


Enterprise Linked Site Setup Checklist

Last Modified on 10/22/2024 4:24 pm EDT

Here are the steps to follow to report data successfully from one DevResults site to another:

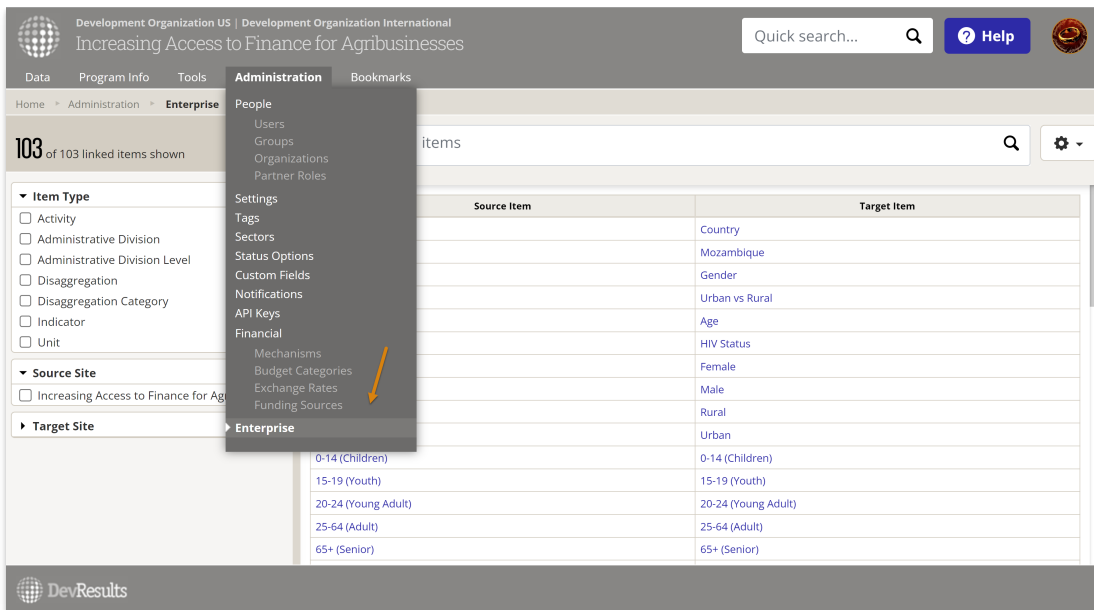
1. Download the [Enterprise Linking Request Template.xlsx](#) 
2. In the first row, enter the URLs for the sites that you would like to link
3. In the following rows, enter in the names of the activities on each site that you would like to link. If you are linking multiple activities on the publishing 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.

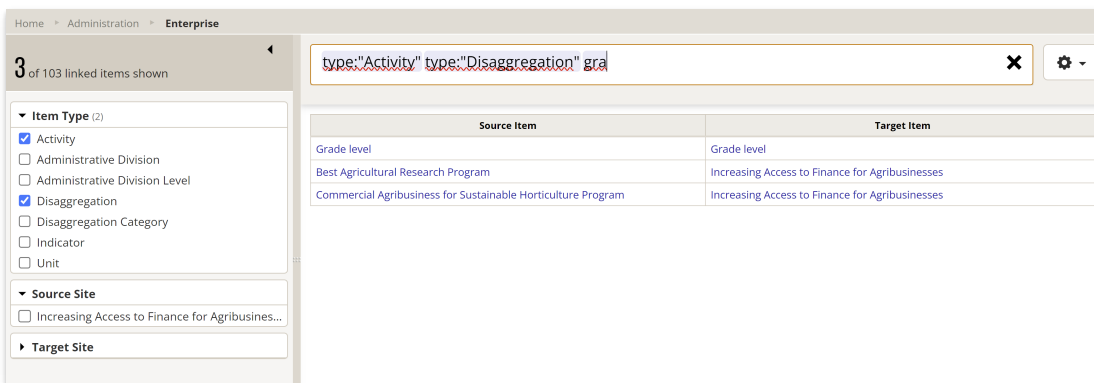
Checklist for data publishing

- **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**
- 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.

