

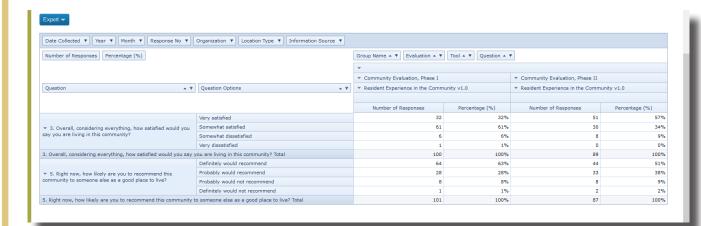
Running Reports:

Comparing Data from Different Evaluations

Use this guide to generate a report if:

- 1. You are comparing data from different evaluations.
- 2. You are comparing data from different organizations.

The image below shows an example of a percentages report, displaying data from two questions in two evaluations.



To run this type of report, you'll use **More Reporting Options**.

Accessing More Reporting Options

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

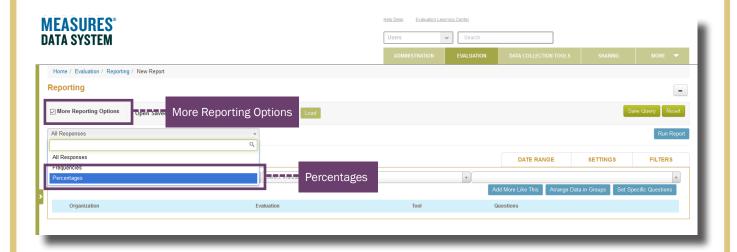


Select the Report Type

• Click the More Reporting Options check box.

The next tab defaults to an **All Responses** report.

- Click the tab to change the report type.
- Click the **Percentages** option from the drop-down list.

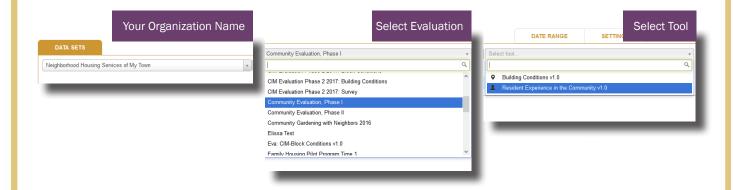


TIP: In this guide, we will run a Percentages report which shows both percentages and frequencies. You can also run a Frequencies report to only show frequencies.

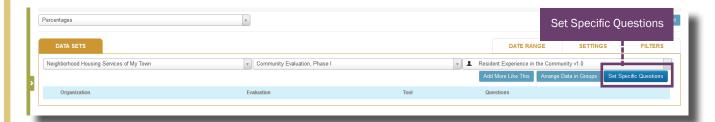
Selecting the Data Sets

Your organization name will be displayed in the first box.

- Click the **Select evaluation** dropdown arrow and select an evaluation
- Click the Select tool dropdown and select a tool.



Click the Set Specific Questions button.



Selecting the Data Set Questions

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

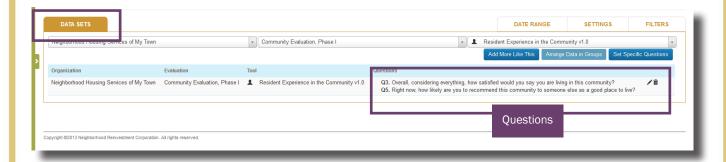
- Click the checkbox to the left of each question you want in your report.
- Click the Apply these Selections button.



TIP: In this guide, we are using only multiple choice questions as examples. You can use these same instructions for any type of question from your tool, except open-ended questions.

Select only a few questions at a time to keep your report manageable. A matrix question should have its own separate report.

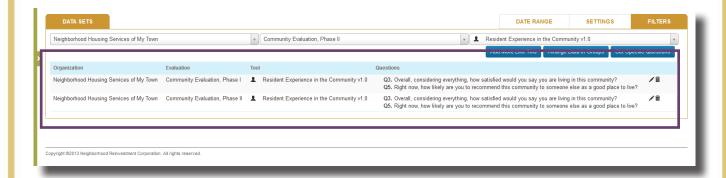
After you select the questions you want to display, the **Data Sets** tab displays your selected questions.



