

# Tags and Sectors

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DevResults offers two multi-purpose tools for organizing, sorting, and filtering information: **tags** and **sectors** defined by users.

- **Tags** enable users to filter projects, data tables, indicators, locations, organizations, and photos (as well as indicator data).
- **Sectors** enable users to filter indicators and projects (as well as indicator data).

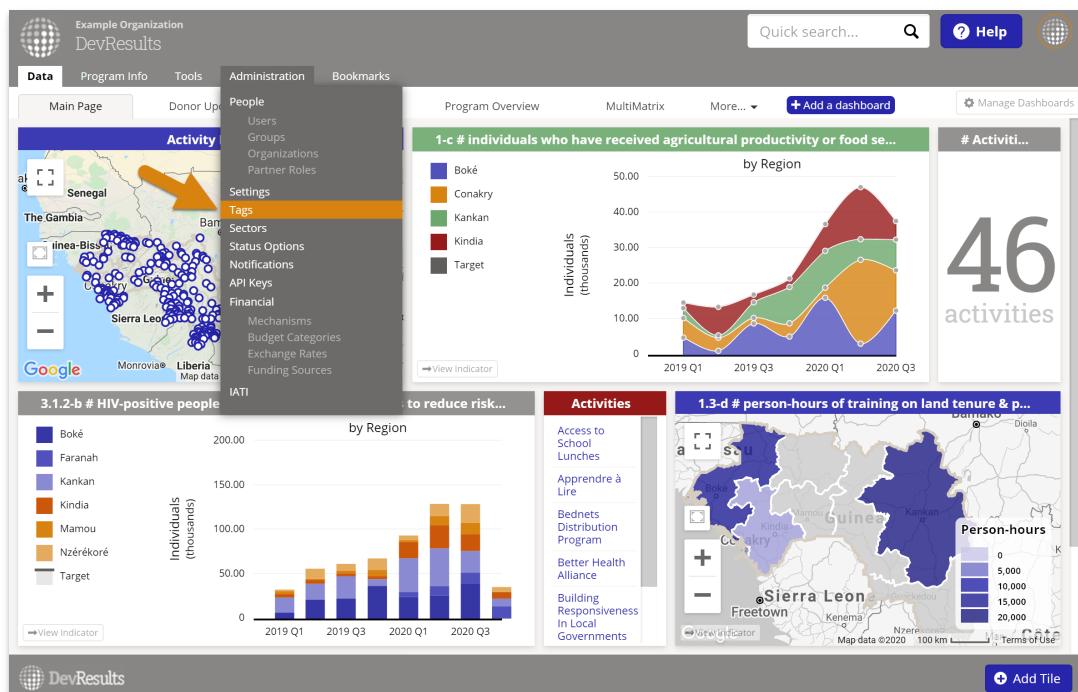
"Tags" and "Sectors" are default terms in DevResults, but you could **rename** them to something else that matches the terminology in your organization, like "Themes" and "Focus Areas". To do so, please reach out to our Help Desk at [help@devresults.com](mailto:help@devresults.com).

On this page:

- [Create a tag](#)
- [Create or edit multiple tags using an Excel import](#)
- [Assign a tag](#)
- [Use tags to filter information](#)
- [Create a sector](#)
- [Assign a sector](#)
- [Use sectors to filter information](#)

## Create a tag

To create a new tag, go to **Administration > Tags**.



Choose from the blue tabs to create a tag for projects, data tables, indicators, locations, organizations, or photos.

Click on the grey **Click to add...** text at the bottom of the table and type the name of your new tag. Click anywhere outside of the cell to save the tag.

The screenshot shows the DevResults administration interface for managing tags. At the top, there's a navigation bar with links for Data, Program Info, Tools, Administration (which is selected), Bookmarks, and a search bar. Below the navigation is a breadcrumb trail: Home > Administration > Tags. Under the 'Administration' tab, there are several sub-links: Activity Tags (selected), Data Table Tags, Indicator Tags, Location Tags, Organization Tags, and Photo Tags. The main content area displays a table with a single column labeled 'Name'. The table contains rows for 'Capacity Building', 'Children', 'Climate', 'Data', 'Gender', 'Infrastructure', and 'Rural'. At the bottom of the table, there is a grey text field containing the placeholder 'Click to add...'. Two orange arrows point to this text field: one from the top right and another from the bottom left.