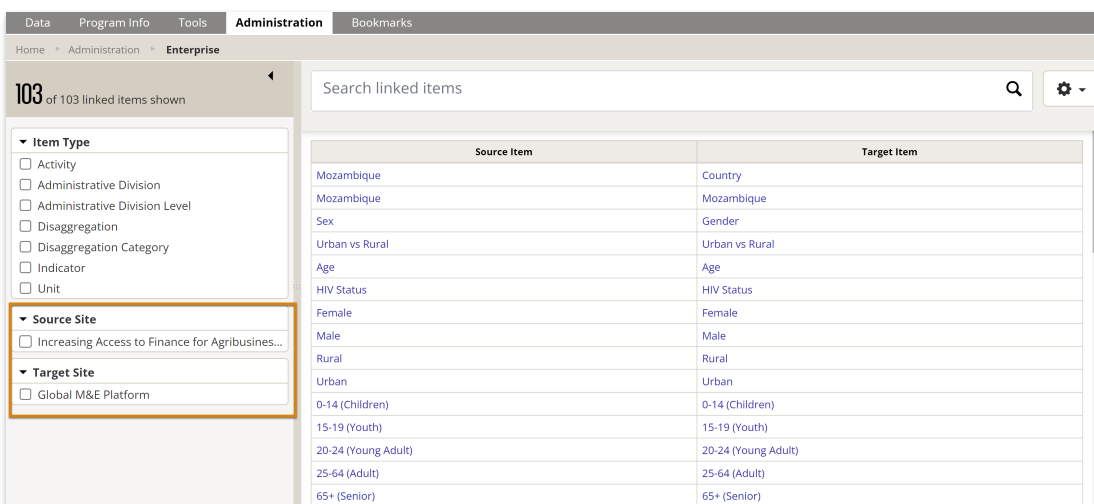
For a quick overview on what is and is not linked, go to **Administration > Enterprise**



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



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

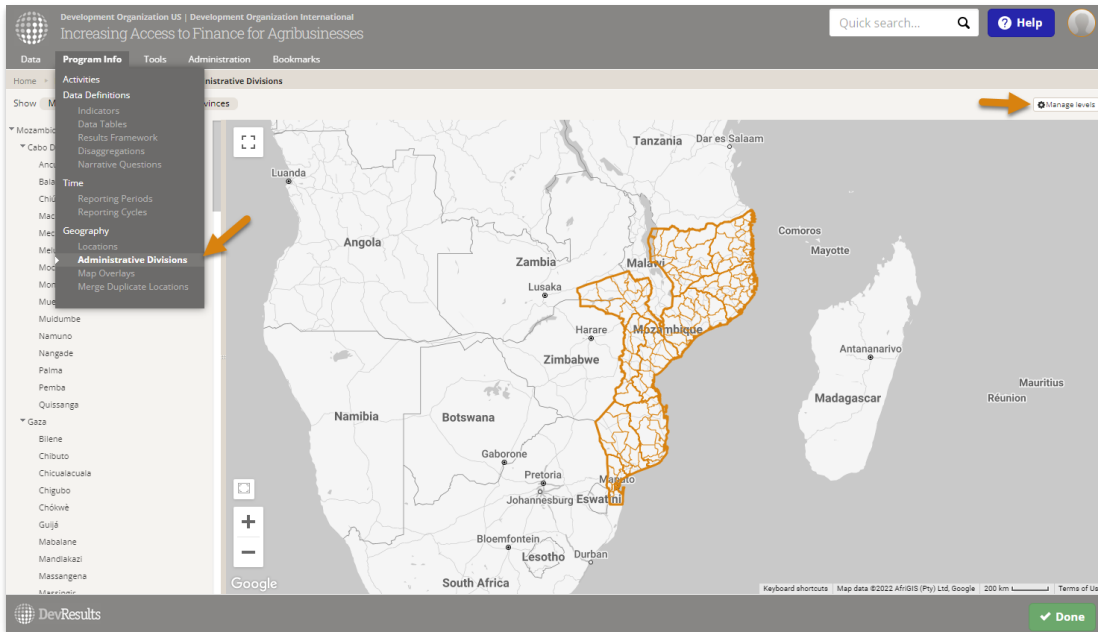


NOTE: If you see "Unknown" under a target item, it's either because you do not have permissions on the target site to see that item, or a result of a deleted link. Reach out to us at help@devresults.com to help investigate the issue.

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.



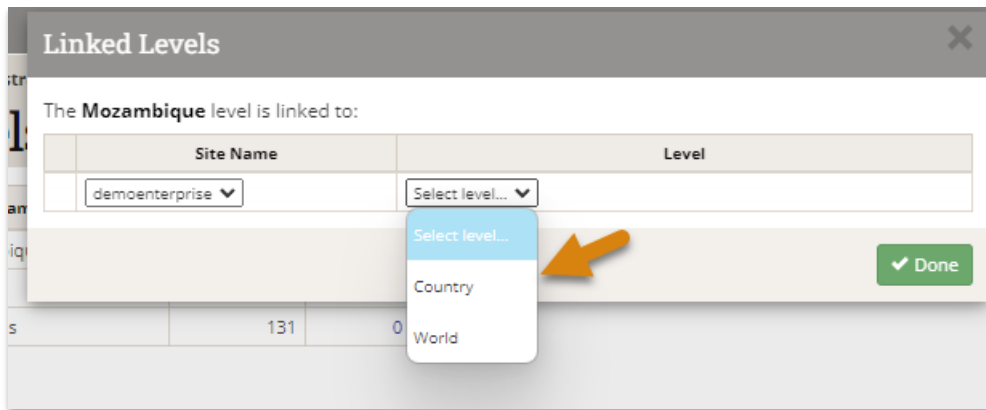
Click the number in the **Linked Levels** columns for each level you want to link. This will open a pop-up to view/edit the linked levels.