Once you have set the questions from your first evaluation and they appear in the Data Set area...

• Repeat these steps to select the second evaluation, tool, and same questions. These will appear in the Data Set area below your first evaluation.

These will appear in the Data Set area below your first evaluation.



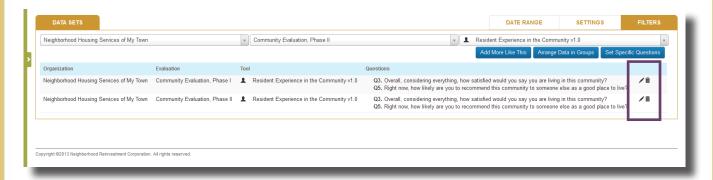
TIP: You can review the two sets of questions to ensure they match up, and decide if you are ready to run the report or if you want to make any edits.

Editing Data Sets

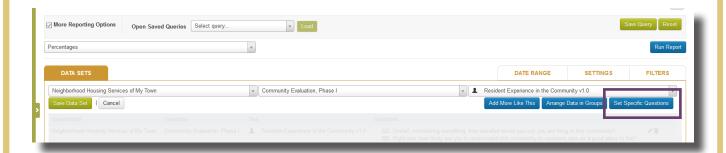
You may want to edit your data set before or after generating a report to add or remove questions.

Click the **Pencil icon** to the right of the questions.

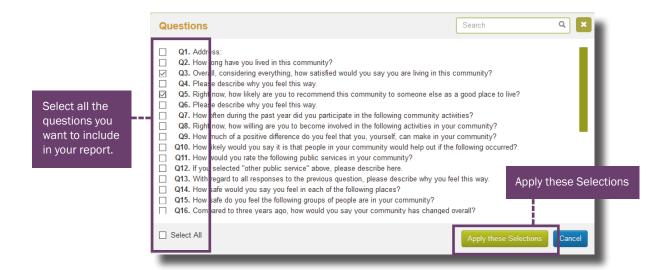




• Click on **Set Specific Questions**.



Change your selection of questions by checking or unchecking the box by specific questions, click
 Apply these Selections.



TIP: If you are comparing data from two evaluations and change one data set, be sure to change the second one as well.

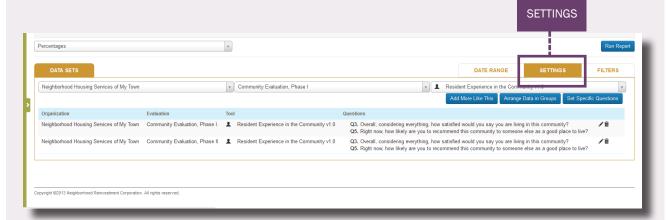
To save your new selection of questions, click Save Data Set.



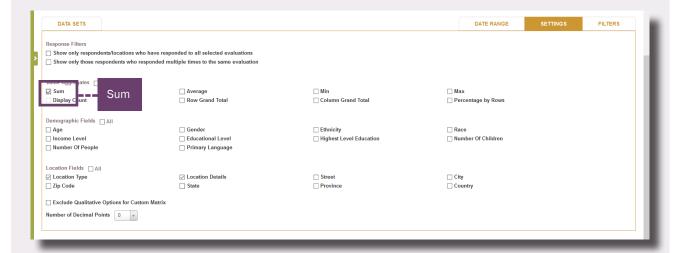
OPTIONAL

You might want to show the total number of responses for each question.

• To display this, go to the **Settings** tab.

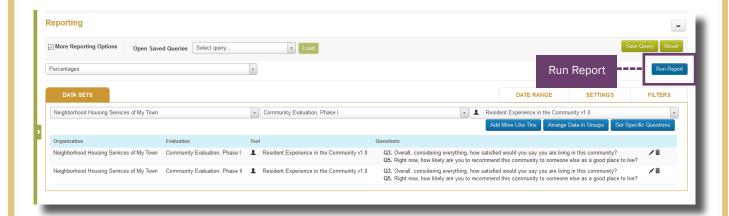


Then click the Sum check-box.



