

User Guide

Customizing Tools

Customizing Tools

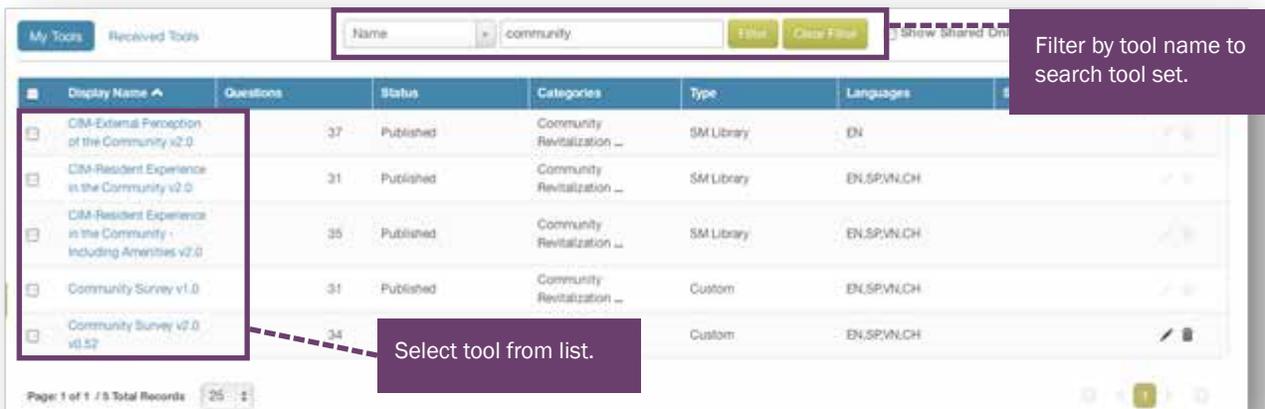
SMDS is designed to allow users to create evaluations using any available tools, and to create new tools based on existing tools.

The system allows a user to

- Create a new tool based upon an existing tool, through the process of “cloning”.
 - Make modifications to that new draft tool, to remove questions, add questions from the existing list of questions, and create custom questions with a variety of response set types.
 - Add skip logic to questions, so that depending upon what answer is provided the respondent would be able to skip forward to the next relevant question.
-
- Login to SMDS.
 - Place cursor over the **Data Collection Tools** link.
 - Click the **Manage Tools** link.



Here, you will see a list of every tool in your SMDS account. You can customize any tool in your account. You can select the tool directly from your tool set, or search the set for a tool by name.



Customizing Tools

- Click the **checkbox** next to the tool you want to customize.
- Click the **Clone** button at the bottom of the screen.

<input type="checkbox"/>	Display Name ^	Questions	Status	Categories	Type	Languages	Sharing
<input type="checkbox"/>	CIM-External Perception of the Community v2.0	37	Published	Community Revitalization ...	SM Library	EN	
<input type="checkbox"/>	CIM-Resident Experience in the Community v2.0	31	Published	Community Revitalization ...	SM Library	EN,SP,VI,CH	
<input type="checkbox"/>	CIM-Resident Experience in the Community - Including Amenities v2.0	30	Published	Community Revitalization ...	SM Library	EN,SP,VI,CH	
<input checked="" type="checkbox"/>	Community Survey v1.0	31	Published	Community Revitalization ...	Custom	EN,SP,VI,CH	
<input type="checkbox"/>	Community Survey v2.0 v0.52	34	Draft	Community Revitalization ...	Custom	EN,SP,VI,CH	

Page: 1 of 1 / 5 Total Records

1 Tool(s) Selected

- Enter the **name** of your new tool in the dialogue box that appears. The tool should be given a name that makes it easy for you to identify the tool in your tool set.

The **tag field** is optional. It allows you to search for the tool based on the words you add here, along with the name of the tool.

- Click the **Submit** button.

Clone Tool ✕

Name *

Tag

Your new tool will be created in a minute or two. Your new tool will be displayed in draft form. From here, you are ready to begin customizing your tool.

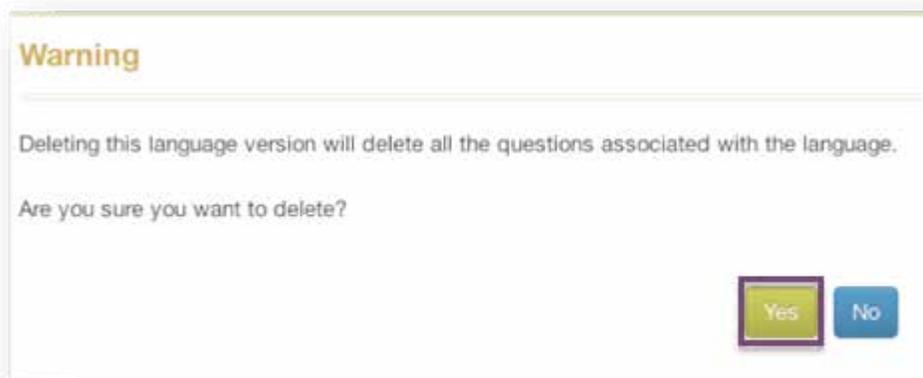
If your tool is available in multiple languages, you will see those languages listed in the top right corner. If you will not be using one or more of the languages, you can delete the language before making changes to the tool.

Delete a Language.

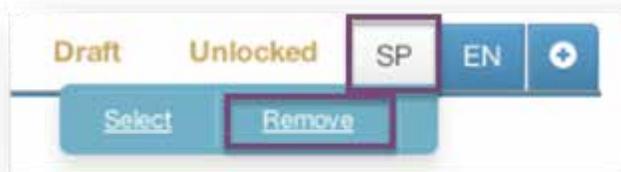
- Click the **SP** language tab.
- Click the **Remove** link.

A Warning dialogue box will display confirming the deletion of the language.

