# Define an Indicator

DevResults offers several tools for defining indicators:

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

> **Note:** Any user whose group includes **View & Edit** permissions for **Indicator Definitions** can create new indicators.
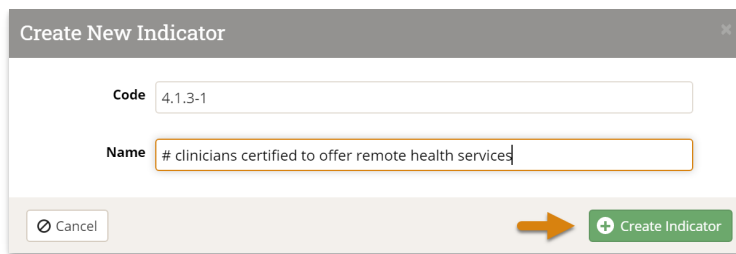
## Create an indicator

To add an indicator, go to **Program Info > Indicators**. This will open the Indicators Index page. Click the **+ New Indicator** button in the lower right.



This will open a **Create New Indicator** pop-up. This pop-up has two fields, both required:

- The **Code** is the unique identifier for each indicator. Each indicator must have a different code. You might want to use the codes that people already commonly use to refer to each indicator. If you don't use any codes to identify indicators, we advise you to come up with a coding system that relates to the way you think about how these indicators are organized, such as referencing the results frameworks, sectors, or indicator types.
- Give your indicator a **Name** that clearly describes what you are counting or measuring. Phrases like "Increase in certifications" or "Level of support" are not good indicator names. The indicator names should instead be something like "# trainees certified" or "Average support score on a scale of 1-10".

Once you've filled out these fields, click the **+ Create Indicator** button in the lower right.
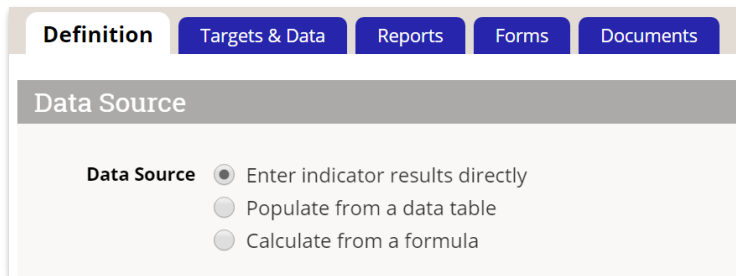
**Create New Indicator**                                                          ✕

Code    `4.1.3-1`

Name    `# clinicians certified to offer remote health services`

⊘ Cancel          ➡️    ⊕ Create Indicator

The following information about creating indicator definitions is a summary. For more detailed explanations about each aspect of an indicator's definition, please see our **Indicator Guidebook**.

The **Data Source** describes how information will be entered.

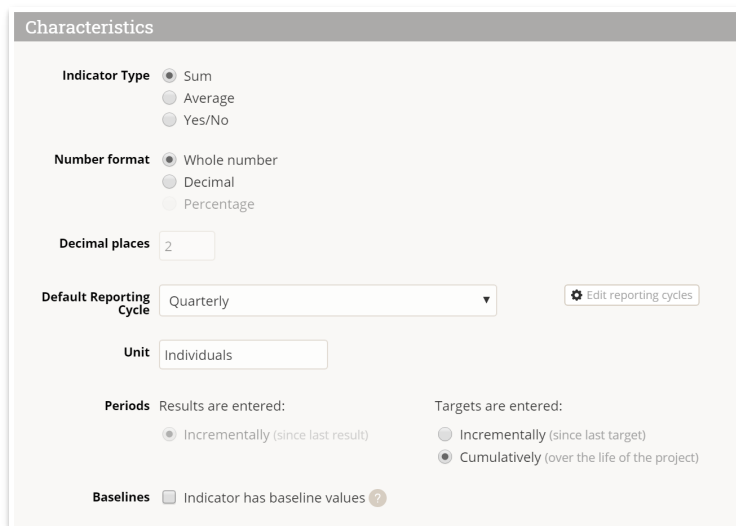| **Definition** | Targets & Data | Reports | Forms | Documents |
|---|---|---|---|---|

**Data Source**

Data Source    ⦿ Enter indicator results directly
               ○ Populate from a data table
               ○ Calculate from a formula

- Select **Enter indicator results directly** to report the actual count, sum, or average for the indicator once per reporting period.
- Select **Populate from a data table** to report individual records and have the system do the aggregation for you, rather than directly reporting an aggregated total as you would in direct entry.
- Select **Calculate from a formula** to calculate this indicator using data from other indicators.

