# **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:

- 1. Download the Enterprise Linking Request Template.xlsx 🖉
- 2. In the first row, enter the URLs for the sites that you would like to link

3. In the following rows, enter in the names of the activities on each site that you would like to link. If you are linking multiple activities on the publishing site to a single activity on the enterprise site, please enter in the enterprise activity name for each row. For example, if two activities in site A publish to activity "BetterBetter" in site B, list "BetterBetter" in the site B column **twice**.

4. Email the completed Excel file to DevResults at **help@devresults.com** with the subject line Enterprise Linking Request.

Once your activities have been linked, you will need to link **indicators**, **disaggregations**, and **administrative divisions** to ensure you can publish data. Below is a checklist of all items that need to be linked, as well as the other conditions that need to be fulfilled to successfully publish data.

# Checklist for data publishing

- Administrative Division Levels are linked.
- Administrative Divisions and Locations are linked.
- Indicators are linked. (Note: Directly copying indicators from the Indicator Library will automatically link them.)
- Disaggregations and disaggregation categories are linked.
- One activity on the publishing site has **data entered** and **approved**.
- Reporting period on the publishing site is **certified** and compatible with the reporting period on the enterprise site (they run for the same length of time and the publishing start and end date fall within the enterprise start and end date).
- Data can be entered on the corresponding period on the enterprise site (the submission window is open and is not set to a Submitted/Approved status)
- The activity on the enterprise site has appropriate geography mappings to receive published data
- The activity on the enterprise site has appropriate reporting period mappings to receive published data
- The activity on the enterprise site is **assigned to the indicator**
- The indicator on the enterprise site is set to "**direct entry**"
- The linked indicators are compatible:
  - The publishing indicator cannot have a less granular geographic disaggregation than the enterprise indicator. (i.e.: you cannot publish country-level data to an indicator that's set to report at the location level, but you can publish location-level data to a country-level indicator.)
  - The indicator type matches (e.g.: they're both 'sum')
  - The publishing indicator must have all the disaggregations that exist on the target indicator (e.g.: you can't publish data disaggregated by sex to an indicator that is disaggregated by sex AND age, but you can publish an indicator disaggregated by both to an indicator that is only disaggregated by one or the other.)
  - The enterprise indicator must report per activity.

For a quick overview on what is and is not linked, go to Administration > Enterprise

	IS   Development Organization Intern to Finance for Agribusin		Quick search Q 🛛 Help
Data Program Info Tools	Administration Bookmarks		
Home * Administration * Enterprise	People Users Groups Organizations Partner Roles	items	٩ ٩٠
▼ Item Type	Settings -	Source Item	Target Item
Activity     Administrative Division     Administrative Division Level	Tags Sectors Status Options		Country Mozambique
<ul> <li>Disaggregation</li> <li>Disaggregation Category</li> </ul>	Custom Fields Notifications API Keys		Gender Urban vs Rural
Indicator Unit	Financial Mechanisms		Age HIV Status
▼ Source Site	Budget Categories		Female
Increasing Access to Finance for Ag	Exchange Rates Funding Sources		Male Rural
Target Site	• Enterprise		Urban
	0-14 (Children)		0-14 (Children)
	15-19 (Youth)		15-19 (Youth)
	20-24 (Young Adult)		20-24 (Young Adult)
	25-64 (Adult)		25-64 (Adult)
	65+ (Senior)		65+ (Senior)
DevResults			

You can sort, filter, and search for specific items in the list using either the left-hand side filter or the search bar.

Home 🖻 Administration 🔺 Enterprise		
4 d of 103 linked items shown	type:"Activity" type:"Disaggregation" gra	× •-
▼ Item Type (2)	Source Item	Target Item
Activity     Administrative Division	Grade level	Grade level
Administrative Division     Administrative Division Level	Best Agricultural Research Program	Increasing Access to Finance for Agribusinesses
✓ Disaggregation	Commercial Agribusiness for Sustainable Horticulture Program	Increasing Access to Finance for Agribusinesses
Disaggregation Category		
Indicator		
Unit		
▼ Source Site		
Increasing Access to Finance for Agribusines		
Target Site		

If you are linked to multiple sites, you can also filter by either the source or target site.

