

Define a Project

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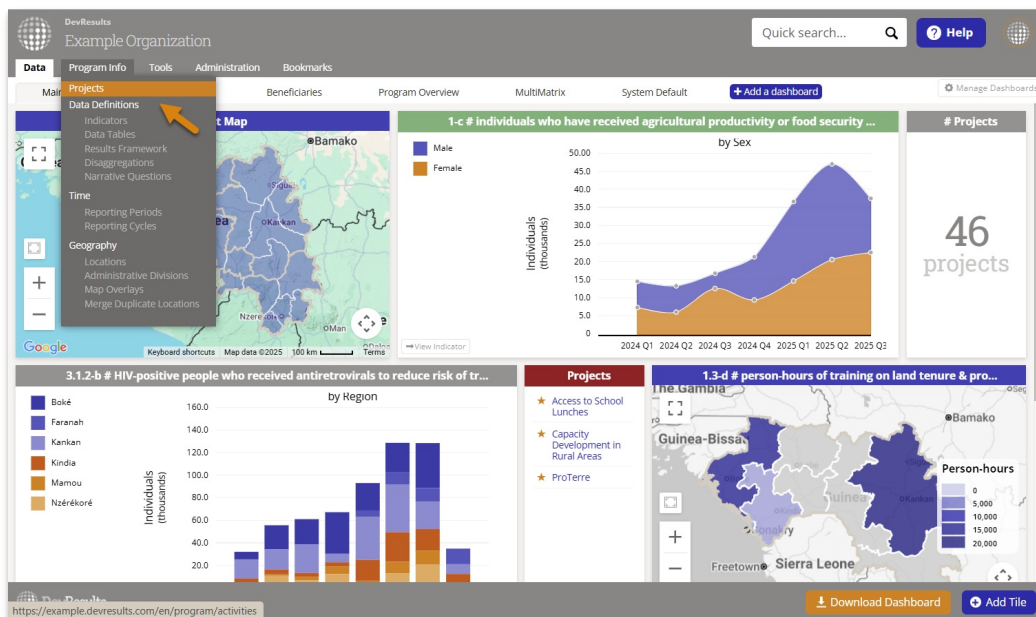
DevResults offers several tools for defining projects:

1. **Create** or **edit** a single project
2. **Create** or **edit** multiple projects using an **Excel upload**
3. **Edit** multiple projects from the **project index**

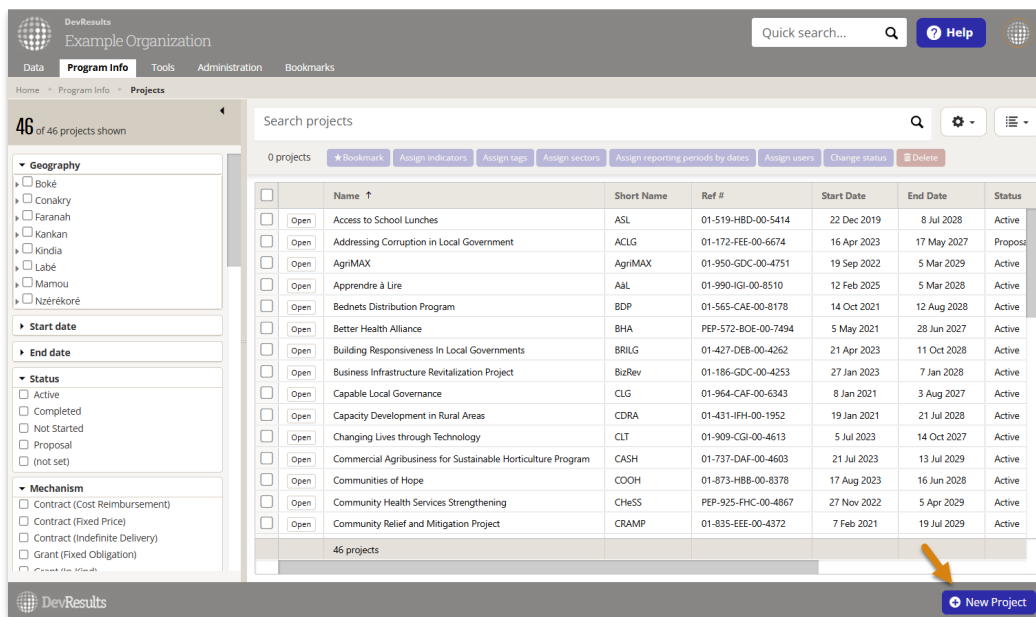
Note: Any user whose group includes **View & Edit** permissions for **Project Overview** can create new projects.

