User Guide
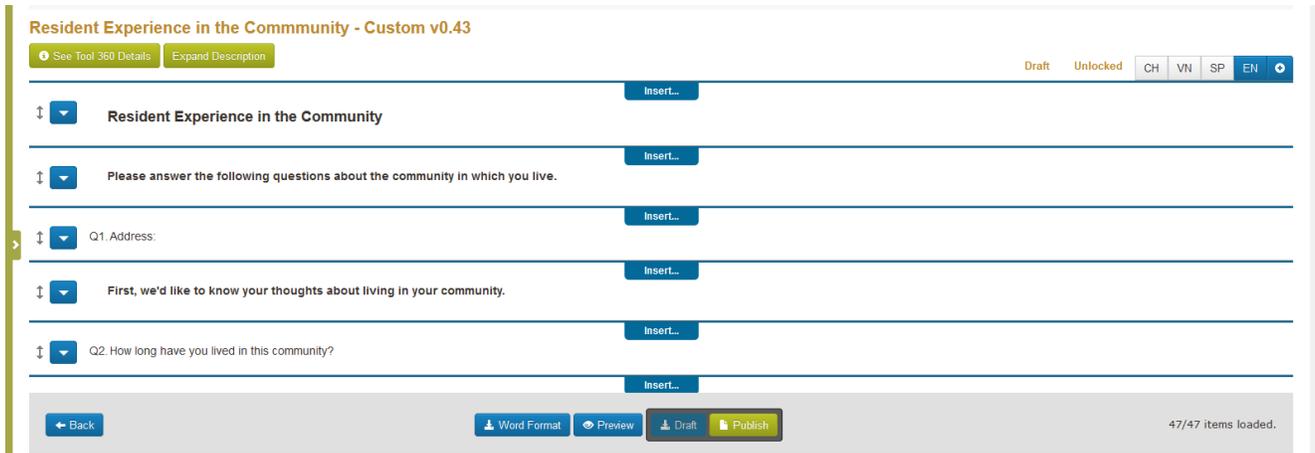
Adding an Entire Tool/Module

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This guide demonstrates how to add an entire tool or module to a custom SMDS tool.

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A **Tool** is a set of questions that can stand alone. It has a title, and perhaps instructions and a thank you at the end.

A **Module** is a set of questions that is intended to be inserted into a tool. It does not have a title or a thank you at the end.

