

User Guide

Running Reports to Show
Changes in Data Over Time
(with data in multiple evaluations)

Running Reports to Show Changes in Data Over Time (with data in multiple evaluations)

Use this guide to generate a report if:

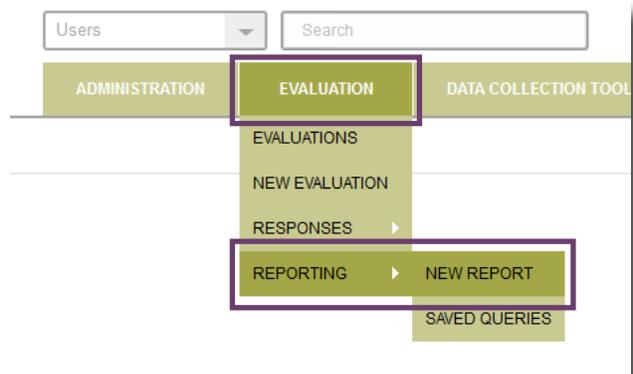
1. **All responses are in multiple evaluations.**
2. **You are analyzing multiple rounds of data.**

The query can be customized, saved, and re-generated with up-to-date data. The image below shows an example of a percentages report.

		Community Evaluation, Phase I		Community Evaluation, Phase II	
		Resident Experience in the Community v1.0		Resident Experience in the Community v1.0	
		Number of Responses	Percentage (%)	Number of Responses	Percentage (%)
3. Overall, considering everything, how satisfied would you say you are living in this community?	Very satisfied	32	32%	51	57%
	Somewhat satisfied	61	61%	30	34%
	Somewhat dissatisfied	6	6%	8	9%
	Very dissatisfied	1	1%	0	0%
5. Right now, how likely are you to recommend this community to someone else as a good place to live?	Definitely would recommend	64	63%	44	51%
	Probably would recommend	28	28%	33	38%
	Probably would not recommend	8	8%	8	9%
	Definitely would not recommend	1	1%	2	2%

Accessing More Reporting Options

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



Selecting the Report Type

- Click the **More Reporting Options** check box.
- Click the **All Responses** drop-down arrow.
- Click the **Percentages** option from the drop-down list.

NEIGHBORHOOD HOUSING SERVICES OF MY TOWN Elissa Schloesser 4

Help Desk Evaluation Learning Center

Users Search

ADMINISTRATION EVALUATION DATA COLLECTION TOOLS SHARING MORE

Home / Evaluation / Reporting / New Report

Reporting

More Reporting Options More Reporting Options Load Save Query Reset

All Responses All Responses

Frequencies Percentages

DATE RANGE SETTINGS FILTERS

Add More Like This Arrange Data in Groups Set Specific Questions

Organization Evaluation Tool Questions

TIP: In this guide, we will run a percentages report, which shows both percentages and frequencies. You can also generate an All Responses report.

Selecting the Data Sets

- Click the **Your Organization** drop-down arrow. Your organization name will already be displayed.
- Click the **Select Evaluation** drop-down arrow then select an evaluation.
- Click the **Select Tool** drop-down arrow then select a tool.

DATA SETS Click Your Organization

Neighborhood Housing Services of My Town

Neighborhood Housing Services of My Town

NeighborWorks of Orange County, Inc.

