

# Activities and Organizations

Last Modified on 02/20/2019 2:19 pm EST

Activities and Organizations define **who** carries out an activity, reports indicator data, or is associated with specific results.

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## What Is an Activity?

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An "Activity" in DevResults is a central organizing feature of the system. It is up to you to decide what an Activity means to you and your organization. Activities are often grants or sub-grants managed by external organizations who report data to you, or internal projects managed by teams within your organization, or are some combination of the two.

A general guideline is that each grant or award should be a separate Activity. There are a variety of tools for grouping related Activities: by organization, by awarding organization/donor, by tags, or by sectors.

If you're still unsure how to define activities for your site, consider the following:

- Activities are generally not single events, but are ongoing programs or implementing mechanisms that report indicator results each reporting period.
- Activities each have their own users with specific roles, checklists of tasks for completion, and budgets.
- Activities operate in specific geographic areas, even if these areas change over time.
- Activities are individually accountable for reporting results, and subsequently all results achieved for an activity are associated with that specific Activity.

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## What Is an Organization?

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An Organization is a distinct entity that is associated with one or more Activities. Organizations typically include consortium partners, local partners, donors, as well as the organization that owns and operates a DevResults site.

Organizations also represent their associated users, whether the staff of the main organization, partner organization staff, or external stakeholders. When "Partner" or "Partner Manager" user accounts are associated with specific Organizations, they will be

granted access to all of the activities associated with that Organization.

Organizations can be used throughout DevResults to search for all associated Activities, filter data by one or more Organizations, or to aggregate results across an Organization's Activities.

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## How Should I Organize My Activities and Organizations?

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Generally, Organizations and Activities should be defined in the way that is most intuitive to users and best reflects the organization of your program. Occasionally, there are situations where it may be advantageous to split a single legal entity into multiple Organizations, each with their own Activity. Similarly, there are also situations where a single grant or award may be better defined and captured by multiple Activities within one or multiple Organizations. Consider the following rules of thumb:

- If a single grant or award is too large in scope to be defined by one Activity, it may be beneficial to break it into multiple Activities associated with one Organization. This is typically seen where one "umbrella" Activity represents the management of the main grant or award, and all other Activities represent sub-grants or individual initiatives, each with their own set of users, budgets, task checklists, etc.
- If the same staff are involved in multiple Activities, they should be associated with a single Organization.
- If a large entity has multiple teams or program units that do not collaborate on or share responsibilities across multiple activities, they could be defined as separate Organizations. This is typically seen where country offices or sector-based teams operate mostly as independent units, even though they may all work for the same international firm or federation.
- If you want to eventually aggregate or roll up data by Organization, you will want to use multiple Activities associated with individual Organizations.
- If you want certain users with "Partner" or "Partner Manager" permissions to have access to a specific set of Activities but not others, you will need to associate those Activities with a separate Organization. This could mean creating multiple Organizations for different groups of users, each assigned to their relevant Activities, even if they all work for the same legal entity.

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