

Enterprise Linked Site Setup Checklist

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Here are the steps to follow to report data successfully from one DevResults site to another:

First, contact DevResults staff to establish the relationship between the two sites. We will need to know:

1. What is the url for the individual project/program/country office's DevResults site?
2. What is the url for the DevResults enterprise site you'd like to link and publish data to from site #1?
3. Do you want enterprise site administrators to be able to grant their users access to your project/program/country office's site? (Typically, this is a yes if your organization owns both sites and a no if you are linking to a site outside your organization.)
4. What is the url of the activity on the enterprise site you'd like this site to publish data to?

Once we've established these relationships, the two sites are linked and, if you answered yes to #3, you'll be able to navigate between the two sites and administer users for the project/country office's site from the linked enterprise site. If you don't want to publish data between the two sites, your work is done.

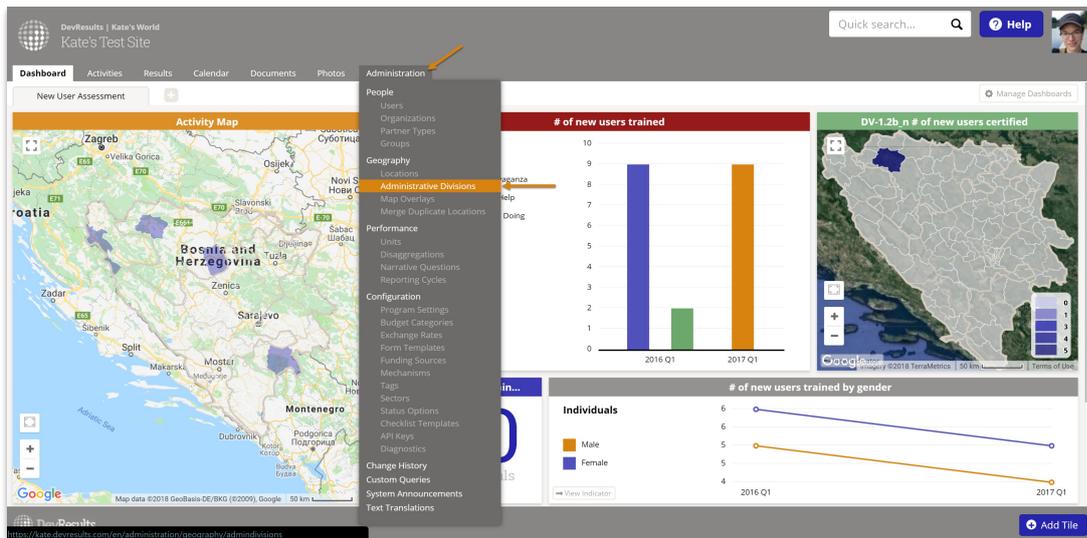
If you do want to publish data between the two sites, you'll need to complete some additional linking from within the project/program/country office's DevResults site before publication can complete. These steps are:

1. [Link Administrative Division Levels](#)
2. [Link Administrative Divisions](#)
3. [Link Disaggregations and Disaggregation Values](#)
4. [Link Indicators](#)