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- 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. To find the tool you are customizing, select the tool directly from your tool set, or search for the tool by name. Click the name of the tool to open it in **Tool Builder**.
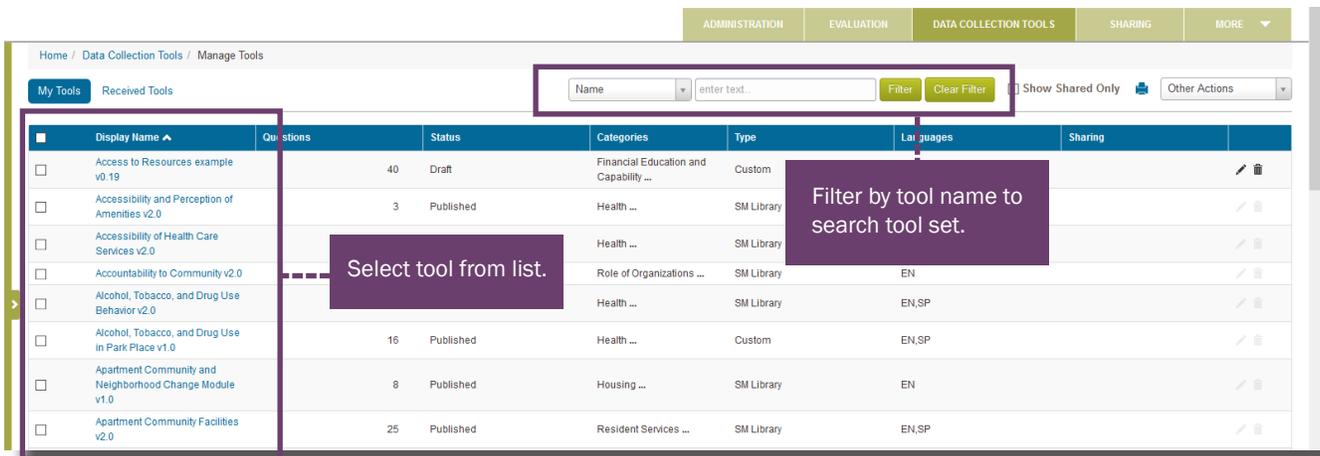
TIP: Only tools in draft form can be customized (see status column). To learn how to put a tool in draft form, please use the Customizing Tools guide on the SMDS Help Desk.
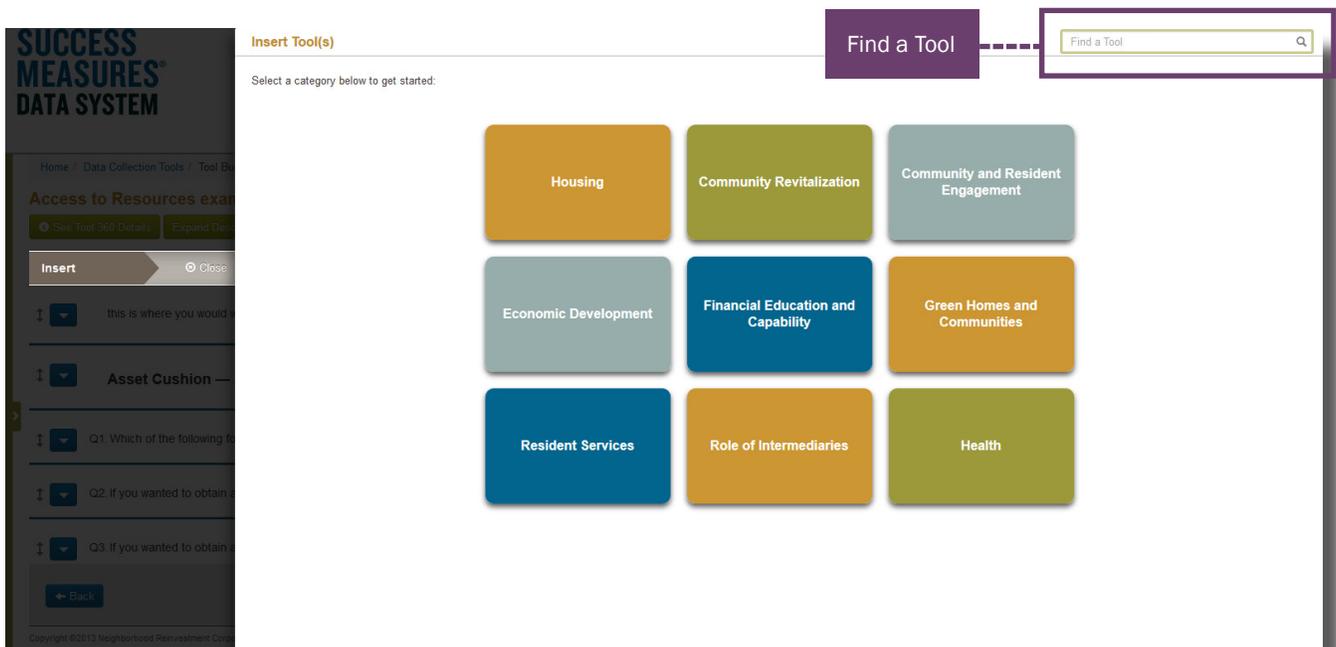
- In Tool Builder, click the insert tab in the place where you would like to insert the **Tool.**
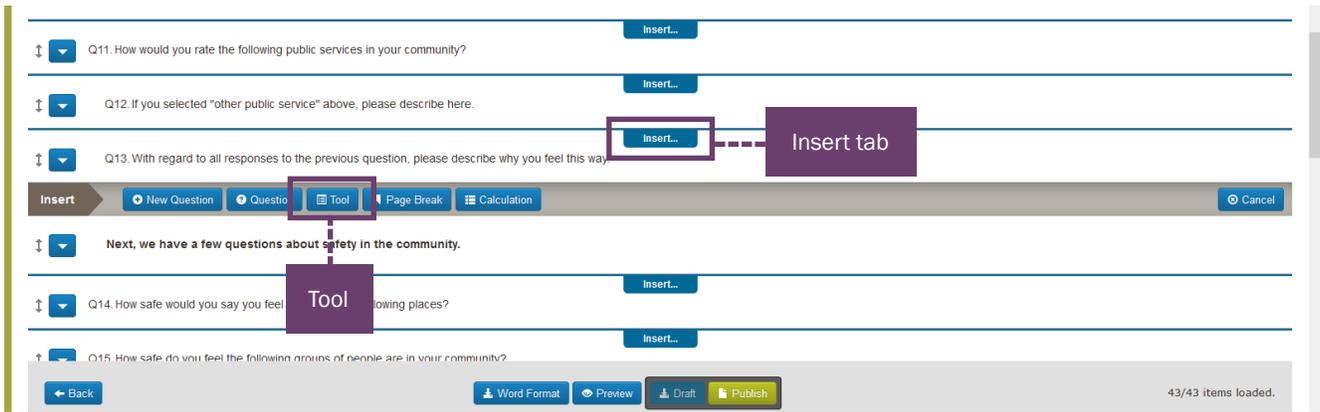
The Insert Tool(s) screen displays. The "**Find a Tool**" text field is available to search by name.

