

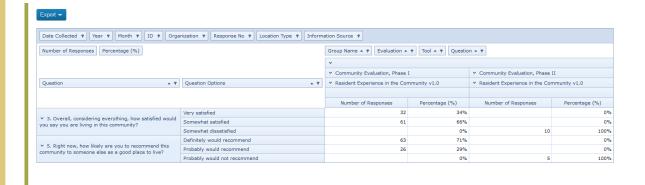
User Guide

Filtering Answers in Reports

Filtering Answers in Reports

The purpose of the Filter tab is to allow you to filter a report based on how questions are answered.

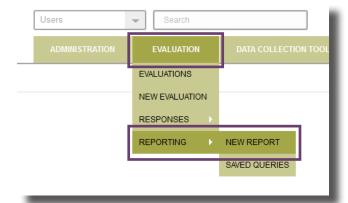
The Filter tab allows you to sort your report based on answers to questions. In the example below, if someone chose "Very satisfied" or "Somewhat satisfied" in Question 3, you can then see how they responded to Question 5. Filtering can be done on any report, whether looking at one round of data or multiple rounds, or multiple choice or matrix questions. This guide will show you how to filter a multiple choice question for one round of data, and then for two rounds of data.



To filter a report, you'll need to 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.



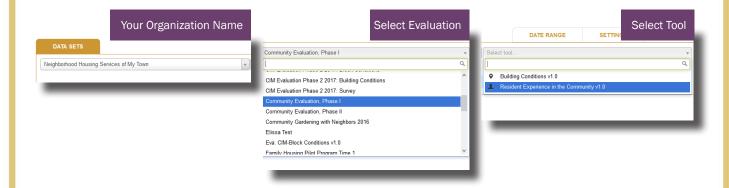
TIP: In this guide, we will run a Percentages report which shows both percentages and frequencies. You can also run:

- A Frequencies report to only show frequencies.
- An All Responses report to show data by each response.

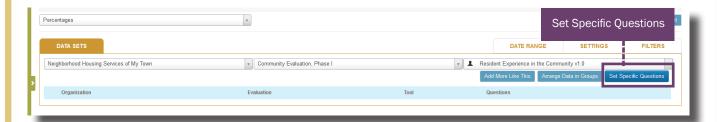
Selecting the Data Sets

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.

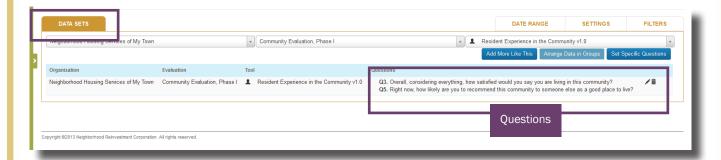
- Click the checkbox to the left of each question you want in your report.
- Click the **Apply these Selections** button.



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.

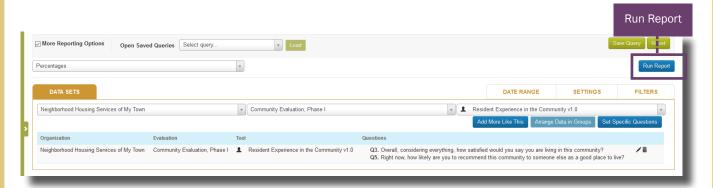
Select only a few questions at a time to keep your report manageable. A matrix question should have its own separate report.

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

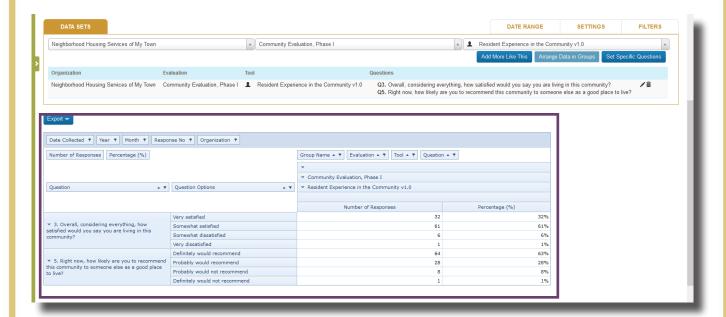


From here, we will generate the report to show how respondents answered each question selected.