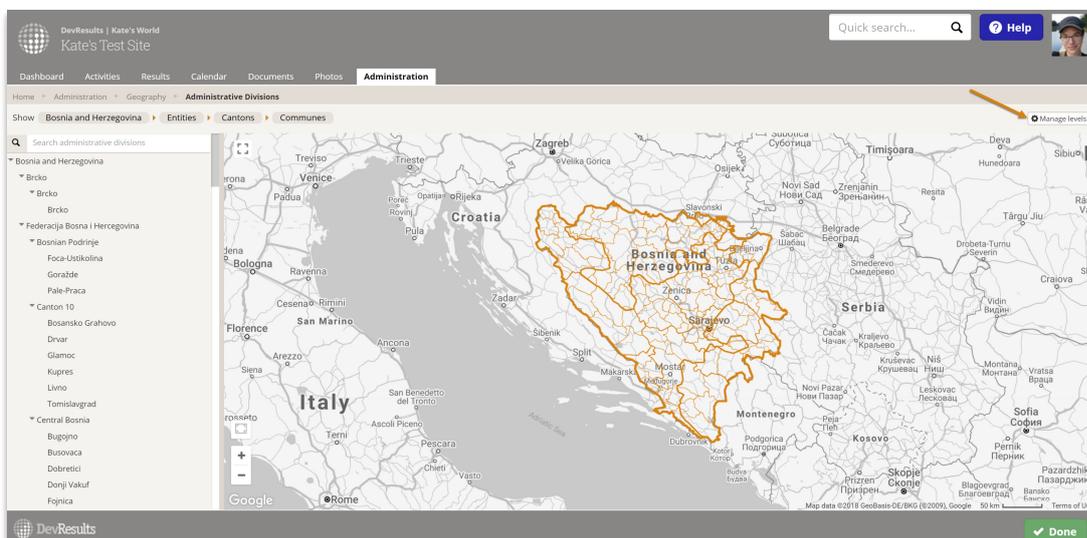
Link Administrative Division Levels

Typically, this just means linking your Country level to the enterprise site's Country level. You need to explicitly link Administrative Division Levels between sites because they are often called different things. In a single-country site, typically the country level is the name of the country (such as Bosnia and Herzegovina, in our example below). But in a regional or worldwide site, the country level is just called "Country." The levels must be explicitly linked so the Publication Engine knows how to aggregate data from the country site into a regional/worldwide site.

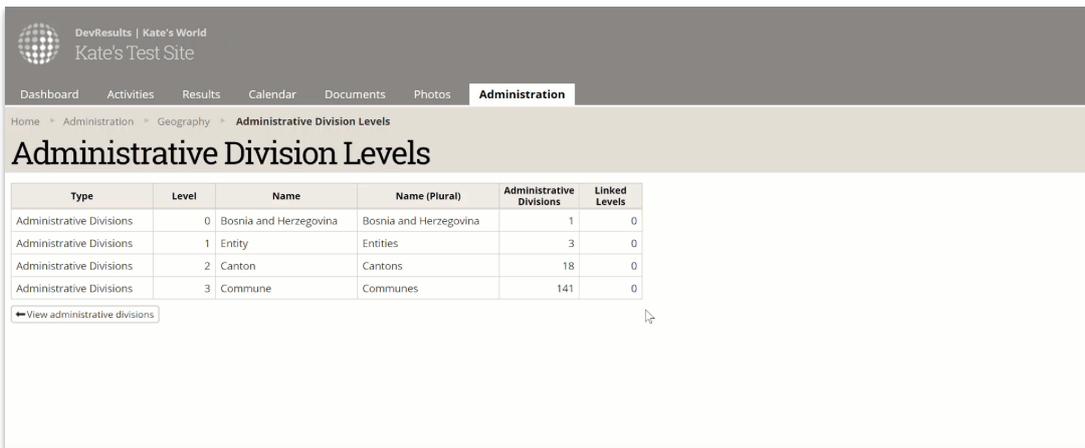
Go to **Administration->Administrative Divisions**.



Click the **Manage levels** button in the upper right corner.



For each level you wish to link, click the number in the **Linked Levels** column. This will open a pop-up to view/edit the Linked Levels. Select the site you wish to link to and the level in that site to link to. (In most cases, you'll likely be linking a single level, such as linking your country level to the linked site's country level, as in this example.) Click **Done** once you've finished making selections.



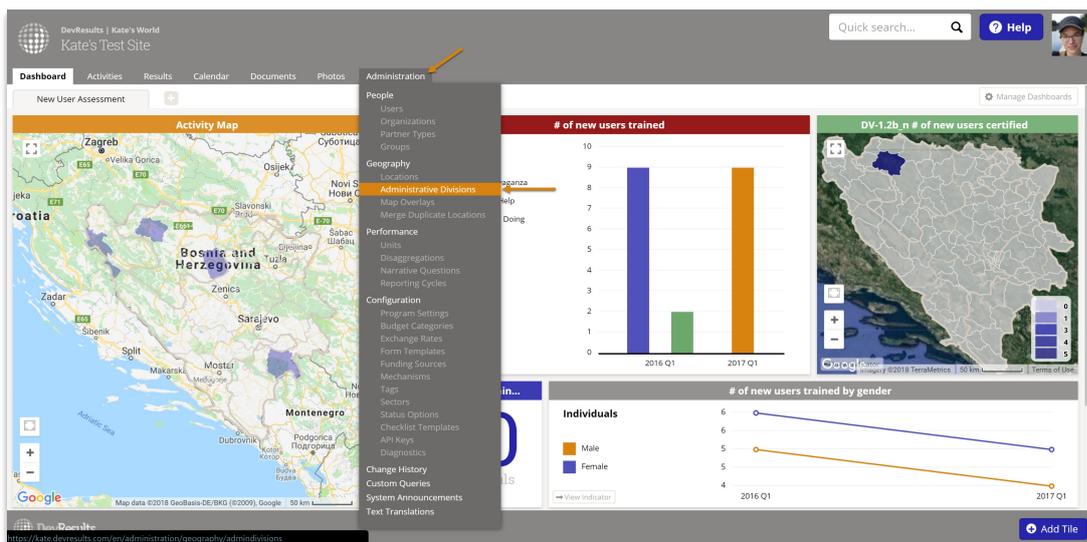
Repeat these linking steps for each level you need to link.