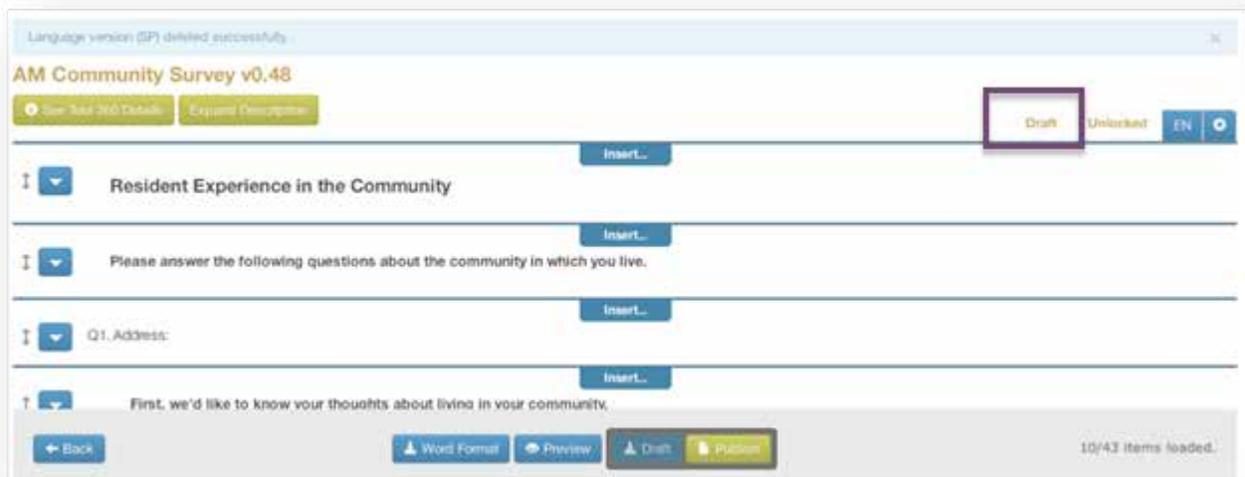
- Click the **Yes** button.



If you need multiple languages for your tool, any edits or additions to the tool will need to be translated.



Customizing the Tool. With your tool in draft mode, you have many options available for editing questions currently in the tool, or adding new questions. First, we will look at editing questions currently in the tool.



Editing Questions in the Tool

By clicking the down arrow to the left of the question, you can edit, clone, replace, skip logic, make required, indent, and remove from tool.

Diagram illustrating the editing options available for a question in the tool. The question shown is "Q9. How much of a positive difference do you feel that you, yourself, can make in your community?". The editing options are:

- Edit**—Make changes to the question.
- Clone**—Make a copy of the question.
- Replace**—Choose a question to replace the current question.
- Skip Logic**—Select Skip logic to set up question branching based on the response.
- Make Required**—Click Make required to require respondents to answer this question before they can continue.
- Indent**—Move the question to the right; used to make a question subordinate to the previous question.
- Remove from Tool**—Delete the question from the tool.

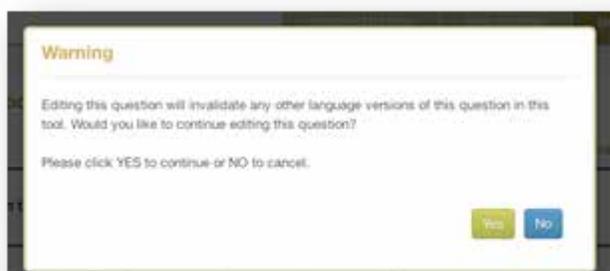
Edit a Tool. Use this if you need to make changes to a question.

- Click the **white drop-down arrow** button to the left of the question.
-
- Click the **Edit** link from the menu that displays.



When you select edit on any question in a survey tool that has multiple languages, a warning box will appear advising you that editing this question will invalidate any other language versions. Because the edits to this question have not been changed into the other languages, you can continue without worrying about this warning. Later, you can either make the language changes, delete the other languages, or keep the edits in English in the other languages.

Click the **Yes** button to continue with your edit of the question.



The custom question window will display with your question text box, and you can edit the wording.

- Enter the **correction** in the text field. For this example, alter “**pisitive**” to “**positive**” in the question text field.
- Click the **Save** button.

Clone a question. Use this to ask the same question with a minor change. For example, you might want to ask how much of a difference a person feels they can make in their community, and then on their block.

- Click the **white drop-down arrow** button to the left of the question.
- Click the **Clone** link from the menu that displays.



The duplicated question will appear with the words CLONED at the end of the statement.

The system automatically renumbers the questions. The new question has been inserted into the existing list of questions.



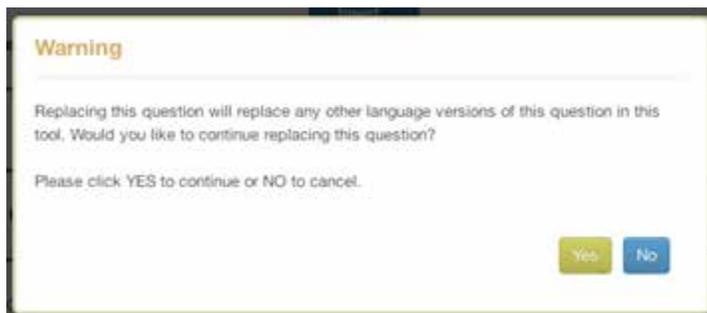
Replace a Question. Use this to delete the current question and replace it with a question from an existing tool.

- Click the **white drop-down arrow** button to the left of the question.
- Click the **Replace** link from the menu that displays.



When you select replace on any question in a survey tool that has multiple languages, a warning box will appear advising you that editing this question will invalidate any other language versions. Because the edits to this question have not been put into those other languages, you can continue without worrying about this warning. Later, you can either add the language changes, delete the other languages, or keep the edits in English in the other languages.

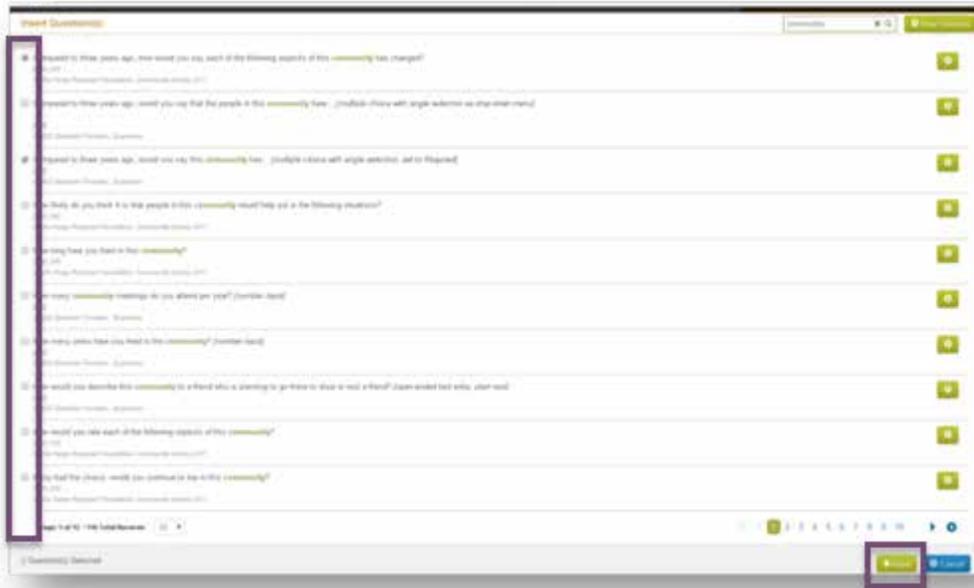
- Click the **Yes** button to continue with your replacement of the question.