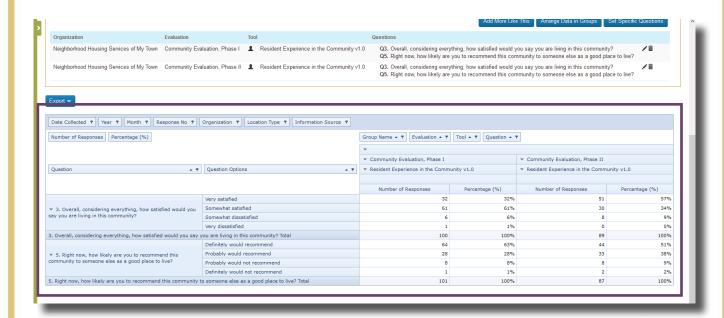
Running the Report

Click the Run Report button to generate your report.



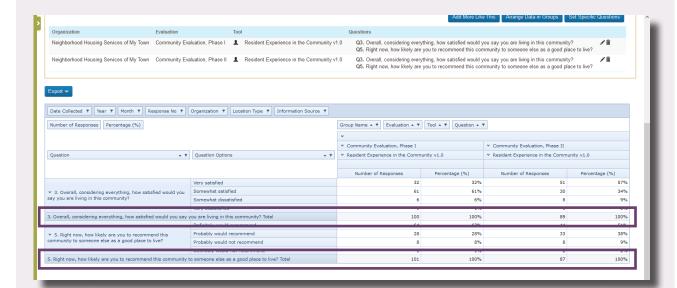
Displaying Data

After running the report, the bottom portion of the screen displays the data you have selected. The data from this report initially shows frequency amounts and percentages for the two different evaluations.



OPTIONAL

If you used the Settings tab to add a Sum to your question, your table will display the Sum so that you can easily see how many respondents answered that question in each Evaluation.

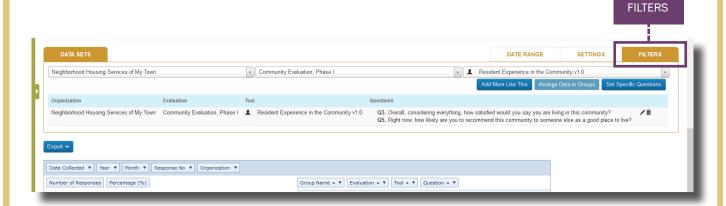


Filtering Answer Choices

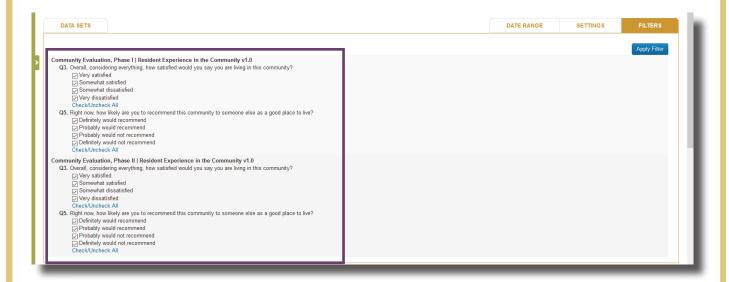
The Filter tab allows you to sort your report based on answers to questions. In the example below, if someone chose "Very satisfied" or "Somewhat satisfied" in Question 3, you can then see how they responded to Question 5.

TIP: If you are using the filter option, uncheck the Sum box and re-run the report.

Click the Filters tab.



All possible answer choices are displayed on this tab.



For this example, we want to see how people who responded "Very satisfied" or "Somewhat satisfied" to Question 3 then responded to Question 5.

• Click the Check/Uncheck All for the question you want to filter so you uncheck all answer options.



