SUCCESS MEASURES®
DATA SYSTEM

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

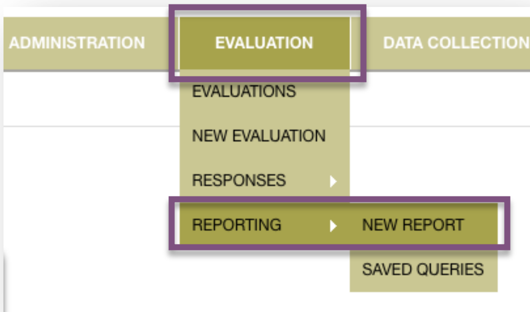
Number of Responses | Percentage (%)

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 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.	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 income? Total		33	100%	33	100%
2. Which of the following statements best describes how you keep track of your spending?	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 spending? 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%

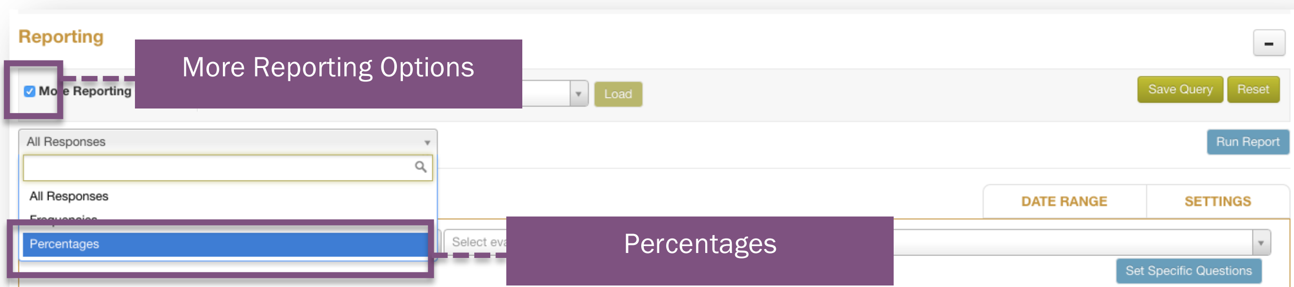
Accessing More Reporting Options

- 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

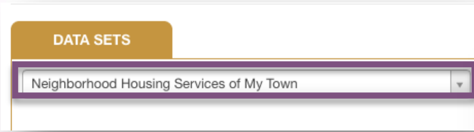
- Click the **More Reporting Options** check box.
- Click the **All Responses** drop-down arrow.
- Click the **Percentages** option from the drop-down list.

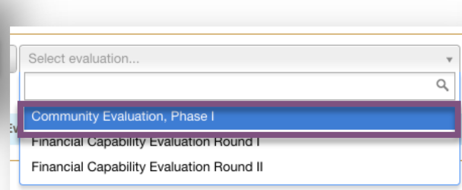


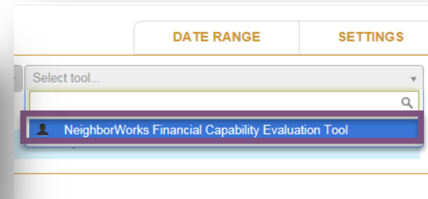
TIP: In this guide, we will run a percentages report, which shows both percentages and frequencies. You can also generate an All Responses report.

Selecting the Data Sets

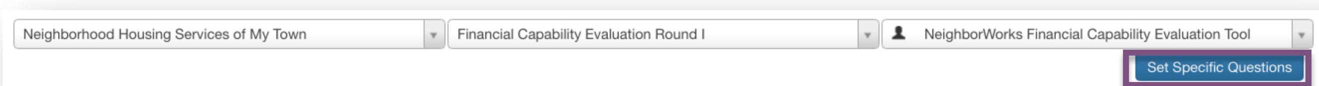
- Click the **Your Organization** drop-down arrow. Your organization name will already be displayed.
- Click the **Select evaluation** drop-down arrow then select an evaluation.
- Click the **Select tool** drop-down arrow then select a tool.





