

Bulk Imports

Last Modified on 10/07/2024 4:07 pm EDT

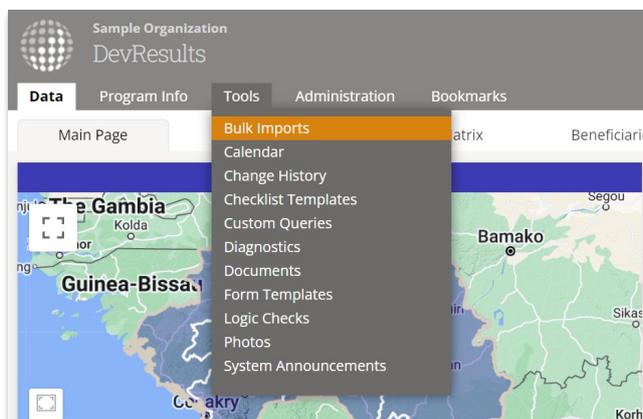
Users have the option to make many kinds of changes to their DevResults site in one place by using the **Bulk Imports** page. Additions of activities, indicators, locations, targets, and more can be done by completing and importing Excel templates. Most of the templates on this page can be accessed on the index page for each part of the system, but there are tools that offer functionality not found elsewhere in DevResults. This article covers how to use the Bulk Imports page and things to consider when doing so.

Note: This page is currently only available to users who belong to permissions groups with the Owner role enabled.

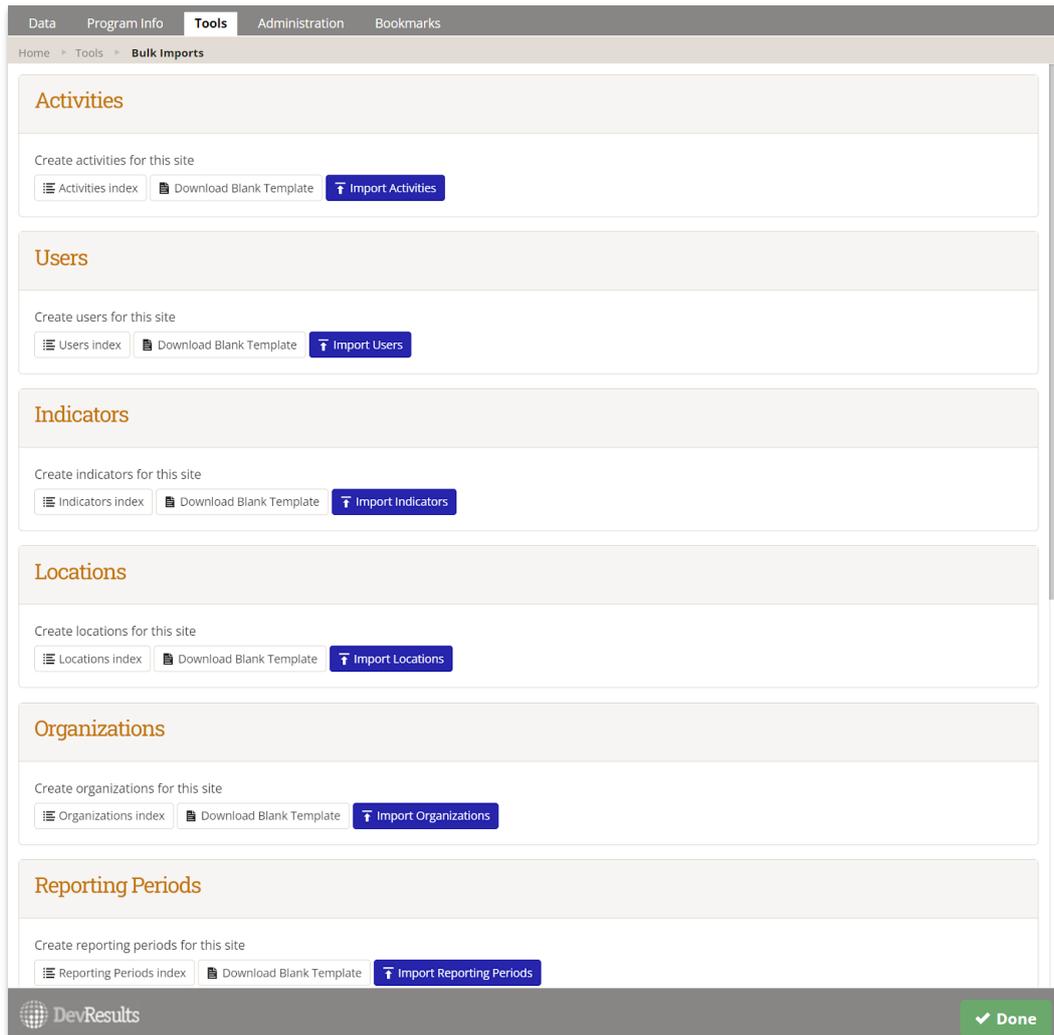
- **Using Bulk Import Templates:** Most templates follow this pattern. Find additional links below for unique templates.
- List of bulk import templates:
 - Activities
 - Users
 - Indicators
 - Locations
 - Organizations
 - Reporting Periods
 - Result Frameworks
 - Disaggregations
 - Activity Roles - **Assign users to activities**
 - Indicator Targets - **Import targets**
 - Mechanisms
 - Tags
 - Activity Geography Mappings - **Assign geographies to activities**
 - Activity Indicator Mappings - **Assign indicators to activities**
 - Narratives

