

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:

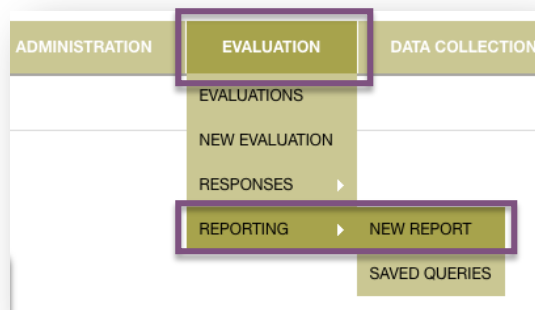
- 1) All responses are in one evaluation.
- 2) People have responded multiple times to the survey.

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

Date Collected ▾		Year ▾	Month ▾	Organization ▾			
Number of Responses		Percentage (%)		Evaluation ▲ ▾	Response No ▲ ▾	Question ▲ ▾	
Question ▲ ▾		Question Options ▲ ▾		▼ Financial Capability Evaluation Round I		▼ Financial Capability Evaluation Round II	
				▼ 1		▼ 1	
				Number of Responses	Percentage (%)	Number of Responses	Percentage (%)
▼ 1. Which of the following statements best describes how you keep track of your <u>income</u> ?	I do not keep track of my income.			1	3%	2	6%
	I have a general idea of my income, but do not keep a written record as it comes in.			23	70%	16	48%
	I keep a written record of my income as it comes in.			9	27%	15	45%
1. Which of the following statements best describes how you keep track of your <u>income</u> ? Total				33	100%	33	100%
▼ 2. Which of the following statements best describes how you keep track of your <u>spending</u> ?	I do not keep track of my spending.			5	15%	3	9%
	I have a general idea of my spending, but do not keep a written record as it occurs.			21	64%	16	48%
	I keep a written record of my spending as it occurs.			7	21%	14	42%
2. Which of the following statements best describes how you keep track of your <u>spending</u> ? Total				33	100%	33	100%
▼ 7. How often do you put money aside as savings?	Every once in a while			7	21%	8	24%
	Never			6	18%	2	6%
	On a regular basis			18	55%	17	52%
	Rarely			2	6%	6	18%
7. How often do you put money aside as savings? Total				33	100%	33	100%

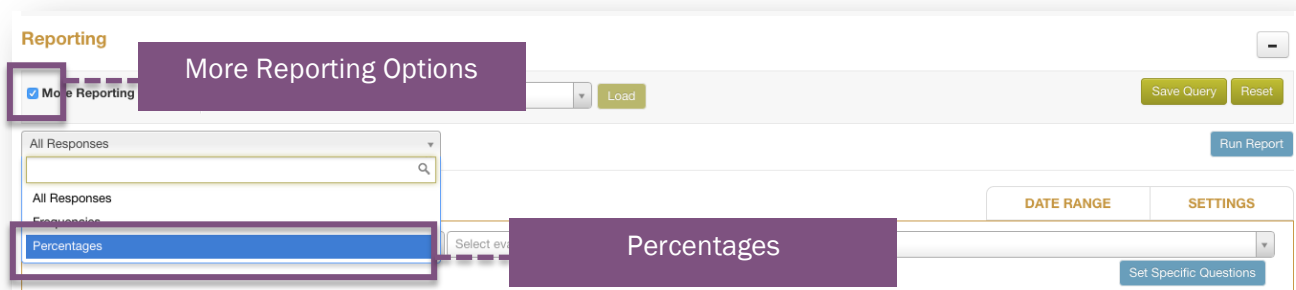
Accessing More Reporting Options

- 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

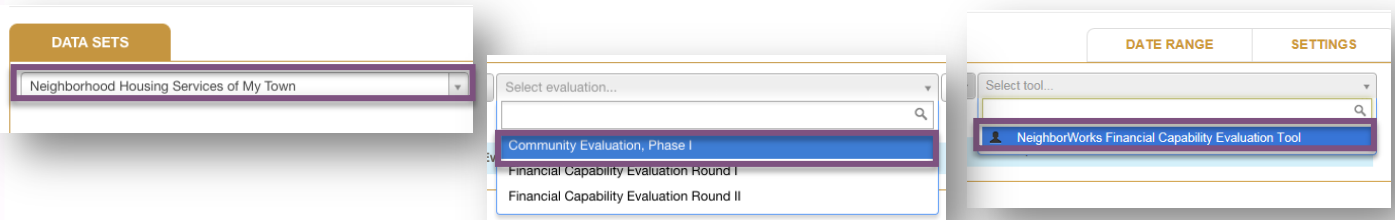
- Click the **More Reporting Options** check box.
- Click the **All Responses** drop-down arrow.
- Click the **Percentages** option from the drop-down list.



