

**SUCCESS
MEASURES®
DATA SYSTEM**

User Guide:
More Reporting Options

V01 - 01.14.15

More Reporting Options

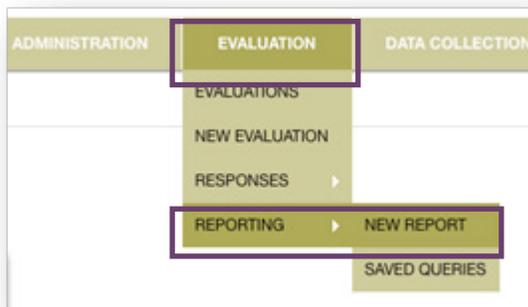
SMDS has extended options for creating reports. With more reporting options, you are not restricted to looking at one set of responses from one tool. You now have the option to look at data from multiple tools at the same time. Most users will use these additional options to create reports within their organization. Some users will use these options to compare data across organizations.

These reporting options can be used for any type of report a user may want to create. It is especially useful for:

1. Aggregating and comparing data between multiple evaluations (for example, comparing survey data from three different neighborhoods)
2. Displaying data across multiple time periods (looking at places or responses from individuals)
3. Showing data for respondents that have responded to multiple evaluations (for example, showing financial capability clients' changes over time)
4. Combining data for multiple organizations

Accessing More Reporting Options

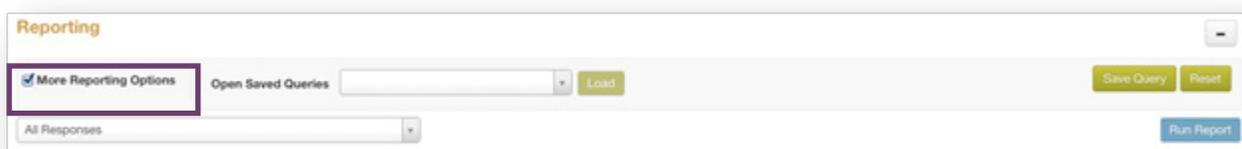
- Login to SMDS.
- Place your cursor over the Evaluation link.
- Place your cursor over the Reporting link.
- Click the **New Report** link.



The reports screen displays, with a “More Reporting Options” checkbox shown.