Your Organization

Select Evaluation

Community Evaluation, Phase I

CIM Evaluation Phase 2 2017: Building Conditions

CIM Evaluation Phase 2 2017: Survey

Community Evaluation, Phase I

Community Evaluation, Phase II

Community Gardening with Neighbors 2016

Elissa Test

Eva: CIM-Block Conditions v1.0

Family Housing Pilot Program Time 1

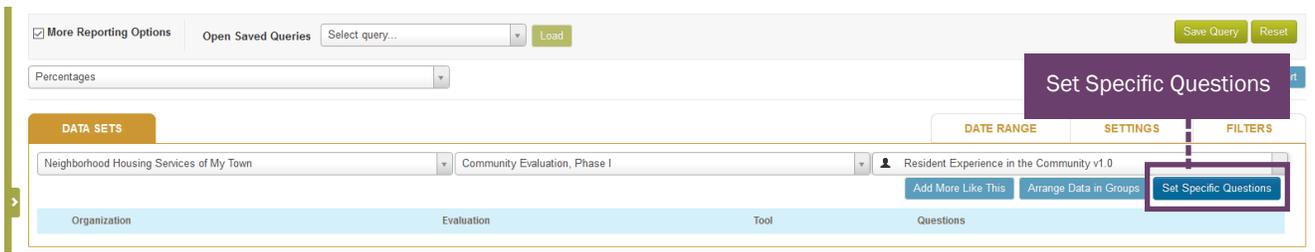
Select Tool

Select tool...

Building Conditions v1.0

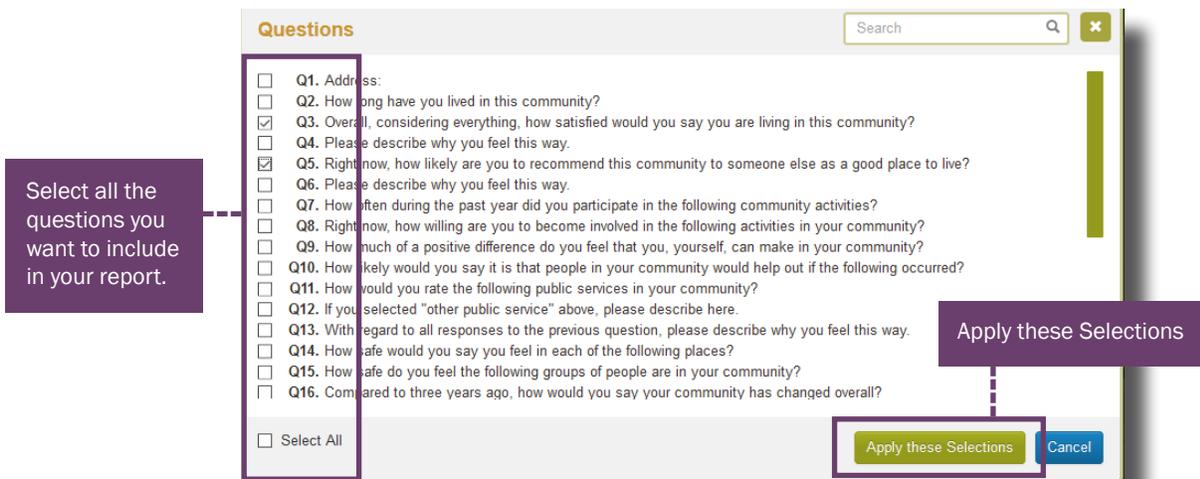
Resident Experience in the Community v1.0

- Click the **Set Specific Questions** button.



A dialogue box will appear, showing all questions in the tool.

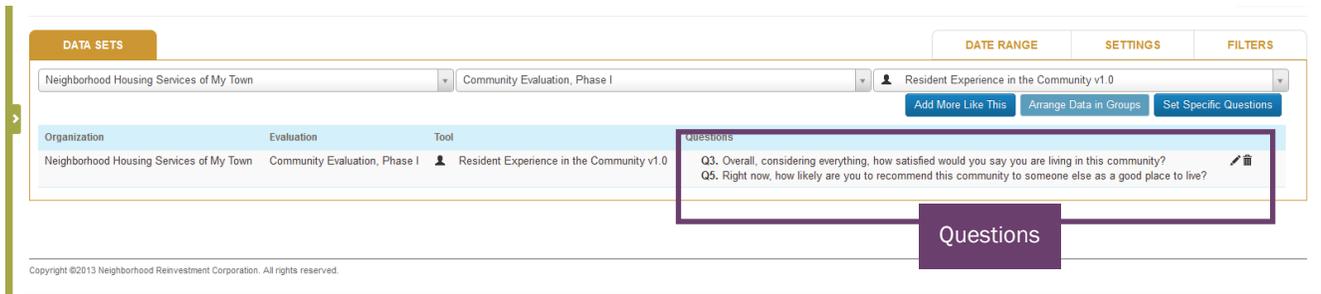
- Click the check box to the left of each question you want in your report.
- Click the **Apply these Selections** button.