To edit an existing tag, click on the tag text, edit it, and click anywhere outside of the cell to save the change.

To delete a tag, hover over the tag and click on the orange **X** that appears to its left.

[back to top](#)

## Create or edit multiple tags using an Excel import

Tags in DevResults can be added or edited by uploading an Excel file. There are multiple template options:

### Single tag type

On the **Administration > Tags** page, you can download templates for editing or adding tags for a specific part of the site, like project tags or indicator tags.

The screenshot shows the same DevResults administration interface for tags. The 'Administration' tab is selected. A dropdown menu is open over the 'Tags' table, specifically over the row for 'Children'. The menu contains three items: 'Export All', 'Download Blank Template', and 'Import'. An orange arrow points to the 'Download Blank Template' option. The rest of the page is identical to the first screenshot, showing the list of tags and the 'Click to add...' button.

Downloading a **blank template** will give you a single column for adding new tags.

**Exporting all** will give you a template with an ID number for each tag. To edit an existing tag, change the text but not the ID. Here, we're changing *Children* to *Children and Youth*. All projects tagged with *Children* will be updated to *Children and Youth* as well.

In the same template, you can also add a new tag by adding a row and leaving the ID blank. Never add an ID yourself; these are created by the system. (If you do, the system will think you're trying to update whatever tag already has that ID.) Here, *Agriculture* will be added as a new project tag.

1	A	B	C	D
1	tagID	Name		
2	12632	Capacity Building		
3	12633	Children and Youth		
4	12634	Climate		
5	12635	Data Training		
6	12636	Gender		
7	12637	Infrastructure		
8	12638	Rural		
9		Agriculture		

Once you've completed a template and saved it, import it to the same page by clicking on the **Import** option in the gear menu and following the prompts.

### All tag types

On the **Tools > Bulk Imports** page, we've added an option to download a Tags template.

This template lets you add tags of any type, such as project, indicator, and location tags. Add the new tag in the *Name* column and note the type in the other.

1	A	B	C
1	Type	Name	
2	Activity	Agriculture	
3	Activity	Sanitation	
4	Activity	Local Government	
5	Indicator	Output	
6	Indicator	Outcome	
7	Location	Hospital	
8	Location	Village	
9	Location	School	

Once you've completed the template and saved it, import it to the same page by clicking on the **Import Tags** button

and following the prompts.

[back to top](#)

## Assign a tag

Once you've created tags, navigate to the definition page for any project, data table, indicator, location, organization, or photo. Assign a tag by clicking on the **+ Add a tag...** button. Select a tag from the drop down menu to save the tag assignment. You can assign unlimited tags.

This example shows where to assign a tag to a project:

The screenshot shows the 'Classification' section of the 'Delivering Basic Nutrition' project. At the top, there are tabs for Overview, Performance, Budget, Finance, Geography, Checklists, and Forms. The 'Performance' tab is active. Below the tabs, there are three buttons: 'Results and Indicators' (selected), 'Indicators (4)', and 'Results (6)'. Under 'Indicators', there is a table with four rows:

	Indicator	Reporting Cycle
2.1.2-f # person-hours of USG-supported train	Quarterly	▼
F-3.1.1-f-D # children under 5 years old in hou	Quarterly	▼
F-3.1.1-f-N # children under 5 years old who s	Quarterly	▼

Below the table are two buttons: '+ Select indicators...' and 'Allow reporting cycles to vary over time'. Under 'Sectors', there is a table with one row:

Sectors	Sector
Health	

Below the sectors is a button '+ Add a sector...'. At the bottom left, there is a 'Tags' section with a list containing 'Children' and a button '+Add a tag...'. A yellow arrow points to this '+Add a tag...' button.

[back to top](#)

## Use tags to filter information

Tags can be used to filter information in indices and reports.

For example, the project index can be filtered to show only projects with a certain tag.