Administrative Division Levels

Type	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

[←View administrative divisions](#)

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.

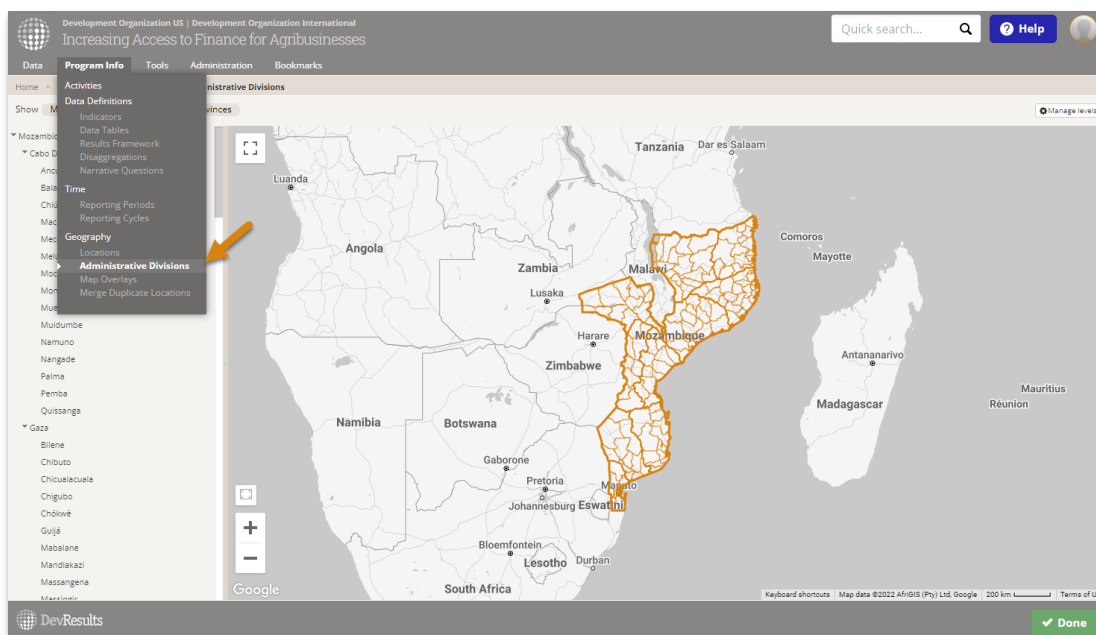


Repeat these linking steps for each level you need to link. Please note that admin division level links are "one to one" between sites.