TIP: For a percentage report, only include questions without open-ended answers.

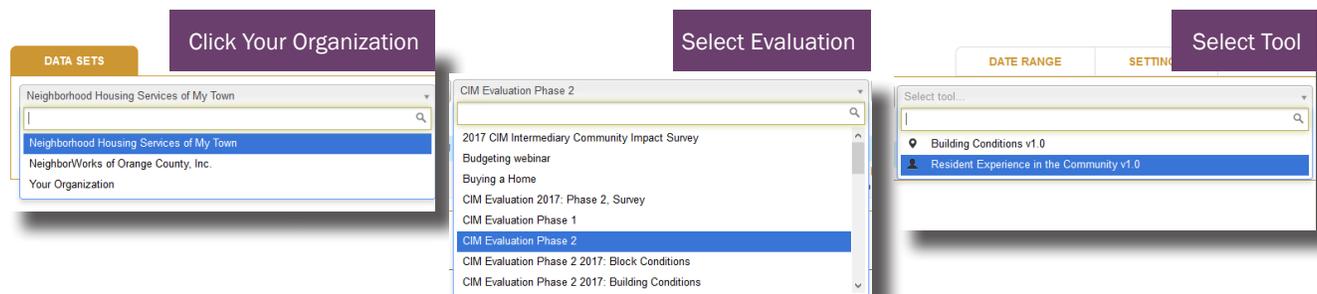
It is also recommended to select only a few questions at a time in order to keep your analysis succinct.

After you select the questions you want to display, the **Data Sets** tab displays your selected data set.

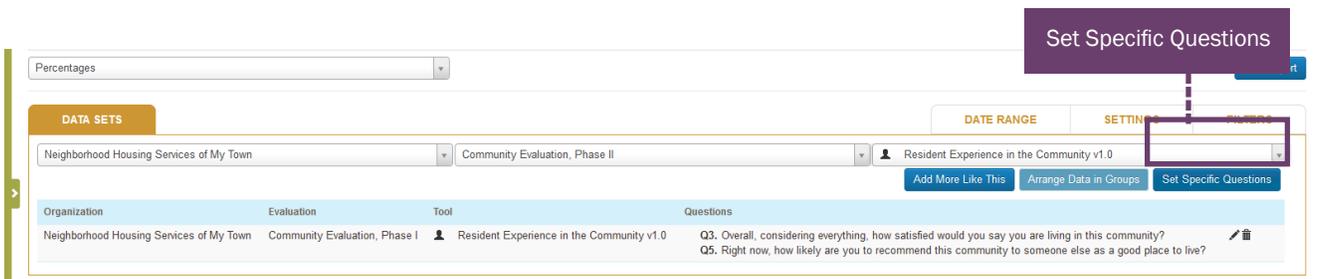


Next, add the second data set with same questions selected in the first data set.

- Click the **Your Organization** drop-down arrow. Your organization name will already be displayed.
- Click the **Select evaluation** drop-down arrow then select an evaluation.
- Click the **Select tool** drop-down arrow then select a tool.



- Click the **Set Specific Questions** button.



A dialogue box will appear, showing all questions in the tool.

- Click the check box to the left of each question you want in your report.
- Click the **Apply these Selections** button.

The screenshot shows a 'Questions' dialog box with a search bar and a list of 16 questions. Questions Q3, Q5, and Q16 are selected with checkmarks. A callout box on the left says 'Select all the questions you want to include in your report.' and points to the list. A callout box on the right says 'Apply these Selections' and points to the 'Apply these Selections' button. At the bottom right, there is a 'Cancel' button.