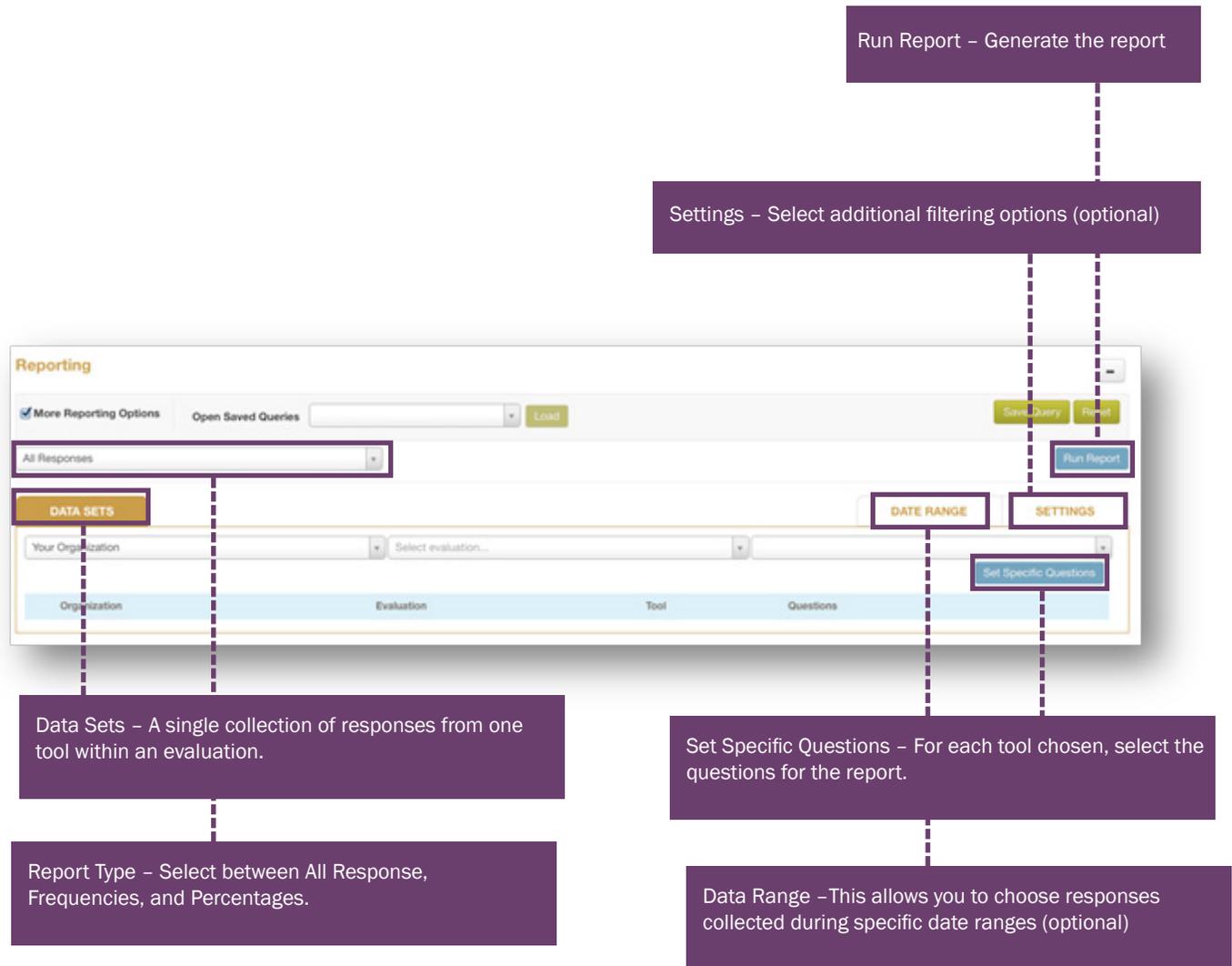
- Click the checkbox for More Reporting Options

More reporting options will now be displayed.



Navigation and Features

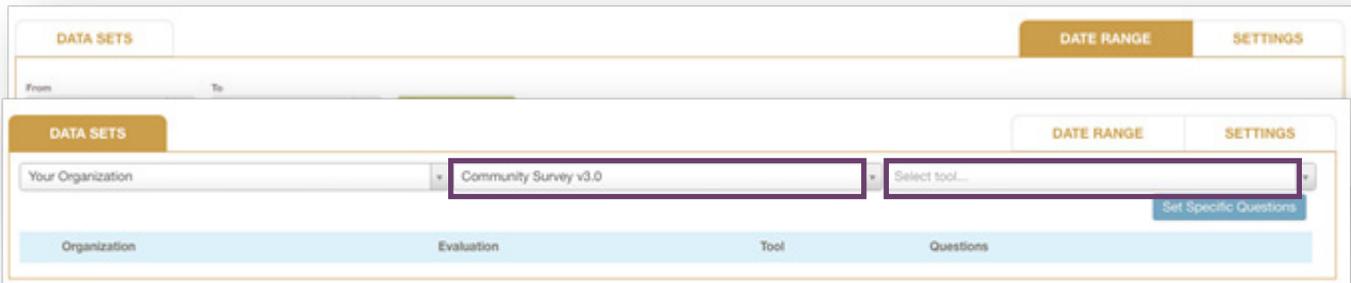
The reporting screen is laid out to guide you through a step-by-step process to choose the report you want to generate. This process includes:



Data Sets

A data set is a single collection of responses from one tool within an evaluation.