Data Program Info Tools Administra Home > Administration > Enterprise	ation Bookmarks		
• IO3 of 103 linked items shown	Search linked items		۹ ۵
▼ Item Type	Source Item	Target Item	
Activity     Administrative Division	Mozambique	Country	
Administrative Division	Mozambique	Mozambique	
Disaggregation	Sex	Gender	
Disaggregation Category	Urban vs Rural	Urban vs Rural	
Indicator	Age	Age	
🗌 Unit	HIV Status	HIV Status	
▼ Source Site	Female	Female	
Increasing Access to Finance for Agribusines	Male	Male	
	Rural	Rural	
Target Site     Global M&E Platform	Urban	Urban	
	0-14 (Children)	0-14 (Children)	
	15-19 (Youth)	15-19 (Youth)	
	20-24 (Young Adult)	20-24 (Young Adult)	
	25-64 (Adult)	25-64 (Adult)	
	65+ (Senior)	65+ (Senior)	

**NOTE:** If you see "Unknown" under a target item, it's either because you do not have permissions on the target site to see that item, or a result of a deleted link. Reach out to us at **help@devresults.com** to help investigate the issue.

#### Link Administrative Division Levels

To begin with, link the administrative division levels.



Go to **Program Info > Administrative Divisions**. Then click on **Manage levels** in the upper right corner.

Click the number in the **Linked Levels** columns for each level you want to link. This will open a pop-up to view/edit the linked levels.

# Administrative Division Levels

Туре	Level	Name	Name (Plural)	Administrative Divisions	Linked Levels
Administrative Divisions	0	Mozambique	Mozambique	1	0
Administrative Divisions	1	Region	Regions	11	0
Administrative Divisions	2	Province	Provinces	131	0

Select the site you wish to link to and the level in that site to link to. Click **Done** once you've finished making selections.

atr ]	Linked Levels The Mozambique level is lin	nked to:			×
1	Site Name			Level	
am	demoenterprise 🗸		Select level 🗸		
ia			Select level		
.4.			Country		✓ Done
s	13	I (	World		

Repeat these linking steps for each level you need to link. Please note that admin division level links are "one to one" between sites.

## Link Administrative Divisions

For every Administrative Division Level you linked, you'll need to link at least one Administrative Division.



#### Go to **Program Info** > **Administrative Divisions**.

Select the administrative division you want to link and 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.

Add Linked Ad	lministrative Division	×
Site	demoenterprise.(	
Administrative Division	Mozam	•
	<b>Mozam</b> bique	
		✓ Add Link

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

	t Organization US   Development Organization International ng Access to Finance for Agribusinesses		Quick search	۹ 🕜	Help
Data Program In			_		
Home ► Program Info	Geography > Administrative Divisions > Mozambique				_
Administrative I	Division	Activity Mapping			
Hierarchy		Activities No activities are mapped to this administrative	e division.		
Name	Mozambique	Linked Administrative Divisions			
Code		Site Name Administrative Division			
level	Mozambique	demoenterprise Mozambique			
+ Google	gola Zambia Mala Linaka Againa Mala Disaka Againa Mala Disaka Againa Mala Disaka Againa Mala Madagascar Pretoria E/Hergens shortouts Mag data 60022 Google 300 km m m m m m m m m m				
1	Gaza				
	Inhambane				
	Manica				
	Maputo				
	Naputo City Nampula				
	Nassa				
	Sofala				
()) DevResults					✓ Done

To publish data between locations, you will need to link locations to one another. Go to **Program Info > Locations** and select the location you want to link.

ta Program Info Tools	Administratio	on Bookmarks			
e 🕨 Activities	ions:				
Data Definitions	•				
Indicators		Search locations			Q 🗘
Data Tables Results Framework					
dmin Disaggregations		0 locations Assign tags The Delete			
Narrative Questions					
ag Time		Location	Province, Region	Latitude	Longitude
Reporting Periods		Angoche	Angoche, Nampula	-16.216265600	39.91446600
Reporting Cycles		Banhine NP	Chigubo, Gaza	-22.748496000	32.80844960
Geography		Bazaruto NP	Inhassoro, Inhambane	-21.649153100	35.46723680
Locations		🔲 Beira	Dondo, Sofala	-19.796381600	34.88448670
Administrative Divisions Map Overlays		Chimanimani National Reserve	Sussundenga, Manica	-19.802886000	33.08395400
Merge Duplicate Location	ns	Chinde	Chinde, Zambezia	-18.584677100	36.460782300
		Chokwé	Chókwè, Gaza	-24.532316600	32.983199800
		Cuamba	Cuamba, Nassa	-14.800087700	36.53377310
		Dondo	Dondo, Sofala	-19.611540000	34.74092900
		Gorongosa NP	Gorongosa, Sofala	-18.815368600	34.49626660
			Gurue, Zambezia	-15.471492500	36,98097010

