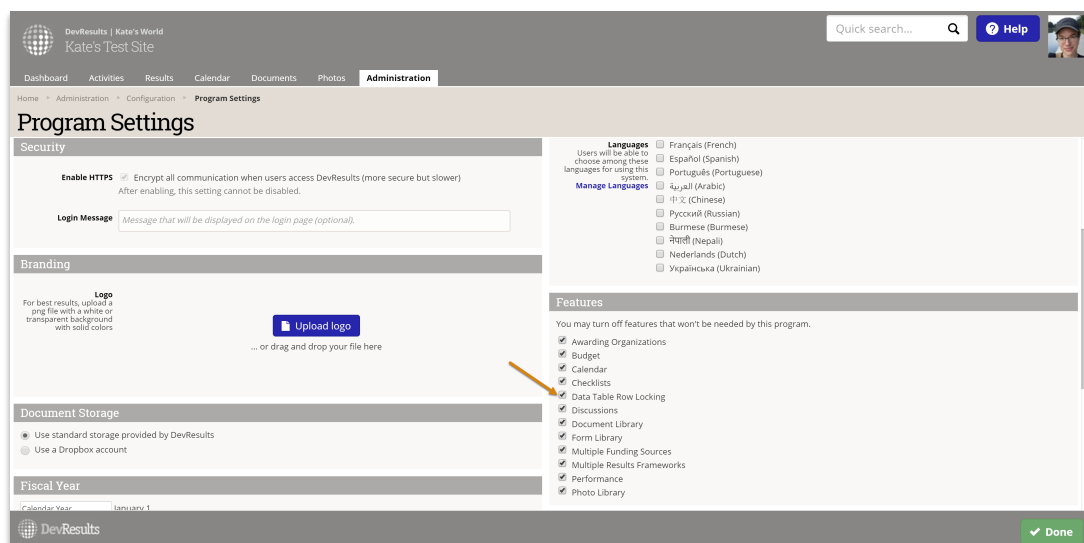


Data Table Row Locking

Last Modified on 01/23/2018 4:22 pm EST

One of the reasons people want to use DevResults is to provide a way to formalize data submission, review, and approval processes--and to guarantee that approved data can be "finalized" and become the data of record moving forward.

We provide an out-of-the-box **data submission and approval process**, which is enabled by default for all direct entry data. You can also enable this approval/locking functionality for data table data. To turn this feature on, go to **Administration > Program Settings** and add a checkmark next to **Data Table Row Locking** under the **Features** section. Once you see the "Your change has been saved" message, the feature is enabled.



Note: If you already have a lot of existing data tables, this process may take up to a minute to complete while the system evaluates all existing data to apply locks.

What Does It Mean When a Row Is Locked?

Locked rows cannot be edited or deleted except by those with advanced permissions.

In addition, users cannot create new rows in already-locked Activity Reporting Periods.

How Can I Tell if a Row Is Locked?

With Data Table Row Locking enabled, every data table will display one new column: **Locked?** If the row is locked, a lock icon will appear in this row; clicking on that icon will provide a pop-up with details on the Reporting Period(s) locking it with links to take you directly to that Activity Reporting Period:

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0 records
Delete
Add new record

	Key Value	Locked?	Row Locked	Gender	Trainee First Name	Trainee Last Name	Certification Exam Taken?	Certification Exam Passed?	Train the Trainers Training Completed?	Certified Trainer Passed?	Activity	Number Days Attended		
	1		<div> This row is locked according to the status of these reporting periods for this activity: 2017 Q1 </div>		Jane	Doe	Yes	Yes	No	(not set)	Friendly Data Help	4		
	2				Joe	Doe	Yes	No	No	(not set)	Friendly Data Help	4		
	3				Apple	Fiona	Yes	Yes	No	(not set)	Friendly Data Help	4		
	4				Brian	Riggs	Yes	No	No	(not set)	Friendly Data Help	4		
	5			16 Mar 2017	Kozara National P...	Female	Eve	Marple	Yes	Yes	Yes	No	Friendly Data Help	4
	6			16 Mar 2017	Kozara National P...	Male	Joshua	Main	Yes	Yes	Yes	Yes	Friendly Data Help	4
	7			16 Mar 2017	Kozara National P...	Female	Janet	Mine	Yes	Yes	Yes	Yes	Friendly Data Help	4
	8			16 Mar 2017	Kozara National P...	Male	John	Dice	No	No	No	No	Friendly Data Help	4
	9			16 Mar 2017	Kozara National P...	Female	Janice	Dane	No	No	No	No	Friendly Data Help	4
	10			1 Jan 2016	Testic (Testic, Banj...	Female	Jane	Doe	Yes	Yes	No	No	Definitive Data Doi...	4
	11			1 Jan 2016	Testic (Testic, Banj...	Male	Joe	Doe	Yes	No	No	No	Definitive Data Doi...	4
	12			1 Jan 2016	Testic (Testic, Banj...	Female	Apple	Fiona	Yes	Yes	No	No	Definitive Data Doi...	4
	13			1 Jan 2016	Testic (Testic, Banj...	Male	Brian	Riggs	Yes	No	No	No	Definitive Data Doi...	4
	14			1 Jan 2016	Testic (Testic, Banj...	Female	Eve	Marple	Yes	Yes	Yes	No	Definitive Data Doi...	4

