

Success Measures Data System Overview

1. Prepare



2. Set Up



3. Collect



4. Analyze



**SUCCESS
MEASURES[®]
DATA SYSTEM**



STEP 1: Prepare

Search for tools

You can browse tools from the Data Collection Tools tab.

- Place your cursor over the Data Collection Tools tab and click Manage Tools.
- Search for a tool by name by using the filter box.
- Click Word or Preview at the bottom of the screen to view a tool. Click on the tool name to display the questions in the tool. Click a question to see the answer choices.

The screenshot shows the Success Measures Data System dashboard. At the top right, the user is identified as 'Elissa Schloesser' with a dropdown arrow and the number '2'. Below this is a search bar with 'Users' and 'Search' fields. The navigation menu includes 'ADMINISTRATION', 'EVALUATION', 'DATA COLLECTION TOOLS', 'SHARING', and 'MORE'. The 'DATA COLLECTION TOOLS' menu is open, showing 'FIND TOOL', 'MANAGE TOOLS', and 'NEW TOOL'. The main content area has a 'Welcome to your Success Measures Data System (SMDS) Dashboard!' message. Below this are four cards: 'Active Evaluations' (with a list of evaluations and a 'VIEW ALL ACTIVE EVALUATIONS' link), 'Tools Under Construction' (with a list of tools and a 'VIEW ALL TOOLS' link), 'Evaluations Under Construction' (with a list of evaluations and a 'VIEW ALL EVALUATIONS' link), and 'Success Measures System Alerts' (with the message 'No System alerts found.').

To learn more on this topic, check out our tutorial on [Searching for Tools](#).

Review the tools

Once you find your tool(s) you have two options:

1. Use your tool as-is (**continue on to Step 2, Set Up an Evaluation**).
2. Customize your tool by making additions or changes.

Create custom tools

Customizing a tool is done by cloning, or making a copy, of the Success Measures tool. By making a copy, the Success Measures tool will always be in your tool set. Your cloned tool can now be customized to fit your needs.

1. Clone your tool

- Place your cursor over the Data Collection Tools and click the Manage Tools link to go to your tool set.
- Find the tool you'd like to clone by scrolling through the list, or typing the name into the search box.
- Once you have found the tool, click the checkbox to the left of the tool you want to clone.
- Click the blue Clone button on the bottom left of the screen.
- Enter the name of your new tool, and click the Submit button.

2. Customize your tool

- Your new tool will be created in draft mode. Here, you can customize your tool.
- There are two main ways to customize a tool:
 1. Adding something new, like a question you create or a question from a different tool, or
 2. Making changes to existing questions (changing the word “community” to “Walker Neighborhood), deleting questions, or rearranging questions.
- When you've finished making changes to your tool, click the green Publish button at the bottom of the screen.

In the Help Desk, you can find more detailed [tutorials](#) and [user guides](#) on Customizing Tools.

**After you have customized your tools, you are ready for
STEP 2: Set Up a New Evaluation.**



STEP 2: Set Up

After you have your tool the way you want it, in order to enter data into SMDS, the tool must be in an active evaluation. Let's look at creating an evaluation.

Create a new evaluation

- Place your cursor over the Evaluation tab and click the New Evaluation link.
- Enter a name and start date and click the blue Save button at the bottom of the screen.

Add tools to your evaluation

- To insert a tool, click the blue Insert Data Collection Tool button.
- Search or filter for the tool you'd like to add.
- Click the check box next to the tool or tools you would like to insert, then click insert. Remember, you can add multiple tools to an evaluation.
- Next, select the source of information for each tool inserted in the evaluation. Select location if your information is from or about a physical place, individual if your information is from a person, group if your information is from a focus group, or record if your information is from either administrative or public records.

Activate your evaluation

- Click the Activate button at the bottom of the screen. From this screen, you can preview a tool, download the Word version of a tool, or download an Excel spreadsheet of the tool.

In the Help Desk, you can find a more detailed tutorial on [Creating an Evaluation](#).

**After you have created an evaluation, you are ready for
STEP 3: Collect Data.**



STEP 3: Collect

There are also different ways to enter data. You can:

- **Enter data directly into SMDS, one survey or observation at a time.**
- **Enter data into a system-generated Excel spreadsheet and upload into SMDS.**
- **Set up an email distribution for your clients or customers to fill out a survey on their own.**

There are also different information sources (individual, location) to use for data entry. What you use depends on the data you are collecting. You might be collecting property observations, in which case you would be entering location data. You might be collecting survey responses, in which case you would be entering data from individuals.

If you are collecting multiple rounds of data and entering data directly into the system, you will enter data for either a person or location. We have guides for both options.

We encourage you to use the user guide or tutorial that matches your response type and data entry type when you're ready to enter data.

INFORMATION SOURCE: INDIVIDUAL

Type of Data Entry	User Guide and Tutorials
Enter data directly into SMDS	<ul style="list-style-type: none"> • Entering a Survey Response (for a new respondent) • Entering a Survey Response (for a respondent already in the system)
Use an SMDS Excel spreadsheet to upload data	<ul style="list-style-type: none"> • Generating Spreadsheet Templates and Importing Responses
Set up an email distribution	<ul style="list-style-type: none"> • Sending Surveys by Email Distribution

INFORMATION SOURCE: LOCATION

Type of Data Entry	User Guide and Tutorials
Enter data directly into SMDS	<ul style="list-style-type: none"> • Entering a Survey Response (for a new respondent) • Entering a Location Response (for a location already in the system)
Use an SMDS Excel spreadsheet to upload data	<ul style="list-style-type: none"> • Generating Spreadsheet Templates and Importing Responses

**After you have collected your data and entered it into SMDS, you are ready for
STEP 4: Analyze Your Data.**



STEP 4: Analyze

After you have collected your data and entered it into SMDS, you are ready to analyze your data.

Generate Reports

- Run basic reports to show all of your data by response, or frequencies and percentages.
- More advanced reports to show changes over time for multiple rounds of data, or data from different evaluations.

In the Help Desk, you can find more detailed [user guides](#) for generating basic reports as well as generating reports to show changes over time.

Export data to Excel

SMDS allows for some analysis, but you also might want to export to Excel or other programs for further analysis. To get to the reporting feature, place your cursor over the Evaluation tab, then Reporting, and finally click New Report.

From the reports page, you can generate basic reports, or check the box for More Reporting Options to look at data over time.

After you have generated your report using the user guides in the Help Desk, click either the blue Export button or the floppy disk icon to export your data to Excel, Word, or as PDF.

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 shows the SUCCESS MEASURES DATA SYSTEM interface. At the top left is the logo. At the top right, it says "NEIGHBORHOOD HOUSING SERVICES OF MY TOWN" and "Elissa Schloesser". A "Help Desk" link is highlighted with a purple box and a dashed line. Below the header is a navigation menu with "ADMINISTRATION", "EVALUATION", "DATA COLLECTION TOOLS", "SHARING", and "MORE". The main content area shows a breadcrumb trail "Home / Data Collection Tools / Manage Tools" 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 v2.0	25	Published	Resident Services ...	SM Library	EN,SP	