Your question bank contains all questions from all tools in your tool set.

Select the **checkbox** of the questions to be added.

Click the **(+) Insert** button in the lower right corner of the screen.

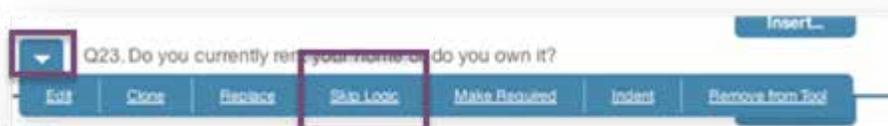


The selected questions will be integrated into the existing tool. The questions will be automatically renumbered.

Skip **Logic**. Use this to set up question branching based on the answer to a question. This means that the next question a respondent is directed to will be determined by how they answer a previous question.

The question below asks if you currently rent or own your home. The next question inquires about if the respondent answers “other” instead of rent or own. If the respondents selects affirmative to renting or owning, they don’t need to complete the “other” fill-in-the-blank question. It makes sense to “Skip” the next question and go to the next section of the survey

- Click the **white drop-down arrow** to the left of the question.
- Click the **Skip Logic** link.



A Skip Logic window will display. You will be able to provide the system with your instructions of which survey question to go to depending upon which answer is selected.

You can first select what happens if “Rent” response is selected, and then what happens if “Own” is selected.

- From the drop-down arrow, select “**Option 1 I rent my own home.**” option.
- Under the “Then skip to” section, select “**Q25**” option.
- Click the **Save** button.
- Click the **Close** link.



You will see a small symbol to the right of your question denoting Skip Logic.



Make Required. Use this to require respondents to answer the question.

- Click the **white drop-down arrow** to the left of the question.
- Click the **Make Required** link from the window that displays.

You will see a small icon to the right of your question denoting it is required.

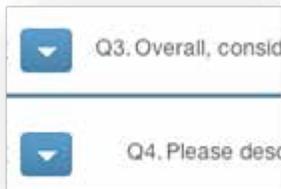


Indent a Question. Use this to display hierarchy visually to the user. Below are instructions on how to indent a question.

- Click the **white drop-down arrow** button to the left of the question.
- Click the **Indent** link from the menu that displays.



The designated question will be indented under the previous question.



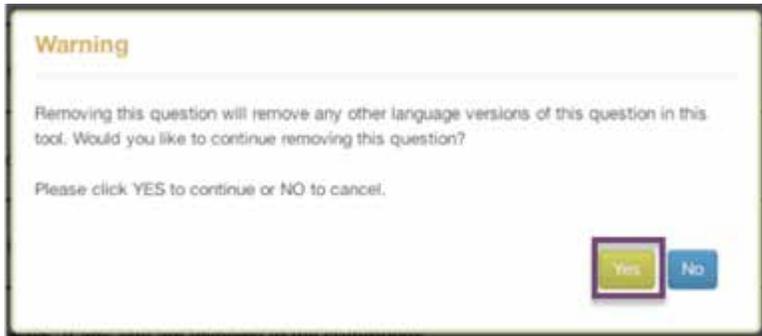
Remove from Tool. Use this to delete a question from the tool.

- Click the **white drop-down arrow** button to the left of the question.
- Click the **Remove from Tool** link from the menu that displays.



When you select remove on any question in a survey tool that has multiple languages, a warning box will appear advising you that editing this question will invalidate any other language versions. Because the edits to this question have not been put into those other languages, you can continue without worrying about this warning. Later, you can either add the language changes, delete the other languages, or keep the edits in English in the other languages.

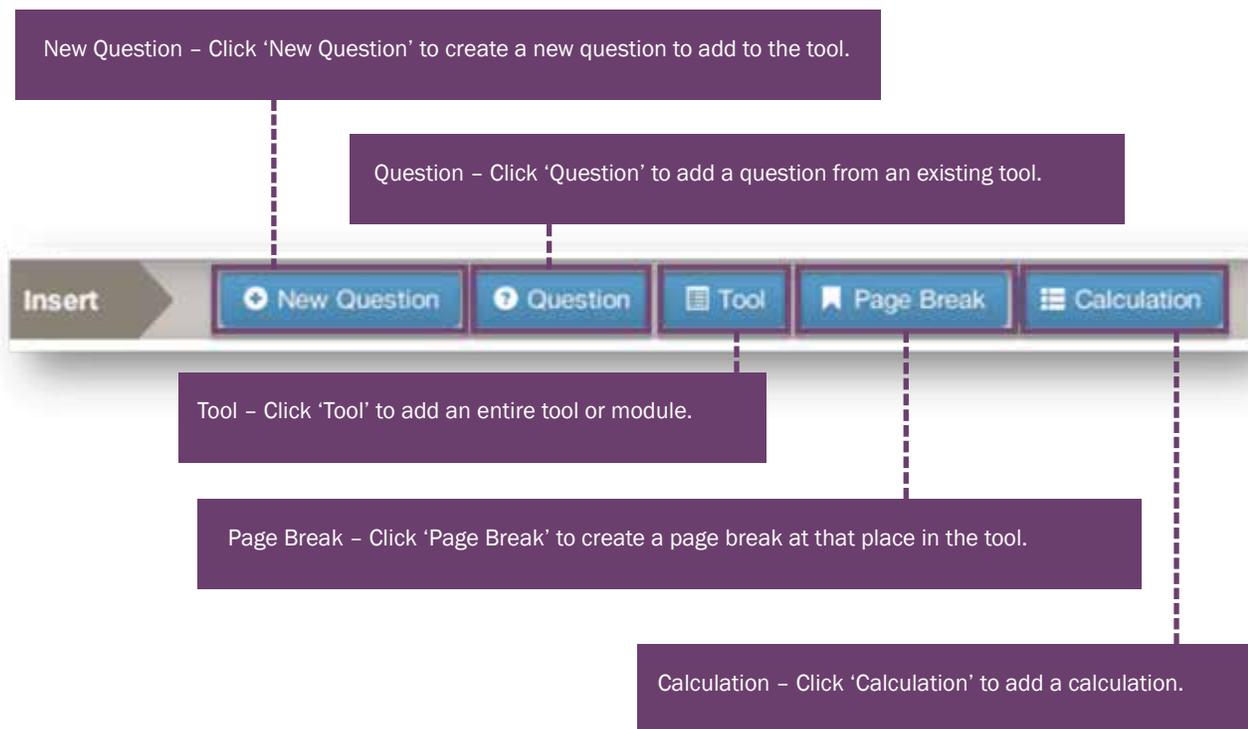
- Click the **Yes** button to continue with your removing the question.



The question will be removed from display. You do not need to type in the question number. The system automatically renumbers them.