Link Administrative Divisions

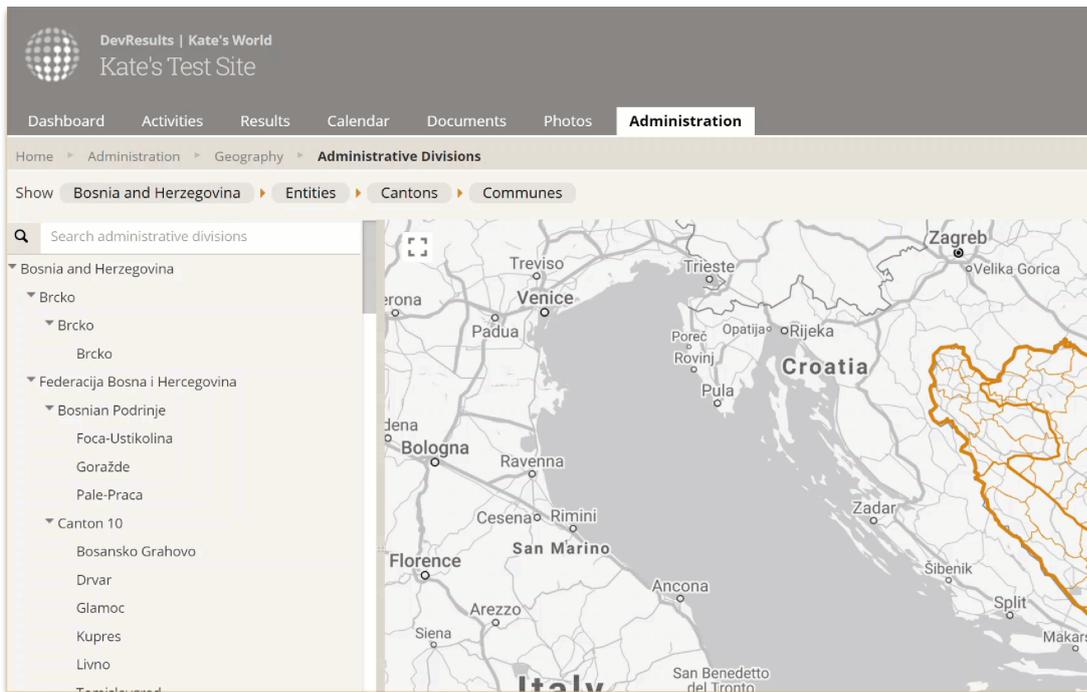
For every Administrative Division Level you linked, you'll need to link at least one Administrative Division. We ask you to explicitly link these in case you have differences in spelling or wording between the two sites.

For example, if you linked the Country Level, you will need to link your country to a corresponding country on the other site. Similarly, if you linked additional administrative divisions (such as provinces, governorates, etc.), you'll need to link those to provinces or governorates on the other site.