Delete this data table
Done

When you click on an individual row, open the data entry form, and try to edit the data, if the row is locked, you'll see a warning at the top of your screen when it tries to save:

DevResults | Kate's World
Kate's Test Site

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Search

1 record
Delete
Add new record

	Key Value	Locked?	Date	Location
	1		16 Mar 2017	Kozara National P...
	2		16 Mar 2017	Kozara National P...
	3		16 Mar 2017	Kozara National P...
	4		16 Mar 2017	Kozara National P...
	5		16 Mar 2017	Kozara National P...
	6		16 Mar 2017	Kozara National P...
	7		16 Mar 2017	Kozara National P...
	8		16 Mar 2017	Kozara National P...
	9		16 Mar 2017	Kozara National P...
	10		1 Jan 2016	Testic (Testic, Banj...
	11		1 Jan 2016	Testic (Testic, Banj...
	12		1 Jan 2016	Testic (Testic, Banj...
	13		1 Jan 2016	Testic (Testic, Banj...
	14		1 Jan 2016	Testic (Testic, Banj...

Failed to save changes. (Cannot modify record data because it is locked.)

Date
16 Mar 2017

Location
Kozara National Park (Prijedor, Banja Luka, Repuplika Srpska)

Trainee Gender
Male

Trainee First Name
Joe

Trainee Last Name
Doe

Certification Exam Taken?
☒

Certification Exam Passed?
☐

Train the Trainers Training Completed?
☐

Certified Trainer Passed?
☐

Activity
Friendly Data Help (FDH)

Number Days Attended
4

Add new record
Done

When you click on an individual row and open the data entry form, you'll also see a warning across the top:

Trainee	Activity
Eve	Marple

Data Form

This row is locked according to the status of these reporting periods for this activity:
2016 Q1

Date

Location

Trainee Gender

Trainee First Name

Trainee Last Name

Certification Exam Taken? ☐ unknown ☒ yes ☐ no

Certification Exam Passed? ☐ unknown

Are There Any Differences Between This Workflow and the Direct Entry Workflow?

Yes. The main difference is that data table rows can always be entered for *future* reporting periods. Direct entry data can only be entered once a reporting period's submission window is open. Since data tables usually capture weekly or monthly data, we do not enforce this requirement. (We do still enforce it for past reporting periods, though.)

How Does Data Table Row Locking Really Work?

With Data Table Row Locking enabled, every row in a data table gets evaluated to see if it should be editable or not, based on these criteria:

1. Is the data table used by any indicators?
 - **No:** data table rows are never locked
 - **Yes:** data table rows are evaluated for locking based on the indicators' defined Date and Activity columns
2. What is the Activity Reporting Period's status?
 - **No Data:**
 - Submission is upcoming or open: rows falling within this Activity Reporting

Submission is upcoming or open: rows falling within this Activity Reporting Period are fully editable by anyone with **View & Edit** permission on **Indicator Results**.

- Submission window is closed: new rows cannot be added and existing rows are locked from editing
 - **In Progress:**
 - Submission window is upcoming or open: rows falling within this Activity Reporting Period are fully editable by anyone with **View & Edit** permission on **Indicator Results**.
 - Submission window is closed: rows falling within this Activity Reporting Period are only editable by anyone with the **Approve Indicator Results** or **Owners** roles.
 - **Submitted:**
 - Rows falling within this Activity Reporting Period are only editable by anyone with the **Approve Indicator Results** or **Owners** roles.
 - **Returned:**
 - Submission window is upcoming or open: rows falling within this Activity Reporting Period are fully editable by anyone with **View & Edit** permission on **Indicator Results**.
 - Submission window is closed: rows falling within this Activity Reporting Period are only editable by anyone with the **Approve Indicator Results** or **Owners** roles.
 - **Approved:** Rows falling within this Activity Reporting Period are only editable by anyone with the **Owners** role.
3. What permissions does this user have?
- As you can see from the Activity Reporting Period statuses above, there are some cases where rows are locked from editing to all users except a particular group (such as those with the **Owners** role). So in addition to checking the Activity Reporting period status, we always check the user's permissions before allowing or preventing an edit to data table rows.

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

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