

# Video Tutorial: Create an Activity

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## Key points from the video

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### Context

Preparing an activity for reporting requires assigning reporting periods, indicators, and geographic places. Partner users must either share an organization with the activity or be listed on the activity overview page.

### Activity index [0:11]

- The activity index shows a list of all activities in the site.
- Filter the index to activities of interest using the left-hand filter options.
- Display information of interest by selecting columns from the gearbox drop-down.

### Create activity [0:35]

- Click on "New Activity".
- Provide the name and click "Create Activity".
- Fill out additional activity details in the reference and details sections.

### Assign reporting periods [1:55]

- Activities must be assigned reporting periods in order to enter data.
- Click on "Add Reporting Periods" and select the periods for which the activity should enter data.

### Assign indicators [2:10]

- Activities must be assigned indicators in order to enter data.
- Click on "Select indicators" and navigate through the results framework by clicking on the triangles by each objective. Use the check boxes to select single indicators or portions of the results frameworks.

### Assign sectors and tags [2:47]

- Click on "add a tag" or "add a sector" to classify the activity.
- Tags and sectors help with finding, sorting and grouping activities for reporting.

### Assign organization [3:20]

- Denote the partner organization(s) for this activity. Only the first one listed will be attributed indicator results.
- List the partner type and primary contact if desired.
- Optionally, add the awarding organization.

### Assign users [4:15]

- Under "Staff Roles and Partner Access", list users associated users.
- Users have a single job title but might have different "roles" for different activities.
- Partners gain access to activities either by sharing an organization with the activity or by being listed here.
- Users listed in this section will receive notifications about discussions and data submission.

### Assign geographic places [5:18]

- Activities must be assigned geographic places in order to enter data.
- Click on the geography tab to add geographic places.
- A warning is shown on the tab each geographic level where places are required for reporting. (If an activity reports on location-level indicators, you must specify *which* location, etc.)

### Test for readiness [6:28]

- From the activity's overview page, click on a reporting period and then choose a direct entry indicator.
- If there's a place to enter data, then the activity is ready for reporting.

If you have any questions about any of this, please check out our [knowledge base article about activities](#) .

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