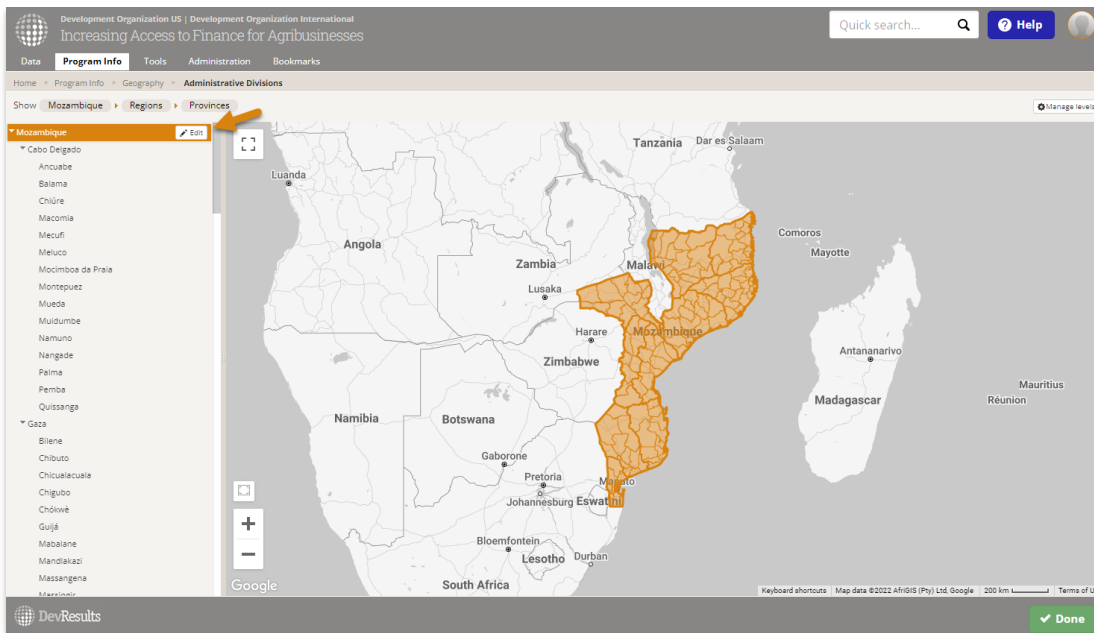
Link Administrative Divisions

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

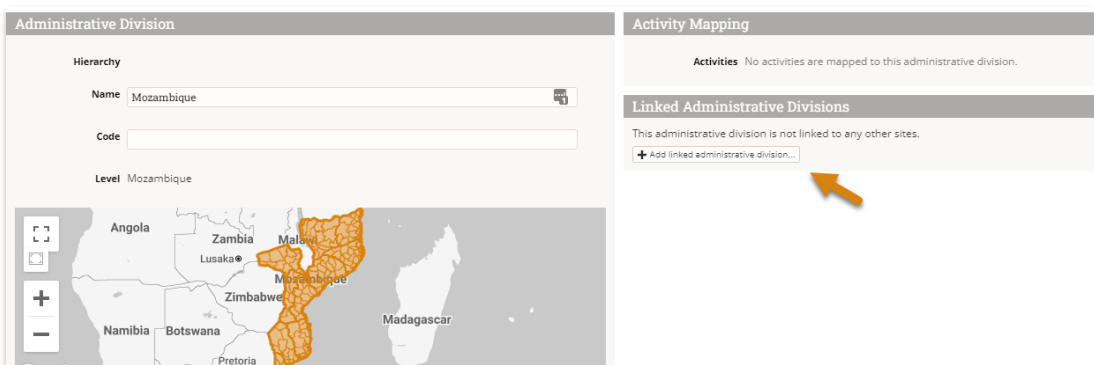
Go to **Program Info > Administrative Divisions**.



Select the administrative division you want to link and click the **Edit** button.



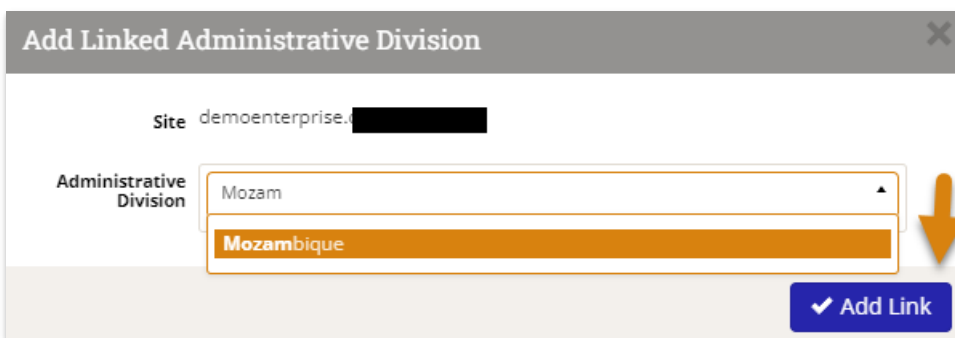
This will open the Administrative Division's Details page. Click the **(+) Add linked administrative division...** button.



