Dropbox Integration: Frequently Asked Questions

DevResults allows you to continue using Dropbox for your document storage, but to integrate that storage with your DevResults site so that documents in Dropbox appear within DevResults. This page provides answers to frequently asked questions about this integration. Topics include:

- Why Would I Use It?
- How Does It Work?
- Who Can Configure Dropbox Integration?
- What Do I Need to Begin Configuration?
- Once Our Site Is Configured, Who Can Make Changes to Documents?
- What if I Rename or Rearrange My Dropbox Files/Folders?
- How Do Changes Made to Subfolders or Documents in DevResults Get Tracked in Dropbox?
- Which Parts of DevResults Storage Can I Link to Dropbox?
- Can I Integrate DevResults with any other Document Storage Solutions?

Why Would I Use It?

Bottom line: it lets you keep using the Dropbox structure you're used to while also exposing that in DevResults, which can be really handy if you don't want all your DevResults users to access Dropbox directly.

There are three advantages to this:

1. **Clarity**: If your organization has an existing Dropbox account to store documents and you also use DevResults' own document storage, it can create confusion about which system is the "single source of truth" for documents. You may find staff double-uploading or updating documents in the wrong place. Linking them together gets you the best of both worlds: Dropbox will persist as your single source of truth, but all your DevResults users can interact with the documents within DevResults without having to log directly into Dropbox.

2. **Access Control**: If you have partners who should not see other activities' or organizations' files, giving them direct access to Dropbox can be a bit of a permissions nightmare. Using our integration, you guarantee that partners only ever see the files and folders in the Dropbox folder that you explicitly assigned to their activities.

3. **Editability**: If you normally use the desktop client for Dropbox, you can keep adding documents in bulk and rearranging there and those changes will be reflected in DevResults.

How Does It Work?

One of your site administrators will link a single Dropbox account to your DevResults site and create links between individual Activity Documents or Indicator Documents tabs and specific folders in that Dropbox account.

Once those links are made, DevResults will show all folders, subfolders, and files from within that Dropbox folder within DevResults--just as if they were files created and stored in DevResults.

Updates to folder names, structure, and documents made in DevResults will be reflected in Dropbox. Changes to files from within Dropbox will be reflected in DevResults the next time you access the relevant page. All of this happens automatically without any extra work or review for you!

For general information about linking Dropbox to other software applications, see this page .

Who Can Configure Dropbox Integration?

Only users with **View & Edit** permissions on **Program Settings** can configure Dropbox Integration and link DevResults folders to Dropbox folders. If you've kept our default permissions, this limits it to **Owners**, but since you can change permissions for every group in the system, you'll need to check group permissions on your site to be sure. (And if you need a refresher on how to change permissions, here's how .)

What Do I Need to Begin Configuration?

For the initial setup, you'll need:

1. A Dropbox account
2. A Dropbox folder to link to your DevResults global, site-wide **Documents** folder.
3. You do not need to have folders for individual activities or indicators. You can add these on the fly at any time.

Global Documents in DevResults are documents not specific to an individual Activity or Indicator. These are often document templates used to create other documentation, organization-wide planning documents, etc. You can access them by clicking the **Documents** tab at the top of any DevResults screen.

> If you do not currently have a folder for these site-wide Documents, you will need to create a folder for it to properly link your DevResults site to your Dropbox account. We recommend having a folder that houses only these documents, rather than using one of your "root" folders in Dropbox, which would expose everything in all subfolders.

Once Our Site Is Configured, Who Can Make Changes to Documents?

Because the Dropbox folders and documents are exposed within DevResults, the DevResults permissions for **Documents** dictates who can view and edit these documents. If you want to restrict which users can create/edit/delete documents in DevResults and, by extension, in Dropbox, we recommend reviewing all your group permissions for **Documents** to enforce those restrictions.

What if I Rename or Rearrange My Dropbox Files/Folders?

If it's a change that breaks the linkage entirely (you deleted the linked folder, etc.), we'll show you a warning the next time you navigate to that Activity's or Indicator's Documents tab. You can then repeat the steps above to link it to the new folder.

How Do Changes Made to Subfolders or Documents in DevResults Get Tracked in Dropbox?

All changes to folders and documents made within DevResults' documents interface will be reflected in Dropbox under the user account provided in the DevResults Program Settings page.

Which Parts of DevResults Storage Can I Link to Dropbox?

For right now, you can integrate Dropbox with all of these DevResults documents:

- Global Documents (Documents tab in the main navigation)
- Individual Activity Documents tabs
- Individual Indicator Documents tabs

In the next few months, we'll also be adding integration with our Photos Library.

Can I Integrate DevResults with any other Document Storage Solutions?

Not yet. Dropbox is the only request we've had from clients, so we focused all of our energy there. But if you are using some other cloud-based document storage provider and want to integrate it, let us know!

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

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