Adding Questions to the Tool

By clicking insert between two questions, you can add a new question, add a question from an existing tool, add an entire tool or module, create a page break, or add a calculation. SMDS has many different options for question and answer formats. Please go to the end of this guide for question and answer format descriptions.



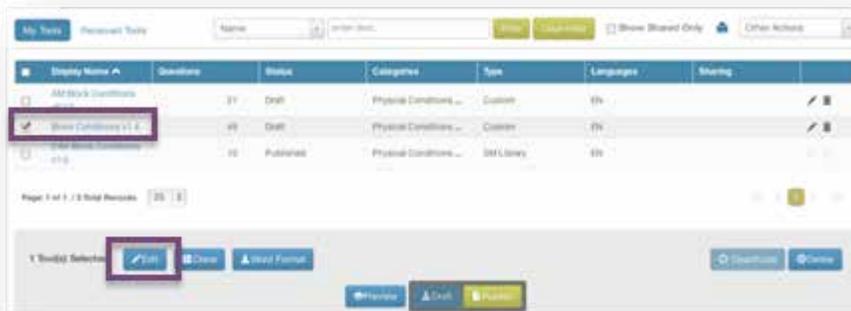
Add A New Question. Use this to create a new question to add to the tool.

- From the Dashboard, place your cursor over the **Data Collections Tool** link.
- Click the **Manage Tools** link.



Click the **checkbox** next to the tool you want to customize.

Click the **Edit** button. *The Edit option is only available for tools in Draft mode. If you need to edit a tool that is published, see the beginning of this guide on customizing tools.*

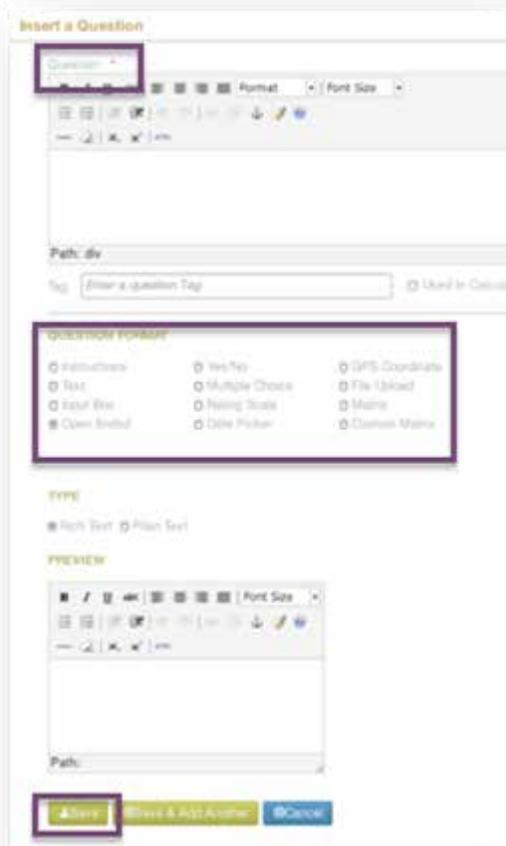


- In **Draft Tool** mode, click the Insert tab between two questions. This is where the new question will insert.
- Click the **+ (plus sign) New Question** button.



An **Insert Question** dialogue box appears. Select the type of question you would like to create.

- Enter the **new question** into the text field.
- Select the **Question Format**.
- Click the **Save** button.



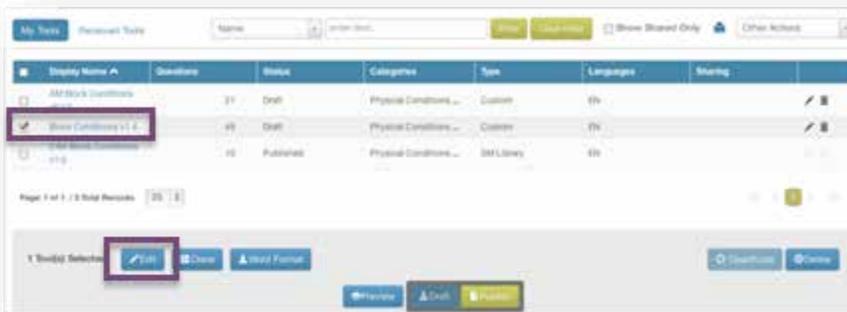
The new question will be added to the list of already created questions. The system will automatically renumber the questions.

Add an Existing Question. Use this to add a question from an existing tool.

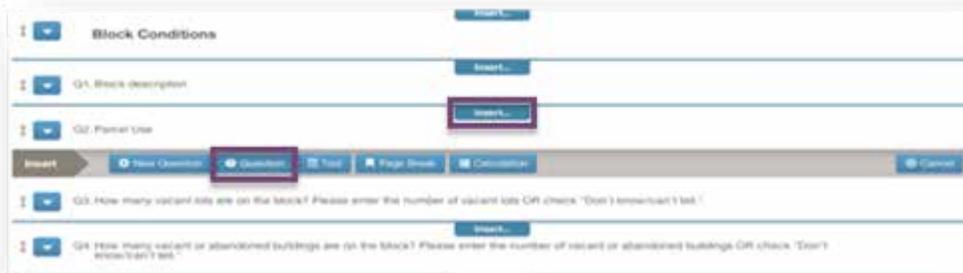
- Place your cursor over the **Data Collections Tool** link.
- Click the **Manage Tools** link.



- Click the **checkbox** next to the tool you want to customize.
- Click the **Edit** button. *The Edit option is only available for tools in Draft mode. If you need to edit a tool that is published, see the beginning of this guide on customizing tools.*

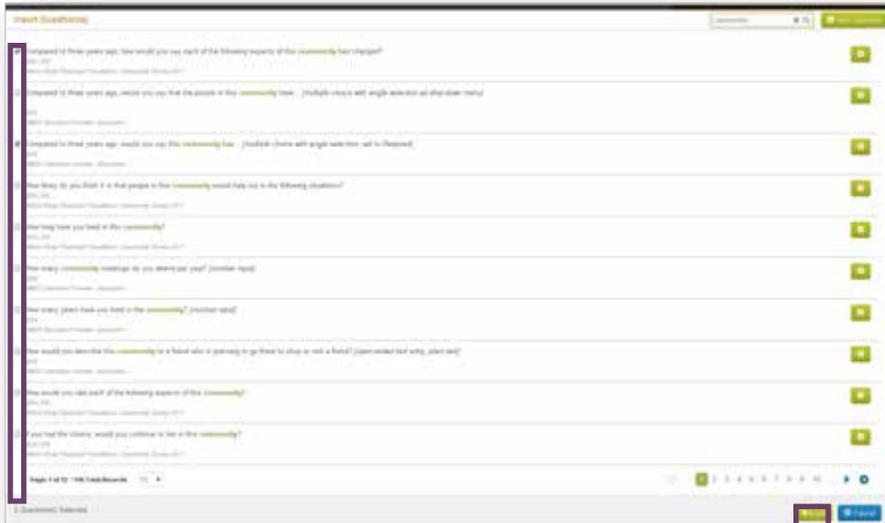


- Click the **Insert** tab.
- Click the **Question** button.