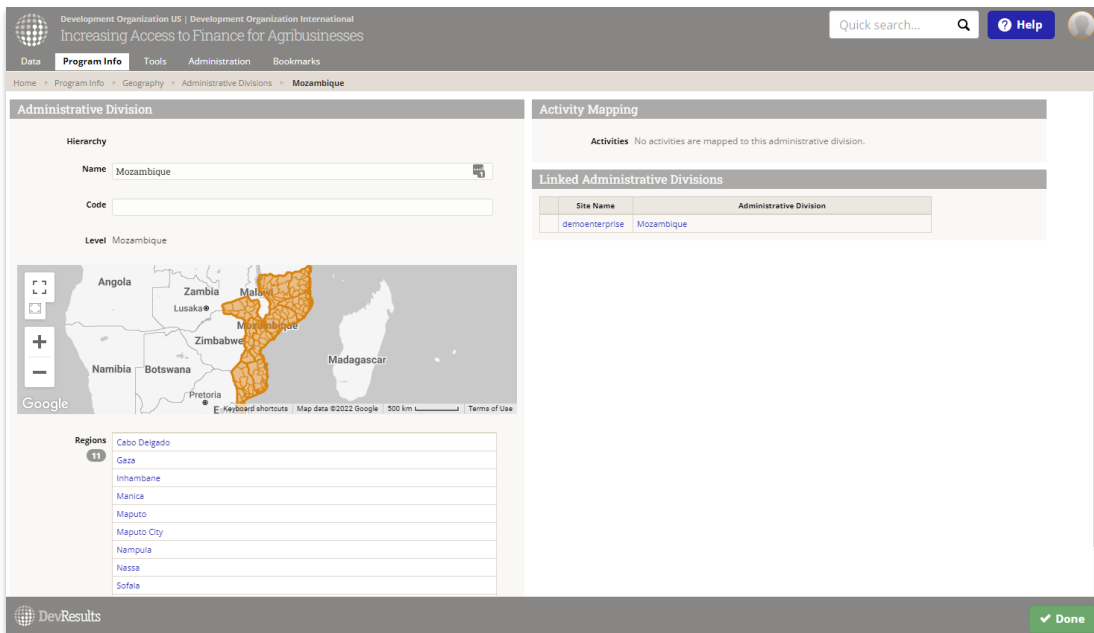
This will open a pop-up to select a linked site and Administrative Division to link to. If your site is only linked to one other site, we'll autoselect it for you. If your site is linked to multiple other sites, you'll see a dropdown at the top so you can pick the site to link to.

Use the Administrative Division dropdown to make your selection. You can start typing the name of the Administrative Division to filter the dropdown list.

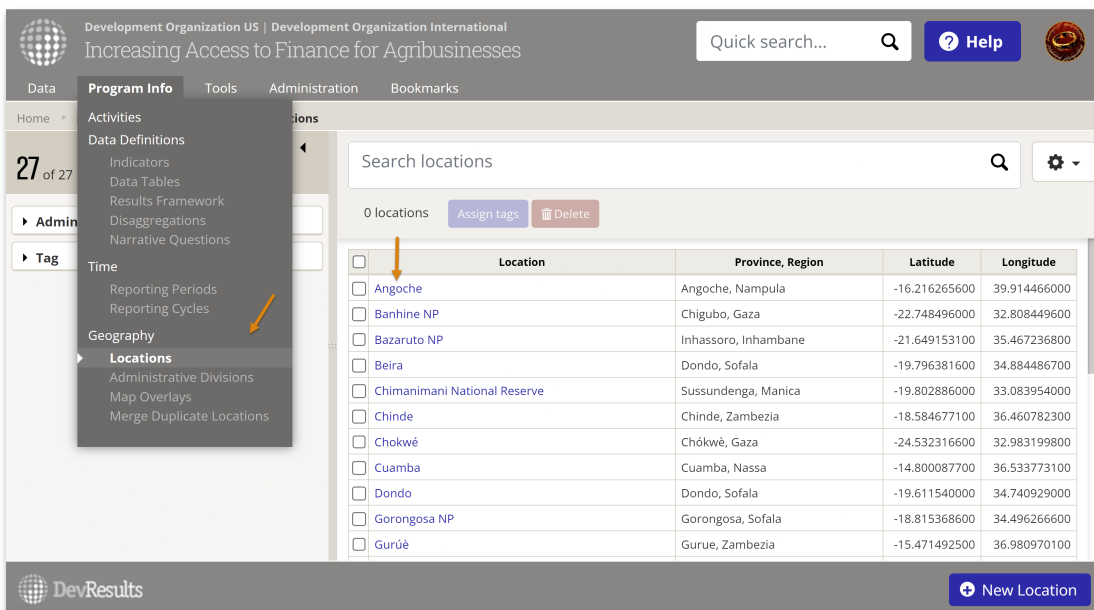
Once you've selected both the linked site and the Administrative Division to link to, click the **Add Link** button to complete the linking.



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



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.