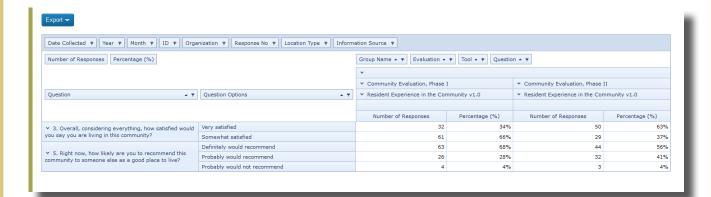
Check the answer choice(s) you want to filter in your report.

Here, we check the boxes next to "Very satisfied" and "Somewhat satisfied" in Evaluation 1 and Evaluation 2.

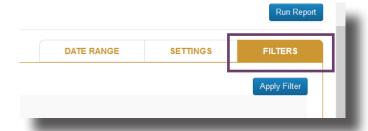
• Click the **Apply Filter** button to generate the updated report.

DATA SETS	DATE RANGE	SETTINGS	FILTERS
Community Evaluation, Phase I Resident Experience in the Community v1.0 Very satisfied Somewhat satisfied Somewhat satisfied Somewhat diseasticfied Somewhat diseasticfied Check/Uncheck All Q5. Right now, how likely are you to recommend this community to someone else as a good place to live? Definitely would recommend Probably would not recommend Probably would not recommend Definitely would not recommend Check/Uncheck All	A	pply Filter	Apply Filter
Community Evaluation, Phase II I Resident Experience in the Community v1.0 Very satisfied Somewhat satisfied Somewhat satisfied Check/Uncheck All Q5. Right now, how likely are you to recommend this community to someone else as a good place to live? Enfinitely would recommend Probably would recommend Probably would not recommend Definitely would not recommend Check/Uncheck All			

A new report shows the number of responses and percentages in Question 5 as they relate to "Very satisfied" or "Somewhat satisfied" in Question 3. In the example below, the data is displayed for both evaluations.



You can change the filter at any time in the **Filters** tab.

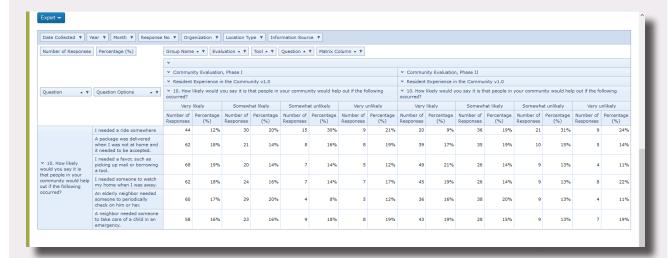


TIP: To find more on filtering, check out our Help Desk guide on the Filters feature.

Running a Report with a Matrix Question

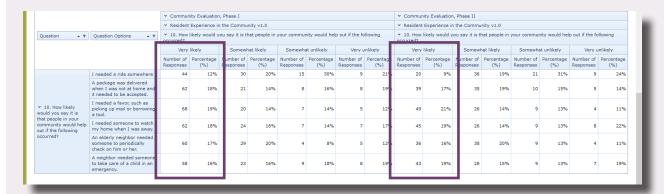
Now, let's look at a report that contains a matrix question. A matrix question is a series of questions combined in one table. We generated this report using the same steps from above: Selecting the evaluation, tool, and question for two data sets.

When we run this report, we see all answers in the first evaluation, and then all answers in the second evaluation.



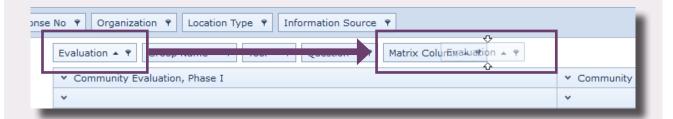
You might want to rearrange the order of the column headings to change how the data is displayed.

Instead of first seeing answers for the first evaluation and then the answers for the second evaluation, you might want to easily compare responses between the two evaluations. In this example, you might want to see those who responded "Very likely" in the first evaluation next to those who responded "Very likely" in the second evaluation.