Click Run Report.



Here, you see the total number of responses and percentages for both Question 3 and Question 5.

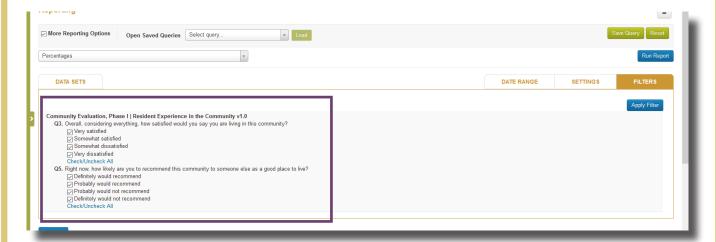


Filtering the Answer Choices

• Click the Filters tab.

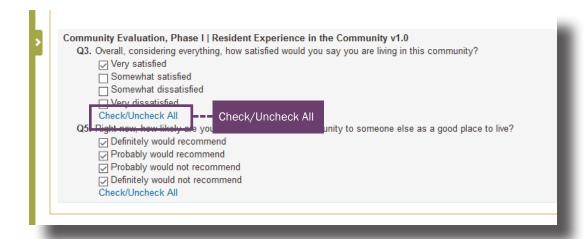


All possible answer choices are displayed on this tab.

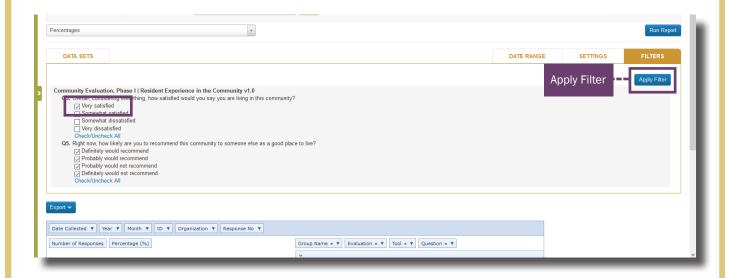


For this example, we want to see how people who responded "Very satisfied" to Question 3 then answered Question 5. To show that, we want to only see people who responded "Very satisfied" to Question 3 then answered Question 5.

- 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. In this example, we checked the box next to "Very satisfied"

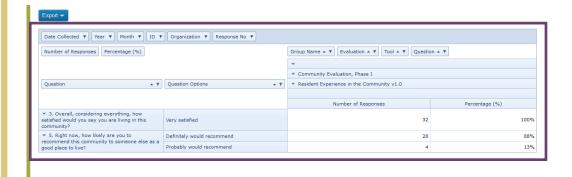


• Click the **Apply Filter** button to generate the updated report.



A new report shows the number of responses and percentages in Question 5 as they relate to "Very satisfied" in Question 3. 28 people answered Question 5 with "Definitely would recommend," and 4 people answered with "Probably would recommend." The percentages come from the 32 people: 88% of the 32 people (28 people), answered "Definitely would recommend," and 13% of the 32 people (4 people), answered "Probably would recommend."

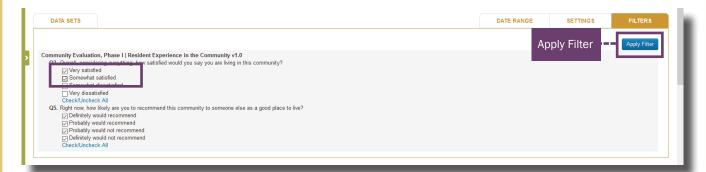
As you can see, the options from Question 3 that we did not select are not in this report—we only see "Very satisfied." Similarly with Question 5, those who chose "Very satisfied" did not choose "Probably would not recommend" or "Definitely would not recommend," so we do not see those answer choices displayed.



