SUCCESS MEASURES® DATA SYSTEM

User Guide:
More Reporting Options

SUCCESS MEASURES®

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.
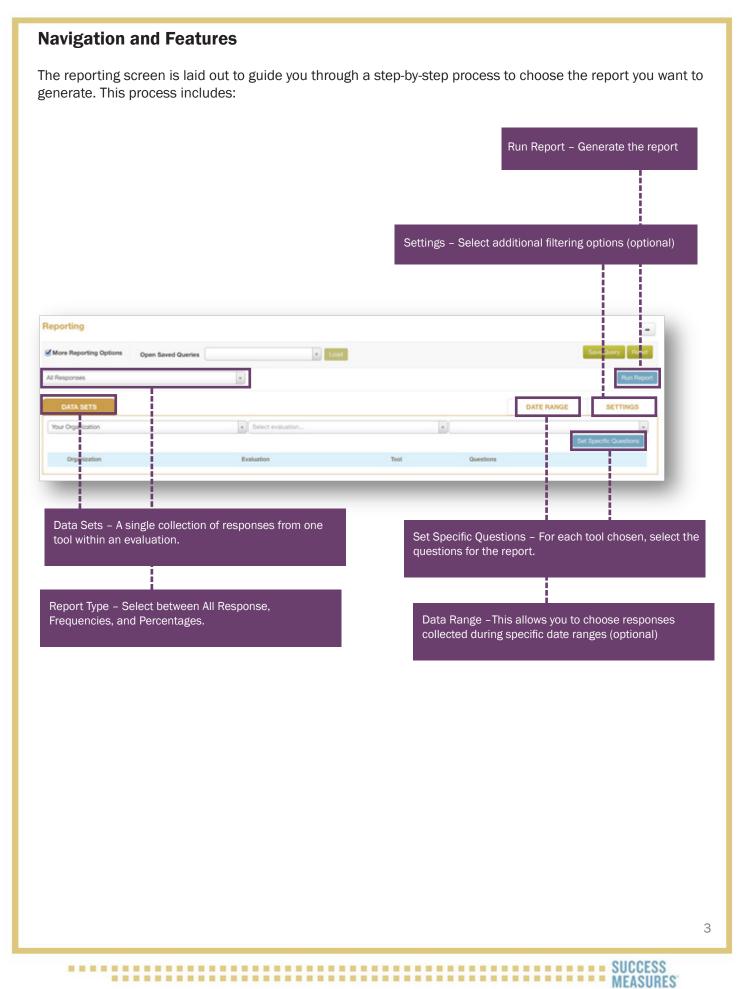- Click the **New Report** link.

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

- Click the checkbox for More Reporting Options
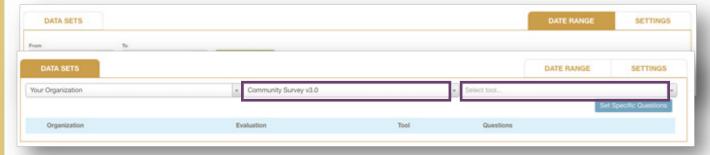
More reporting options will now be displayed.

SUCCESS MEASURES

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:

Run Report – Generate the report

Settings – Select additional filtering options (optional)

Data Sets – A single collection of responses from one tool within an evaluation.

Set Specific Questions – For each tool chosen, select the questions for the report.

Report Type – Select between All Response, Frequencies, and Percentages.