Using the Bulks Import Page

The **Bulk Import** page can be found under the **Tools > Bulk Imports**.

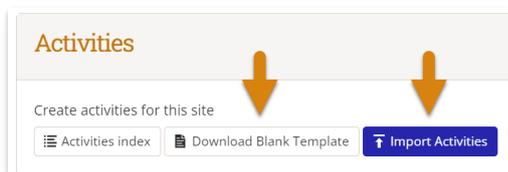


The **Bulk Imports** page shows a list of all available templates:



To add new activities (for example):

1. Click on the **Download Blank Template** button in the activities section. Fill out the Excel template with new activities and save it.
2. Import the completed template by clicking on the **Import Activities** button and choosing your edited file.
3. Note: The **Activities Index** button takes you to the list of all of your activities. Navigate to this page if you want to access an activity or make edits to activities.



Each section of the Bulk Imports page provides an different excel template that can be downloaded and populated with new information. For example, when adding multiple new disaggregations, download the blank template in the **Disaggregations** section. This template is same as the template you can download from the Disaggregations page, and can be uploaded in either place. The same is true for each template and the index page for that kind of information.

[Back to top](#)

Assigning Users to Activities

The **Activity Roles** section provides an import option not available elsewhere in DevResults. There are other easy tools for **assigning users to activities**, but this template enables you to use an Excel import to assign multiple users to multiple activities.

In this template:

- Each row should contain the assignment of one user to one activity. Add as many rows as necessary for multiple users for an activity, or multiple activities for a user.
- By default, the activity dropdown uses the **name**, but it works just as well to use the **short name**, **code**, or **reference number**, if those values are all unique in the site. **Tip:** To get rid of the restrictions of the dropdown menu, copy/paste a blank cell where you need it.
- The user must be identified with the **email** they use to log into the site.
- The **Role** column is optional: this can be used to describe an individual's responsibility with regard to that activity. While someone's job title might be "Senior M&E specialist", their role for a particular activity might be "Reviewer", for example.

In this example, we're assigning three users to "Access to School Lunches" and two users to "Bednets Distribution Program". Aboubacar will be assigned to both activities:

	A	B	C
1	Activity	User	Role
2	Access to School Lunches	aboubacar.diallo@example.org	Reviewer
3	Access to School Lunches	brian.antwerp@example.org	Approver
4	Access to School Lunches	christine.benga@example.org	COP
5	Bednets Distribution Program	aboubacar.diallo@example.org	Data specialist
6	Bednets Distribution Program	delphine.dadié@example.org	Consultant
7			

[Back to top](#)

Importing Targets for Multiple Indicators

The **Targets** section provides an import option not available elsewhere in DevResults. While users can import **targets** for an individual indicator on that indicator's targets tab, this template enables you to use an Excel import to assign multiple targets to multiple indicators and activities at one time.