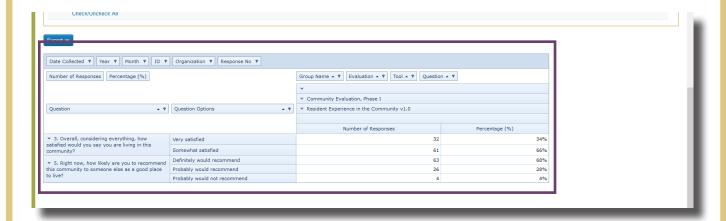
TIP: By selecting data sets and adding a filter, we have now set up a query in SMDS. Queries can be saved in SMDS and run later with up-to-date data. You'll learn more about saving a query at the end of this guide.

You can change the filter at any time in the Filters tab. Let's add another answer choice to Question 3 and see how that changes Question 5.

- Select "Somewhat satisfied" under Question 3 to add this answer choice to the filter.
- · Click Apply Filter.



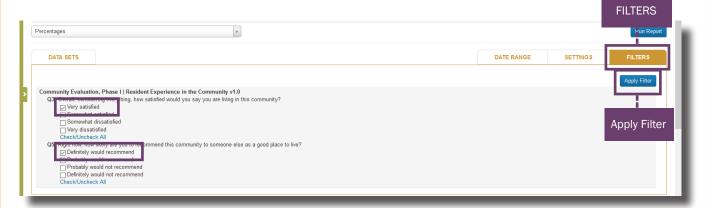
Now, we see 32 people who answered "Very satisfied" and 61 people who answered "Somewhat satisfied." From there, the report shows Question 5 and the number of responses and percentages for those 93 people.



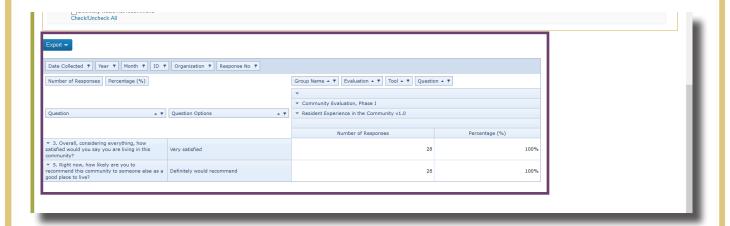
Applying a Filter to More than One Question

Now, let's look at what happens when we apply a filter to both Question 3 and Question 5. We will see how many people selected both "Very satisfied" for Question 3 and "Definitely would recommend" for Question 5.

- Click the Filters tab.
- Check one box for each question. For Question 3, we will select "Very satisfied," and for Question 5, we will select "Definitely would recommend."
- Click Apply Filter.



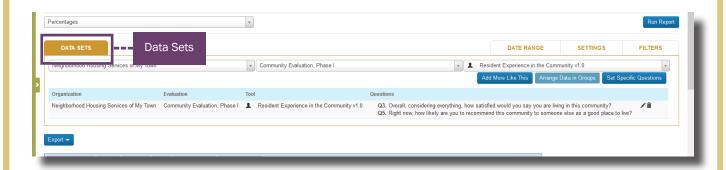
This report shows that 28 people answered that they were both "Very satisfied" and "Would definitely recommend." Here, we see that 28 people chose both answer choices. If no one answered all questions with these answers, no records would display in the report.



Next, we will build on the report we just created and use the filter feature to show data in two evaluations.

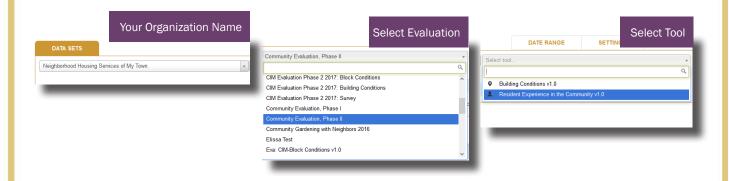
Adding a Second Data Set

Click the Data Sets tab.

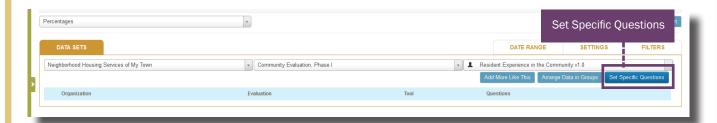


Your organization name will be displayed in the first box.