Create a project

To add a new project in DevResults go to **Program Info > Projects** from any page.



This will open the projects index page. To create a new project, click the **+ New Project** button in the lower right.



In the **Create New Project** pop-up, type the name of the new project and click the **+ Create Project** button.

The 'Create New Project' pop-up form is shown. The 'Name' field contains the text 'Improving Public Works'. There is a 'Cancel' button on the left and a '+ Create Project' button on the right.

You will be taken to the new project's **Overview** tab where you can add other information about the project.

The screenshot shows the 'Improving Public Works' project overview page. The 'Overview' tab is selected. The page is divided into two main sections: 'Reference' and 'Details'. The 'Reference' section includes fields for Name, Short Name, Reference #, and Code. The 'Details' section includes dropdowns for Status and Mechanism. The 'Description' section includes text areas for Context, Objectives, Summary, Expected Results, Beneficiary Description, and Deliverables & Reporting. At the bottom right, there are buttons for 'Delete this project' and 'Done'.

This includes reference information, including:

- **Short Name** - such as the name everyone uses when speaking about the project
- **Reference Number** - such as the grant number
- **Code** - such as an additional internal code for the project

Reference

Name Improving Public Works

Short Name IPW

Reference # US-001-30-GW25

Code IPW2015

And descriptive information. If you'd like to change, add to, or remove the fields in this section, you can do so by going to **Administration > Custom Fields**. Read more about [custom fields for projects](#).

Description

Context Words: 0
Context for this project

Objectives Words: 0
Objectives for this project

Summary Words: 0
Summary for this project

Expected Results Words: 0
Expected Results for this project

Beneficiary Description Words: 0
Beneficiary Description for this project

Deliverables & Reporting Words: 0
Deliverables & Reporting for this project

To configure a new project in DevResults for reporting indicator results, the project must be assigned a number of other elements. These elements include:

- **Status:** You must select a status to find this project when filtering by status.
- **Mechanism:** You must select a mechanism to find this project when filtering by mechanism.
- **Dates:** You must add dates in order for this project to appear on the timeline or to find this project when searching by date.
- **Reporting Periods:** You must add the reporting periods for which this project will report indicator results or narrative results.

Details

Status Active

Mechanism Indefinite Delivery

Dates 15 Dec 2012 - 13 Aug 2019

Reporting Periods

	Name	Start Date	End Date	Status
	FY 2013	1 Oct 2012	30 Sep 2013	Approved
	FY 2014	1 Oct 2013	30 Sep 2014	Approved
	FY 2015	1 Oct 2014	30 Sep 2015	Approved
	FY 2016	1 Oct 2015	30 Sep 2016	Submitted
	FY 2017	1 Oct 2016	30 Sep 2017	No Data

+ Add Reporting Periods

- **Results and Indicators:** You must assign the results and indicators for which this project reports data. You can look at the [Assign an Indicator to an Project](#) page for more information.

Classification

Results and Indicators

Indicators 2

Results 2

Indicator	Reporting Cycle
1.2-a # kilometers of roads improved or construct...	FY Annual
1.4-a % gross margin per kg of tubers	FY Annual

+ Select indicators...

Allow reporting cycles to vary over time

Technical Sector

Agriculture

Education

+ Add a sector...

Tags

Climate

Rural

+ Add a tag...

Organization Info: You must add the partner organization that will manage this project in order to enable that organization's DevResults users to report indicator results and narrative results for this project.

- **Partner Type:** You can select a Partner Type to indicate what type of partner relationship this is.
- **Primary Contact:** You can optionally add the primary contact for this project.
- To add organizations, users, or partner types, click the relevant buttons below the grid. Once you've added them, clicking the Done button will bring you back to this screen.

