

Generating Reports:

Running Reports to Show Changes in Data Over Time (with the same respondents in multiple evaluations)

V01-07.31.16

Running Reports to Show Changes in Data Over Time (with the same respondents with multiple evaluations)

Use this guide to generate a report if:

- 1) All responses are in one evaluation.
- 2) People have responded multiple times to the survey.

The query can be customized, saved, and re-generated with up-to-date data. The image below shows an example of a percentages report.

Question Question Options Image: Section Responses Image: Section Responses Image: Section Responses Percentage (%) Number of Responses Percentage (%) V 1 3% 2 Image: Responses Percentage (%) Number of Responses Percentage (%) V 1 3% 2 Image: Responses Percentage (%) Number of Responses Percentage (%) V 1. Which of the following statements best describes how you keep track of your income? I have a general idea of my income as it comes in. 23 70% 16 44 1. Which of the following statements best describes how you keep track of your income? Total I do not keep track of my income as it comes in. 33 100% 33 100 2. Which of the following statements best describes how you keep track of your income? Total I do not keep track of my spending. 1 16 44 v 2. Which of the following statements best describes how you keep track of your spending? I do not keep track of my spending. 1 33 100 34 44 v 2. Which of the following statements best describes how you keep track of your spending as it occurs. I have a general idea of my spending. 16 44 44	Number of Responses Perc	entage (%)	Evaluation 🔺 🕈	Response No	▲ ♥ Ouestion ▲	Ŷ
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		Never	6	18%	2	6%
Barely 2 6% 6 18	money aside as savings?	On a regular basis	18	55%	17	52%
		Rarely	2	6%	6	18%

2

Accessing More Reporting Options

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



Selecting the Report Type

- Click the More Reporting Options check box.
- Click the All Responses drop-down arrow.
- Click the **Percentages** option from the drop-down list.

Reporting More Reporting Options	Save Query Reset
All Responses All Responses Percentages Percentages Percentages Percentages	Run Report DATE RANGE SETTINGS V Set Specific Questions
TIP: In this guide, we will run a percentages report, wh percentages and frequencies. You can also generate a	
	SUCCESS MEASURES

Selecting the Data Sets

- Click the **Your Organization** drop-down arrow. Your organization name will already be displayed.
- Click the **Select evaluation** drop-down arrow then select an evaluation. ٠

Click the **Select tool** drop-down arrow then select a tool. ٠

DATA SETS			DATE RANGE SETTINGS
Neighborhood Housing Services of My Town	Select evaluation	Select tool	
Veignbornood Housing Services of My Town	Select evaluation	Q	٩
	Community Evaluation, Phase I	NeighborWork	s Financial Capability Evaluation Tool
	Financial Capability Evaluation Round I Financial Capability Evaluation Round II	_	
• Click the Set Specific Questio	ns button.		
Neighborhood Housing Services of My Town	Financial Capability Evaluation Round I	 NeighborWorks Financial 	Capability Evaluation Tool
			Set Specific Questions
A dialogue box will appear, showing a	all questions in the tool		
A dialogue box will appeal, showing e			
Click the check box to the left of	each question you want in yo	our report.	
Click the Apply these Selection	ons button.		
Questions	Search Q ×		
 Q1. Which of the following statements best describes how Q2. Which of the following statements best describes how 			
Q3. Regardless of whether or not you are always able to the	follow it, do you have some kind of		
□ q4. Pt Select all the questions yo	bu		
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Wr a. Pr Select all the questions yc a. Pr a. Pr want included in your c a. Pr a. Pr	DU g plan, and why? to guide your expenses for the		
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 wr a. Pi Select all the questions yc b. H b. H c. Pi want included in your c. report. a. Which of the following statements best describes the money to put aside as savings? a. Piease specify "another way." C. Below is a list of places where people sometimes put Please indicate whether or not you have set aside more set aside more set. 	DU g plan, and why? to guide your expenses for the rway in which you decide how much t money that they set aside as savings oney for sav Apply these Select	ions	
 wit Select all the questions you state of the second sec	DU a plan, and why? to guide your expenses for the away in which you decide how much the money that they set aside as savings oney for say Apply these Select this ago and how much you are saving	ions	
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 wit Select all the questions you set in the provided in your of the provided in your of the provided in the provided	a plan, and why? to guide your expenses for the way in which you decide how much the money that they set aside as savings the one. Apply these Selections Cancel		SUCCESS

TIP: For a percentage report, only include questions without open-ended answers. It is also recommended to select only a few questions at a time in order to keep your analysis succinct.