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

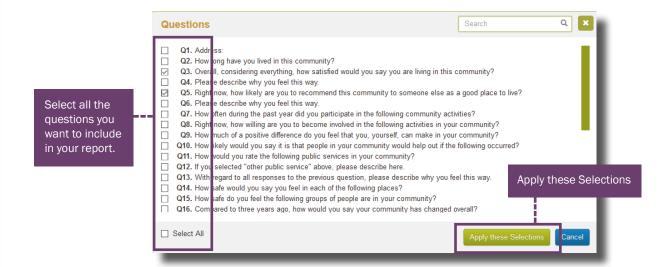


• Click the **Set Specific Questions** button.

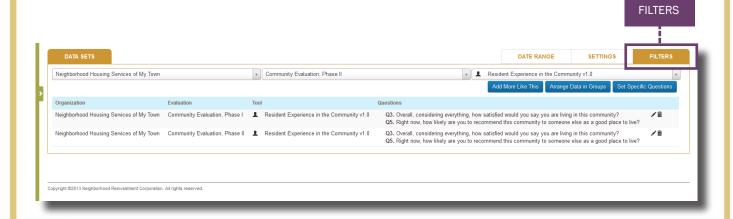


A dialogue box will appear, showing all questions in the tool.

- Click the checkbox to the left of each question you want in your report. Again, we will select Question 3 and Question 5.
- Click the **Apply these Selections** button.



· Click the Filters tab.

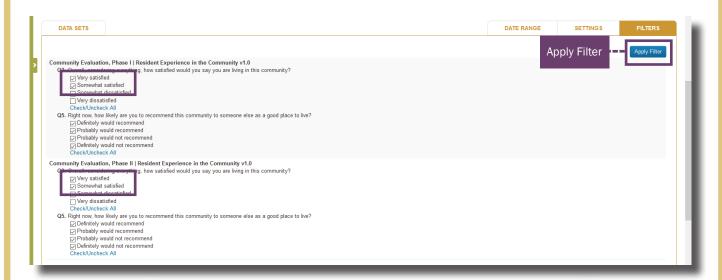


Here, uncheck and check the same answer choices that we used in our first data set.

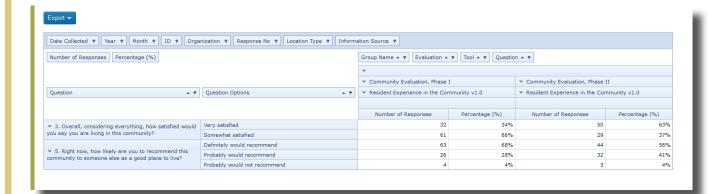
- Click the **Check/Uncheck All** option for the question you want to filter.
- Click the answer choice(s) you want to see in your report.

Here, we check the boxes next to "Very satisfied" and "Somewhat satisfied" for Question 3.

Click the Apply Filter button.



A new report is generated, showing the total number of responses and percentages for Question 5 for only those people who answered Question 3 with "Very satisfied" or "Somewhat satisfied." We see this for Phase 1 answers and Phase 2 answers.



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

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.

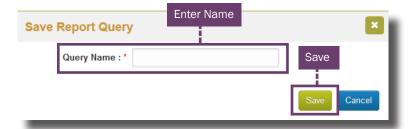
• Click the Save Query button.



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.

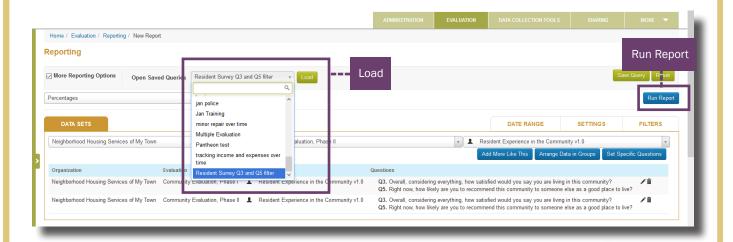


NOTE: A saved query contains information from the Data Sets, Settings, Date Range, and Filter tabs. It does not save the data generated from running the report. This allows you to run a report using the same parameters, with updated data.

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.