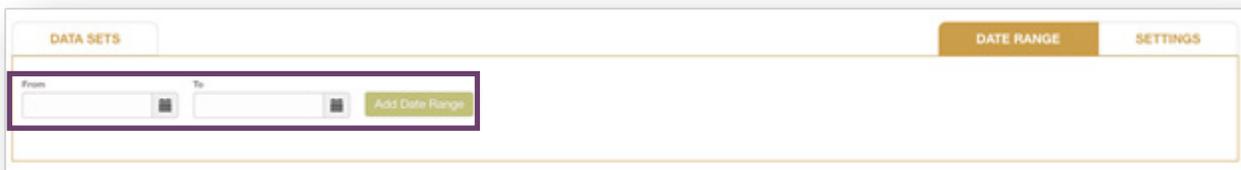
Because the system allows you to combine responses from multiple tools, evaluations or organizations, it requires you to select the organization



The screenshot shows a web interface for selecting data sets. At the top, there are three tabs: "DATA SETS" (selected), "DATE RANGE", and "SETTINGS". Below the tabs, there are two rows of selection options. The first row shows "From" and "To" date pickers. The second row shows a dropdown menu for "Your Organization", a dropdown menu for "Community Survey v3.0", and a dropdown menu for "Select tool...". A blue button labeled "Set Specific Questions" is located to the right of the "Select tool..." dropdown. Below these options is a table with columns labeled "Organization", "Evaluation", "Tool", and "Questions".

Date Range

A date range is a period of time when data was collected. After selecting data sets, you can further limit the data displayed by defining date ranges. If you select one date range, the report will show only responses entered on days within that range. If you select multiple ranges, the report will show responses entered in each date range.



The screenshot shows a web interface for selecting date ranges. At the top, there are three tabs: "DATA SETS", "DATE RANGE" (selected), and "SETTINGS". Below the tabs, there are two rows of selection options. The first row shows "From" and "To" date pickers, and a green button labeled "Add Date Range".

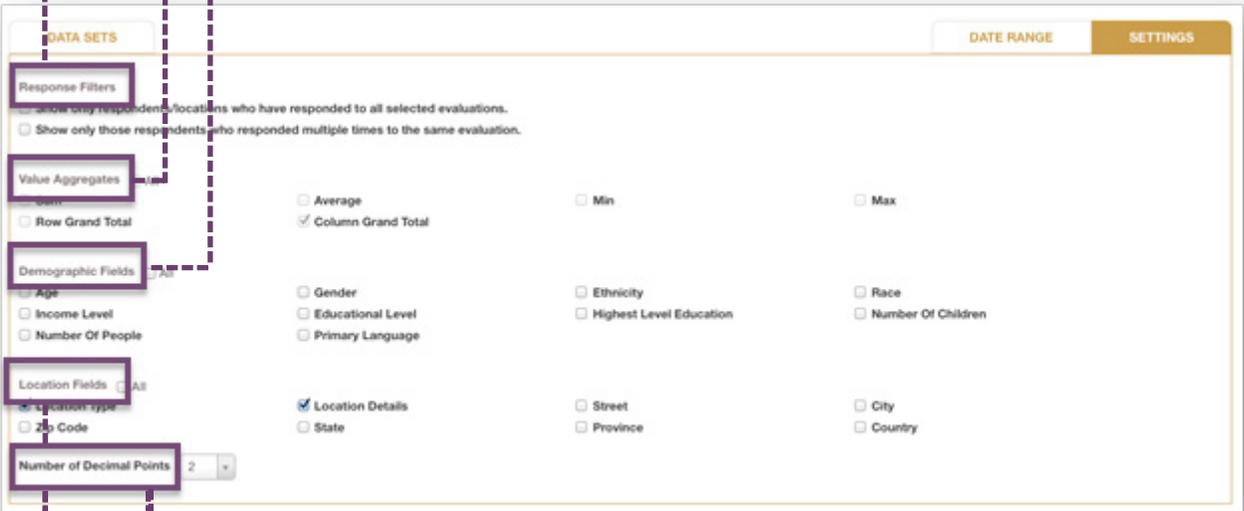
Settings

The Settings tab gives you the option to further filter the data in your report, and to choose some formatting options. These are divided into 5 main sections:

Demographic Fields: Demographic fields are fields related to individual respondents' demographic data – data that is saved in SMDS with a respondent record (not demographic data entered in a data collection tool).

