How do I Change the Data Submission Window?

Problems to solve: The reporting period submission window is closed, but I want to enable projects to enter/edit data.
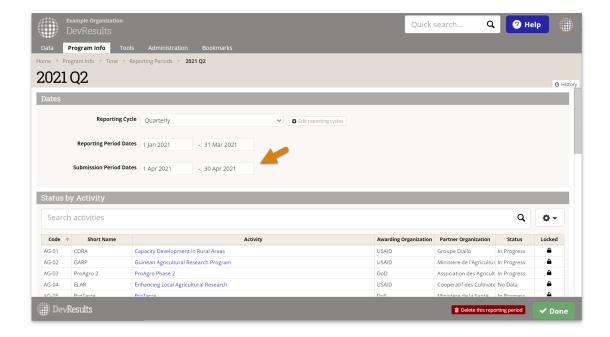
- **Solve this problem for all projects** with unsubmitted data.
- **Solve this problem for some projects** with unsubmitted data. (Not all projects with unsubmitted data should be permitted to edit data for this period.)

Solve this problem for all projects with unsubmitted data

Users with **View/Edit permissions** for the **Reporting Periods** role can change a reporting period's **Submission Period Dates** to allow contributors and partners to enter or edit data.

To do so, navigate to **Program Info > Reporting Periods** and then click on the relevant reporting period. Edit the **Submission Period Dates** so that the date range encompasses the current date.

This will only enable editing for projects with a status of **No Data**, **In Progress**, or **Returned**. Changing the submission window will never allow users without the results data approver permission (such as partner users) to edit data when the status is **Submitted** or **Approved**. Learn more about the **data submission & approval process**.

Solve this problem for some projects with unsubmitted data

You might want to enable some projects with unsubmitted data to edit data for a certain reporting period while restricting others from doing so. There are four separate options for how to do so:

Manage permissions using the project's reporting period status

- Set the reporting period's submission window to be open. (**See above** for instructions).
- Projects that **should** be allowed to edit data should have a status of **No Data**, **In Progress**, or **Returned**.
- For any project that should **not** be able to edit data, set that project's reporting period status to **Submitted** or **Approved**. For information about changing a project's reporting period status, please read more about the **data submission & approval process**.

Enable "indicator results view/edit" permissions for certain users

- In the permissions groups for partners, change **Indicator Results** from **View & Edit** to **View**. This disables editing of indicator data for all partners.
- Set the reporting period's submission window to be open. (**See above** for instructions).
- To give an individual permission to edit data for a project with a status of **No Data**, **In Progress**, or **Returned** for the open reporting period, create a new user group by going to **Administration > Groups**. Click **+ New Group** and name it something like "Late Reporters". **Define the new group** with the same permissions as the original partner permission group. Assign the individual to this group.

Enable "results data approver" role for certain users

- Set the reporting period's submission window to be closed. (**See above** for instructions, but make sure the submission period dates do *not* encompass the current date).
- A user that should be able to enter or edit data for closed reporting periods should be re-assigned to a permissions group that has the **results data approver** role enabled. This will allow that user to

edit/submit/approve data for any reporting period that has a closed submission window.

- For example if you want to give a partner this permission, create a new user group by going to **Administration > Groups**. Click **+ New Group** and name it something like "Partners who can edit data for closed periods". **Define the new group** with the same permissions as the original, but enable the **results data approver** role at the bottom. Assign the individual to this group.
- Users with the **partner** role enabled will still be restricted to just their project/projects.

Users without permission to edit data for closed reporting periods can provide completed templates to users who do have that permission

- Set the reporting period's submission window to be closed. (**See above** for instructions, but make sure the submission period dates do *not* encompass the current date).
- Any project that needs to make changes can send downloaded/completed direct entry or data table Excel files to users with **results data approver** or **owner** roles enabled, who can then upload that information to DevResults for them.

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