#### Click the **+ Add linked location**... button

Linked Locations
This location is not linked to any other sites.
+ Add linked location

This will open a pop-up to select a linked site and location 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 location dropdown to make your selection. You can start typing the name of the location to filter the

dropdown list.

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

Add Linked L	ocation	×
Site Name	demoenterprise.devresults.com	
Location	start typing to search locations       Angoche (Mozambique)	
	Beira (Mozambique)	ink

Please note that both locations and admin divisions can be mapped "one to one" or "many to one" if multiple areas in a site are to be aggregated and published to a single area in a target site.

#### Indicators

To publish data between sites, you will need to link the indicators to one another. You can either use the **Indicator Library** for this, or do so manually.

To link indicators manually, go to Program Info > Indicators

Increasing Access to			Quick search	
ta Program Info Tools A				
Activities	Indicators			
Data Definitions				
of 34 Data Tables	Search indic	ators		Q 4
Results Framework				
ame Disaggregations	0 indicators	Bookmark Assign activities Assign tags Mark Inactive		
Narrative Questions Pe Time	Code	Indicator	Disaggregation	Cross-Disaggrega
Reporting Periods	1.1-0	# hectares of agricultural land (fields, rangeland, agro-forests) showing improved biophysical conditions as		No
Reporting Cycles	E 1.2-0	# kilometers of roads improved or constructed	Urban vs Rural	No
ta S Geography	1.3-0	# farmers and others who have applied new technologies or management practices as a result of USG assis	Sex	No
Locations Administrative Divisions	1.4-8	% gross margin per kg of tubers	Crop Type	No
Man Oundaum	- 1-a	\$ GDP per capita		No
Merge Duplicate Locations	- 1-6	\$ agricultural gross domestic product (GDP)		No
catio zambioue	2.1-a	# public policies introduced, adopted, repealed, changed or implemented consistent with citizen input		No
vince	2.2-a	% local elected councils and and/or mayorships undergoing turnover in political party control from one elec	Incumbent v Non	No
gion	🗋 2.2-a-D	# local elected councils and and/or mayorships to hold elections	Incumbent v Non	No
-	2.2-a-N	# local elected councils and/or mayorships undergoing turnover in political party control from one election	Incumbent v Non	No
aggregation	2-a	USAID NGO sustainability index		No
e op Type	3.1-a	# people living with HIV/AIDS (PLHIV) reached with a minimum package of prevention with PLHIV (PWP) inte	Age, Sex	Yes
nicity	3.1-b	96 households with at least one insecticide-treated net (ITN)		No
ade level	3.1-b-D	# households surveyed about insecticide-treated nets (ITN)		No
umbent v Non	3.1-b-N	# households with at least one insecticide-treated net (ITN)		No
nd Type	□ 3.1-c	96 children under 5 years old who slept under an insecticide-treated net (ITN) the previous night	Sex	No
hool Level	3.1-c-D	# children under 5 years old in households surveyed about insecticide-treated nets (ITN)	Sex	No
x	3.1-c-N	# children under 5 years old who slept under an insecticide-treated net (ITN) the previous night	Sex	No
sting Facility Type	3.2-a	% testing facilities (laboratories) that are accredited according to national or international standards	Testing Facility Type	No
ban vs Rural	□ 3.2-a-D	# testing facilities (laboratories) surveyed	Testing Facility Type	No
ctor	3.2-a-N	# testing facilities (laboratories) that are accredited according to national or international standards	Testing Facility Type	No
g	3.3-8	# children under five reached by USG-supported nutrition programs	Sex	No
0	- R 22,6	pravalance of underweight children under five vasie of ane		No

Search or filter the indicator index and select the indicator you want to link.

