

# User Guide

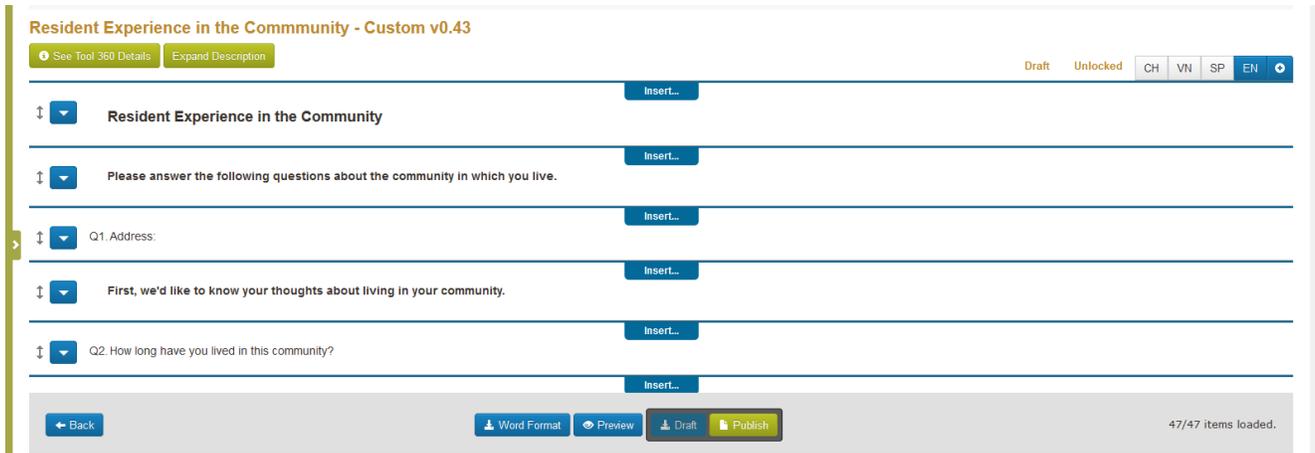
## Adding an Entire Tool/Module

# Adding an Entire Tool/Module

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.



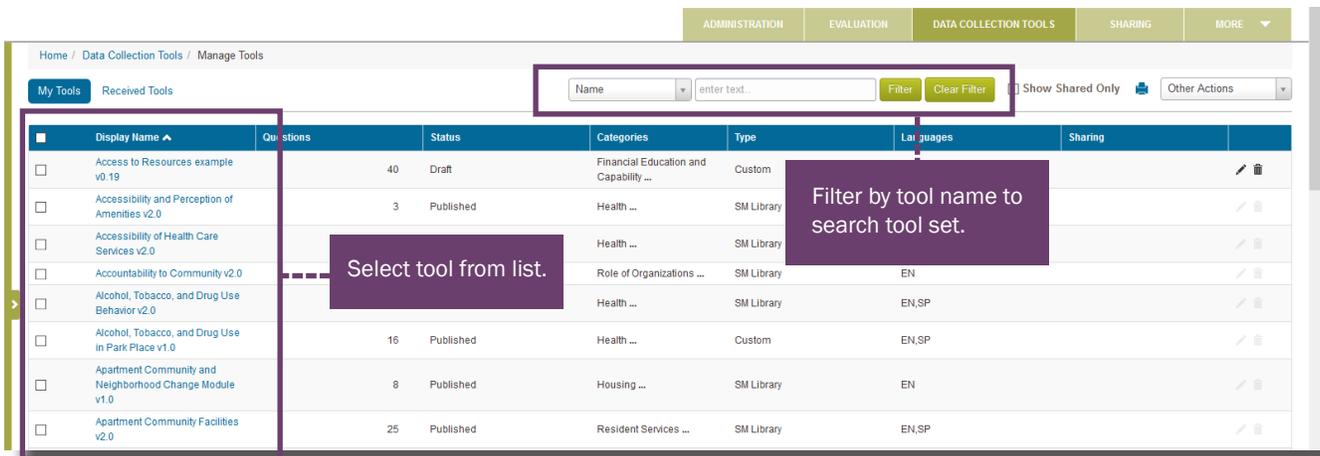
A **Module** is a set of questions that is intended to be inserted into a tool. It does not have a title or a thank you at the end.



- Login to SMDS.
- Place cursor over the **Data Collection Tools** link.
- Click the **Manage Tools** link.