Additional configuration fields will be displayed for relevant data sources. (Formula indicators will show a Formula Editor; Data Table indicators will show Data table configuration).

The **Characteristics** section helps define how the system should expect and format the data entered for this indicator.

**Characteristics**

Indicator Type    ⦿ Sum
            ○ Average
            ○ Yes/No

Number format    ⦿ Whole number
            ○ Decimal
            ○ Percentage

Decimal places    `2`

Default Reporting Cycle    `Quarterly ▾`    ⚙ Edit reporting cycles

Unit    `Individuals`

Periods    Results are entered:          Targets are entered:
         ⦿ Incrementally (since last result)    ○ Incrementally (since last target)
                                            ⦿ Cumulatively (over the life of the project)

Baselines    ☐ Indicator has baseline values ❓

- **Indicator Type** describes how information will be calculated.
- **Number Format** describes how numbers will be formatted and displayed.
- **Decimal places** lets you specify how many decimal places the app should display.
- **Default Reporting Cycle** lets you define the default frequency for which this indicator's data should be collected or calculated. This only appears if your site has more than one defined reporting cycle, such as quarterly or

annual.

- **Unit** should be the thing your indicator is counting or measuring. It's best to use the plural version like "individuals" or "trainings".
- **Periods, Targets are** defines the type of targets for this indicator:
  - **Incremental**: Use this option if your targets reflect only the work you are doing in a given reporting period (e.g. a target for Q4 is for Q4 only).
  - **Cumulative**: Use this option if your targets reflect all of the work you have done cumulatively to date (e.g. a target for Q4 is for all the work done since the activity began work in Q1).

The **Disaggregations** section lets you define the various disaggregations this indicator will require.



- **Disaggregations** will add non-geographic disaggregations. These are **optional** and you can add as many as you need.
  - Click the **+ Add a disaggregation** button and select the relevant disaggregation(s) from the dropdown list to add it.
  - If your disaggregation does not appear in the dropdown menu, click on the gearbox to the right that says **Master list of disaggregations**.
  - If you select 2 or more disaggregations, you can choose to disaggregate these in parallel or cross. See **Disaggregations** for details on those options.
- The **Geographic Disaggregation** is a special kind of disaggregation that links to maps. It is **required**.
  - Each indicator has one geographic disaggregation. All data will be entered using this geographic disaggregation, but DevResults enables automatic geographic aggregation of data by encompassing geographic areas.
  - If the indicator is not disaggregated geographically, select the largest geographic place.
- If your indicator is collected by multiple activities, keep the **Results are reported separately for each activity** box checked.
  - Assign activities by clicking on the **+ Add an Activity** button. Begin typing the activity name, then select the activities that will report on this indicator.

The **Classification** section defines which portion of the **Results Framework**, which **Sectors**, and which **Tags** this indicator relates to. You **must** assign the indicator to at least one section of your results framework; tags and sectors are optional.

The narrative definition sections (**Definition**, **Justification**, **Data Acquisition**, **Data Quality**, and **Data Analysis, Review, and Reporting**) allow capture of additional information about the indicator.

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## Edit an indicator

To edit an indicator, go to **Program Info > Indicators.**

This will open the indicators index page, shown above.

Click on the indicator you'd like to edit and make the desired changes. You can find more detail on configuration options and other fields in the section above.