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

DATA SETS			DATE RANGE SETTINGS
Neighborhood Housing Services o	f My Town	Financial Capability Evaluation Round I	NeighborWorks Financial Capability Evaluation Tool
Organization	Evaluation	Tool	Questions Questions
Neighborhood Housing Services of My Town	Financial Capability Evaluation Round I	NeighborWorks Financial Capability Evaluation Tool	 Q1. Which of the following statements best describes how you keep track of your income? Q2. Which of the following statements best describes how you keep track of your <u>spending</u>? Q7. How often do you put money aside as savings?

TIP: You may want to edit your data set before or after generating a report to add or remove questions. To do so, click the Pencil icon to the right of the questions.

Next, add the second data set with same questions selected in the first data set.

- Click the Your Organization drop-down arrow. Your organization name will already be displayed. ٠
- Click the Select evaluation drop-down arrow then select an evaluation. •
- Click the **Select tool** drop-down arrow then select a tool. ٠

DATA SETS			DATE RANGE	SETTINGS
Neighborhood Housing Services of My Town	Financial Capability Evaluation Round I	Select tool		• م
	Community Evaluation, Phase I Financial Capability Evaluation Round I	L NeighborWo	orks Financial Capability Evalu	ation Tool
	Financial Capability Evaluation Round II			
			SUCCE MEASU	SS RES

Click the Set Specific Quest	ions button.	
Neighborhood Housing Services of My Town	Financial Capability Evaluation Round II	NeighborWorks Financial Capability Evaluation Tool Set Specific Questions
A dialogue box will appear, showing		
 Click the check box to the left of Click the Apply these Select 	•	want in your report.
Questions I Which of the following statements best describes I Q. Which of the following statements best describes I Q. Which of the following statements best describes I Q. Which of the following statements best describes I Q. Which of the following statements best describes I Q. Which of the following statements best describes I Q. Please solution Q. Please specify "another way." Q. Please specify "another way." Q. Please specify "another way." Q. Please specify "someplace else" above: Q. Please specify "Someplace else" above: Q. Please think about how much vou were saving 6 m Select All	how you keep track of your <u>spending</u> to follow it, do you have some kind of yOU a plan, and why? to guide your expenses for t the way in which you decide how much you money that they set aside as eaving money for say and how such you are say honths ado and how such you are say Apply these Selections Ca	he ch ese Selections vina nce
Organization Evaluation T Neighborhood Housing Services of My Town Financial Capability Evaluation Round I	Ferent Data Sets Sool • NeighborWorks Financial Capability Evaluation Tool • NeighborWorks Financial Capability Evaluation Tool	DATE RANGE SETTINGS MeighborWorks Financial Capability Evaluation Tool <lu> Specific Questions Cuestions Questions Mich of the following statements best describes how you keep track of your income? Which of the following statements best describes how you keep track of your income? Which of the following statements best describes how you keep track of your income? Which of the following statements best describes how you keep track of your income? Which of the following statements best describes how you keep track of your income? Which of the following statements best describes how you keep track of your gending? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? How often do you put money aside as savings? </lu>

Selecting the Respondents

To see changes over time, filter the report to show only respondents who have responded to the survey two or more times.

- Click the **Settings** tab. ٠
- Click the Show only those respondents who responded multiple times to the same evaluation checkbox.