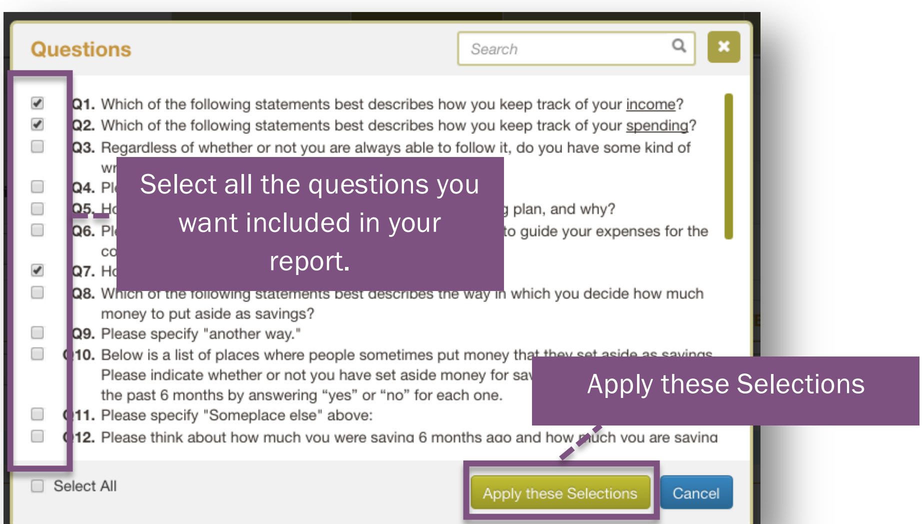


- Click the **Set Specific Questions** button.



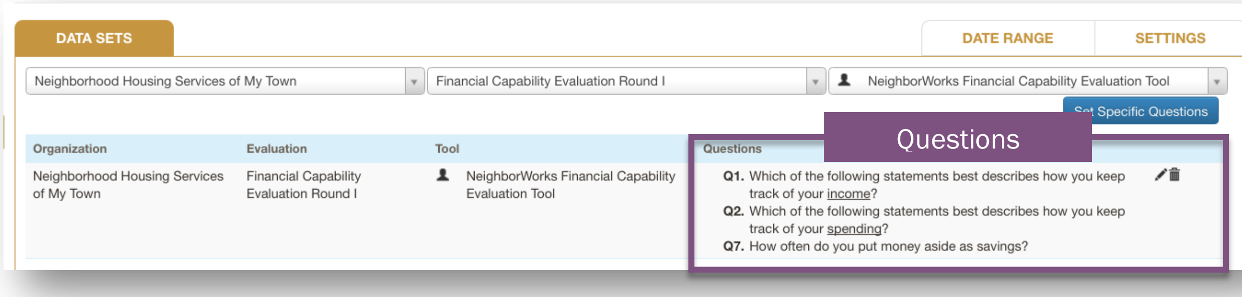
A dialogue box will appear, showing all questions in the tool.

- 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.

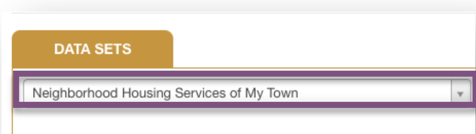
After you select the questions you want to display, the **Data Sets** tab displays your selected data set.

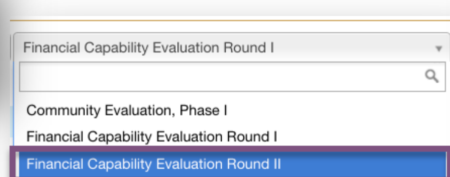


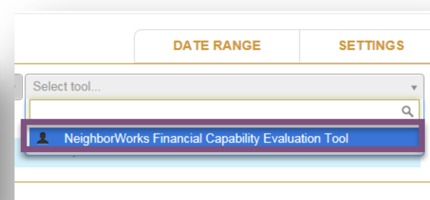
TIP: You may want to edit your data set before or after generating a report to add or remove questions. To do so, click the Pencil icon to the right of the questions.

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

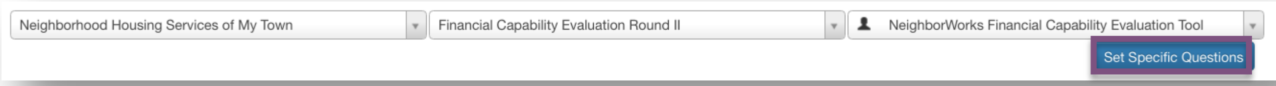
- Click the **Your Organization** drop-down arrow. Your organization name will already be displayed.
- Click the **Select evaluation** drop-down arrow then select an evaluation.
- Click the **Select tool** drop-down arrow then select a tool.