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

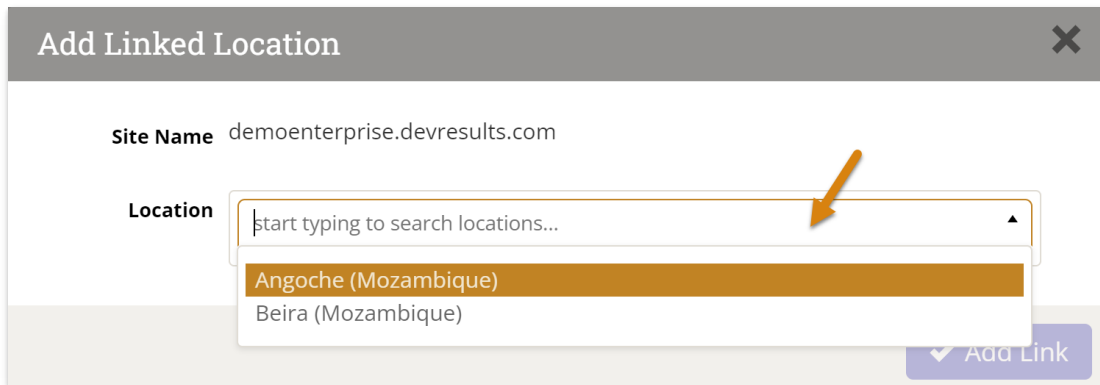


This will open a pop-up to select a linked site and location to link to. If your site is only linked to one other site, we'll autoselect it for you. If your site is linked to multiple other sites, you'll see a dropdown at the top so you can pick the site to link to.

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.

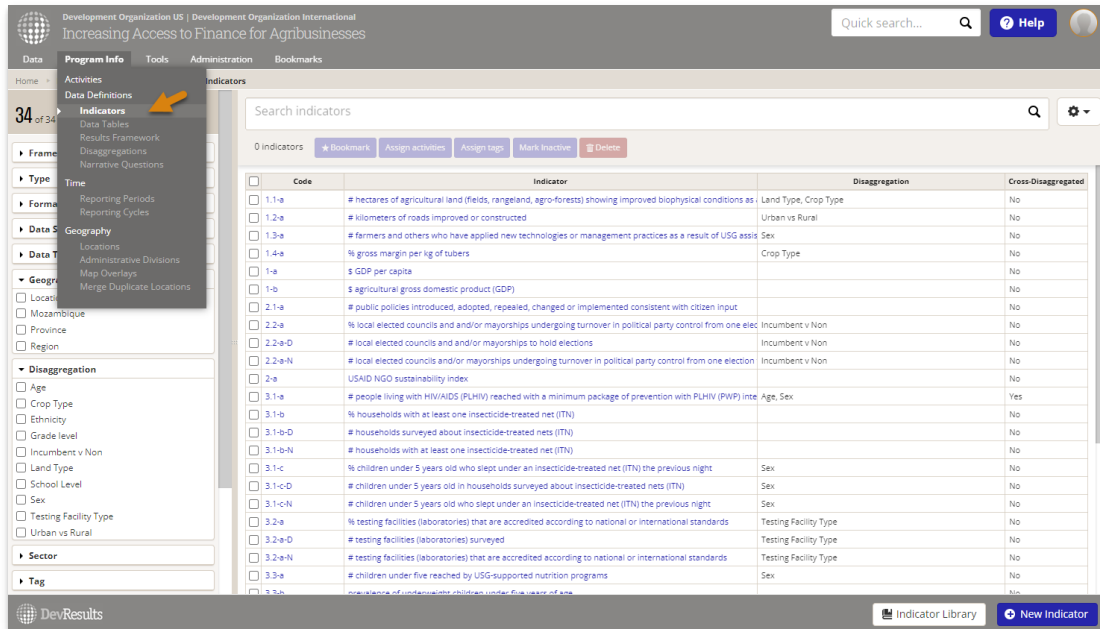


Please note that both locations and admin divisions can be mapped "one to one" or "many to one" if multiple areas in a site are to be aggregated and published to a single area in a target site.