In this template:

- Each row should contain a single target for a single indicator for a particular date. (The date should align with the end of a reporting period.)
- The **Activity** column should be left blank for 1) global targets or 2) indicators not reported per activity.

In this example, we're assigning targets to two indicators: 4.1 and 4.2.

- Indicator 4.1 will have 3 global targets, one for each of 3 different quarters
- Indicator 4.1 will have:
 - 3 global targets
 - 3 activity targets for the Access to Learning activity
 - 3 activity targets for the Ed-Change activity

	A	B	C	D
1	Indicator	Activity	Date	Target
2	4.1 # board-certified primary teachers in intervention schools		31 Dec 2023	40
3	4.1 # board-certified primary teachers in intervention schools		31 Mar 2024	50
4	4.1 # board-certified primary teachers in intervention schools		30 Jun 2024	60
5	4.2 # person-hours of test interventions with teachers		31 Dec 2023	100
6	4.2 # person-hours of test interventions with teachers		31 Mar 2024	150
7	4.2 # person-hours of test interventions with teachers		30 Jun 2024	200
8	4.2 # person-hours of test interventions with teachers	Access to Learning	31 Dec 2023	50
9	4.2 # person-hours of test interventions with teachers	Access to Learning	31 Mar 2024	75

Assigns 3 global targets to indicator 4.1

Assigns 3 global targets to indicator 4.2

10	4.2 # person-hours of test interventions with teachers	Access to Learning	30 Jun 2024	100
11	4.2 # person-hours of test interventions with teachers	Ed-Change	31 Dec 2023	50
12	4.2 # person-hours of test interventions with teachers	Ed-Change	31 Mar 2024	75
13	4.2 # person-hours of test interventions with teachers	Ed-Change	30 Jun 2024	100

Assigns 3 activity targets, also to indicator 4.2, for each of two activities: Access to Learning & Ed-Change

Note: Targets should be entered incrementally (the goal for just that period) or cumulatively (the total goal up to that point) depending on how target entry is defined for that indicator on the indicator's definition page.

[Back to top](#)

Assigning Geographies to Activities

The **Activity Geography Mappings** section provides an import option not available elsewhere in DevResults. There are other easy tools for **assigning geographies to activities**, but this template enables you to use an Excel import to assign multiple activities to multiple geographies.

In this template:

- The template contains a tab for each geographic level in your site.
- Each row should contain the assignment of one activity to one geography. Add as many rows as necessary for multiple activities for a geography, or multiple geographies for an activity.
- By default, the activity dropdown uses the **name**, but it works just as well to use the **short name**, **code**, or **reference number**, if those values are all unique in the site.
- For locations, you can use the **name**, **code**, or **name+code** (such as *Yatia - p1008*).
- For geographies, you can use the **name**, **code**, **full name** (e.g. *Amalfi, Antioquia, Colombia*), or **lineage** (e.g. *Colombia / Antioquia / Amalfi*).
- **Tip:** To get rid of the restrictions of the dropdown menu, copy/paste a blank cell where you need it.

[Back to top](#)

Assigning Indicators to Activities

The **Activity Indicator Mappings** section provides an import option not available elsewhere in DevResults. There are other easy tools for **assigning indicators to activities**, but this template enables you to use an Excel import to assign multiple activities to multiple indicators.

In this template:

- Each row should contain the assignment of one activity to one indicator. Add as many rows as necessary for multiple activities for an indicator, or multiple indicators for an activity.
- By default, the activity dropdown uses the **name**, but it works just as well to use the **short name**, **code**, or **reference number**, if those values are all unique in the site.
- For indicators, you can use the **name**, the **code**, or the **code+name** (such as *1-c # individuals trained*)
- **Tip:** To get rid of the restrictions of the dropdown menu, copy/paste a blank cell where you need it.

[Back to top](#)

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