E++" has two people who work on that activity, list "E++" in this column twice.

Email

- In DevResults, a person's email is their unique identifier.

- For each activity, list the email for every person affiliated with that activity - both internal staff and reporting partners. Use one row for each activity-user pair.

Role

- You have the option of entering a person's role for each activity.
- A person's role for an activity might not necessarily be their job title. For example, a person's job title might be "M&E Specialist", but for a certain activity their role might be "Team Leader".
- A person can have different roles for different activities.

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ReportingCycles

The ReportingCycles tab lets you indicate multiple indicator reporting frequencies for your program. Are some indicators reported quarterly, while some are reported annually? List those frequencies here.

Note: Only add ReportingCycles for how frequently data is *entered* for an indicator, not how often you need to *create* reports. For example, if all of your indicators are reported every quarter, then you would only need a quarterly ReportingCycle. You would not need an annual ReportingCycle to *create* reports based on quarterly data.

ReportingCycle

- Give each ReportingCycle a name, such as "Quarterly", "Annual", or "Semi-Annual", *etc*.

Interval, IntervalUnit

- Indicate the length of a ReportingPeriod within each cycle in terms of the number of weeks or months.
- *e.g.* Quarterly reporting would involve 3-month ReportingPeriods and annual reporting would involve 12-month ReportingPeriods.

SubmissionPeriod, SubmissionPeriodUnit

- Indicate the length of time that partners or users should be given to enter data after the end of a ReportingPeriod. This can be entered as the number of months, weeks, or days.
- *e.g.* Partners or users are commonly given one month to enter data after the end of a ReportingPeriod.

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ReportingPeriods

The ReportingPeriods tab should include a list of all the timeperiods for which data should be entered (such as a list of all quarters), along with the timeframe for reporting indicator results (such as within the month following the end of a quarter).

ReportingPeriodName

- Give each reporting period a title, such as "2015 Q4", "2014 Jan" or "2016 SAPR".

StartDate, EndDate

- The StartDate and EndDate columns refer to the period of time that an indicator result should describe, regardless of when the data is entered into the system.
- *e.g.* An indicator such as "Number of children vaccinated" for the period 1-Jan-2015 to 31-Mar-2015 should refer to just the number of children who were actually vaccinated within those three months.

SubmissionStartDate, SubmissionEndDate

- The SubmissionStartDate and SubmissionEndDate columns refer to the window of time that partners can log in to report indicator results. Outside of this window, partners will not be able to log in and edit indicator results.

Reporting Cycle

- Which ReportingCycle does this ReportingPeriod belong to?
- *e.g.* A 3-month ReportingPeriod belongs to a quarterly ReportingCycle. A 12-month ReportingPeriod belongs to an annual ReportingCycle.
- Any ReportingCycle used here should be included in the ReportingCycles tab.

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