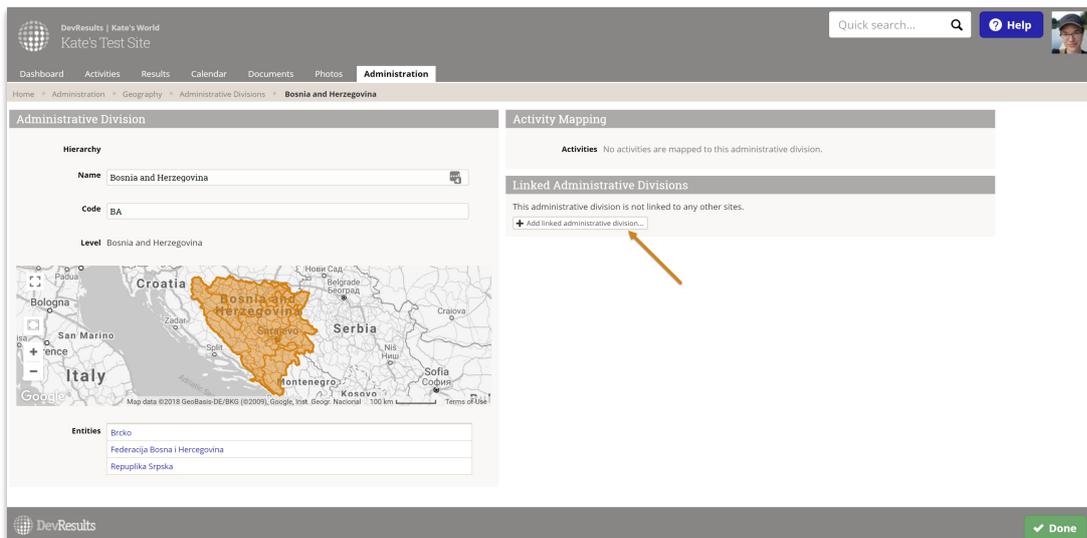
Go to **Administration->Administrative Divisions**.



This will open the Administrative Divisions Index page. Click the title of the Administrative Division you want to link. This will highlight the division on the map and in the tree while also showing an Edit button. Click the **Edit** button.

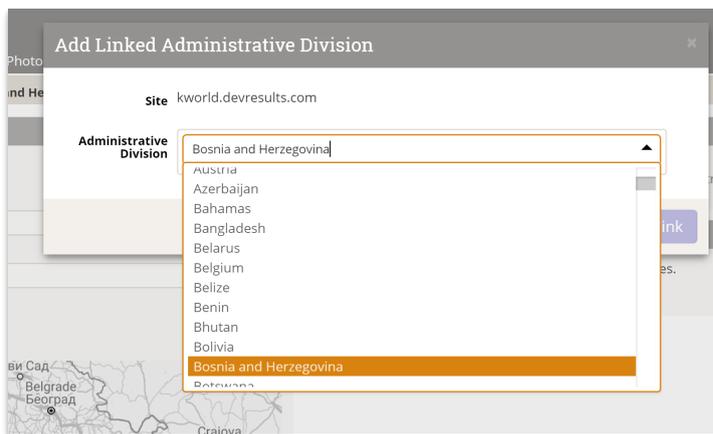


This will open the Administrative Division's Details page. Click the **(+) Add linked administrative division...** button.

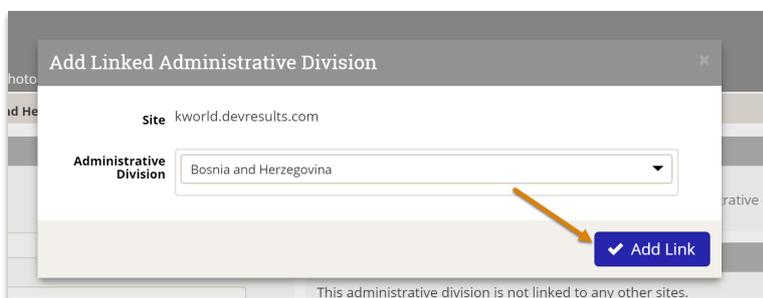


This will open a pop-up to select a linked site and Administrative Division to link to. If your site is only linked to one other site, we'll autoselect it for you. If your site is linked to multiple other sites, you'll see a dropdown at the top so you can pick the site to link to.