19 of 46 activities shown

0 activities

**Activity Tags**

Name	Short Name	Ref #	Status	Tags
Building Responsiveness In Local Governments	BRILG	01-427-DEB-00-4262	Active	Capacity Building, Data
Business Infrastructure Revitalization Project	BizRev	01-186-GDC-00-4253	Active	Capacity Building, Data, Infrastructure
Capable Local Governance	CLG	01-964-CAF-00-6343	Active	Capacity Building
Capacity Development in Rural Areas	CDRA	01-431-IFH-00-1952	Active	Capacity Building, Infrastructure
Changing Lives through Technology	CLT	01-909-CGI-00-4613	Active	Capacity Building, Data
Commercial Agribusiness for Sustainable Horticulture Program	CASH	01-737-DAF-00-4603	Active	Capacity Building, Climate, Rural
Community Health Services Strengthening	CHeSS	PEP-925-FHC-00-4867	Active	Capacity Building, Rural
Community Support for Better Municipal Policy	ComPol	01-727-FIB-00-7717	Active	Capacity Building
Community-Led Anti-Malaria Program	CLAMP	01-727-HDI-00-5718	Not Started	Capacity Building, Rural
Economic Opportunities for Women and Girls	EOWG	01-251-FEE-00-2295	Active	Capacity Building, Children, Data, Gender, Rural
Enhancing Local Agricultural Research	ELAR	01-541-AIA-00-6951	Active	Capacity Building, Climate, Rural
Establishing Community-Led Health Clinics	CommClinics	01-568-ADD-00-7788	Active	Capacity Building, Children, Data
Expanding Funding for Local Governance	Local Fund	01-287-DIA-00-3577	Active	Capacity Building, Infrastructure, Rural
Guinean Agricultural Research Program	GARP	01-713-DHB-00-2079	Active	Capacity Building, Climate, Rural
Improving Health Outcomes through Training	IHOT	01-414-FOA-00-7219	Active	Capacity Building, Data
Nourriture et Nutrition au Niveau National	N-4	01-566-ACA-00-2772	Active	Capacity Building, Children, Rural
Positive Change in Malaria Prevention	MP+	01-371-IED-00-7907	Active	Capacity Building, Data
Support pour la Société Civile	SSC	01-573-HG0-00-1489	Active	Capacity Building
Technology in Rural Medicine	RuralTech	PEP-134-DGA-00-1620	Active	Capacity Building, Data, Rural

19 activities

When creating a MultiMatrix report, the selection panel for **Indicators** can be filtered to only indicators with a certain tag. This lets you easily find indicators for just one tag (or a set of tags) to include in the report. In the MultiMatrix **Filters** panel you can filter the report by only including data for projects or locations with a certain tag (or set of tags). For example, if many projects report on the indicator **# people trained**, you could create a report that only includes data reported by capacity building projects by choosing the **Capacity Building** tag.