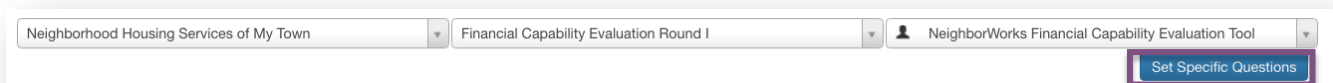
TIP: In this guide, we will run a percentages report, which shows both percentages and frequencies. You can also generate an All Responses report.

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

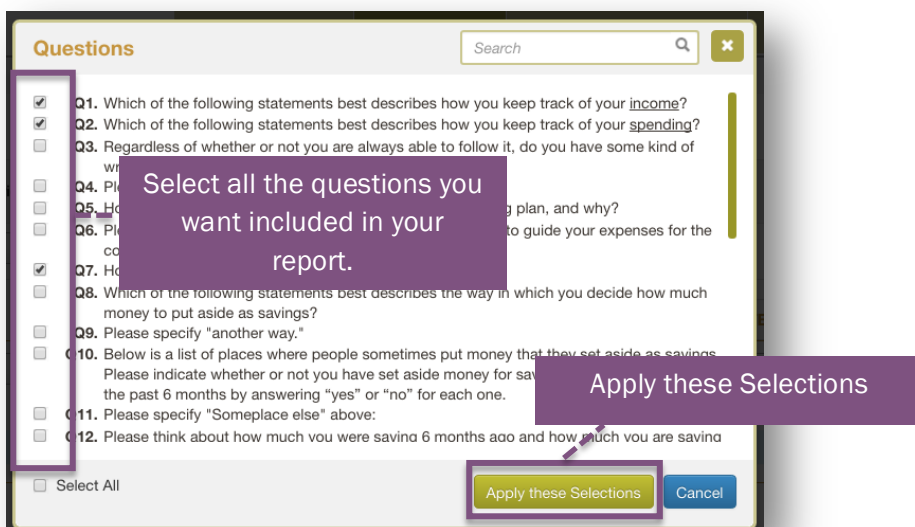


- Click the **Set Specific Questions** button.



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

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



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.

The screenshot shows the 'DATA SETS' tab with three dropdown menus at the top: 'Neighborhood Housing Services of My Town', 'Financial Capability Evaluation Round I', and 'NeighborWorks Financial Capability Evaluation Tool'. Below these is a table with the following data:

Organization	Evaluation	Tool
Neighborhood Housing Services of My Town	Financial Capability Evaluation Round I	NeighborWorks Financial Capability Evaluation Tool

A callout box titled 'Questions' is overlaid on the table, showing a list of questions with pencil icons for editing:

- 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?

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

The three screenshots illustrate the steps to add a second data set:

- Organization dropdown:** Shows 'Neighborhood Housing Services of My Town' selected.
- Evaluation dropdown:** Shows 'Financial Capability Evaluation Round I' selected, with a search bar and a list of options including 'Community Evaluation, Phase I', 'Financial Capability Evaluation Round I', and 'Financial Capability Evaluation Round II'.
- Tool dropdown:** Shows 'NeighborWorks Financial Capability Evaluation Tool' selected.

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

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

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

The **Data Sets** tab displays both your selected data sets and questions.

Organization	Evaluation	Tool
Neighborhood Housing Services of My Town	Financial Capability Evaluation Round I	NeighborWorks Financial Capability Evaluation Tool
Neighborhood Housing Services of My Town	Financial Capability Evaluation Round II	NeighborWorks Financial Capability Evaluation Tool

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

The screenshot shows the 'Settings' tab in the Success Measures interface. A callout box labeled 'Show only those... checkbox' points to the checkbox 'Show only those respondents who responded multiple times to the same evaluation', which is checked. Another callout box labeled 'Sum' points to the 'Sum' checkbox under the 'Value Aggregates' section, which is also checked. Other visible options include 'All', 'Average', 'Min', 'Max', 'Row Grand Total', and 'Column Grand Total'. The 'Run Report' button is visible in the top right corner.