> **Note:** Restrictions apply when editing an indicator with existing data -- some changes will cause data to be deleted, including changing the **data source** , **indicator type** , **disaggregations** (except for adding a new disaggregation to a parallel-disaggregated indicator), **geographic disaggregation** , and **removing activity assignments** .
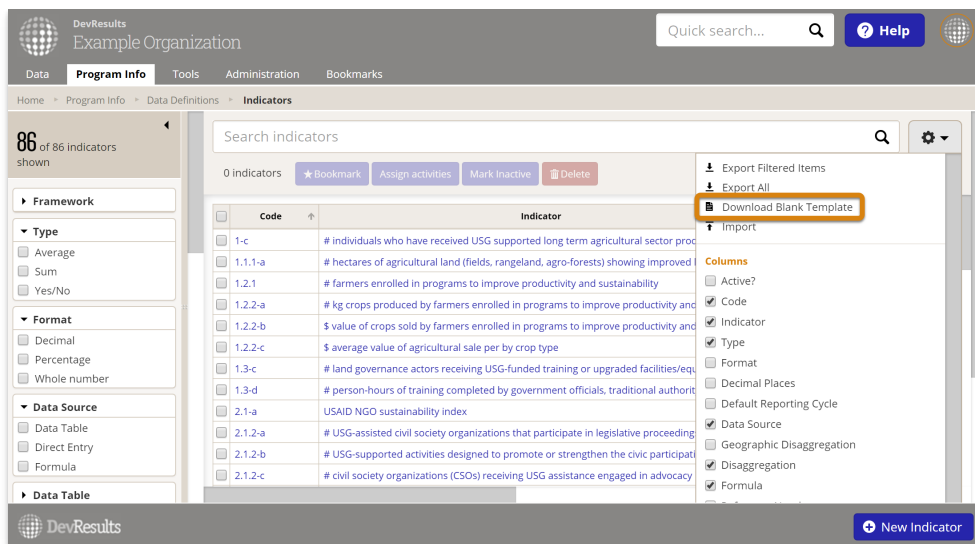
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## Upload new indicators