Value Aggregates - Value aggregates are options used to show summaries within the report, such as grand totals for rows and columns.

Response Filters - Response filters allow you to limit the data shown to only respondents that have responded multiple times to evaluations. There are two choices in this area – to show only respondents/locations who have responded to all selected evaluations; and to show only those respondents who responded multiple times to the same evaluation.



Location Fields - Location fields are fields related to location respondents' data – data that is saved with a location respondent record (not data entered into a data collection tool).

Number of Decimal Points - For frequency and percentage reports, you may set the number of decimal points that are displayed.

Generating a Report

- Click the **checkbox** for More Reporting Options.
- Select the type of report from the drop down menu. Choose between All Response, Frequencies, or Percentages. This example is an All Response report.
- To select a data set, you will first select the organization (if you do not share data with other organizations, your organization name will be the only option).
- Click the down arrow on the **Select evaluations** box. Select the desired evaluation from the drop-down list.
- Click the down arrow on the **Select tool** box. Select the desired tool from the drop-down list.

The screenshot shows the 'Reporting' interface. At the top, there is a 'More Reporting Options' checkbox which is checked. Below it, there is a dropdown menu for 'All Responses' and a 'Run Report' button. The 'DATA SETS' section is highlighted with a yellow background and contains three dropdown menus: 'Your Organization', 'Community Survey v3.0', and 'Community Survey'. A 'Set Specific Questions' button is located to the right of these dropdowns. The interface also includes 'DATE RANGE' and 'SETTINGS' tabs at the top right.

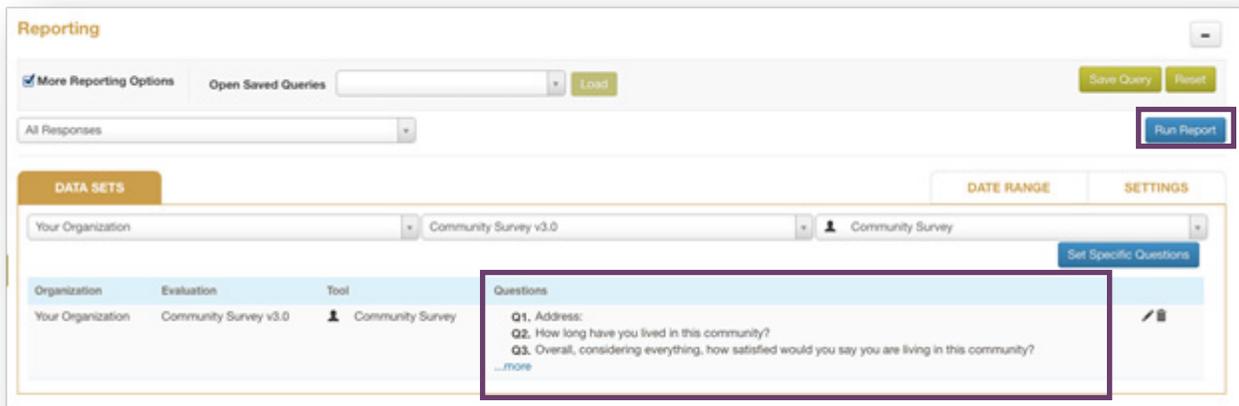
A Questions dialogue box will display.

- Select the **checkbox** for questions you wish to include in your report.