Percentages	×			F	Settings
DATA SETS	Show only those o	checkbox		DATE RANGE	NGS
	s/locations who have responded to all selected ev ondents who responded multiple times to the sam				
Sun Sun Row Stand Total	Column Grand Total	_ Min	☐ Max		
display this	ght want to show t s, click the Sum ch lude, such as Avera Report	eckbox. You can			
	un Report button to	generate your repc	ort.		
Percentages	×				Run Report
DATA SETS				DATE RANGE	SETTINGS
Response Filters	······				_

Displaying Data and Modifying the Report

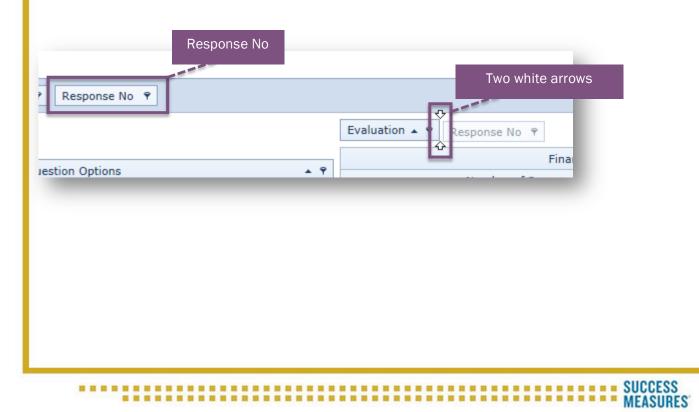
After running the report, the bottom portion of the screen displays the data you have selected.

The data from this report initially shows frequency amounts and percentages for all responses.

Number of Deservoirs	entage (%)	Evaluation 🔺 🕈	Ouestion • 1		
Number of Responses Perc	entage (%)	Evaluation • •	Question - 1		
		 Financial Capal Evaluation Round 		 Financial Capab Evaluation Round I 	
Question • 🕈	Question Options				
		Number of Responses	Percentage (%)	Number of Responses	Percentage (%)
	I do not keep track of my income.	1	3%	2	6%
 1. Which of the following statements best describes how you keep track of your <u>income</u> 		25	68%	17	50%
	I keep a written record of my income as it comes in.	11	30%	15	44%
	I do not keep track of my spending.	5	14%	3	9%
 2. Which of the following statements best describes how you keep track of your spending? 	I have a general idea of my spending, but do not keep a written record as it occurs.	23	62%	16	47%
	I keep a written record of my spending as it occurs.	9	24%	15	44%
	Every once in a while	8	22%	8	24%
 7. How often do you put 	Never	7	19%	2	6%
noney aside as savings?	On a regular basis	18	49%	17	50%
	Rarely	4	11%	7	21%

To show how responses changed over time, you will want to "drag" the **Response No** block from the blue bar at the top of the report down into the report.

- Click and hold the **Response No** block.
- Drag the **Response No** block to the area next to Evaluation.
- Drop it when the two white arrows appear, showing where it will be placed.



Date Collected 🕈 Year 🕈	Month 🕈 Organization 🕈	Data Set	1	Data	a Set 2
Number of Responses	Filter icon	Evaluation • •		 Question Financial Capab Evaluation Round 1 	ility
Question . 🕈	Question Options	× 1		* 1	
_	-	Number of Responses	Percentage (%)	Number of Responses	Percentage (%)
	I do not keep track of my income.	1	3%	2	6%
 1. Which of the following statements best describes how you keep track of your income? 	I have a general idea of my income, but do not keep a written record as it comes in.	25	68%	17	50%
	I keep a written record of my income as it comes in.	11	30%	15	44%
	I do not keep track of my spending.	5	14%	3	9%
 2. Which of the following statements best describes how you keep track of your spending? 	I have a general idea of my spending, but do not keep a written record as it occurs.	23	62%	16	47%
spending.	I keep a written record of my spending as it occurs.	9	24%	15	44%
	Every once in a while	8	22%	8	24%
 7. How often do you put 	Never	7	19%	2	6%
money aside as savings?	On a regular basis	18	49%	17	50%
	Rarely	4	11%	7	21%

TIP: The Filter icon allows you to filter by question, answer, or individual in an All Response report.

The report can be exported into multiple formats.

- Click the **Export** button. A drop-down menu of export options will display.
- Click a **Format** option.