TIP: You might want to show the total number of responses for each question. To display this, click the Sum checkbox. *You can select any other parameters you wish to include, such as Average or Max.*

Running the Report

- Click the **Run Report** button to generate your report.

The screenshot shows the 'Run Report' button in the top right corner of the Success Measures interface. The 'Settings' tab is selected, and the 'Run Report' button is highlighted with a callout box.

Displaying Data and Modifying the Report

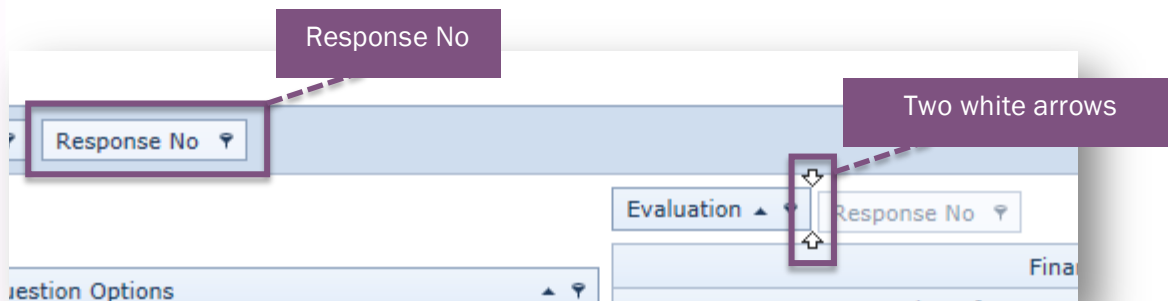
After running the report, the bottom portion of the screen displays the data you have selected.

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

Date Collected ▾		Year ▾	Month ▾	Organization ▾	Response No ▾		
Number of Responses		Percentage (%)		Evaluation ▾ ▾		Question ▾ ▾	
				▾ Financial Capability Evaluation Round I		▾ Financial Capability Evaluation Round II	
Question ▾ ▾		Question Options ▾ ▾					

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.



The report is regenerated and displays the results of the query, separated by response “No.”

Date Collected ▼ Year ▼ Month ▼ Organization ▼		Data Set 1		Data Set 2	
Number of Responses		Evaluation ▼	Response No ▼	Question ▼	
Filter icon		Financial Capability Evaluation Round I		Financial Capability Evaluation Round II	
Question		1		1	
Question Options		Number of Responses	Percentage (%)	Number of Responses	Percentage (%)
1. Which of the following statements best describes how you keep track of your <u>income</u> ?	I do not keep track of my income.	1	3%	2	6%
	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%
2. Which of the following statements best describes how you keep track of your <u>spending</u> ?	I do not keep track of my spending.	5	14%	3	9%
	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%
7. How often do you put money aside as savings?	Every once in a while	8	22%	8	24%
	Never	7	19%	2	6%
	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.

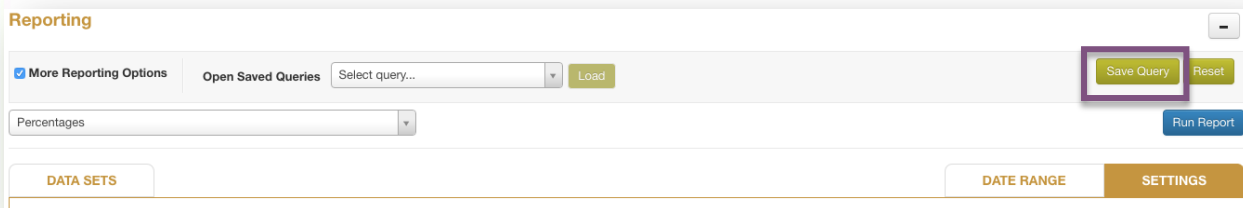
Export ▼		Month ▼	Organization ▼	Evaluation ▼		Response No ▼	Question ▼
PDF Format		Financial Capability Evaluation Round I		Financial Capability Evaluation Round II		1	
EXCEL Format		1		1		1	
CSV Format		Number of Responses	Percentage (%)	Number of Responses	Percentage (%)	Number of Responses	Percentage (%)
1. Which of the following statements best describes how you keep track of your <u>income</u> ?	I do not keep track of my income.	1	3%	2	6%		
	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%		

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.