The screenshot shows a 'Questions' dialogue box with a search bar at the top. A list of 15 questions is displayed, each with a checkbox. Questions Q1 through Q5 have their checkboxes checked, while Q6 through Q15 have theirs unchecked. At the bottom of the list, there is a 'Select All' checkbox which is unchecked. Two buttons are at the bottom right: 'Apply these Selections' (highlighted with a yellow box) and 'Cancel'.

Follow this process again, as many times as needed, to include each data set you need for your report. As each data set is selected, you will see it displayed on your screen.

- If you do not need to add date ranges or additional filters, click the **Run Report** button.



The screenshot shows the 'Reporting' interface. At the top, there is a 'More Reporting Options' section with a 'Load' button and 'Save Query' and 'Reset' buttons. Below this is a dropdown menu for 'All Responses' and a 'Run Report' button. The main area is divided into three tabs: 'DATA SETS', 'DATE RANGE', and 'SETTINGS'. The 'DATA SETS' tab is active, showing a table with columns for 'Organization', 'Evaluation', and 'Tool'. A 'Questions' panel is open, displaying three questions: 'Q1. Address:', 'Q2. How long have you lived in this community?', and 'Q3. Overall, considering everything, how satisfied would you say you are living in this community?'. The 'Run Report' button is highlighted with a red box.

- To set a date range, click the **Date Range** tab.
- Click the **“From” Date Picker** icon to select the start date.
- Click the **“To” Date Picker** icon to select the end date.
- After both dates are entered, click the **Add Date Range** button.



The screenshot shows the 'DATE RANGE' tab in the Reporting interface. It features two date picker fields labeled 'From' and 'To', each with a calendar icon. An 'Add Date Range' button is positioned between the two fields. Below the fields, the date range '11/01/2014 - 12/31/2014' is displayed. The 'DATE RANGE' tab is highlighted with a red box.

- Repeat this process as needed to add more date ranges.
- After all selections have been made, click the **Run Report** button to generate the data you have selected.

All Responses Run Report

DATA SETS **DATE RANGE** **SETTINGS**

From: To: Add Date Range

12/01/2014 - 01/01/2015

Export

Date Collected Year Month Organization Response ID Date Range

Response Question Evaluation Question Options

1. Address:	2. How long have you lived in this community?	3. Overall, considering everything, how satisfied would you say you are living in this community?	4. Please describe why you feel this way.	5. Right now, how likely are you to recommend this community to someone else as a good place to live?	6. Please describe why you feel this way.	7. How often during the past year did you partico
Last Name	First Name	Alternate Id	Response No.	Community Survey v3.0	Community Survey v3.0	Community Survey v3.0
Community Survey v3.0	Community Survey v3.0	Community Survey v3.0	Community Survey v3.0	Community Survey v3.0	Community Survey v3.0	Community Survey v3.0
	How long have you lived in this community? - Years	How long have you lived in this community? - Months				Participated in a community, resident, or tenant association
						Volunteers to help others in the community
						Participated in a community improvement project, such as a clean-up, community gardening, or other
						Supports local business events, such as a sidewalk sale or "shop local" etc.

- To set additional filters, click the **Settings** tab.

All Responses Run Report

DATA SETS **DATE RANGE** **SETTINGS**

From: To: Add Date Range

12/01/2014 - 01/01/2015

- Select the **checkbox** next to each filter or feature you would like to add.
- Click the **Run Report** button.

AI Responses Run Report

DATA SETS DATE RANGE SETTINGS

Response Filters

- Show only respondents/locations who have responded to all selected evaluations.
- Show only those respondents who responded multiple times to the same evaluation.

Value Aggregates All

- Sum
- Average
- Min
- Max
- Row Grand Total
- Column Grand Total

Demographic Fields All

- Age
- Gender
- Ethnicity
- Race
- Income Level
- Educational Level
- Highest Level Education
- Number Of Children
- Number Of People
- Primary Language

Location Fields All

- Location Type
- Location Details
- Street
- City
- Zip Code
- State
- Province
- Country

Number of Decimal Points

Export