Export 🗸					
PDF Format EXCEL Format	🕈 Month 🕈 Organization 🕈				
CSV Format	ercentage (%)	Evaluation 🔺 🕈	Response No	▲ ♥ Question ▲	۴
MHT Format RTF Format		 Financial Capa Evaluation Round 		 Financial Capab Evaluation Round 1 	
TEXT Format	Question Options	¥ 1		▼ 1	
HTML Format					
		Number of Responses	Percentage (%)	Number of Responses	Percentage (%)
	I do not keep track of my income.	1	3%	2	6%
 Which of the followin statements best describes you keep track of your incomendation 	how income, but do not keep a	25	68%	17	50%
	I keep a written record of my income as it comes in.	11	30%	15	44%

TIP: Further analysis can be done in Excel. To save this report, export to Excel and save to your computer.

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 wish to run it again later.

٠ Click the Save Query button.

<complex-block></complex-block>	Reporting	Open Saved Queries Select query	▼ Load		- Save Query Reset
<text><list-item><list-item></list-item></list-item></text>	Percentages				Run Report
<text></text>	DATA SETS			DATE RANGE	SETTINGS
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Save Save Save Cancel Save	Save Rep	ort Query	Name the query.		
Data Sets Data Range Settings Difference Financial Capability Evaluation Round II Leighbor/Works Financia Capability Evaluation Round II					
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Neighborhood Housing Services of My Town Financial Capability Evaluation Round I Image: NeighborWorks Financial Capability Evaluation Tool Q1. Which of the following statements best describes how you keep track of your income? Q2. Which of the following statements best describes how you keep track of your spending? Q7. How often do you put money aside as savings?	Neighborhood Housing	Services of My Town	Financial Capability Evaluation Round II	NeighborWorks Fit	
of My Town Evaluation Round I Evaluation Tool track of your <u>income</u> ? Q2. Which of the following statements best describes how you keep track of your <u>spending</u> ? Q7. How offen do you put money aside as savinos?	Organization	Evaluation	Tool	Questions	
				track of your <u>income</u> ? Q2. Which of the following statements bes track of your <u>spending</u> ?	t describes how you keep
					0000000

TIP: A saved query contains information in the Data Sets, Date Range, and Settings tab. It does not save the data generated from running the report.

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

Reporting			
More Reporting Options	Open Saved Queries	Multiple Evaluations	Load
Percentages DATA SETS		Select query credit score over time Location 2015 savings over time	
Neighborhood Housing Servi	ces of My Town	Multiple Evaluations	Round II

You may run this same query at any time. You can select the saved query from the drop-down menu and click the **Load** button.

• Click the Run Report button.

The report will be generated with up-to-date data in the system.

DATA SETS					DATE RANGE SETTING	GS
Response Filters						
 Show only respondents/locations who have responded to all sele Show only those respondents who responded multiple times to the 						
Value Aggregates 🛛 All						- 17
 Sum Display Count 	Average Row Grand Total		Min Column Grand Total	■ Max ■ Percetage by Rows		
Demographic Fields All						- 17
Age Income Level	Gender Educational Level		Ethnicity Highest Level Education	Race Number Of Children		
Number Of People	Primary Language					
Location Fields All	Location Details		Street	City		- 17
Zip Code	State		Province	Country		
Exclude Qualitative Options for Custom Matrix Number of Decimal Points						- 17
Export -						_
Date Collected + Year + Month + Organization + Respon	nse No 🔻					
Number of Responses Percentage (%)	Evaluation - + Question - +					
	 Financial Capability Evaluation Round I 	 Financial Capability Evaluation Round II 				
Question - + Question Options - +						
	Number of Percentage Responses (%)	Number of Percentage Responses (%)				
1 do not keep track of my income.	1 3%	2 6%				
statements best describes how you keep track of your	25 68%	17 50%				
income? I keep a written record as it comes in. I keep a written record of my	11 30%	15 44%				
income as it comes in.	11 50%	15 44%				_
			and the second		SUCCESS	
					MEASURES	

TIP: All reports are generated with current data in the system. Each time you generate a report, you will need to format the table. For example, drag the Response No in the table.



leed Addition	al Help?	
•	esk link at the top of the scree ides are helpful resources as yo	
	uestions or encounter any probl	iems, piease
submit a help des	Help Desk Evaluation Learning Center YOUR	ORGANIZATION Sam Jones 🔻 5
SUCCESS Help Desk MEASURES®		ORGANIZATION Sam Jones 👻 5
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