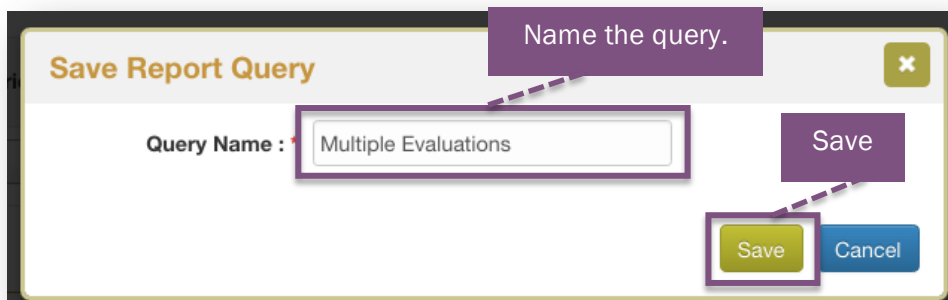
- Click the **Save Query** button.



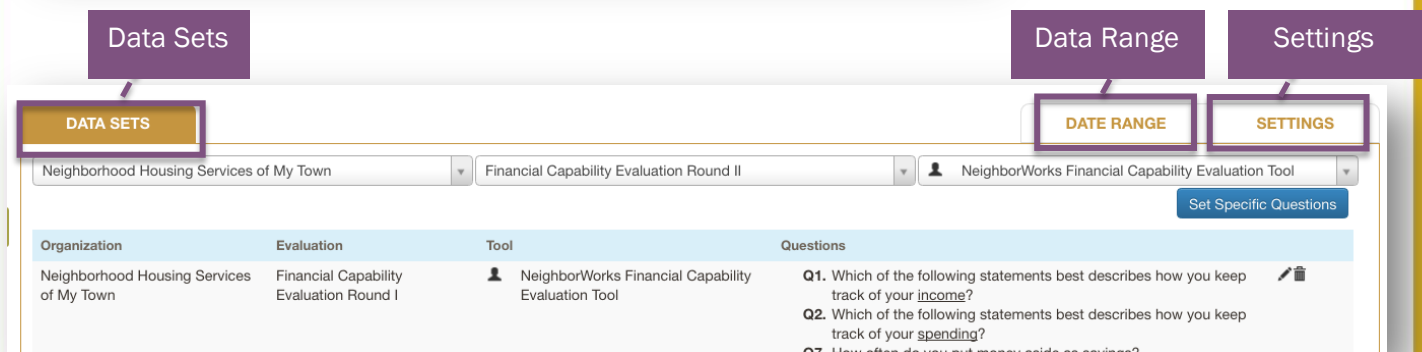
The screenshot shows the 'Reporting' section of a web application. At the top, there is a 'More Reporting Options' checkbox which is checked. Below it, there is a section for 'Open Saved Queries' with a dropdown menu labeled 'Select query...' and a 'Load' button. To the right of this section, there is a 'Save Query' button (highlighted with a red box) and a 'Reset' button. Below these buttons, there is a 'Run Report' button. At the bottom of the interface, there are three tabs: 'DATA SETS', 'DATE RANGE', and 'SETTINGS'.

The Save Report Query dialogue box will display.

- Name the query.
- Click the **Save** button.



The screenshot shows a 'Save Report Query' dialog box. It has a title bar with a close button (X). Inside the dialog, there is a label 'Query Name :' followed by a text input field containing the text 'Multiple Evaluations'. A red dashed arrow points from the text 'Name the query.' to the input field. To the right of the input field, there is a 'Save' button (highlighted with a red box) and a 'Cancel' button. Above the 'Save' button, there is another 'Save' button (highlighted with a red box) and a 'Reset' button.



The screenshot shows the 'Reporting' section of a web application. At the top, there are three tabs: 'DATA SETS', 'DATE RANGE', and 'SETTINGS'. The 'DATA SETS' tab is selected and highlighted with a red box. Below the tabs, there are three dropdown menus: 'Neighborhood Housing Services of My Town', 'Financial Capability Evaluation Round II', and 'NeighborWorks Financial Capability Evaluation Tool'. To the right of these dropdowns, there is a 'Set Specific Questions' button. Below the dropdowns, there is a table with the following data:

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

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.

The screenshot shows the 'Reporting' section of a software interface. It includes a 'More Reporting Options' checkbox, an 'Open Saved Queries' dropdown menu, and a 'Load' button. The dropdown menu is open, showing a search bar and a list of saved queries: 'Select query...', 'credit score over time', 'Location 2015', 'savings over time', and 'Multiple Evaluations'. The 'Multiple Evaluations' option is highlighted. Below the dropdown, there is a 'DATA SETS' section with a text input field containing 'Neighborhood Housing Services of My Town' and a 'Round II' label.