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

On this page, click on the gear icon and then click **Download Blank Template** to get an Excel template.
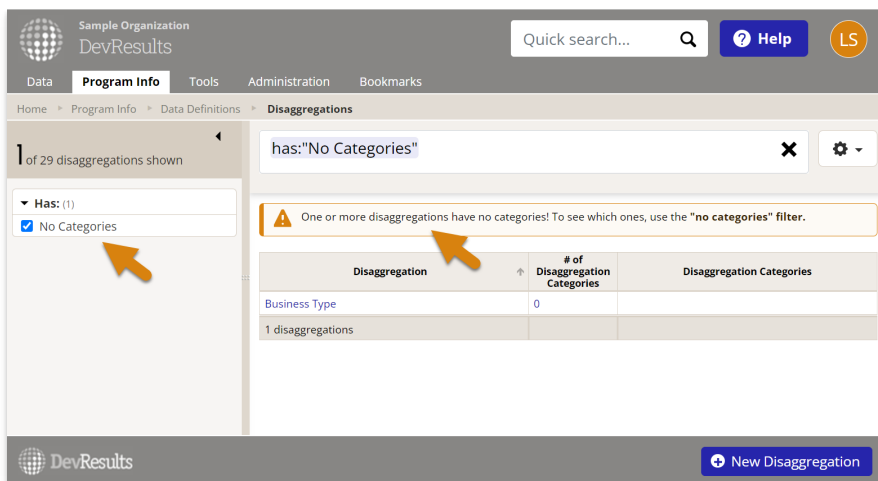
> **Note:** Linking data table indicators to data tables cannot be completed with an upload and must be done individually.
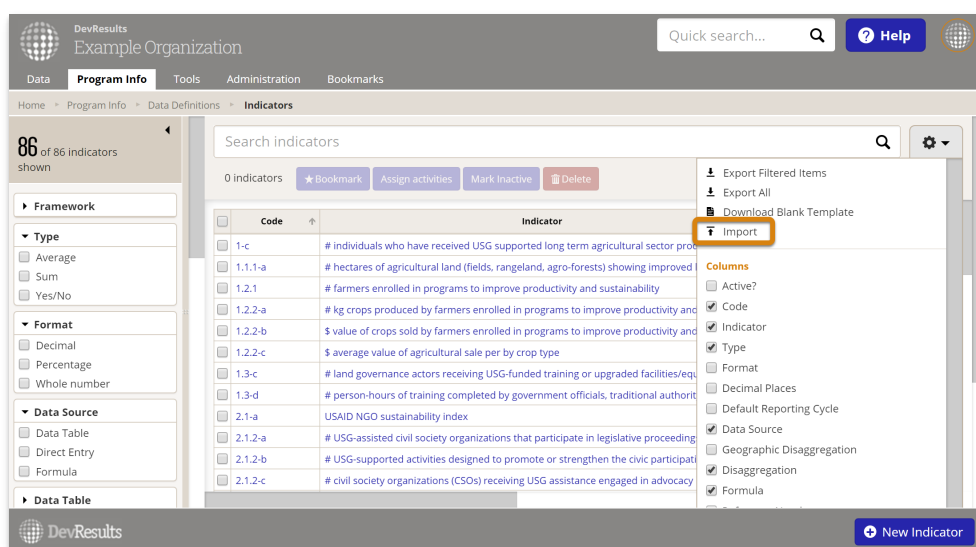
Edit the Excel file by replacing the list of existing indicators with the new indicators you'd like to upload.
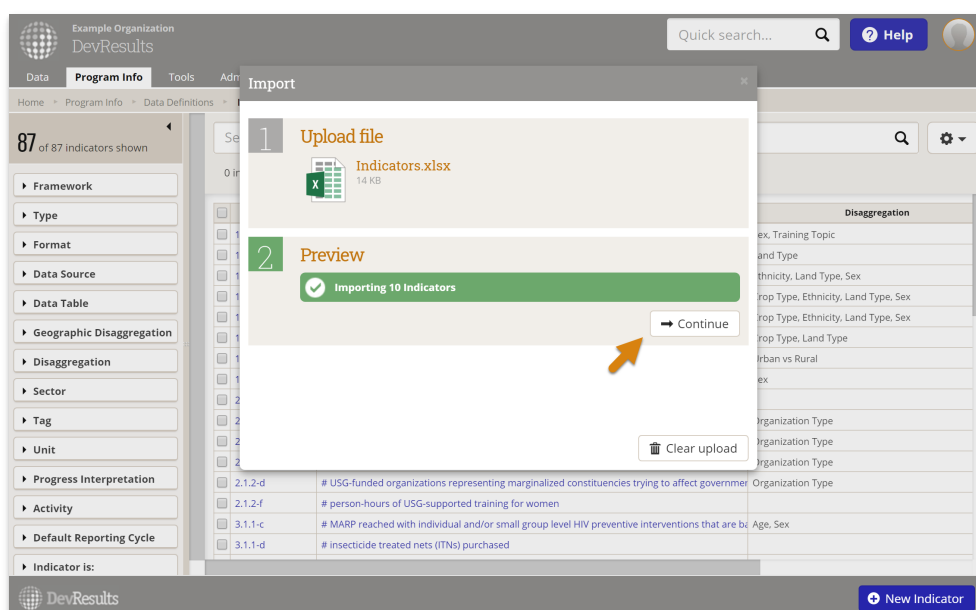


- The **Type** column must be filled out with **Sum**, **Average**, or **Yes/No**.
- The **Format** column must be filled out with **Whole number**, **Percentage** or **Decimal**.
- The **Data Source** column must be filled out with **Direct Entry**, **Data Table**, or **Formula**.
- The columns for **Default Reporting Cycle** and **Geographic Disaggregation** must be filled out with the options available in your site for reporting cycles and administrative division levels (including Location).
- You can enter multiple **Sectors** separated by commas, for example: "Health, Education".
- You can enter multiple **Tags** separated by commas, for example: "Training, Engagement".
- You can enter multiple **Disaggregations** separated by commas, for example: "Sex, Training Topic".
- If you use disabled Disaggregations, you can include them in parentheses, for example: "Classification, Gender, (Age)".
- You can enter multiple **Results Framework Objectives** separated by commas, for example: "1.1, 1.2". These objectives need to already exist in your framework(s). If you have more than one framework, the framework's code should precede the objective's code, for example: "M/1.1, F/1.2".
- For columns like **Reports Per Activity** that show true/false in the download, you can use **TRUE/FALSE**, **yes/no**, or **1/0** in the spreadsheet.
- For **Sectors**, and **Tags**, and **Disaggregations**:
  - 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.
  - Remember that **Disaggregations** are not complete until you add their **Disaggregation Categories**. Visit **Program Info > Disaggregations**. Filter to "No Categories" to find incomplete disaggregations. Click on each one to add categories.