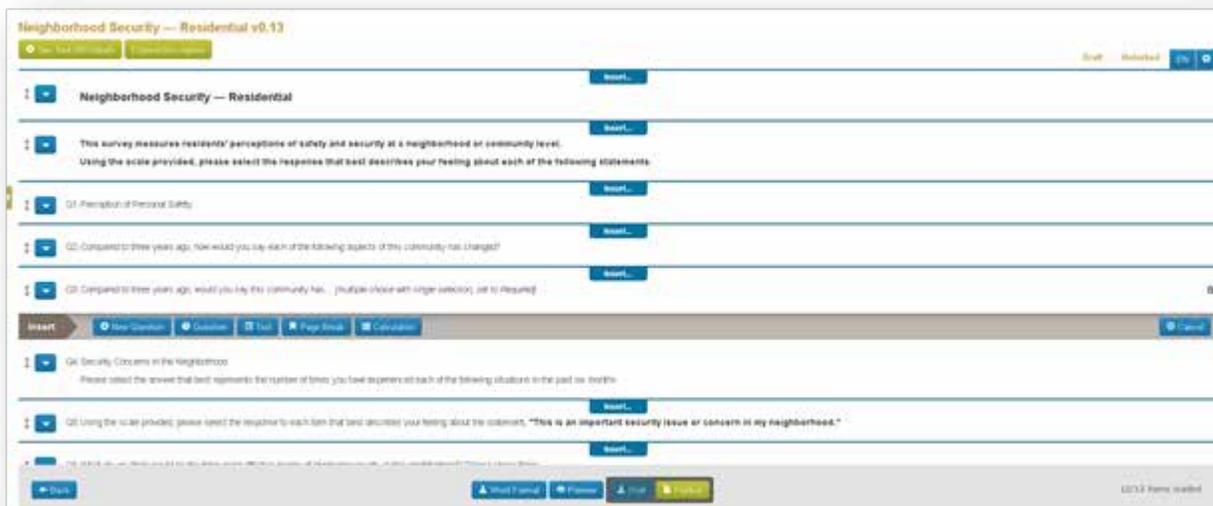


The Insert Question(s) dialogue box appears. Your question bank contains all questions from all tools in your toolset.

- Select the **checkbox** of the questions to be added.
- Click the **(+) Insert button** in the lower right corner of the screen.



The selected questions will be inserted into the existing survey.

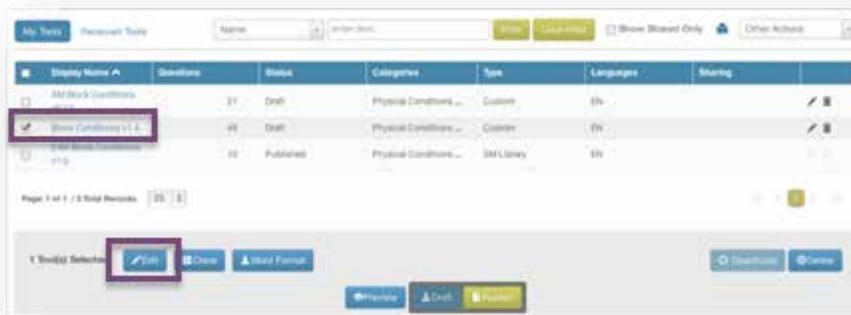


Add an Entire Tool or Module. Use this to add an entire tool or module to the current tool.

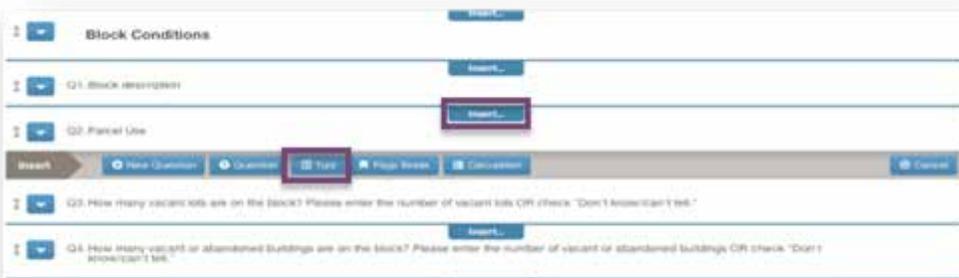
- Place your cursor over the **Data Collections Tool** link.
- Click the **Manage Tools** link.



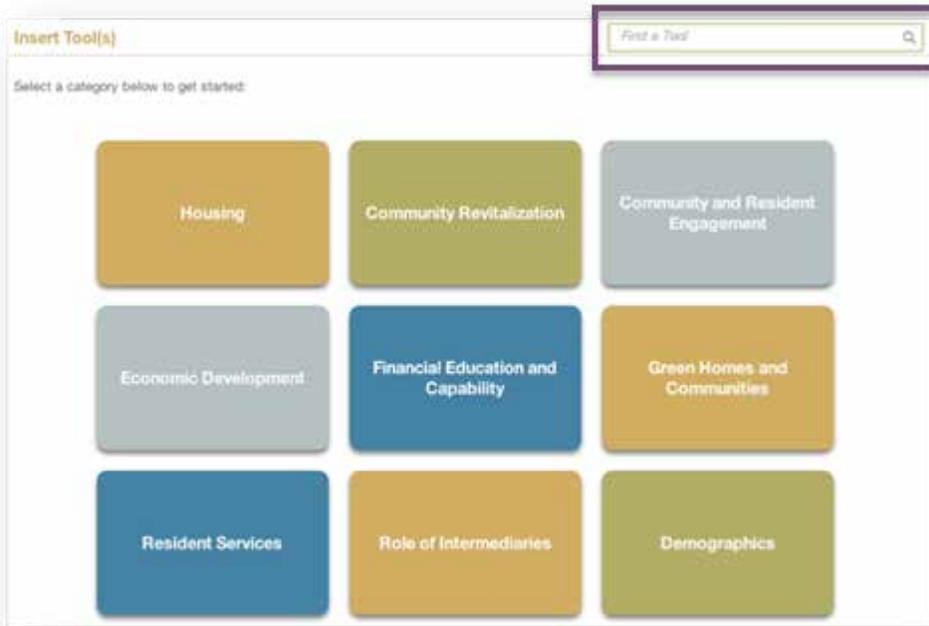
- Click the **checkbox** next to the tool you want to customize.
- Click the **Edit** button. *The Edit option is only available for tools in Draft mode. If you need to edit a tool that is published, see the beginning of this guide on customizing tools.*



- Click the **Insert** tab.
- Click the **Tool** button.