Data Range –This allows you to choose responses collected during specific date ranges (optional)
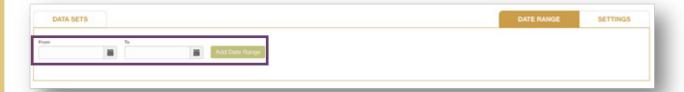
SUCCESS MEASURES

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

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.
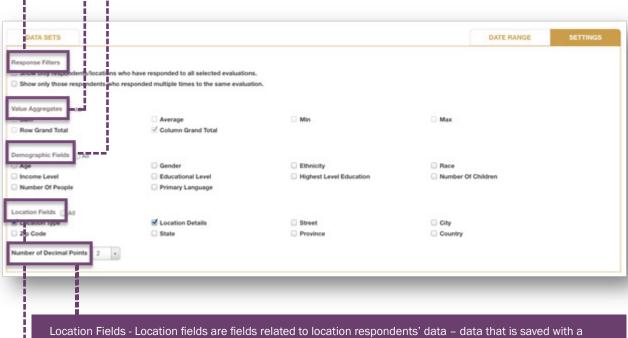
SUCCESS
MEASURES

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.
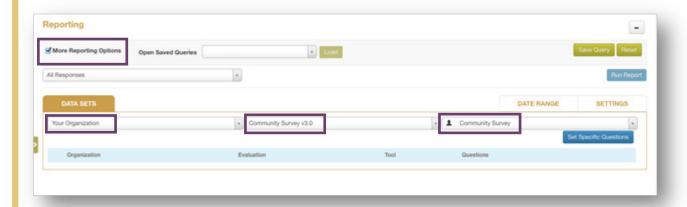

Location Fields - Location fields are fields related to location respondents' data – data that is saved with a location respondent record (not data entered into a data collection tool).

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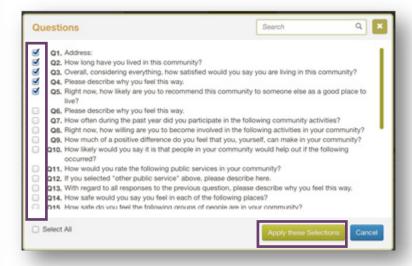
SUCCESS MEASURES

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.
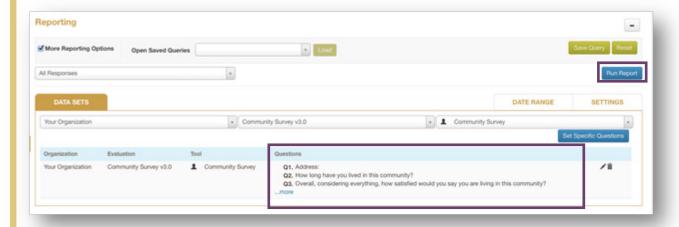

A Questions dialogue box will display.

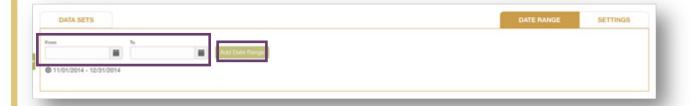- Select the **checkbox** for questions you wish to include in your report.

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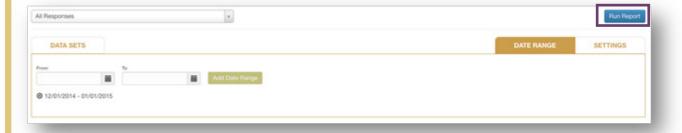
- If you do not need to add date ranges or additional filters, click the **Run Report** button.
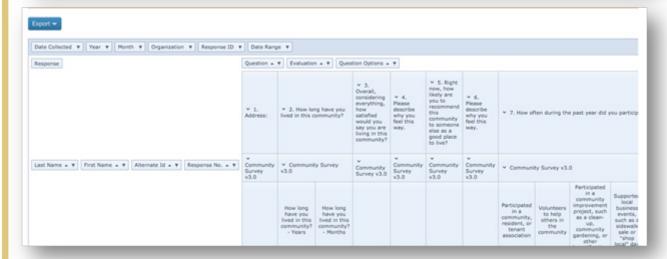

- To set a date range, click the **Date Range** tab.
- Click the **"From" Date Picker** icon to select the start date.
- Click the **"To" Date Picker** icon to select the end date.
- After both dates are entered, click the **Add Date Range** button.

- 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.

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

SUCCESS
MEASURES®

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

SUCCESS
MEASURES®