Partner Organizations

Partner Organization	Partner Role	Primary Contact	IATI Activity	
⚙️ Kunkle Associates				Details
Click to add...				

Note: In reports, all data for this project will be attributed to the primary organization listed first.

⚙️ Manage Organizations

⚙️ Manage Partner Roles

⚙️ Manage Users

- **Staff Roles:** You must **assign users** in order for those users to be included in emails generated by DevResults about reporting project and from communication in the Discussion tab. **Partner users cannot access an project unless they are assigned to it in this table.**

Staff Roles and Partner Access						
	Person ↑	Role	Title	Organization	Permissions	
Profile	Aasit Nanavati	Reviewer	Finance & Administration Direc...	USAID	Owners	
Profile	Aboubacar Diallo	Reviewer	Grants Specialist	Gates Foundation	Partner Managers	
Profile	Aicha Zeinab	M&E Specialist	Ct/Pmtct Study Specialist	Kunkle Associates	Partner Managers	
Profile	Aissata Diop	M&E And Research Specialist		Kunkle Associates	Partner Managers	
Profile	Bo Goldberg	Primary Contact	Clinical Services Director	Kunkle Associates	Partner Managers	
Profile	Dafu Wen		Team Leader		Managers	
Profile	Isabelle Mbagbouée	Approver	Deputy Executive Director	USAID	Owners	
Profile	Leslie Sage	Project Manager			Owners	
Profile	Peter Johnson	M&E Specialist	Senior Virologist	Kunkle Associates	Partner Managers	

+ Assign Users

Finally, for this project to be completely set up for reporting indicator results and narratives for each of its reporting periods, you must **Assign a Geography to an Project**.

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[Edit a project](#)

To edit an project, go to **Program Info > Projects** from any page. This will open the projects index page.

Click on the project you'd like to edit. Make desired changes.

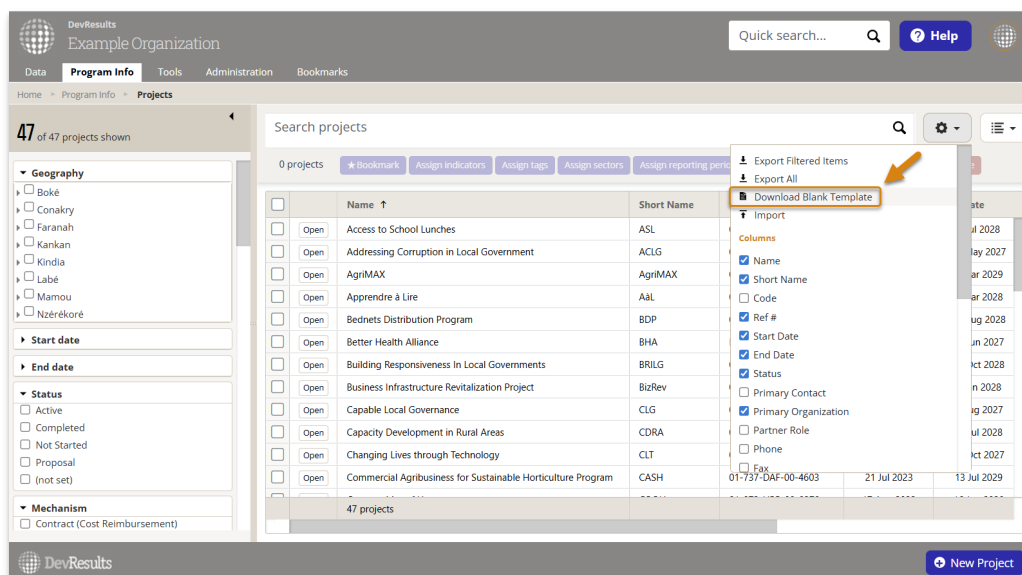
Note: You can change information in the **Reference** and **Description** sections without affecting indicator results. Unassigning reporting periods, indicators, or geographies will delete any data reported for those elements for this project.

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Upload new projects

To add many new projects at once, you can upload a spreadsheet containing their details instead of creating each project individually. First, go to **Program Info > Projects** to open the project index.

On this page, click on the gear icon and then click **Download Blank Template** to get an Excel template.



