Video Tutorial: Create an Indicator

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Key points from the video

Context

At a minimum, defining an indicator requires identifying the data source, indicator type, number format, disaggregations (if applicable), geographic disaggregation, and results framework objective(s).

Indicator index [0:09]

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

Create indicator [0:38]

- Click on "New Indicator".
- Provide a code and name and click "Create Indicator".
- If your indicators don't have codes, create a convention that relates to how they're organized.
- The name should describe the value to be reported.

Data source [1:25]

- Each indicator must have one data source. See our video about data sources for more information about these types.

Indicator type [1:52]

- Choose 'sum' for values that can be added together from different places or reporting periods.
- Choose 'average' for values that should be averaged across places and times, like percentages or scores.
- "Yes/no" should only be used for questions with a yes or no answer, like "was the policy document completed?"

Number format [2:17]

- Sums can be displayed as whole numbers or decimals.
- Averages can be displayed as any format.
- For a number format other than 'whole number', note the desired number of decimal places.

Default reporting cycle [2:37]

- The default reporting cycle establishes the default frequency with which this indicator should be reported. When an activity is assigned to this indicator, the activity will report at this frequency unless you specify otherwise at the bottom of the page.
- You won't see this option if your site only has one reporting cycle.

Unit [3:00]

- The unit is the thing you are counting or averaging, like individuals, trainings, policies, organizations, etc.

Incremental v cumulative targets [3:20]

- Choose incremental targets if this indicator's targets describe what should be accomplished for a given reporting period.
- Choose cumulative targets if this indicator's targets describe the goal from the start through that date.

Disaggregations [3:47]

- Assign disaggregations to the indicator if applicable.
- If the disaggregation isn't available, first add it to the master list of disaggregations.
- Disaggregations can be 'cross-disaggregated' or 'parallel disaggregated.' Read more about cross- and parallel disaggregation.

Geographic disaggregation [4:30]

- Each indicator can only have one geographic disaggregation.
- Any data reported for lower geographic levels can be rolled up automatically to regional or national totals (and so on).

Assign activities [4:51]

- If the indicator is reported by activities, assign them in the "Activities" section.
- If not, uncheck the box that says *results are reported separately for each activity*.
- Each activity assignment comes with the default reporting cycle. If any activities should report this indicator at a different frequency, change that here.

Assign results framework objective(s) [5:45]

- In the classification section, assign the indicator to one or more results framework objectives.
- To define a new results framework or objective, go to Results -> Results Framework.

Assign sectors and tags [6:08]

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

Descriptive fields [6:27]

- Optionally, provide additional descriptive information about the indicator, including: justification, collection method, sources, acquisition frequency, limitations, quality notes, analysis, review, and reporting.

If you have any questions about any of this, please check out our **knowledge base article about indicators**.

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