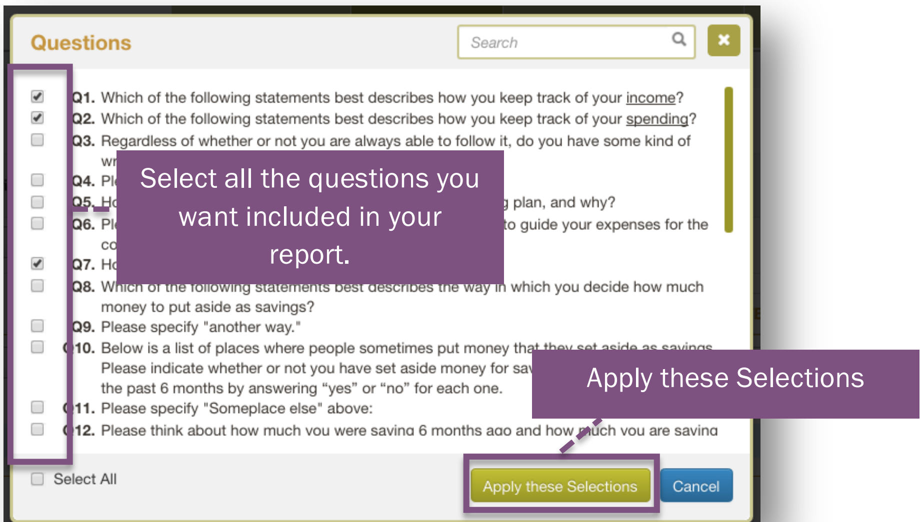


- Click the **Set Specific Questions** button.

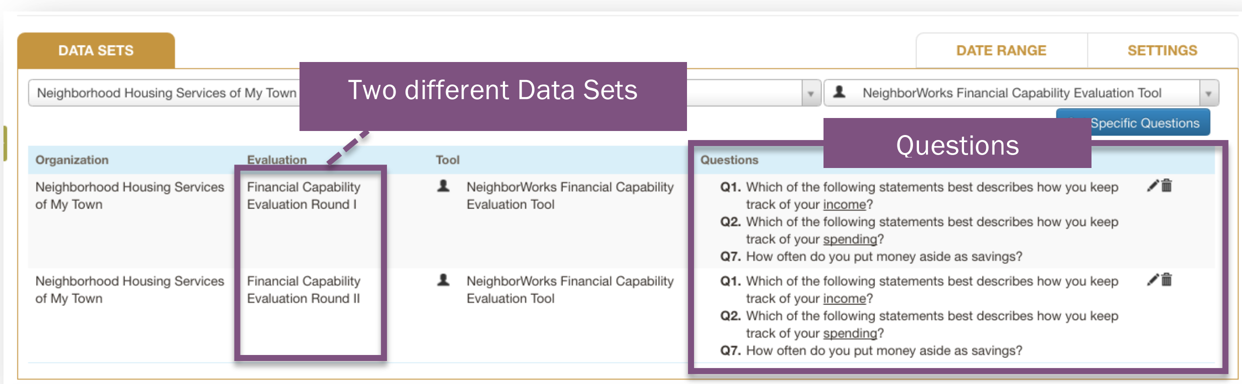


A dialogue box will appear, showing all questions in the tool.

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



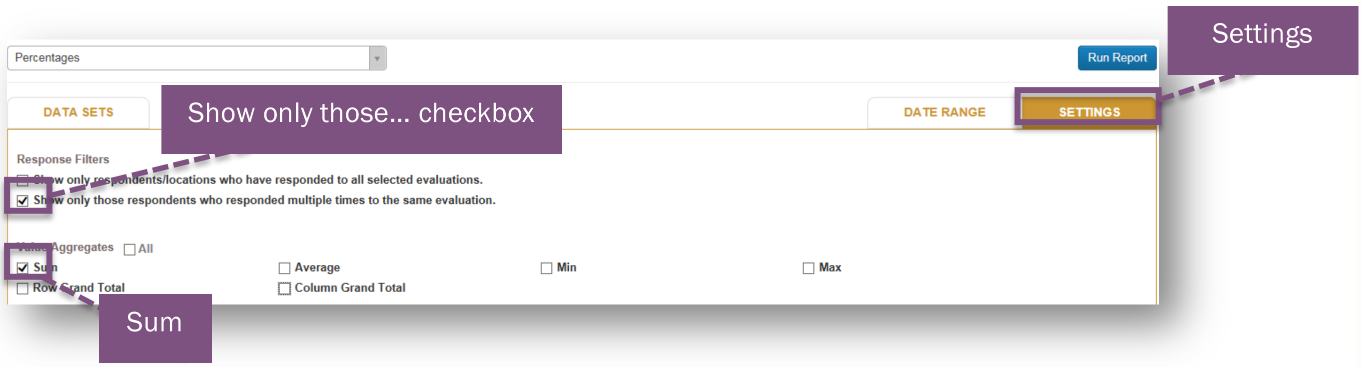
The **Data Sets** tab displays both your selected data sets and questions.



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.