**MultiMatrix**

**Indicators**

Choose Indicators

Main Framework

Foreign Assistance Framework

Status

Inactive indicators

Inactive frameworks

Computed indicators

Component indicators

Indicators reporting per activity

Indicators not reporting per activity

Indicator Types

any type

Indicator Format

any format

Data Source

any source

Data Table

any data table

Geographic Disaggregation

any geographic disaggregation

Disaggregation

any disaggregation

Indicator Sectors

any sector

Indicator Tags

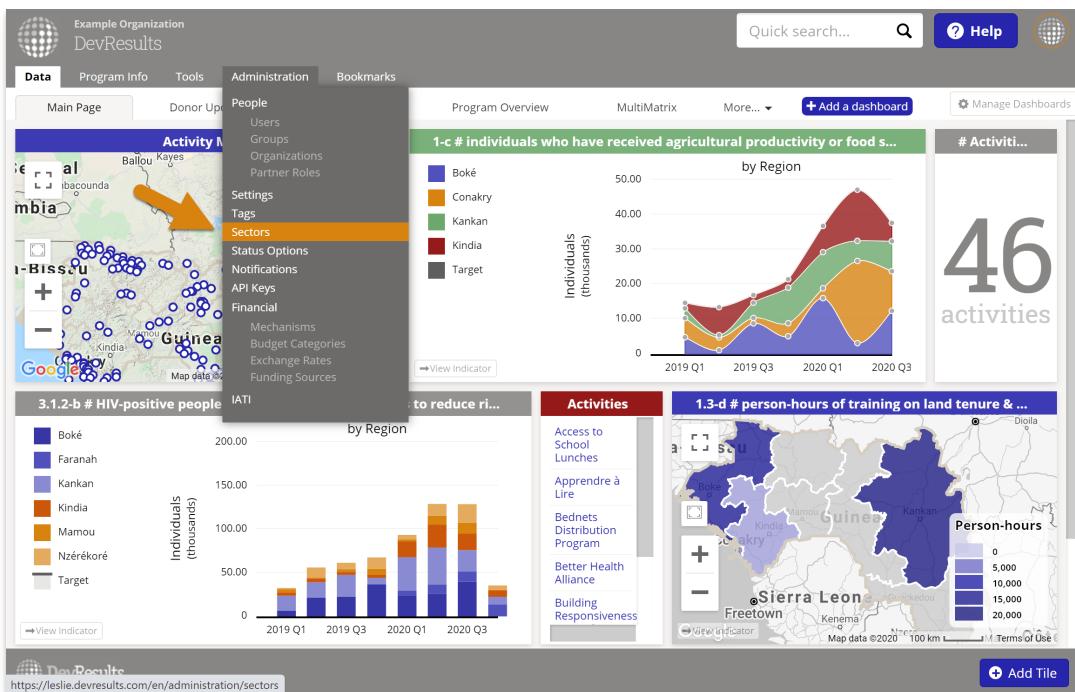
any tag

No indicators selected

[back to top](#)

## Create a sector

To create a new sector, go to **Administration > Sectors**.



Click on the grey **Click to add...** text at the bottom of the table and add the name of your new sector. Click anywhere outside of the cell to save the sector.

This screenshot shows the 'Administration > Sectors' page. The table lists the following sectors:

	Name
	Agriculture
	DRG
	Education
	Health
	<i>Click to add...</i>

An orange arrow points to the 'Click to add...' text at the bottom of the table.

If your site is IATI-enabled, select the corresponding IATI sector by clicking on the dropdown menu under **IATI Sector**.

This screenshot shows the same 'Administration > Sectors' page, but for an IATI-enabled site. The 'Health' sector row has a dropdown menu open under the 'IATI Sector' column. The menu lists various IATI categories, with '12110 - Health policy and administrative management' highlighted with an orange box and an orange arrow pointing to it.

	Name	IATI Sector
	Agriculture	Agricultural services
	DRG	Government administration
	Education	Education facilities and training
x	Health	Health policy and administrative management 11322 - Upper secondary education 11330 - Vocational training 11420 - Higher education 11430 - Advanced technical and managerial training <b>12110 - Health policy and administrative management</b> 12181 - Medical education/training 12182 - Medical research 12191 - Medical services 12220 - Basic health care 12230 - Basic health infrastructure 12240 - Basic nutrition
	<i>Click to add...</i>	

To edit an existing sector, click on the sector text, edit it, and click anywhere outside of the cell to save the change.

To delete a sector, hover over the sector and click on the orange **X** that appears to its left.

[back to top](#)

## Assign a sector

Once you've created sectors, navigate to the definition page for any project or indicator. Assign a sector by clicking on the **+ Add a sector...** button. Select a sector from the drop down menu to save the sector assignment. You can assign unlimited sectors.

This example shows where to assign a sector to a project:

The screenshot shows the 'Classification' section of the 'Delivering Basic Nutrition' project. At the top, there are tabs for 'Overview', 'Performance', 'Budget', 'Finance', 'Geography', 'Checklists', and 'Forms'. The 'Performance' tab is active. Below the tabs, there are three buttons: 'Results and Indicators' (selected), 'Indicators (4)', and 'Results (6)'. The 'Indicators' section contains a table with four rows, each with an indicator ID and reporting cycle. Below the table are two buttons: '+ Select indicators...' and 'Allow reporting cycles to vary over time'. The 'Sectors' section has a table with one row labeled 'Health'. Below the table is a button '+ Add a sector...'. The 'Tags' section shows a single tag 'Children' and a button '+Add a tag...'. A yellow arrow points to the '+ Add a sector...' button.