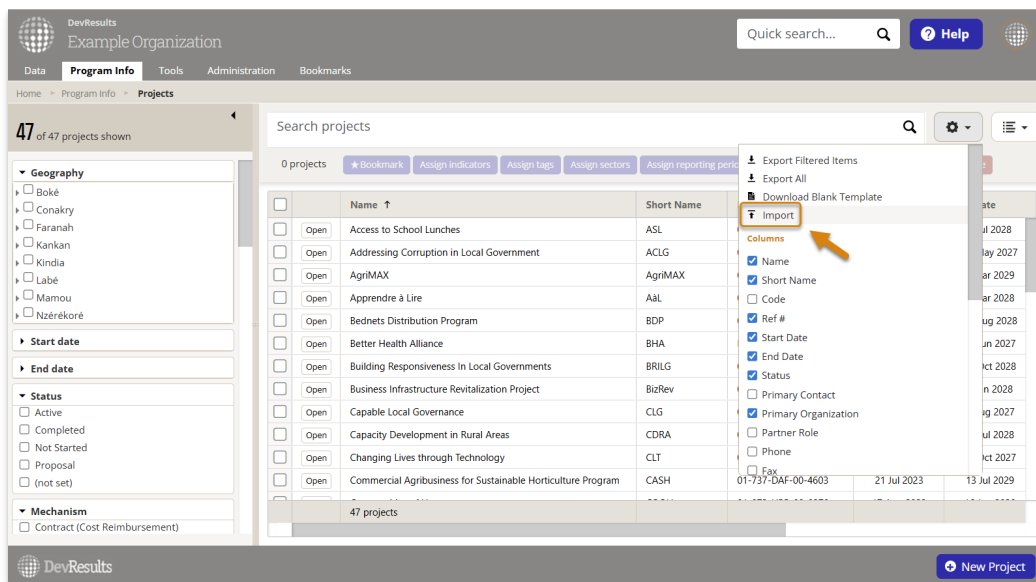
Edit the Excel file by adding the list of projects you'd like to upload.

	A	B	C	D	E	F	G	H	I	J
1	Name	Short Name	Ref #	Code	Status	Mechanism	Start Date	End Date	Sectors	Tags
2	Safe Routes to School	SRS	01-644-ACA-00-8664	ED-06	Active	Grant (Fixed Obligation)	12/20/2017	1/30/2024	Education	Gender, Infrastructure
3	Providing Access to Mosquito Nets	Nets	01-533-FAH-00-5836	HE-10	Completed	Contract (Cost Reimbursement)	9/17/2017	11/22/2019	Health	Children, Rural
4	National Interventions in Health and Education	NIHE	01-459-HAG-00-4055	ED-01	Active	Memorandum of Understanding	2/1/2016	4/24/2022	Education, Health	Infrastructure
5	Water, Sanitation, and Health	WaSH	01-847-CHG-00-8288	HE-02	Completed	Grant (Public-Private Partnership)	6/10/2016	8/16/2019	Health	Children

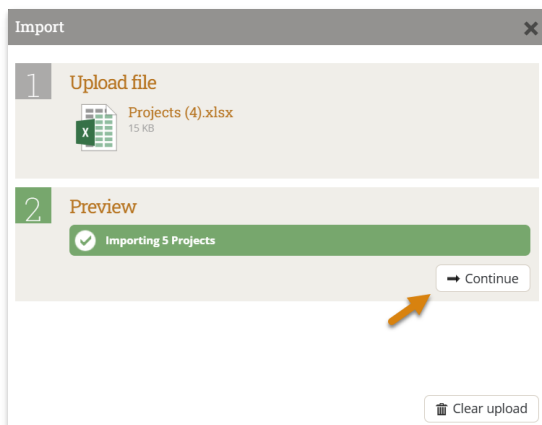
Organization needs to reference an organization that already exists in your site.

- You can enter multiple **Sectors** separated by commas, for example: "Health, Education".
- You can enter multiple **Tags** separated by commas, for example: "Training, Engagement".
- For **Status**, **Mechanism**, **Sectors**, and **Tags**:
 - If you **have permission** to edit these elements, **you can add new values in the template** and they will be created when you import the new file.
 - If you do **not** have permission to edit these elements, **the template must reference values that already exist in the site**, or the import will be rejected.