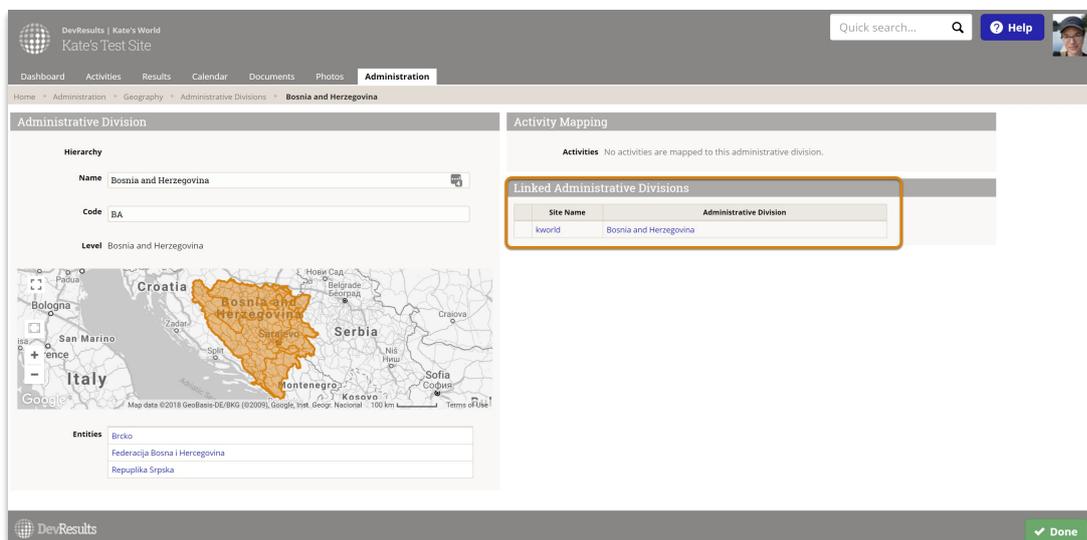
Use the Administrative Division dropdown to make your selection. You can start typing the name of the Administrative Division to filter the dropdown list.



Once you've selected both the linked site and the Administrative Division to link to, click the **Add Link** button to complete the linking.



The Linked Administrative Divisions section will update to reflect the changes you made.



Link Disaggregations & Disaggregation Values

When it comes to publication, if the indicators on the site you're publishing to have disaggregations, you must link those disaggregations and their values to the corresponding disaggregations and values on your own site. This allows you to use different names for the disaggregations themselves between sites (e.g. Age vs. Age1) and

to have different names for the individual list values in that disaggregation (e.g. Infant and Adult vs. Child and Adult).

Do the disaggregations or their value lists have to have the same wording?Nope. The names can be completely different. The linking processes handles the rest. So you can link a Gender disaggregation with Male, Female, and Other to a Sex disaggregation with Male, Female, and Unknown.

Do the two sites have to have the same number of values in the disaggregation list?Not necessarily. The HQ or donor site can have *more* values in the list than the program or project site, as long as the project or program site properly links its values to them. For example, as a program or project site, I might define Gender with two values (Male and Female), while my HQ site might define it with three (Male, Female, and Unknown). I can still link the two disaggregations and link my Male and Female disaggregations to the HQ site's; I just won't ever report any data to their Unknown value.

- Link Project Site Gender -> HQ Site Gender
- Link Project Site Male -> HQ Site Male
- Link Project Site Female -> HQ Site Female
- HQ Site Unknown is ignored in publishing.

However, it's a bit trickier if the HQ or donor site has *fewer* values in the list than the project or program site. Let's take the opposite example: say the HQ site only has the Gender disaggregation as Male and Female and my project site collects it as Male, Female, and Unknown. In this case, if I have Unknown data entered into the project site, publication to the HQ site will fail. However, you can create a formula indicator in the project site that **only** adds together the Male and Female data from this indicator and link that to the HQ site (and link those disaggregations), and successfully publish data.

- Project Indicator 1.1a has 10 Females, 9 Males, 2 Unknown
- Create Project Indicator 1.1a.1 with formula = **[1.1a | Male] + [1.1a | Female]** and disaggregate it by **Gender**.
- Link 1.1a.1 to the HQ indicator.
 - Link Project Site Gender -> HQ Site Gender
 - Link Project Site Male -> HQ Site Male
 - Link Project Site Female -> HQ Site Female

To link the disaggregations and their value lists, go to **Administration->Disaggregations**.

DevResults | Kate's World
Kate's Test Site

Quick search... [Help]

Dashboard Administration

Activity Map

of new users trained

DV-1.2b n # of new users certified

of new users trained by gender

Individuals

Male Female

2016 Q1 2017 Q1

https://kate.devresults.com/en/administration/performance/disaggregations

This will open the Disaggregations Index. Click on the disaggregation you wish to link between sites.