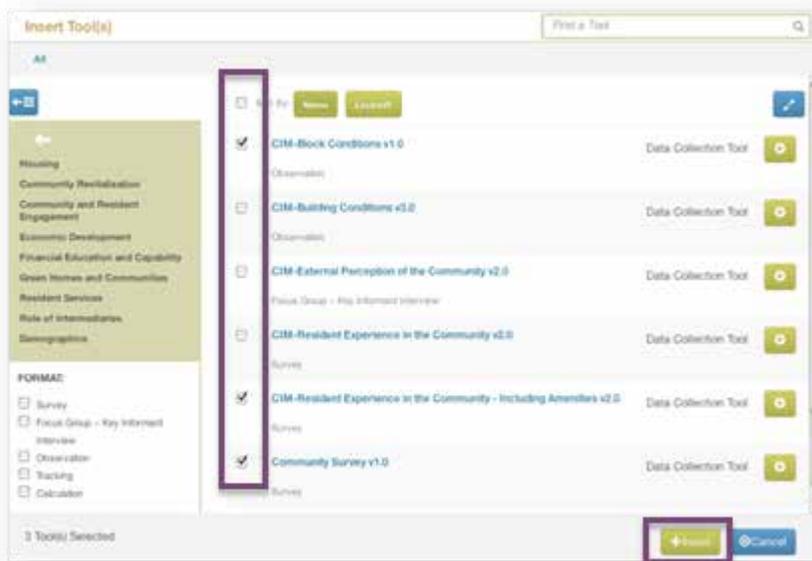


- Click the search icon next to the “Find a tool” box in the upper right corner.



From here, you will see a list of every tool and module in your tool set. You can filter by a tool name, or scan the list for the tool you would like to insert. You can insert multiple tools at the same time.

- Click the **checkbox** next to the tool(s) you would like to insert.
- Click the **Insert** button.



After adding the tool, the questions will be added and automatically renumbered and included into the survey. When you add a tool, please scroll to remove any duplications of headers or unnecessary information. Please make sure the Skip Logic hasn't been effected by adding any additional questions. You can identify Skip Logic the by curved arrow symbol to the right of the question.



Duplicated footers need to be removed.

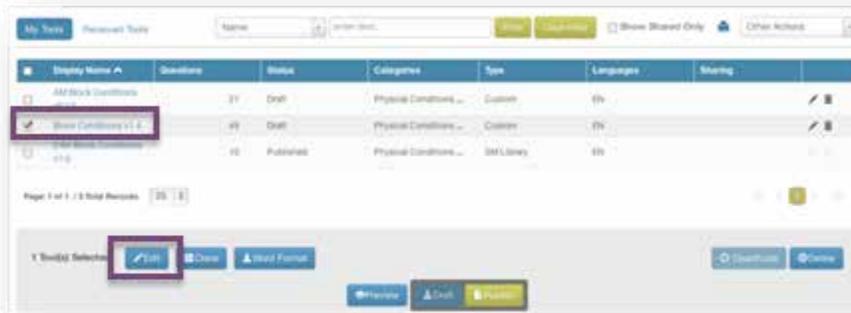
Insert a Page Break. Use this to insert a page break between questions.

- Place cursor over the **Data Collections Tool** link.
- Click the **Manage Tools** link.

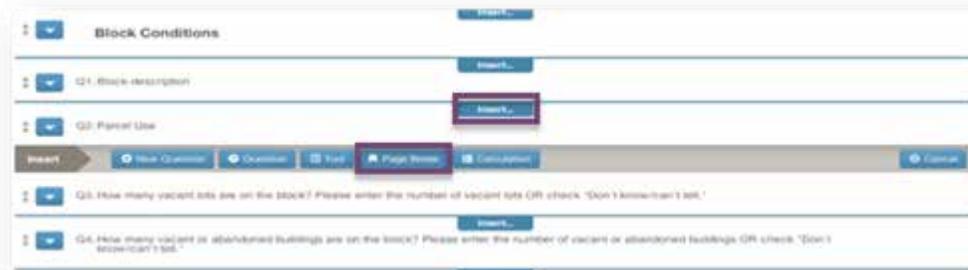


Click the checkbox next to the tool you want to customize.

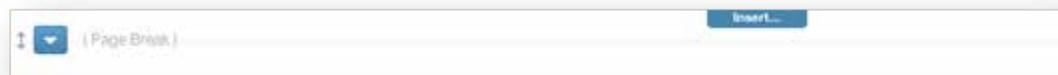
Click the **Edit** button. *The Edit option is only available for tools in Draft mode. If you need to edit a tool that is published, see the beginning of this guide on customizing tools.*



- Click the **Insert** tab.
- Click the Page Break button.



This will create a page break at that place in the tool.

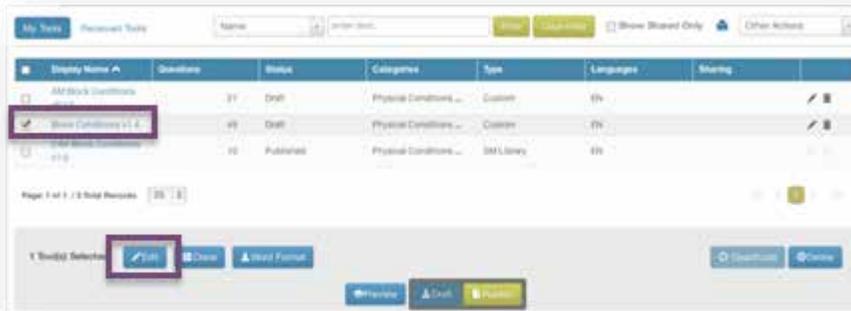


Insert a Calculation. Use this to insert a calculation based on previous answers.

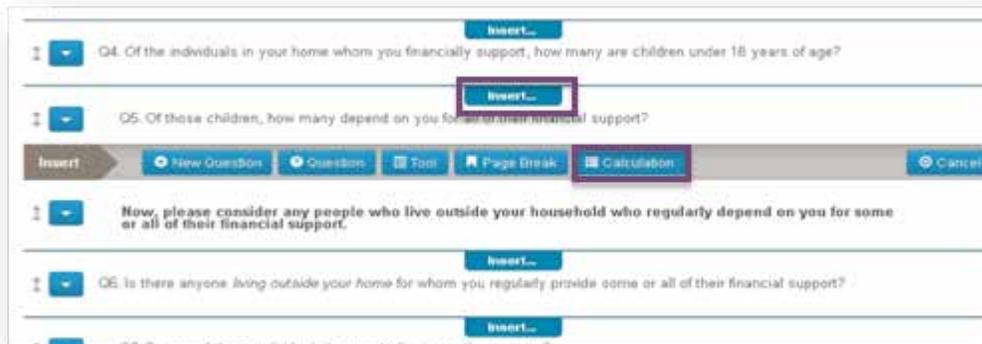
- Place your cursor over the **Data Collections Tool** link.
- Click the **Manage Tools** link.