Save your spreadsheet, click the gear icon again, and select **Import**.



This will open a pop-up window to walk you through the upload process. Choose your file and make sure the summary shows you the expected number of new projects. If there are any errors in the file, you'll get a message explaining what they are. If everything looks good, click **Continue**.

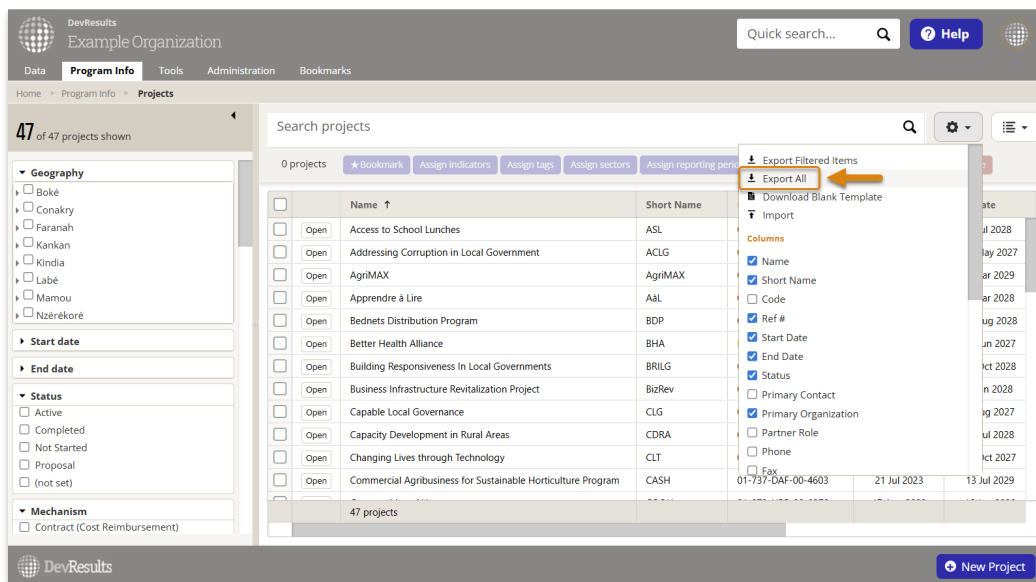


You'll get a message saying that the projects were imported. Once you click **Done**, your project index page will refresh and you'll see your new projects there!

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Edit multiple projects using an Excel upload

You can also use Excel to update multiple projects. To do so, use the same instructions as above, but instead of downloading a blank template, choose **Export All**



Then edit the spreadsheet that you downloaded -- for example, to add a new sector or tag.

Note: To edit existing projects, DO NOT delete or change the field titled 'awardID'. This is the only way the system knows which project should be updated.

When you import the Excel file, existing projects will be updated with any changes to the spreadsheet.

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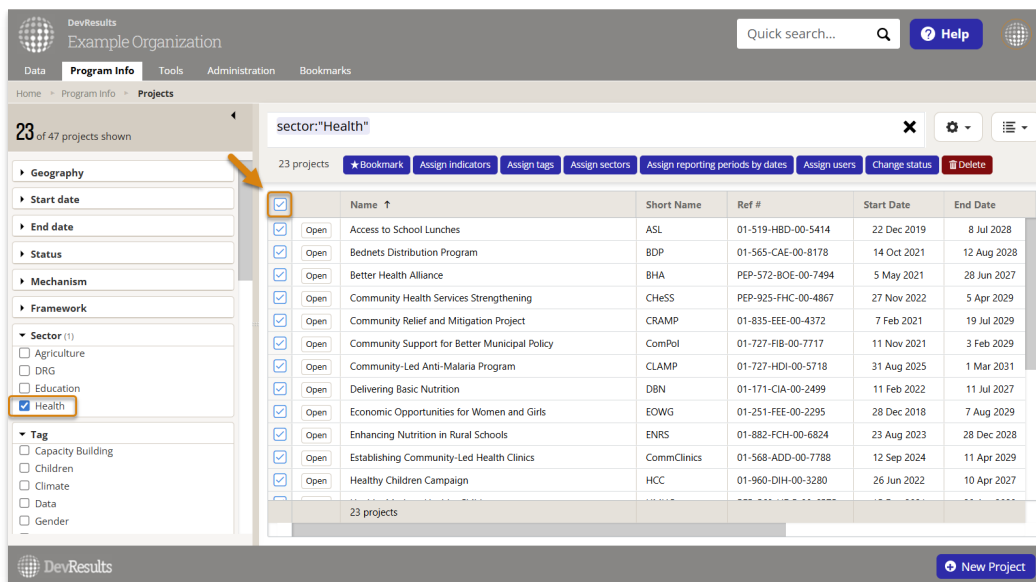
Edit multiple projects from the project index