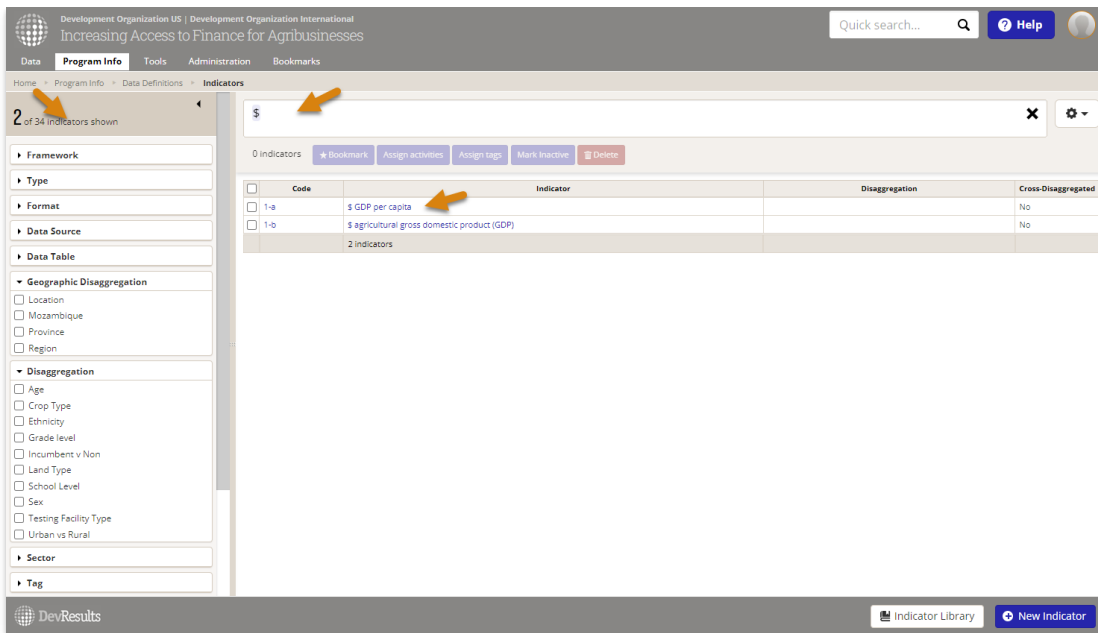
Indicators

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.

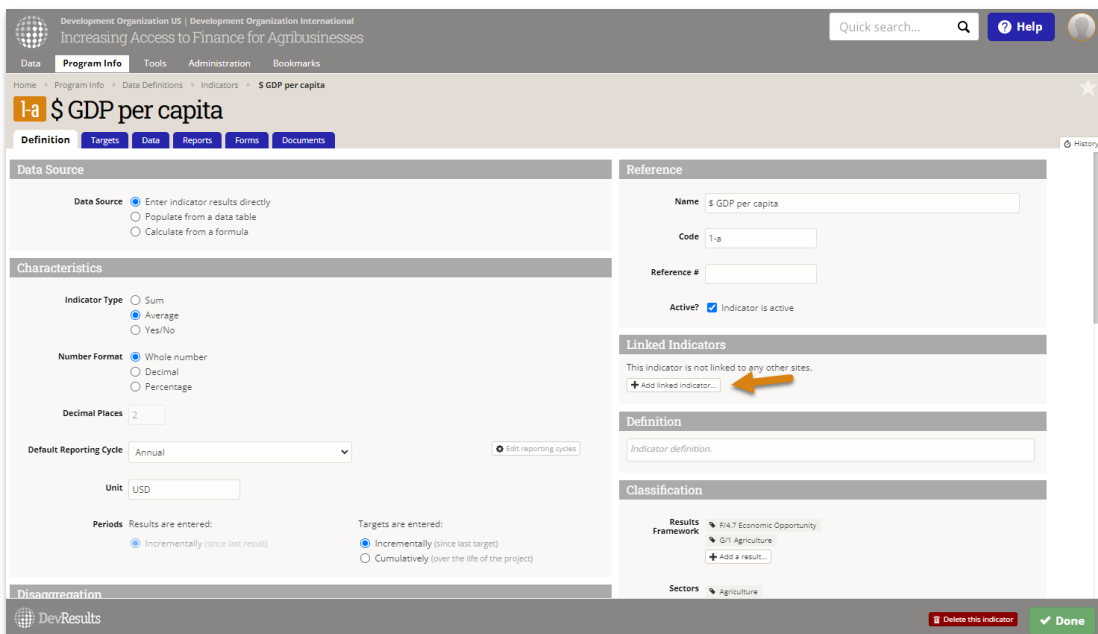
To link indicators manually, go to **Program Info > Indicators**



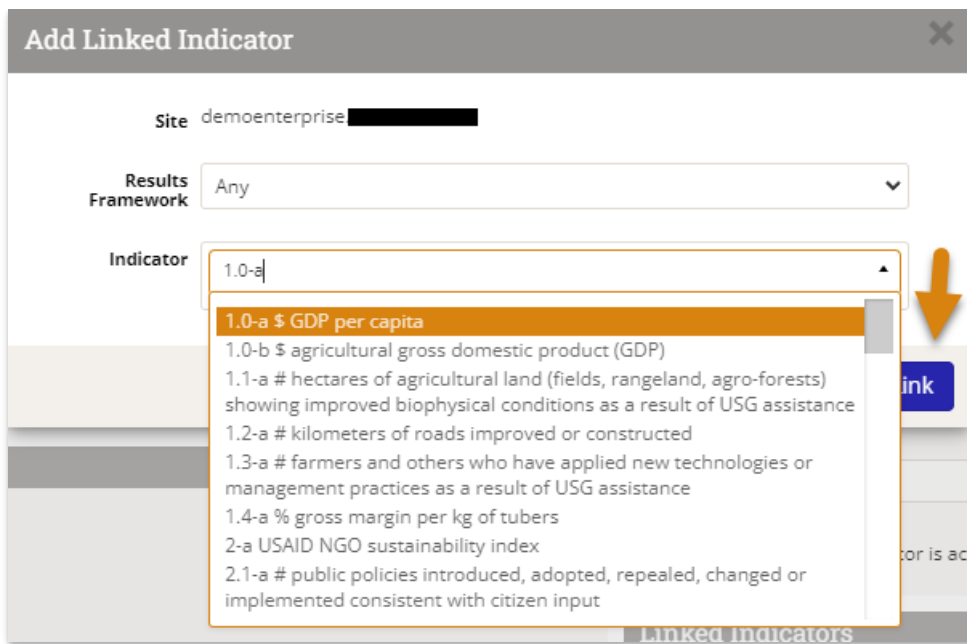
Search or filter the indicator index and select the indicator you want to link.