[back to top](#)

## Use sectors to filter information

Sectors can be used to filter information in indices and reports.

For example, the project index can be filtered to show only projects with a certain sector.

The screenshot shows the 'Activities' section of the platform. At the top, there's a search bar with the query 'sector:"Health"'. Below it is a table with columns: Name, Short Name, Ref #, Status, and Sectors. The 'Sectors' column lists categories like Education, Health, Agriculture, DRG, etc. On the left, there's a sidebar with various filters, including one for 'Sector (1)' where 'Health' is selected. Three orange arrows point to the search bar, the 'Sectors' column header, and the 'Health' filter in the sidebar.

Name	Short Name	Ref #	Status	Sectors
Access to School Lunches	ASL	01-519-HBD-00-5414	Active	Education, Health
Bednets Distribution Program	BDP	01-565-CAE-00-8178	Active	Health
Better Health Alliance	BHA	PEP-572-BOE-00-7494	Active	Health
Community Health Services Strengthening	CHeSS	PEP-925-FHC-00-4867	Active	Agriculture, Education, Health
Community Relief and Mitigation Project	CRAMP	01-835-EEE-00-4372	Active	Agriculture, Education, Health
Community Support for Better Municipal Policy	ComPol	01-727-FIB-00-7717	Active	DRG, Health
Community-Led Anti-Malaria Program	CLAMP	01-727-HDI-00-5718	Not Started	DRG, Health
Delivering Basic Nutrition	DBN	01-171-CIA-00-2499	Active	Health
Economic Opportunities for Women and Girls	EOWG	01-251-FEE-00-2295	Active	Agriculture, DRG, Education, Health
Enhancing Nutrition in Rural Schools	ENRS	01-882-FCH-00-6824	Active	Health
Establishing Community-Led Health Clinics	CommClinics	01-568-ADD-00-7788	Active	Health
Guinean Agricultural Research Program	GARP	01-713-DHB-00-2079	Active	Education, Health
Healthy Children Campaign	HCC	01-960-DIH-00-3280	Active	Health
Healthy Mothers Healthy Children	HMHC	PEP-569-HDG-00-6575	Active	Health
Improving Health Outcomes through Training	IHOT	01-414-FOA-00-7219	Active	Health
Malaria Intervention National Initiative	MINI	01-815-CHA-00-8389	Active	Health
Malaria Intervention Program	MIP	01-443-IHA-00-9021	Active	Health
National Interventions in Health and Education	NIHE	01-459-HAG-00-4055	Active	Education, Health
Nourriture et Nutrition au Niveau National	N-4	01-566-ACA-00-2772	Active	Health
Positive Change in Malaria Prevention	MP+	01-371-ED-00-7907	Active	Health
Programme Anti-Paludisme	PAP	01-221-HHA-00-8523	Active	Health
Providing Access to Mosquito Nets	Nets	01-533-FAH-00-5836	Completed	Health
Technology in Rural Medicine	RuralTech	PEP-134-DGA-00-1620	Active	Education, Health
Water, Sanitation, and Health	WaSH	01-847-CHG-00-8288	Completed	Health

When creating a MultiMatrix report, the selection panel for **Indicators** can be filtered to only indicators with a certain sector. This lets you easily find indicators for just one sector (or a set of sectors) to include in the report. In the MultiMatrix **Filters** panel you can filter the report by only including data for projects with a certain sector (or set of sectors). For example, if many projects report on the indicator **# people trained**, you could create a report that only includes data reported by health projects by choosing the **Health** sector.

The screenshot shows the 'MultiMatrix' selection panel. It has a sidebar on the left with sections for 'Indicators' (which is expanded), 'Status' (with options like Inactive indicators, Inactive frameworks, etc.), 'Indicator Types' (any type), 'Indicator Format' (any format), 'Data Source' (any source), 'Data Table' (any data table), 'Geographic Disaggregation' (any geographic disaggregation), 'Disaggregation' (any disaggregation), 'Indicator Sectors' (any sector), and 'Indicator Tags' (any tag). Three orange arrows point to the 'Indicators' header, the 'Indicator Sectors' dropdown, and the 'Indicator Tags' dropdown.

[back to top](#)

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