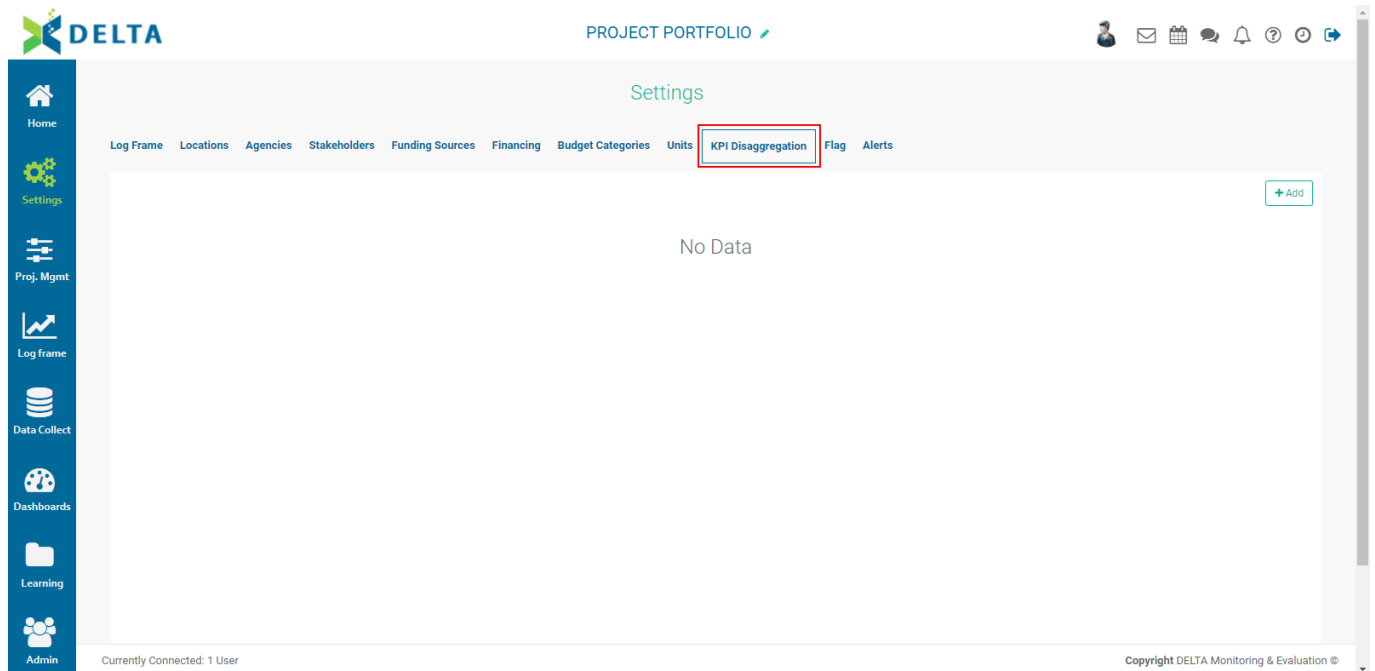


Portfolio Settings

Portfolio Settings: KPI Disaggregation

Delta's **KPI Disaggregation Categories** allow a finer breakdown of indicator data. Common examples include age and gender. If you're not using portfolio-level or cross-cutting indicators, you may not need to use this screen.

From the Portfolio page, click Settings in the left navigation to enter the module, then select KPI Disaggregation from the horizontal navigation.



To **add a disaggregation category**, click the +Add button, then enter a code and a label. Choose the aggregation calculation you wish to use (sum, average, maximum, minimum), then click Option to create the category name. These are strictly **labels**, and as such do not perform any calculations, but mathematical symbols are often a good shorthand, particularly in the case of a KPI category with many numerical ranges, such as the age range shown below:

A screenshot of a form for adding a KPI disaggregation category. The form has a text input field containing the expression '25 <= X < 40'. To the right of the input field is an 'Edit' button with a pencil icon.

You can use as many options as needed. However, keep in mind that using a large number of options for a KPI disaggregation category will make planning and actuals more time-consuming to enter, especially if you use more than one KPI disaggregation category in an indicator.

Click OK when you're done to save your work and return to the KPI Disaggregation Categories list page. The new category will appear on the screen.

To **edit a disaggregation category**, click its name in the list or its Edit icon. To **delete** it, click its Delete icon and confirm the deletion.

Previous: [Portfolio Settings: Units](#) | Next: [Portfolio Settings: Flags](#)
Page 1 / 2

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Portfolio Settings

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