- Click the **checkbox** next to the tool you want to customize.
- Click the **Edit** button. *The Edit option is only available for tools in Draft mode. If you need to edit a tool that is published, see the beginning of this guide on customizing tools.*



- Click the **Insert** tab.
- Click the **Calculation** button.



- In the **Label** text field, enter a description of the calculation that you want to display in your tool.
- Enter the calculation expression in the box labeled EXPRESSION.

You may use addition, subtraction, multiplication and division. Your Calculations in a tool can use the response for any question that has a number format, such as Input Box or Matrix. All of the available number fields in the tool are displayed within the Mathematical Expression instructions.

- Click the **+** (**plus**) button under the Use column and next to the Question number to use the associated value in your expression.
- When your expression is complete, click outside the expression box. A green check mark next to the box indicates a valid expression.
- Click the **Save** button to save your calculation.

CALCULATION

Label:

MATHEMATICAL EXPRESSION

Below are the list of Questions that can be used in the mathematical expression
 Defining mathematical expression is a two step process:
STEP 1: Identify the questions in the list below and make a note of the expression for the questions that will be used in the mathematical expression for output

Use	Question Expressions	Question Text
<input checked="" type="checkbox"/>	0.3 [Q3]	Of those adults, how many depend on you for all of their financial support?
<input checked="" type="checkbox"/>	0.5 [Q5]	Of those children, how many depend on you for all of their financial support?

STEP 2: Enter the expression in the box below. It is important to follow a proper convention in order to write the mathematical expression in the box below. Here is an example: If the question in the above list are Q1, Q2, and Q3 and you have to calculate such as the output should be: Q1+Q2-Q3. This expression will be written as:

For using a matrix cell in an expression use [Q-question number>{<row index>,<column index>}]. For example for the cell of 1st row and 2nd column of question Q1: use [Q1(1,2)]
 For using a matrix column sum/avg in an expression use [Q-question number>{<column index>,<sum/avg>}]. For example for the sum of 1st column of question Q1: use [Q1(1,sum)]

Clicking on the 'Use' button above will insert the expression in the box below. You can then apply the math operators from the list below. Note that round brackets - '()' are allowed in the expression. For example: ([Q1] + [Q2]) / [Q3] is a valid expression.

Use the following characters for math operators:

Add	Subtract	Multiply	Divide
+	-	*	/

EXPRESSION:

Publish the Tool

After you have made additions and edits to the tool, it is ready to be published.

- Click the **Publish** button.

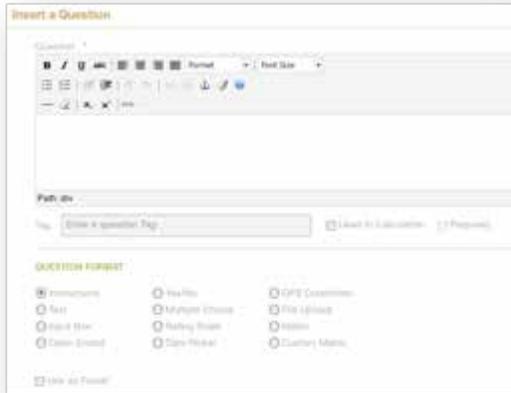


The tool has now been published and can be added to evaluations. Once in an active evaluation, data can be entered for the tool.

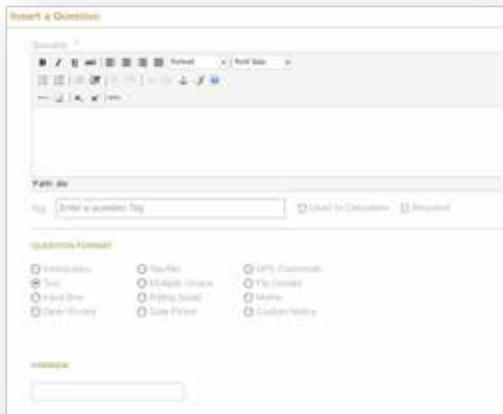
To set up an evaluation and to enter data, please see the user guides on [Creating an Evaluation](#) and [Entering a Response](#).

Question Format Descriptions.

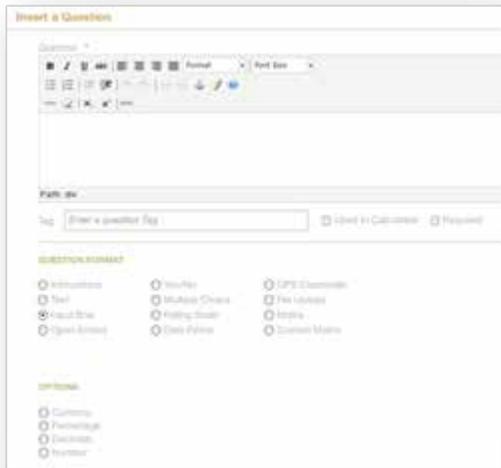
Instructions – Use this to insert instructions such as “Please answer the following questions about the community in which you live” You can adjust the font size and style of your question or instructions text.



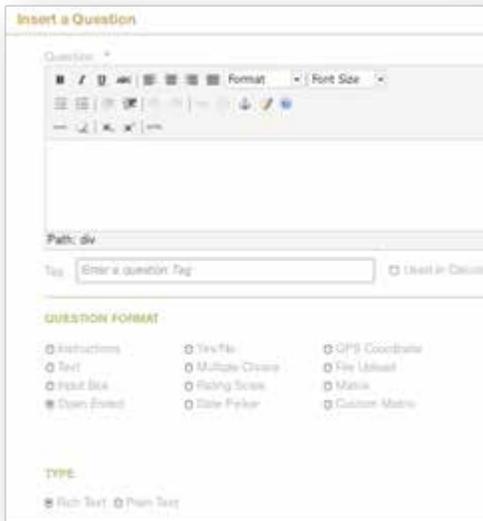
Text – Use this to insert simple text such as “Thank you for completing this survey”



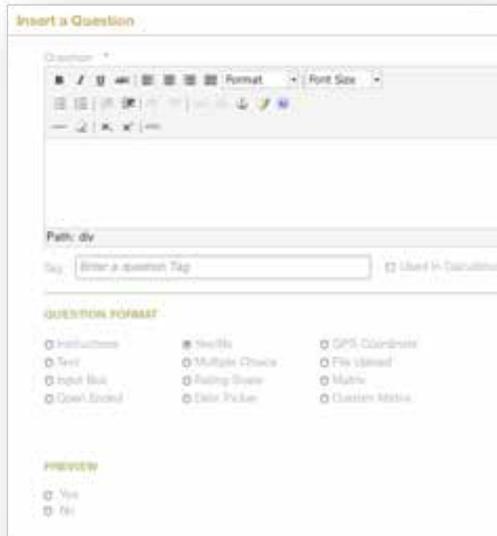
Input box – This provides you with an answer box for a brief answer such as the year moved, or which school their children attend.