Home 🔸 Program Info 🔸 Data Definitions 🔸	Indicators			
2 of 34 indicators shown				× 0-
Framework	0 indicators 🖈	Bookmark Assign activities Assign tags Mark Inactive Tolete		
• Туре	Code	Indicator	Disaggregation	Cross-Disaggregate
Format	□ 1-a	\$ GDP per capita		No
Data Source	0 1-0	\$ agricultural gross domestic product (GDP)		No
Data Source		2 indicators		
Data Table				
<ul> <li>Geographic Disaggregation</li> </ul>				
Location				
] Mozambique				
Province				
Region				
Region				
Region  Disaggregation Age				
Region  Disaggregation Age Crop Type				
Region       Disaggregation       Age       Crop Type       Ethnicity       Grade level       Incumbent v Non				
Region				
Region  Disaggregation  Crop Type  Ethnicity  Grade level  Incumbent v Non  Land Type  School Level				
Region           > Disaggregation           - Age           Crop Type           Ethnicity           Grade level           Innumbert Non           Land Type           School Level           Sex				
Region       • Disagregation       Age       Crop Type       Ethnicty       Grade level       Incurbent v Non       Land Type       School Level       Set       Testing Facility Type				
Region       Disagregation       Age       Crop Type       Ethnicty       Grade level       Incumbent v Non       Land Type       School Level       Set       Ferning Facility Type				
Province Region Voltagregation Age CropType Gradelevel Incumbertv Non LandType School Level Sex Testing Facility Type Testing Facility Type Sector				

Click the (+) Add linked indicator... button

	ganization US   Development Organization Internation ACCESS to Finance for Agribusiness Tools Administration Bookmarks				Quick search	۹	? Help	
	Data Definitions > Indicators > S GDP per capita		_			_	_	
la \$GDP p	per capita							
Definition Targets	Data Reports Forms Documents							<b>O</b> History
						_	_	
Data Source			Reference					
Data Source	Enter indicator results directly		Name	\$ GDP per capita				
	O Populate from a data table							
	<ul> <li>Calculate from a formula</li> </ul>		Code	1-a				
Characteristics								
Characteristics			Reference #					
Indicator Type	O Sum		4-11-12	Indicator is active				
	<ul> <li>Average</li> </ul>		Active:	Indicator is active				
	○ Yes/No		Linked Indica					
Number Format	Whole number							
	O Decimal		This indicator is no	ot linked to any other sites.				
	O Percentage		+ Add linked indices	tor				
Decimal Places							_	
	de:		Definition					
Default Reporting Cycle	Annual	Cell treporting cycles	Indicator definitio	on.				
Unit	USD		Classification					
Periods	Results are entered:	Targets are entered:	Results Framework	F/4.7 Economic Opportunity				
	<ul> <li>Incrementally (since last result)</li> </ul>	<ul> <li>Incrementally (since last target)</li> </ul>		✤ G/1 Agriculture				
		<ul> <li>Cumulatively (over the life of the project)</li> </ul>		+ Add a result				
			Forters					
Disaggregation			Sectors	Agriculture		_		
DevResults						Delete this i	ndicator 🗸	Done

Filter the list of indicators to find the corresponding indicator on the enterprise site and then click **Add Link**.

Add Linked I	ndicator	×
Site	demoenterprise.	
Results Framework	Any	•
Indicator	1.0-a 1.0-a \$ GDP per capita 1.0-b \$ agricultural gross domestic product (GDP) 1.1-a # hectares of agricultural land (fields, rangeland, agro-forests) showing improved biophysical conditions as a result of USG assistance 1.2-a # kilometers of roads improved or constructed 1.3-a # farmers and others who have applied new technologies or management practices as a result of USG assistance 1.4-a % gross margin per kg of tubers 2-a USAID NGO sustainability index 2.1-a # public policies introduced, adopted, repealed, changed or implemented consistent with citizen input	ink tor is act

Please note that indicator links are "one to one" between sites.