DevResults | Kate's World
Kate's Test Site

Quick search... [Help]

Dashboard Administration

Home Administration Performance Disaggregations

Search disaggregations

Disaggregation	Disaggregation Values
Classification	Consultant, M&E, Other, Program Staff
Gender	Female, Male, Other
2 disaggregations	

Click the **(+)** Add linked disaggregation... button.

DevResults | Kate's World
Kate's Test Site

Quick search... [Help]

Dashboard Administration

Home Administration Performance Disaggregations Gender

Disaggregation by Gender

Details

Name: Gender

Description: Standard 3-bucket Gender disaggregation; use this for all indicators disaggregated by gender unless explicitly told otherwise

Disaggregation values	Value	Description
#	Female	
#	Male	
#	Other	Use for N/A, Unknown, Transgend...
Click to add...		

Dependencies

- 11 indicators reference this disaggregation
- One data table references this disaggregation

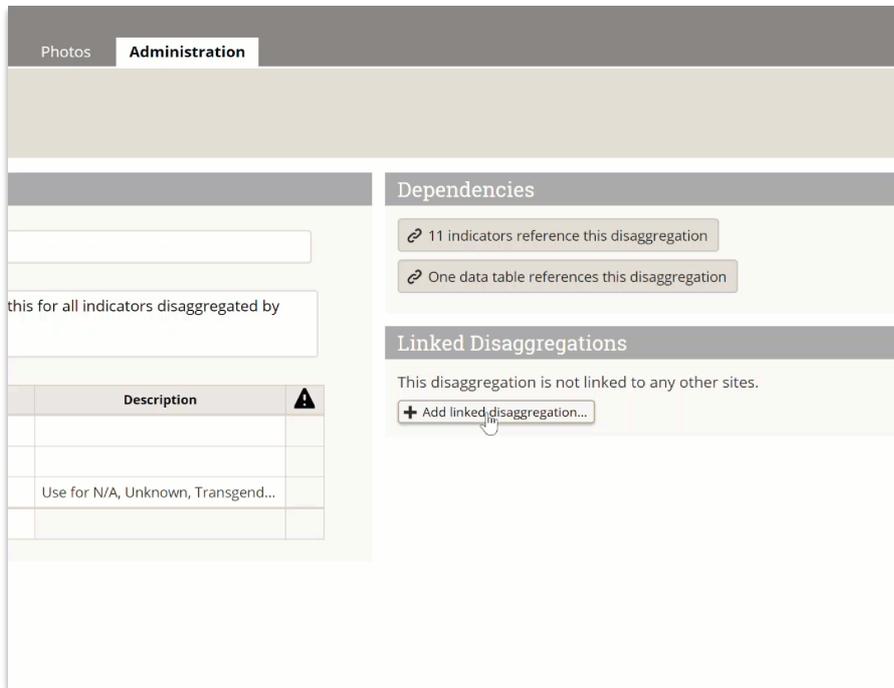
Linked Disaggregations

This disaggregation is not linked to any other sites.

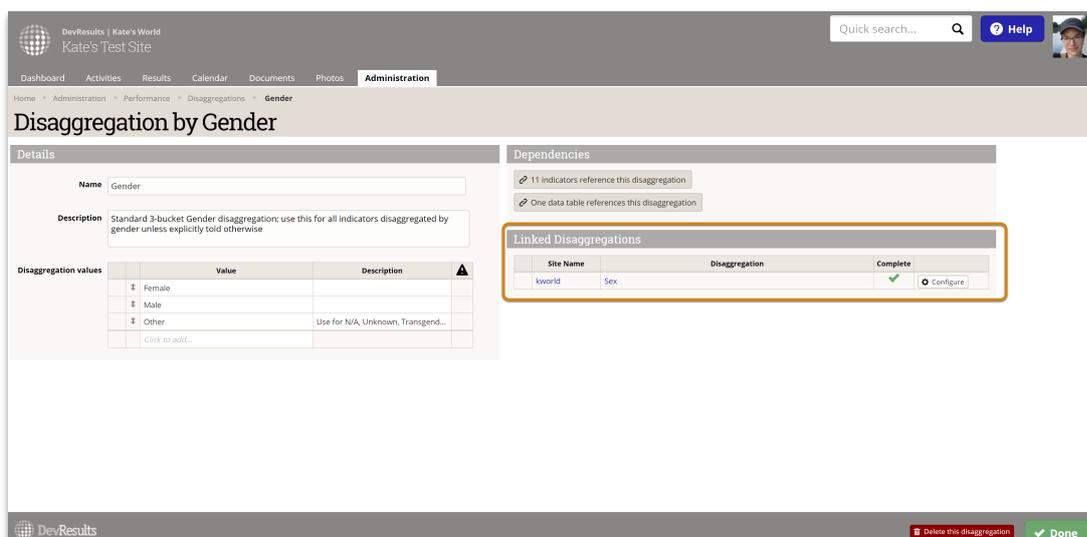
+ Add linked disaggregation...