The **Data Sets** tab displays both your selected data sets and questions.

The screenshot shows the 'Data Sets' tab in a software interface. It displays a table with two data sets: 'Neighborhood Housing Services of My Town' and 'Community Evaluation, Phase II'. A callout box on the left says 'Two different data sets' and points to the first two rows. A callout box on the right says 'Questions' and points to the 'Resident Experience in the Community v1.0' data set, which lists three questions (Q3, Q5, Q3, Q5) with pencil icons for editing.

TIP: You may want to edit your data set before or after generating a report to add or remove questions. To do so, click the Pencil icon to the right of the questions. After you've updated a data set, click the Save button.

Running the Report

- Click the **Run Report** button to generate your report.

Run Report

Run Report

Percentages

DATA SETS

Neighborhood Housing Services of My Town Community Evaluation, Phase II Resident Experience in the Community v1.0

DATE RANGE SETTINGS FILTERS

Add More Like This Arrange Data in Groups Set Specific Questions

Displaying Data and Modifying the Report

After running the report, the bottom portion of the screen displays the data you have selected.

Here, you can see the number of responses and frequencies for each answer choice for both rounds of data.

Add More Like This Arrange Data in Groups Set Specific Questions

Organization	Evaluation	Tool	Questions
Neighborhood Housing Services of My Town	Community Evaluation, Phase I	Resident Experience in the Community v1.0	Q3. Overall, considering everything, how satisfied would you say you are living in this community? Q5. Right now, how likely are you to recommend this community to someone else as a good place to live?
Neighborhood Housing Services of My Town	Community Evaluation, Phase II	Resident Experience in the Community v1.0	Q3. Overall, considering everything, how satisfied would you say you are living in this community? Q5. Right now, how likely are you to recommend this community to someone else as a good place to live?

Export

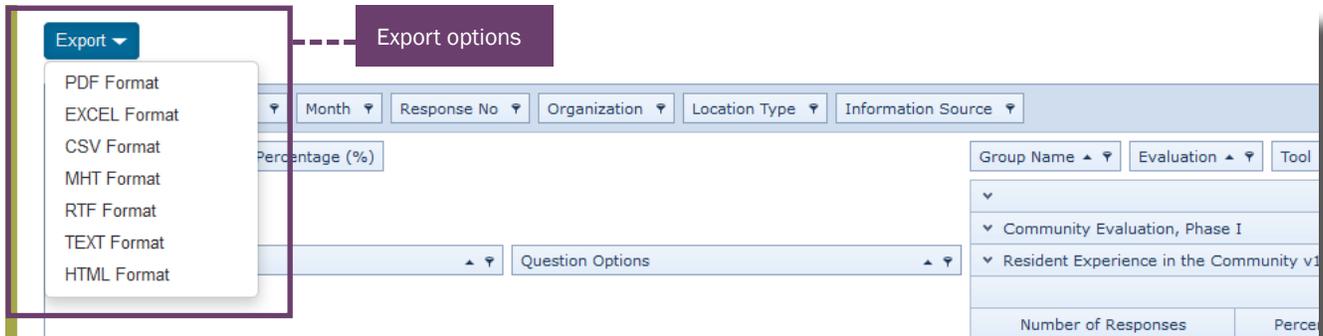
Date Collected	Year	Month	Response No	Organization	Location Type	Information Source	
Number of Responses		Percentage (%)		Group Name	Evaluation	Tool	Question
Question		Question Options		Resident Experience in the Community v1.0		Resident Experience in the Community v1.0	
		Number of Responses	Percentage (%)	Number of Responses	Percentage (%)		
3. Overall, considering everything, how satisfied would you say you are living in this community?		Very satisfied	32	32%	51	57%	
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5. Right now, how likely are you to recommend this community to someone else as a good place to live?		Definitely would recommend	64	63%	44	51%	
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		Definitely would not recommend	1	1%	2	2%	

TIP: The Filter icon allows you to filter by question, answer, or individual in an All Response report.