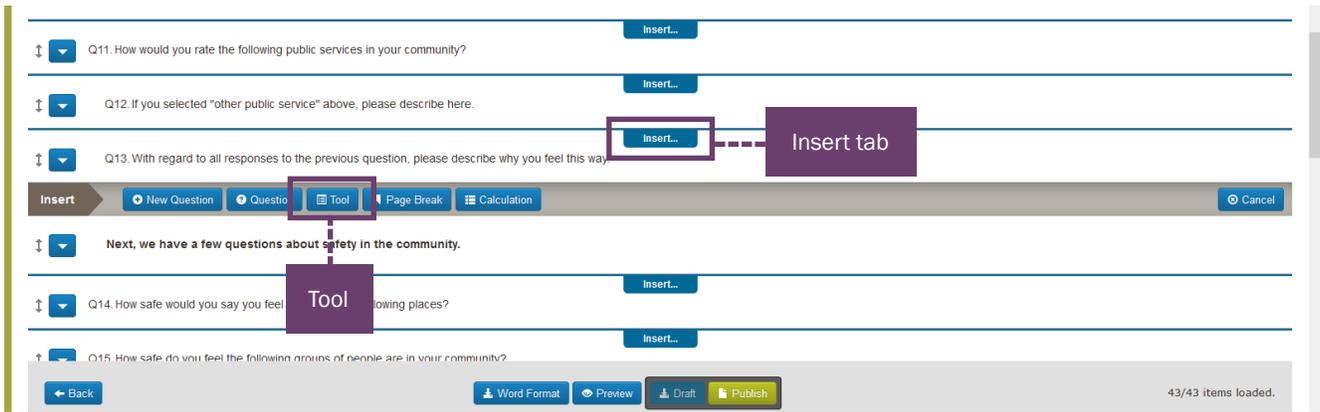
Here, you will see a list of every tool in your SMDS account. To find the tool you are customizing, select the tool directly from your tool set, or search for the tool by name. Click the name of the tool to open it in **Tool Builder**.



**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.

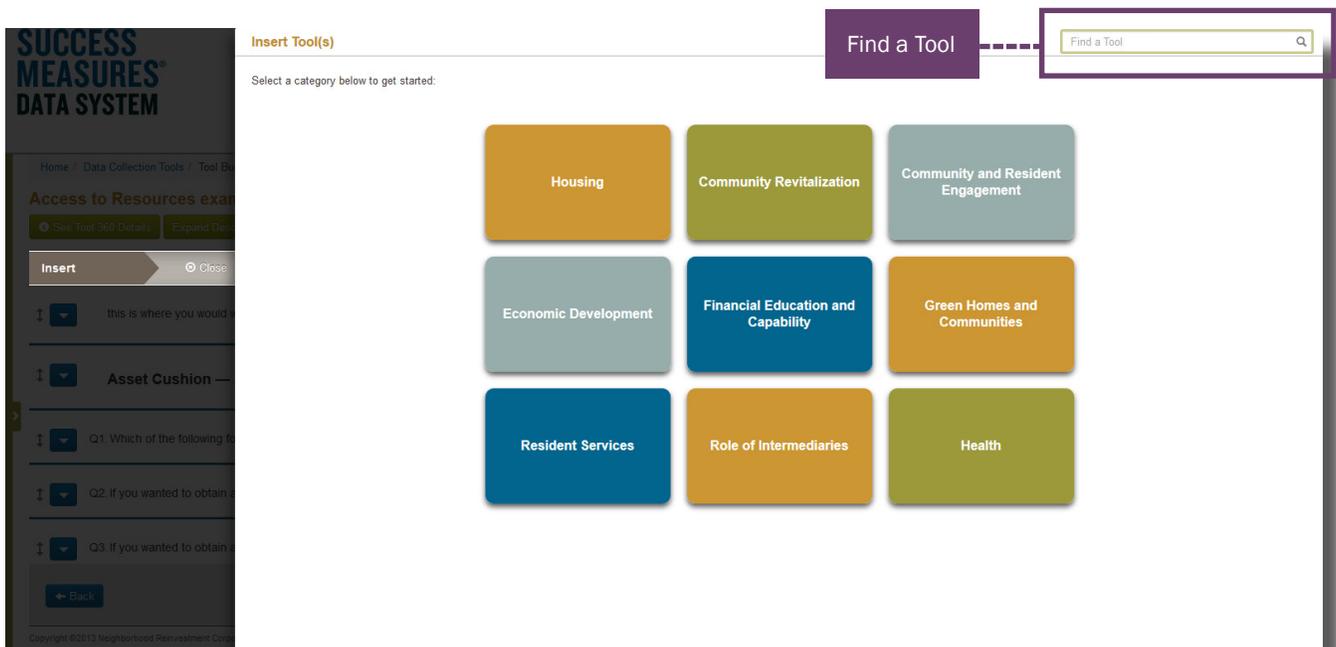
Display Name	Questions	Status
CIM-Resident Experience in the Community, NHS of My Town v1.0	31	Published
CIM-Resident Experience in the Community, Phase 2--NHS of My Town v2.0	33	Published
Resident Experience in the Community - Custom v0.43	31	Draft

- 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.

The screenshot shows the 'Insert Tool(s)' interface with a search bar containing 'reputation of schools'. Below the search bar, there are two survey modules listed:

- CIM-Module—Reputation of Schools v1.0** (Module)
- Reputation of Schools - Module v3.0** (Module)

Each module is identified as a 'Survey'. The interface includes a sidebar with categories like Housing, Community Revitalization, and Economic Development. At the bottom, there are pagination controls showing 'Page: 1 of 1 / 2 Total Records' and a dropdown menu set to '25'.