To make managing projects easier and faster, we offer the ability to edit multiple projects at once right from the project index. Currently, the edits you can make this way are:

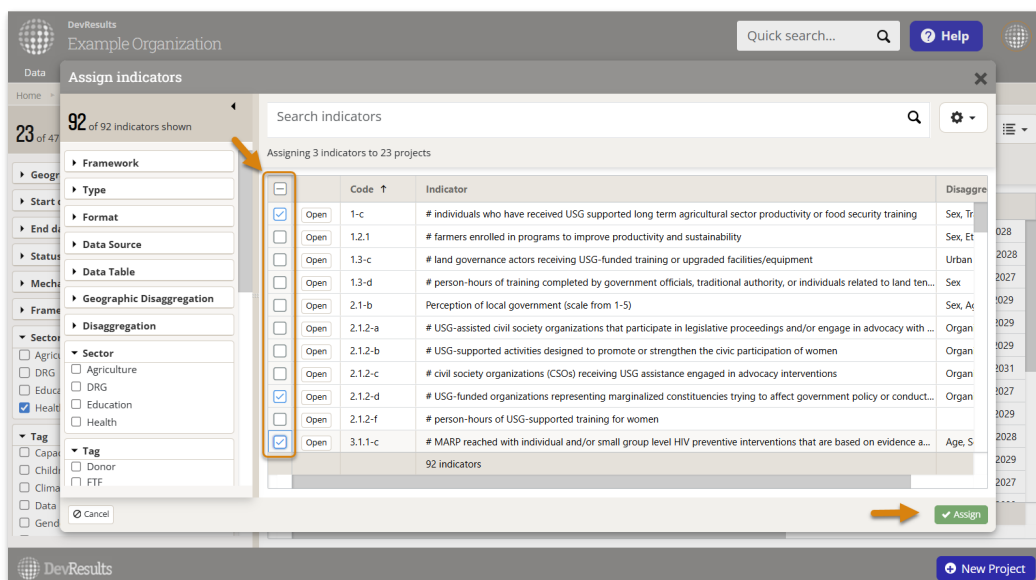
- Bookmarking projects
- Assigning indicators
- Assigning tags
- Assigning sectors
- Assigning reporting periods by dates
- Changing status
- Deleting projects (don't worry -- we'll check with you to confirm this is really what you want to do!)

First, go to the projects index page by clicking **Projects** at the top of any DevResults page.

Click the checkbox next to the projects to edit. You can either scroll through the list to find what you need, or use the left hand filters to narrow the list (and then select all). In this example, we've selected all projects in the Health sector.



Next, click the button for the edit you'd like to complete. This will open a pop-up to help you complete that action. In this example, we're assigning four indicators to the selected projects.



Notes on specific tools

- **Bookmarks:** **Bookmarked projects** appear on your dashboard in the "Bookmarked Projects" tile. Every user has their own set of bookmarks; this does not edit anyone else's bookmarked projects or dashboard.
- **Assign indicators:** Each project-indicator assignment comes with the indicator's default reporting cycle, such as "quarterly" or "annual". To edit the reporting frequency for any particular project-indicator assignment, go to the project's overview page.
- **Assign reporting periods by dates:** This action assigns reporting periods from all reporting cycles based on the start and end dates for the project. If the span of the project overlaps with the span of a reporting period, even by just one day, then that reporting period will be included. If an project is missing a start or end date, this action will not affect that project. No duplicate assignments are created, so it's ok to include projects that might already have some or all reporting periods assigned. You can always go to an project overview page to add or remove reporting periods as needed.

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