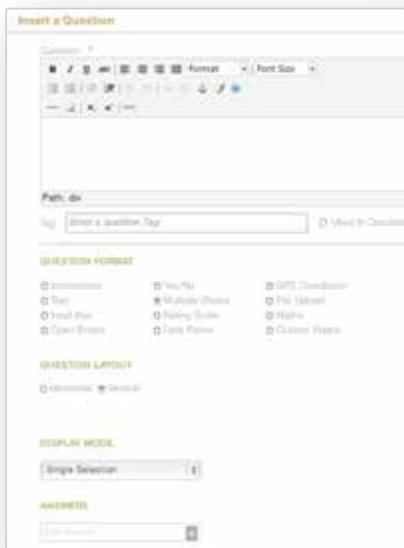
Open ended – This provides you with an answer box for a longer answer, such as the answer to “Please describe why you said that”



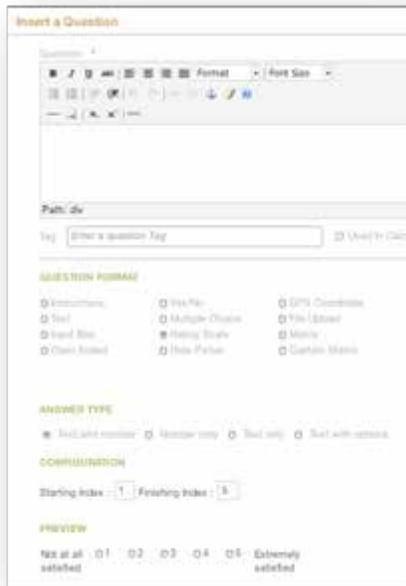
Yes/No – This provides you with the simple Yes/No response set.



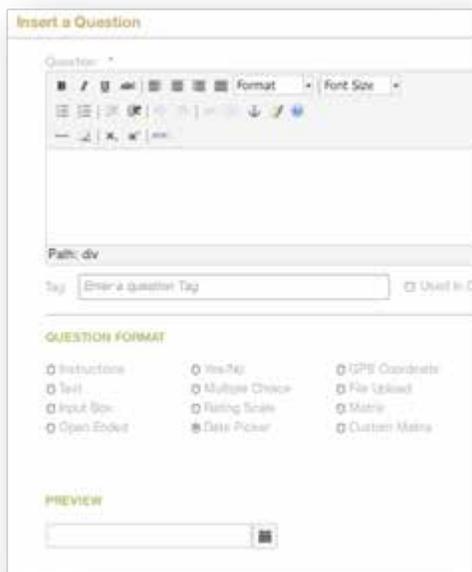
Multiple choice – This allows you to create a response set where the respondent selects one of the answers, such as selecting their race/ethnicity from a list.



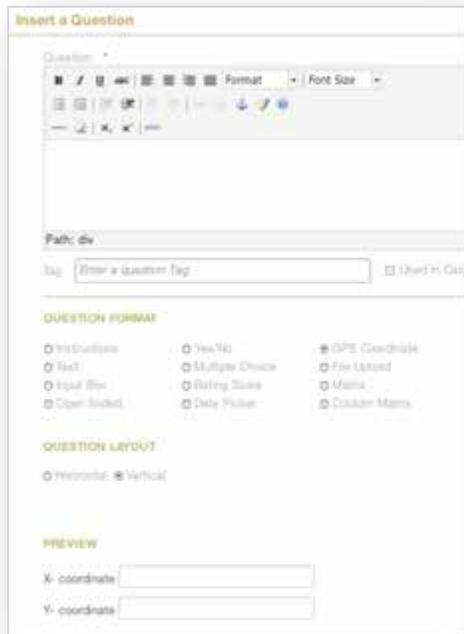
Rating scale – This allows you to create a scale, such as a scale from 1-5 for “Not at all satisfied” to “Extremely satisfied”.



Date picker – This provides you with a short text box and a calendar icon so the respondent can select a date.

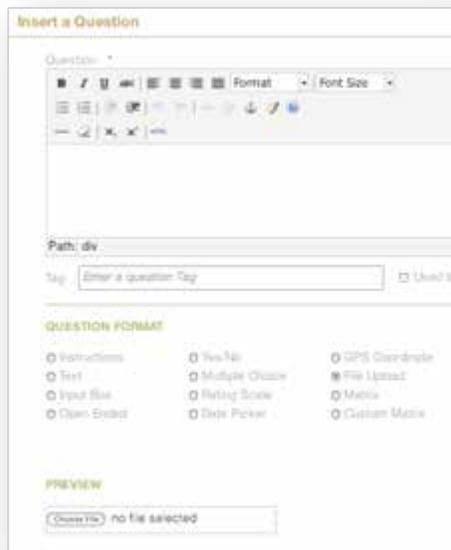


GPS Coordinate – This provides you with space for the respondent to input an X-coordinate and a Y-coordinate so that it can be used with mapping software.



The screenshot shows the 'Insert a Question' dialog box. At the top, there is a 'Question' text area with a rich text editor toolbar. Below this is a 'Path: div' field. A 'Tag' field contains the text 'Enter a question Tag' and a 'Used in Case' checkbox. The 'QUESTION FORMAT' section has several radio button options: 'Instructions', 'Text', 'Input Box', 'Open-Ended', 'Yes/No', 'Multiple Choice', 'Rating Scale', 'Data Picker', 'GPS Coordinate' (which is selected), 'File Upload', 'Matrix', and 'Custom Matrix'. The 'QUESTION LAYOUT' section has 'Horizontal' and 'Vertical' radio buttons, with 'Vertical' selected. The 'PREVIEW' section shows two input fields labeled 'X- coordinate' and 'Y- coordinate'.

File Upload – Use this to upload a document of some type at this point of your tool



The screenshot shows the 'Insert a Question' dialog box. The 'QUESTION FORMAT' section has 'File Upload' selected. The 'PREVIEW' section shows a file selection area with a 'Choose File' button and the text 'no file selected'.

Matrix – Use this to create a table that has custom rows and custom headings for the respondent to indicate their response for each item in the table. Radio buttons work horizontally on a matrix.



Custom Matrix – This is similar to the matrix, but allows you more customization such as having one column that is check all that apply and the next column be select just one. Radio buttons work vertically on a Custom Matrix. If you need horizontal radio buttons, use the standard matrix.