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.

The screenshot shows the details for the 'CIM-Module—Reputation of Schools v1.0' tool. A purple box highlights the 'Green plus (+) sign' icon. Another purple box highlights the tool details: 'Unlocked 2 Question(s) By Carol Rogers Modified on Dec 19, 2014 EN,SP,VN,CH'. Below this, there are three buttons: 'Preview', 'View Questions', and 'Insert this Tool'.

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

This screenshot is similar to the previous one, but with a purple box highlighting the 'Preview' button. The tool details and other interface elements remain the same.

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.

The screenshot shows the 'Insert Tool(s)' interface. At the top, there is a search bar containing 'reputation of schools'. Below the search bar, there is a list of tools. The first tool is 'CIM Module—Reputation of Schools v1.0' with a checkbox. The second tool is 'Reputation of Schools - Module v3.0' with a checked checkbox. Below the list, there is a summary for the selected tool: 'Unlocked 2 Question(s) By Carol Rogers Modified on Dec 19, 2014 EN.SPVN,CH'. At the bottom right of the list, there is a green 'Insert this Tool' button. At the bottom of the interface, there is a bar that says '1 Tool(s) Selected' and a green '+Insert' button next to a blue 'Cancel' 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

The screenshot shows a survey editor interface with a list of questions. Each question has a dropdown arrow on the left and an 'Insert...' button on the right. The questions are:

- Q12. If you selected "other public service" above, please describe here.
- Q13. With regard to all responses to the previous question, please describe why you feel this way.
- Questions about schools in the community.
- Q14. How would you rate the quality of each of the following types of school in this community?
- Q15. Please describe why you feel this way.
- Copyright ©2013 Neighborhood Reinvestment Corporation. All rights reserved.
- Next, we have a few questions about safety in the community.
- Q16. How safe would you say you feel in each of the following places?

At the bottom, there is a toolbar with buttons for 'Back', 'Word Format', 'Preview', 'Draft', and 'Publish'. The status '47/47 items loaded.' is visible in the bottom right corner.

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

This close-up shows a question in the survey editor: 'Questions about schools in the community.' Below the question text, a context menu is open with the following options: 'Edit', 'Clone', 'Replace', 'Indent', and 'Remove from Tool'. The 'Remove from Tool' option is highlighted. The 'Insert...' button is visible to the right of the question.

Remove from Tool

- 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.

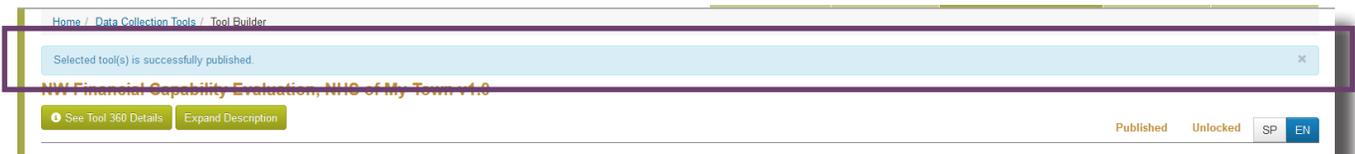


**TIP: In preview mode, be sure to test each answer option to make sure buttons are working correctly.**

- Click the **Publish** button.

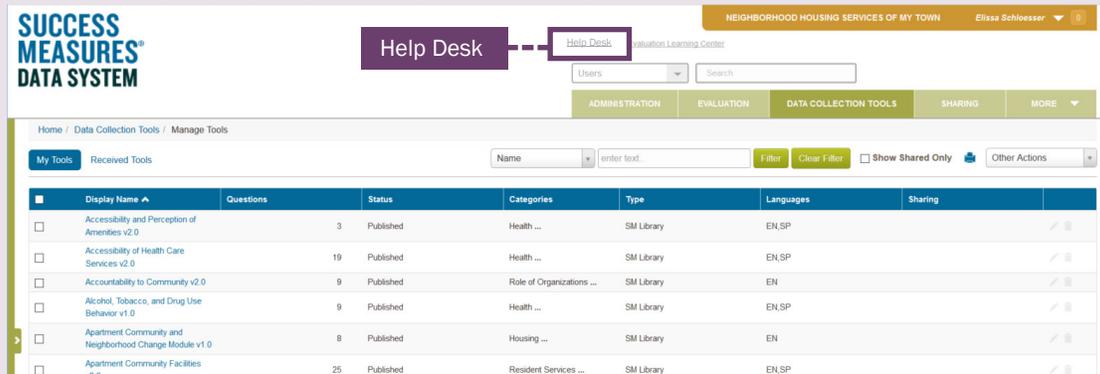


The tool is successfully published.



## 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.



The screenshot shows the SUCCESS MEASURES DATA SYSTEM interface. At the top left is the logo. The top right shows the user name 'Elissa Schloesser' and a dropdown menu. A 'Help Desk' link is highlighted with a purple box and a dashed line. Below the navigation bar is a search bar and a table of tools. The table has columns for Display Name, Questions, Status, Categories, Type, Languages, and Sharing.

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	