Delete this disaggregation Done

This will open a pop-up where you can select the linked site and the disaggregation you'd like to link to. If you know the name, you can start typing in the Disaggregation dropdown to quickly find the Disaggregation you need or scroll through the dropdown. Once you've selected the disaggregation you'd like to link, click the **Add Link** button. This will add dropdowns for each Disaggregation Value; use the dropdowns under the other site's name to match your disaggregation values to the values there. Once you're finished making your selections, click the **Done** button to close the pop-up.



The Disaggregation Details page will update to show this link in the **Linked Disaggregations** section. If you've successfully linked all disaggregations, the Complete column will have a green checkmark. If not, click the **Configure** button to complete linking.

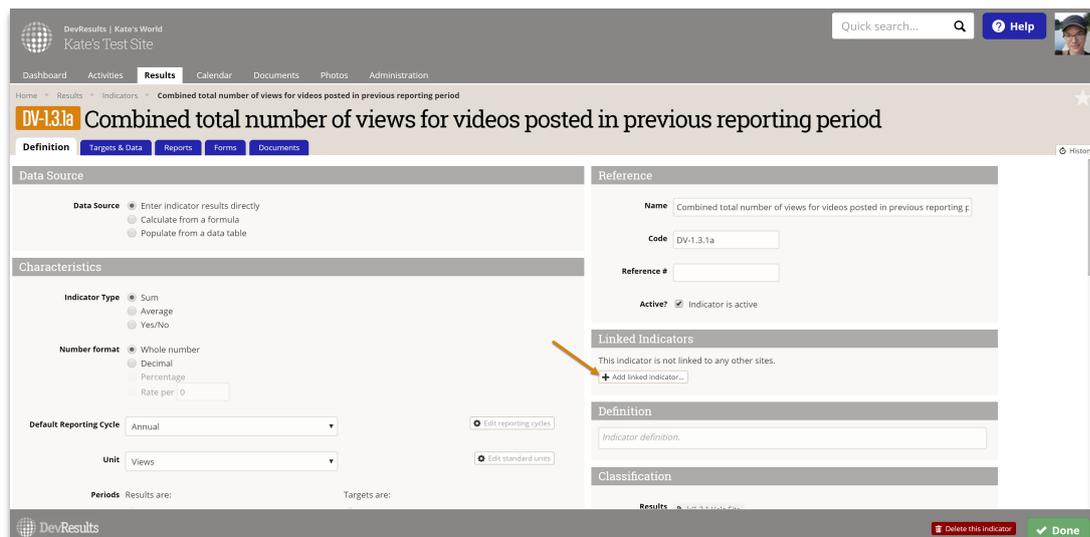


Link Indicators

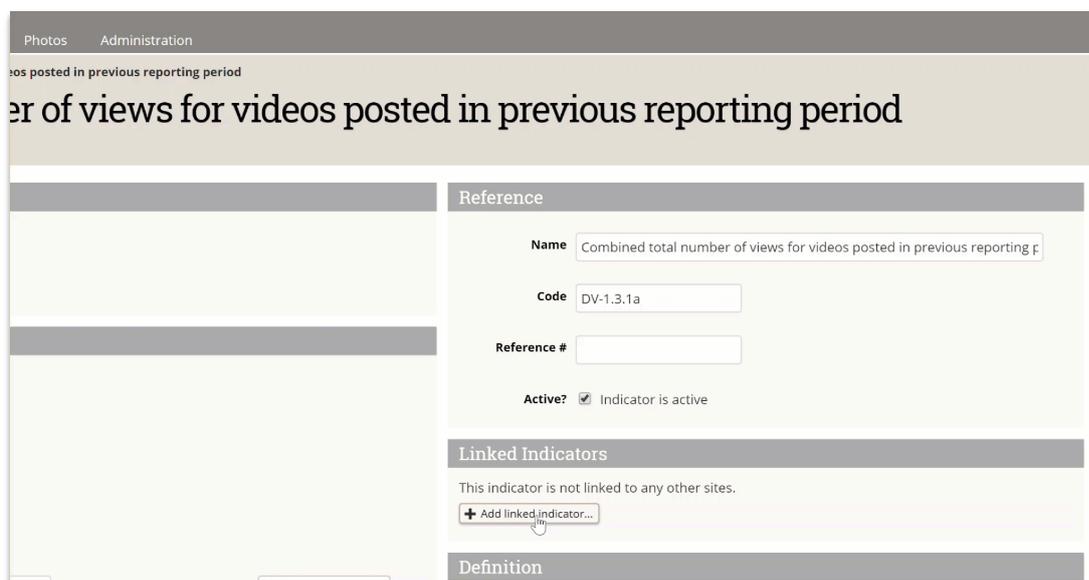
For publishing data between DevResults sites, only the data for indicators which have been explicitly linked will be published, so you'll need to complete these steps for every indicator you want to publish to another site.