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 indicators. If there are any errors in the file, you'll get a message explaining what they are. If everything looks good, click **Continue**.
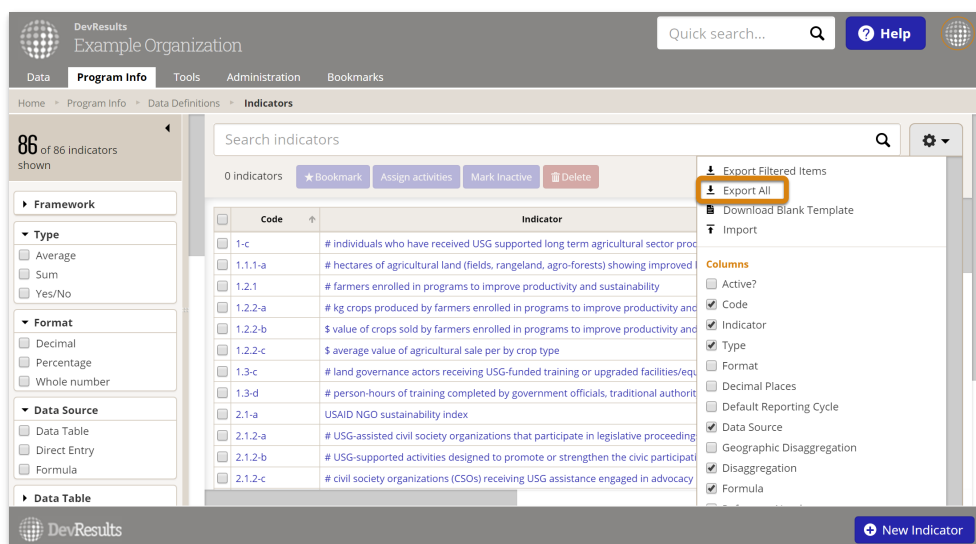
You'll get a message saying that the indicators were imported. Once you click **Done**, your indicator index page will refresh and you'll see your new indicators there! Next you'll need to assign the indicators to framework objectives and the activities that report them.

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# Edit multiple indicators using an Excel upload

You can also use Excel to update multiple indicators. 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 indicators, DO NOT delete or change the indicatorID. This is the only way the system knows which indicator should be updated.

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

> **Note:** It is not possible to delete indicators using an Excel import, but the same restrictions on editing an indicator with existing data apply -- some changes will cause data to be deleted. The importer will warn you if any of your changes would cause data to be deleted, and it will tell you which indicators will be impacted.

To cancel the upload and remove those changes, click **Clear upload**. To proceed with the upload, click **Continue**.

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# Edit multiple indicators from the indicator index

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

- Bookmarking indicators
- Assigning activities
- Marking indicators as inactive
- Deleting indicators (don't worry -- we'll check to confirm that you really want to!)

To make these kinds of edits, first go to **Program Info > Indicators** to open the indicator index page.

When the index page opens, click the checkbox next to the indicators you want to edit. You can either scroll through the list to find what you need, or use the filters and search to get the perfect list and click the checkbox in the column header to select all indicators displayed. Once you have the indicators you want to edit checked, click the button for the bulk action you'd like to complete.



If any additional selections are needed, this will open a pop-up or confirmation window before proceeding; otherwise, it will complete the action. For example, to assign activities to indicators, you'll see this:



If you see a pop-up, make the necessary selections (if any are required) and click the button to proceed with the bulk edit.

> Didn't answer your question? Please email us at **help@devresults.com**.

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