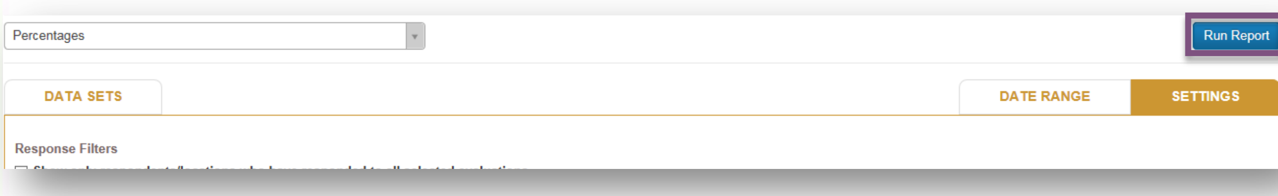
- Click the **Settings** tab.
- Click the **Show only those respondents who responded multiple times to the same evaluation** checkbox.



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.



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.

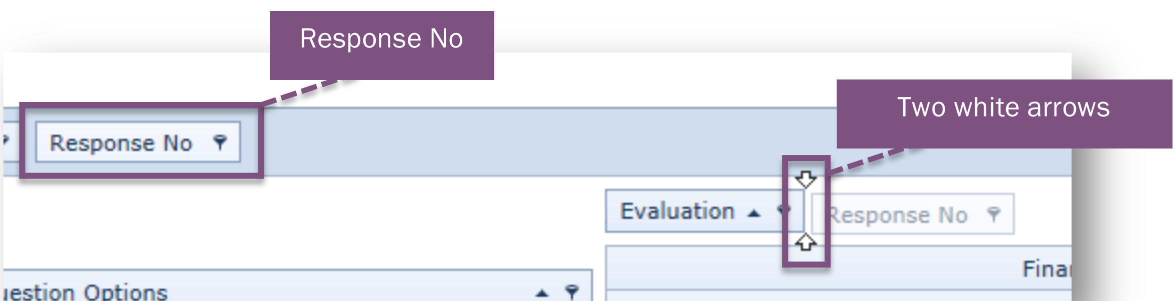
Date Collected | Year | Month | Organization | Response No

Number of Responses | Percentage (%) — Evaluation | Question

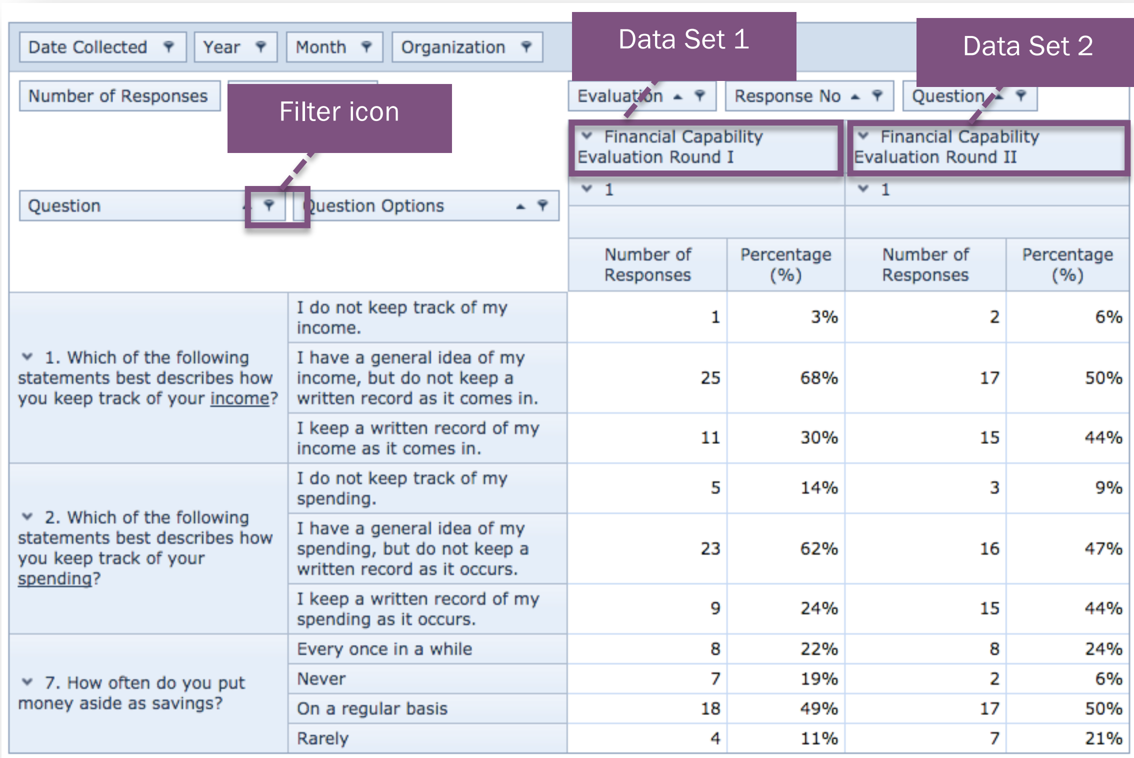
Question	Question Options	Financial Capability Evaluation Round I: Number of Responses	Financial Capability Evaluation Round I: Percentage (%)	Financial Capability Evaluation Round II: Number of Responses	Financial Capability Evaluation Round II: Percentage (%)
1. Which of the following statements best 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%
2. Which of the following statements best describes how you keep track of your spending?	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%