You can either copy indicators from the [Indicator Library](#) to make sure they're properly linked, or manually link existing indicators between sites using the instructions below.

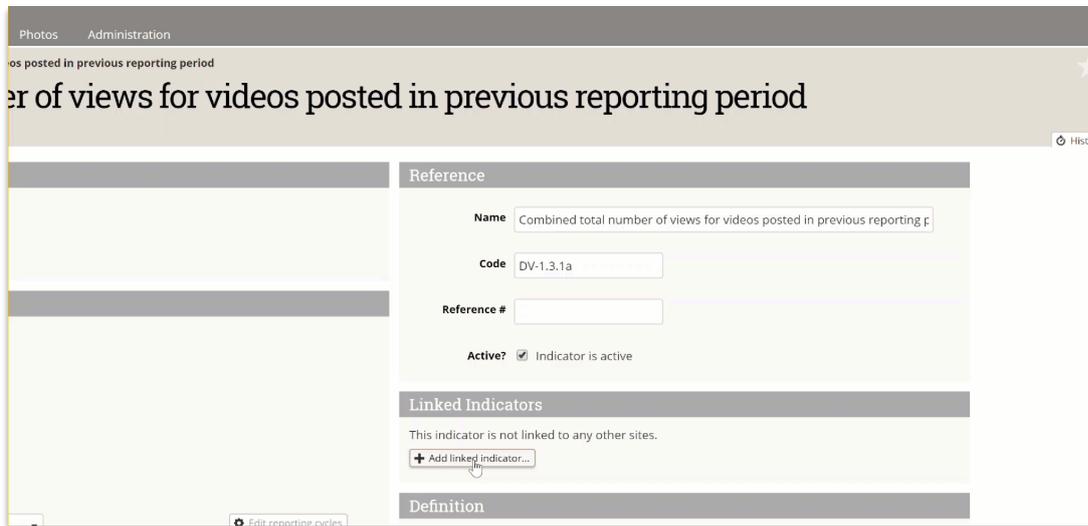
Go to the Definition tab for any Indicator you want to publish data to another site on. In the Linked Indicators section, click the **(+) Add linked indicator** button.



This will open a pop-up in which you can select the linked site, filter by Results Framework (optional--you will see All by default), and select the indicator you wish to link to. If you know the code or name of the indicator on the linked site, simply start typing it into the dropdown to narrow the list of options. Once you've selected the linked site and indicator, click the **Add Link** button. The Indicator Definition page will update to show the linked indicator in the **Linked Indicators** section.



If these indicators were incompatible for publishing, you'd see a message in the linking pop-up. You can still add the link if they're incompatible; you just won't be able to publish data. You'll see the warning icon in the Linked Indicators section, and you can hover your mouse over that icon to see the warning message.



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