- Type the name or keywords of a tool or module into the **Find a Tool** box.

- Click the magnifying glass icon to search

Now, a list of every tool and module in this category is displayed.

To view details of a tool, Click the **green plus (+) sign** to the far right of the tool.
This displays the number of questions in the tool and the languages offered.

To view a preview of the tool, click the green **Preview** button.

Locate the desired tool or module to insert.

- Click the **checkbox** next to the tool or module.

- Click the green **Insert** button on the bottom right of the screen. You can also click the **Insert this Tool** button.

TIP: Always be sure you are inserting the correct tool or module into your tool. You can insert an entire tool with the click of a button, but once the tool is in your draft tool, questions can only be removed one at a time.

The selected tool or module will appear in the **Draft** tool.

After adding the tool, the questions will be automatically renumbered in the survey

TIP: When adding a tool, be sure to scroll to remove any duplications of titles, thank yous, copyrights, or unnecessary information.

- When you have finished making changes to your tool, review your tool in **Word** form and in **Preview** mode by using the buttons at the bottom of the screen.
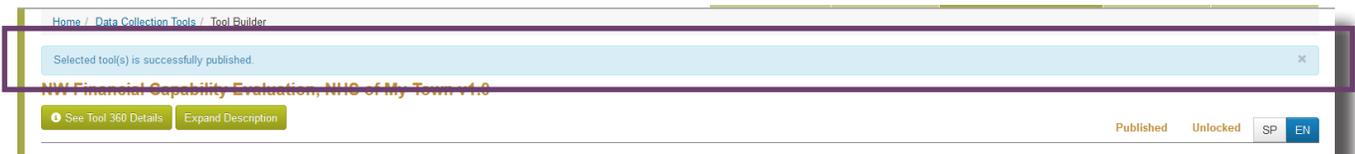

View—Display how it will appear in Word Format.

Preview—Display how it will appear in SMDS.

TIP: In preview mode, be sure to test each answer option to make sure buttons are working correctly.

- Click the **Publish** button.

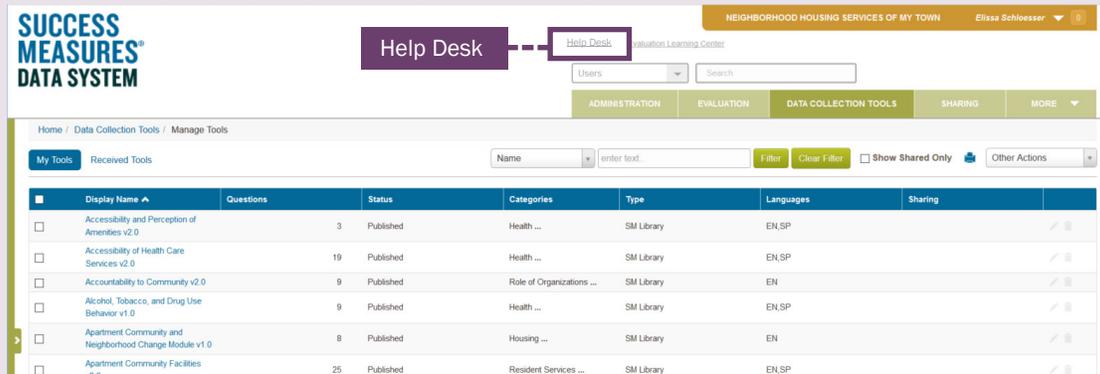Publish— Enter data once added to an active evaluation.

The tool is successfully published.

Home / Data Collection Tools / Tool Builder

Selected tool(s) is successfully published.   ✕

NW Financial Capability Evaluation, NHS of My Town v1.0

See Tool 360 Details   Expand Description   Published   Unlocked   SP EN

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.