The report can be exported into multiple formats.

- Click the **Export** button. A drop-down menu of export options will display.
- Click a **Format** option.

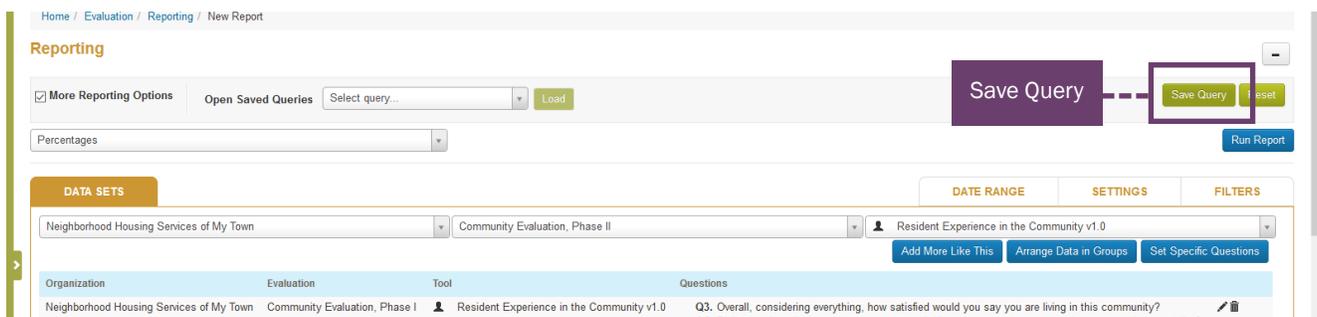


TIP: Further analysis can be done in Excel. To save this report, export to Excel and save to your computer.

Saving Your Query to Run Again at a Later Time

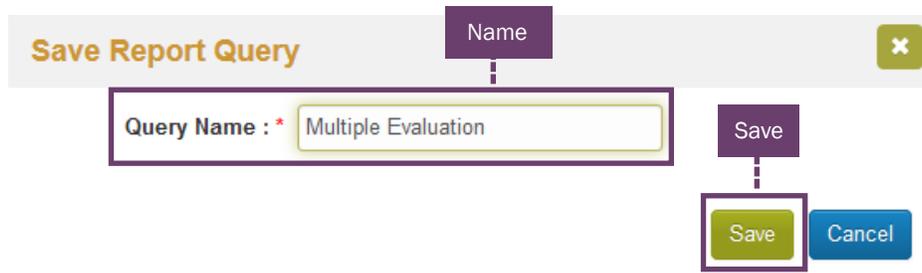
You may use the Save Query button at the top of the page to save your report if you wish to run it again later.

- Click the **Save Query** button.



The Save Report Query dialogue box will display.

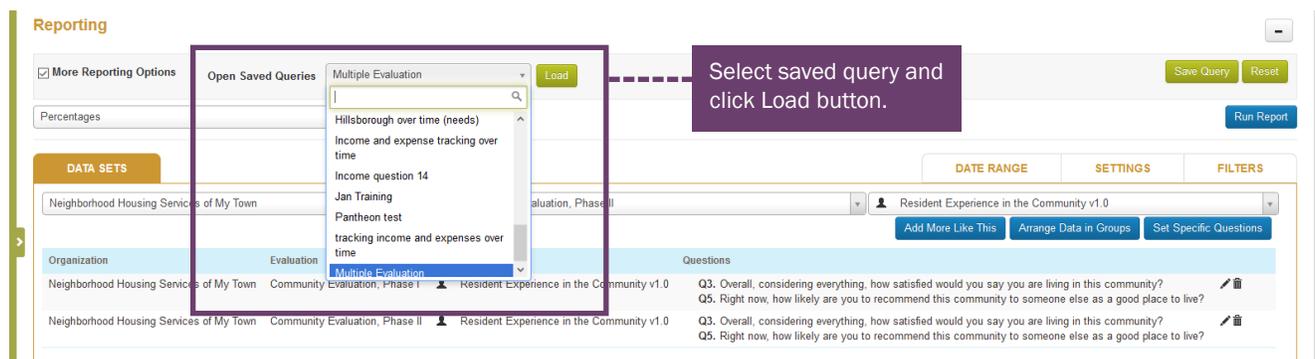
- Name the query.
- Click the **Save** button.