## Link Disaggregations & Disaggregation Categories

To link the disaggregations of the indicators you're publishing, go to **Program Info** > **Disaggregations** 

Development Organization US   Development Organizatio US   Development Organization US   Develop	segment Organization International nance for Agribusinesses	Quick search	Q 🛛 🕜 Help	
Data Program Info Tools Adm				
Home  Activities	isaggregations			
Data Definitions				
Searc Indicators			۹	Q.4
Results Framework				
Disaggregations Narrative Questions	Disaggregation Categories			
Age Time	0-14 (Children), 15-19 (Youth), 20-24 (Young Adult), 25-64 (Adult), 65+ (Senior), Promoting a policy based on constituent feedback, Promoting a policy based on co	onstituent feedback Promoting	a policy based on constitu	ent feedback
Crop Type Reporting Periods	Bananas, Citrus Fruits, Coconuts, Coffee, Corn, Manioc, Palm Kernels, Peanuts, Pineapples, Rice, Sugarcane, Sweet Potatoes, Yams			
Ethnicity Reporting Cycles	Malinke, Other, Peul, Soussou			
Grade lev Geography	1st grade, 2nd grade, 3rd grade, 4th grade, 5th grade, 6th grade, 7th grade, 8th grade, 9th grade, 10th grade, 11th grade, 12th grade			
HIV Status Administrative Divisions	Negative, Positive			
Administrative Divisions Incumber Map Overlays	Incumbent Did Not Run, Incumbent Ran			
Land Type Merge Duplicate Locations	Agro-forests, Fields, Rangeland			
School Le	Primary, Secondary			
Sex	Female, Male			
Testing Facility Type	Attached to Hospital/Clinic, Stand-Alone			
Urban vs Rural	Rural, Urban			
11 disaggregations				
IV DevResults			New Disagg	regation

Click on the disaggregation you want to link and click the **(+) Add linked disaggregation...** button.

tome * Program Info * Data Definitions * Disaggregations * Urban vs Rural Disaggregation by Urban vs Rural									
Details	Details Dependencies								
Name	Urb	an	/s Rural			${\cal O}$ 6 indicators reference this disaggregation			
Description	Dis	aggi	regation definition.			Linked Disaggregations			
Disaggregation			Category	Description	A	This disaggregation is not linked to any other sites.			
categories		\$	Rural		-				
		\$	Urban						
			Click to add						

**The disaggregations or their categories do not need to have the same names/wording.** You may use different names for the disaggregations themselves between sites (e.g. Sex vs. Gender) and have different names for the individual categories in that disaggregation (e.g. Male vs. Men). You can even use different languages. Sites can also have different number of categories in their disaggregation list. Specifically, the enterprise site can have *more* categories in the list than the program or project site, as long as the project or program site properly links its categories to them. For example, a program or project site might define gender with two categories (male and female), while an HQ site might define it with three (male, female, and unknown). In case, the 'unknown' category would never be reported to the HQ site since it doesn't exist on the program/project site.

Link the disaggregations together and click Add Link.

Add Linked Disag	gregation	×
Site	demoenterprise	•
		✓ Add Link

Next, you will be taken to a modal to link the two disaggregation categories. Select the categories from the dropdown menus and then click **Done**.

Manage Linked I	Disaggregation Categories		×
Site	demoenterprise		
Disaggregation	Urban vs Rural		
Categories	demoproject	demoenterprise	
	Rural	Rural 🗸	
	Urban	Urban 🗸	
			•
		✓ Dor	ne

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.

		ization US   Development Organization Int CCESS to Finance for Agribu: Tools Administration Bookmar						Quick search	۹	🕜 Help	
		Definitions > Disaggregations > Urban									
Details					Dependencies						
Name	Urban	vs Rural			6 indicators reference	ce this disaggregation					
Description	Disagg	regation definition.			Linked Disaggre	gations					
					Site Name		Disaggregation	Complete			
Disaggregation categories		Category	Description	A	demoenterprise	Urban vs Rural		× 0	Configure		
		Urban									
		Click to add									
()) DevResults									lete this disaggre	gation	Done

You may still run into issues while trying to publish indicator results. DevResults will send you detailed emails about why a publication may have failed. However, if you find that you're still having issues please email us at **help@devresults.com**.

Didn't answer your question? Please email us a**thelp@devresults.com**.

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