To see that, we need to rearrange the column headings. The default order for displaying data is Evaluation, Tool, Question, Matrix Column. For this example, we want the evaluation to be the last way we sort the data, so we will move Evaluation to the end of the order.

- Click the Evaluation box and drag it to the right of the Matrix Column.
- Look for the white arrows to show you where the Evaluation box will land, and release the Evaluation box.



Now, you can more easily see the percentage and frequency for each answer option.

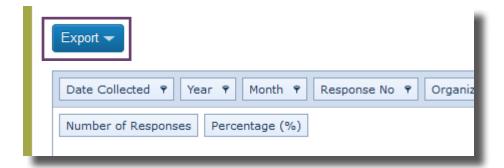
In this example, you see those who responded "Very likely" in Evaluation 1 compared with Evaluation 2, etc.

		~							
	1	▼ Resident Experience in the Community v1.0							
		▼ 10. How likely would you say it is that people in your commur							
Question 🔺 🕈	Question Options	▼ Very likely							
		Community Evaluation, Phase I Phase II					Community Pha		
		Number of Responses	Percentage (%)	Number of Responses	Percentage (%)	- 1	lumber of esponses		
	I needed a ride somewhere	44	12%	20	9%		30		
▼ 10. How likely would you say it is that people in your community would help out if the following occurred?	A package was delivered when I was not at home and it needed to be accepted.	62	18%	39	17%		21		
	I needed a favor, such as picking up mail or borrowing a tool.	68	19%	49	21%		20		
	I needed someone to watch my home when I was away.	62	18%	45	19%		24		
	An elderly neighbor needed someone to periodically check on him or her.	60	17%	36	16%		29		
	A neighbor needed someone to take care of a child in an emergency.	58	16%	43	19%		23		

Exporting your Report

Further analysis can be done in Excel.

- Click the Export button.
- Click Excel.
- Save the report by exporting to Excel and saving to your computer.



TIP: The data can also be exported in PDF or CSV format.

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 want to run it again later.

To run a report in SMDS, you start by setting up your query: Selecting evaluations, tools, and questions to use in your report. A query can be saved in SMDS and run at a later time with up-to-date data.

Use the **Save Query** button at the top of the page to save your report at any time.

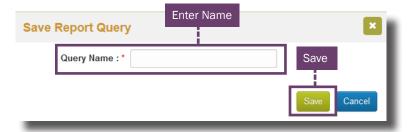
• Click the **Save Query** button.



The **Save Report Query** dialogue box will display.

TIP: Name the query something clear and understandable – In this instance, "Resident Survey Q3 and Q5 filter" would clearly explain what the query was about.

Click the Save button.

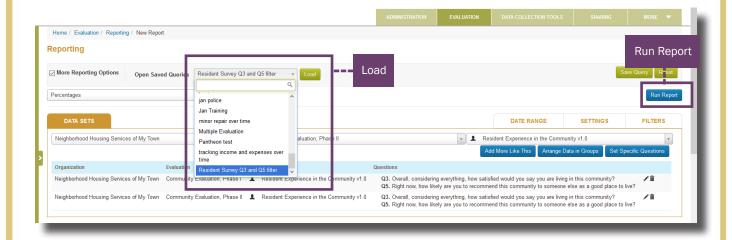


NOTE: A saved query contains information from the Data Sets, Settings, Date Range, and **Filter tabs.** It does not save the data generated from running the report. This allows you to run a report using the same parameters, with updated data.

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

You can run this same query at any time.

- You can select the saved query from the drop-down menu and click the **Load** button.
- Then click the **Run Report** button.



NOTE: The report will be generated with up-to-date data from the SMDS system.

All reports are generated with current data from the system.

A saved query can be changed at any time by selecting it and modifying the information saved in the tabs. Save again when ready.

Alternatively, if you make changes to a saved query you do not want to keep, use the Reset button to return to the original parameters.

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.