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



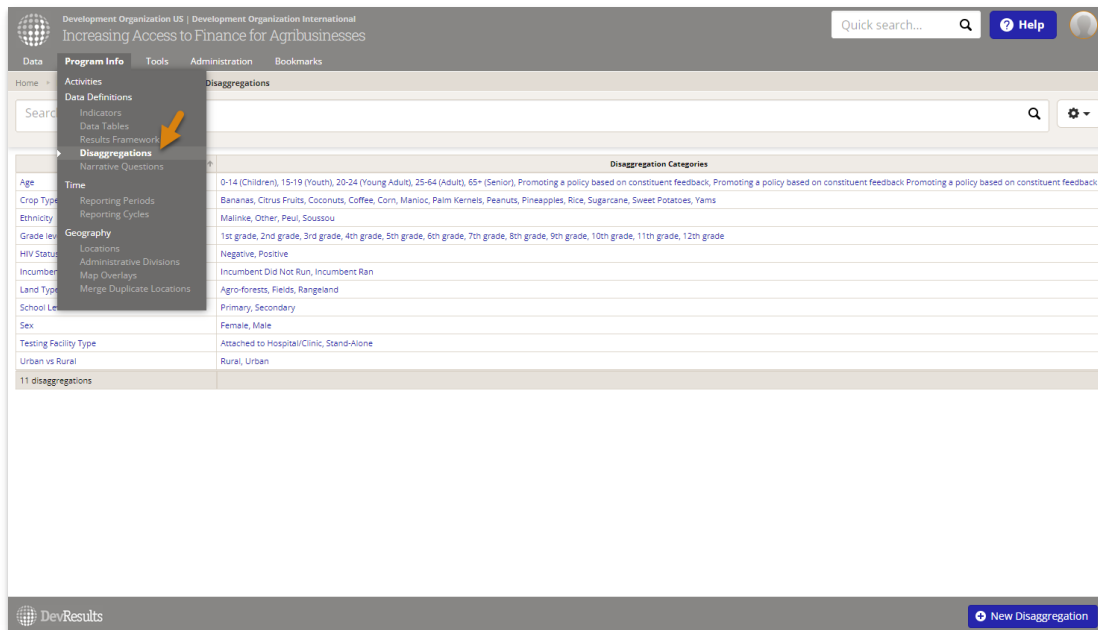
Filter the list of indicators to find the corresponding indicator on the enterprise site and then click **Add Link**.



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**



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

Home > Program Info > Data Definitions > Disaggregations > Urban vs Rural

Disaggregation by Urban vs Rural

Details

Name: Urban vs Rural

Description: Disaggregation definition.

Disaggregation categories

	Category	Description	
±	Rural		
±	Urban		
	Click to add...		

Dependencies

6 indicators reference this disaggregation

Linked Disaggregations

This disaggregation is not linked to any other sites.

+ Add linked disaggregation...

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 Disaggregation

Site: demoenterprise

Disaggregation: Urban vs Rural

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 Disaggregation Categories

Site: demoenterprise

Disaggregation: Urban vs Rural

Categories	demoproject	demoenterprise
Rural		Rural
Urban		Urban

Done

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.

Development Organization US | Development Organization International
 Increasing Access to Finance for Agribusinesses

Quick search...

Data **Program Info** Tools Administration Bookmarks

Home Program info Data Definitions Disaggregations **Urban vs Rural**

Disaggregation by Urban vs Rural

Details

Name: Urban vs Rural

Description: Disaggregation definition.

Disaggregation categories	Category	Description	
	Rural		
	Urban		
Click to add...			

Dependencies

6 indicators reference this disaggregation

Linked Disaggregations

Site Name	Disaggregation	Complete	
demoenterprise	Urban vs Rural	<input checked="" type="checkbox"/>	

DevResults Delete this disaggregation 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 at help@devresults.com.

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