TIP: A saved query contains information in the Data Sets, Date Range, and Settings tab.
It does not save the data generated from running the report.



The newly saved query will be listed in the drop-down menu of the Open Saved Queries drop-down arrow.



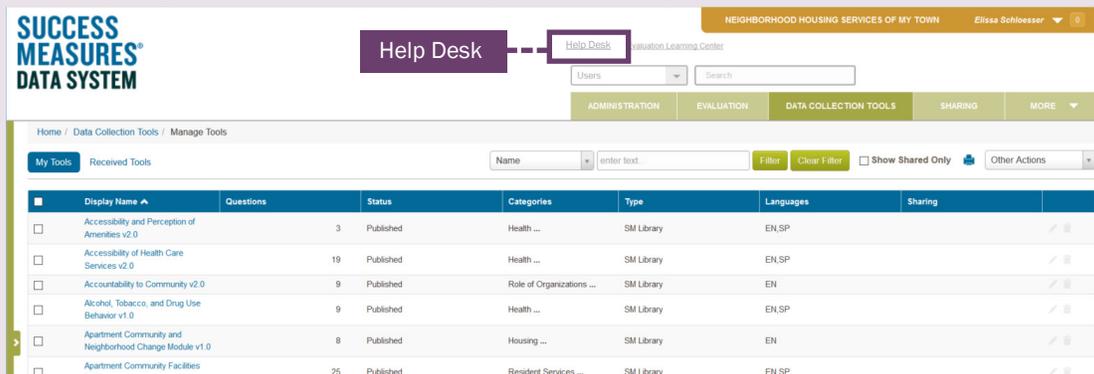
You may run this same query at any time. You can select the saved query from the drop-down menu and click the **Load** button.

- Click the **Run Report** button.

The report will be generated with up-to-date data in the system.

Need additional help?

- Click the **Help Desk** link at the top of the screen to find more guides on Customizing Tools and Question Formats. These guides are helpful resources as you work in the Tool Builder.
- If you have any questions or encounter any problems, please submit a help desk ticket.



The screenshot displays the SUCCESS MEASURES DATA SYSTEM interface. At the top, there is a navigation bar with the logo on the left, a 'Help Desk' link in the center, and user information on the right. Below the navigation bar, there are tabs for 'ADMINISTRATION', 'EVALUATION', 'DATA COLLECTION TOOLS', 'SHARING', and 'MORE'. The main content area shows a table of 'Received Tools' with columns for 'Display Name', 'Questions', 'Status', 'Categories', 'Type', 'Languages', and 'Sharing'. A 'Help Desk' link is highlighted with a purple box and a dashed line pointing to the 'Help Desk' link in the navigation bar.

Display Name	Questions	Status	Categories	Type	Languages	Sharing
Accessibility and Perception of Amenities v2.0	3	Published	Health ...	SM Library	EN, SP	
Accessibility of Health Care Services v2.0	19	Published	Health ...	SM Library	EN, SP	
Accountability to Community v2.0	9	Published	Role of Organizations ...	SM Library	EN	
Alcohol, Tobacco, and Drug Use Behavior v1.0	9	Published	Health ...	SM Library	EN, SP	
Apartment Community and Neighborhood Change Module v1.0	8	Published	Housing ...	SM Library	EN	
Apartment Community Facilities	25	Published	Resident Services ...	SM Library	EN, SP	