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.

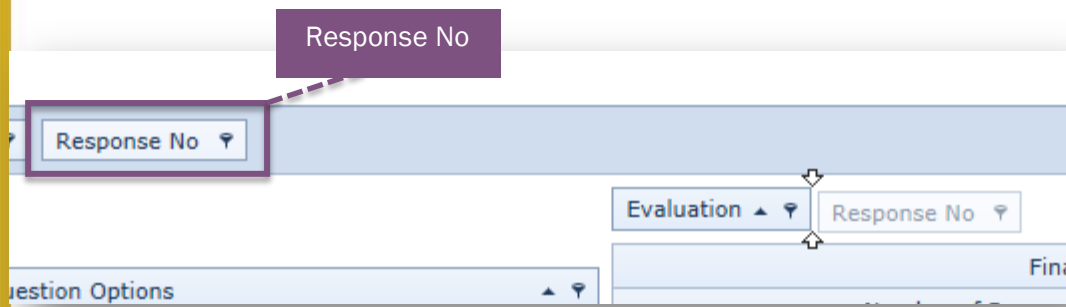
- Click the **Run Report** button.

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

The screenshot shows the 'Data Sets' tab in the Reporting interface. It includes a 'Response Filters' section with checkboxes for 'Show only respondents/locations who have responded to all selected evaluations' and 'Show only those respondents who responded multiple times to the same evaluation'. There are also sections for 'Value Aggregates', 'Demographic Fields', 'Location Fields', and 'Exclude Qualitative Options for Custom Matrix'. Below these sections, there is an 'Export' button and a table showing the results of the report. The table has columns for 'Question', 'Question Options', 'Number of Responses', and 'Percentage (%)'. The data is organized into two main sections: 'Financial Capability Evaluation Round I' and 'Financial Capability Evaluation Round II'.

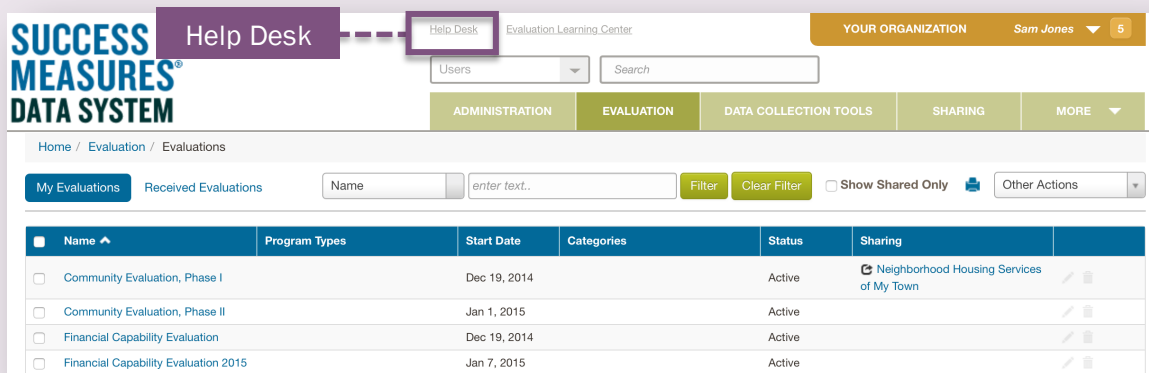
Question	Question Options	Number of Responses	Percentage (%)	Number of Responses	Percentage (%)
1. Which of the following statements best describes how you keep track of your income?	I do not keep track of my income.	1	3%	2	6%
	I have a general idea of my income, but do not keep a written record as it comes in.	25	68%	17	50%
	I keep a written record of my income as it comes in.	11	30%	15	44%

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.



Need Additional Help?

- Click the **Help Desk** link at the top of the screen to find more guides. These guides are helpful resources as you work in SMDS portal.
- 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, the 'Help Desk' link is highlighted in the navigation bar. Below it, the 'EVALUATION' tab is selected, showing a list of evaluations. The interface includes a search bar, a filter button, and a table of evaluations.

Name	Program Types	Start Date	Categories	Status	Sharing
Community Evaluation, Phase I		Dec 19, 2014		Active	Neighborhood Housing Services of My Town
Community Evaluation, Phase II		Jan 1, 2015		Active	
Financial Capability Evaluation		Dec 19, 2014		Active	
Financial Capability Evaluation 2015		Jan 7, 2015		Active	