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."

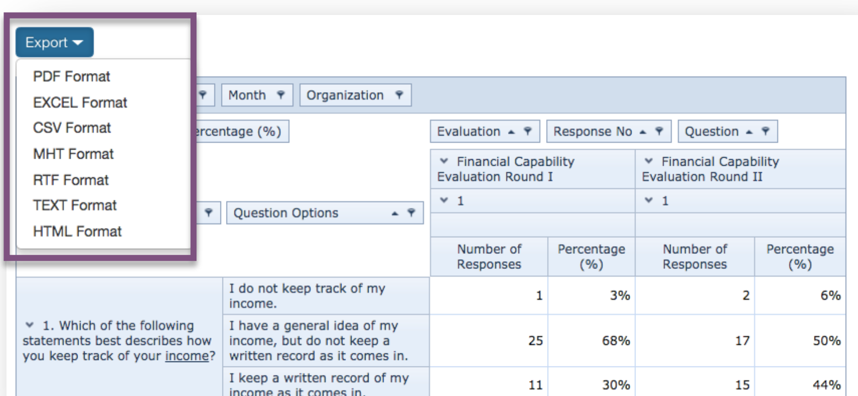


Question	Question Options	Financial Capability Evaluation Round I – 1 – Number of Responses	Financial Capability Evaluation Round I – 1 – Percentage (%)	Financial Capability Evaluation Round II – 1 – Number of Responses	Financial Capability Evaluation Round II – 1 – Percentage (%)
1. Which of the following 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%
2. Which of the following statements best describes how you keep track of your spending?	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.



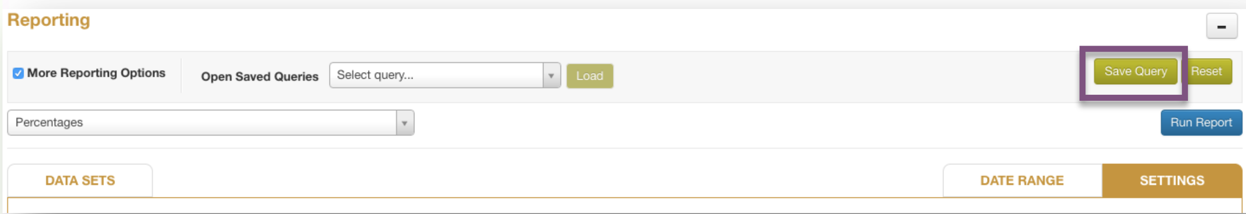
Question	Question Options	Financial Capability Evaluation Round I – 1 – Number of Responses	Financial Capability Evaluation Round I – 1 – Percentage (%)	Financial Capability Evaluation Round II – 1 – Number of Responses	Financial Capability Evaluation Round II – 1 – Percentage (%)
1. Which of the following 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: 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

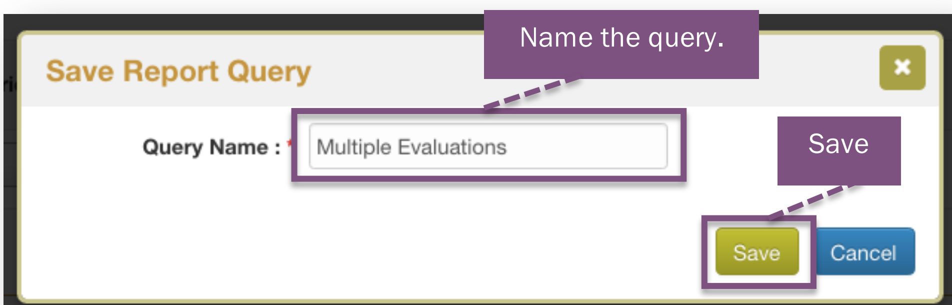
You may use the **Save Query** button at the top of the page to save your report if you wish to run it again later.

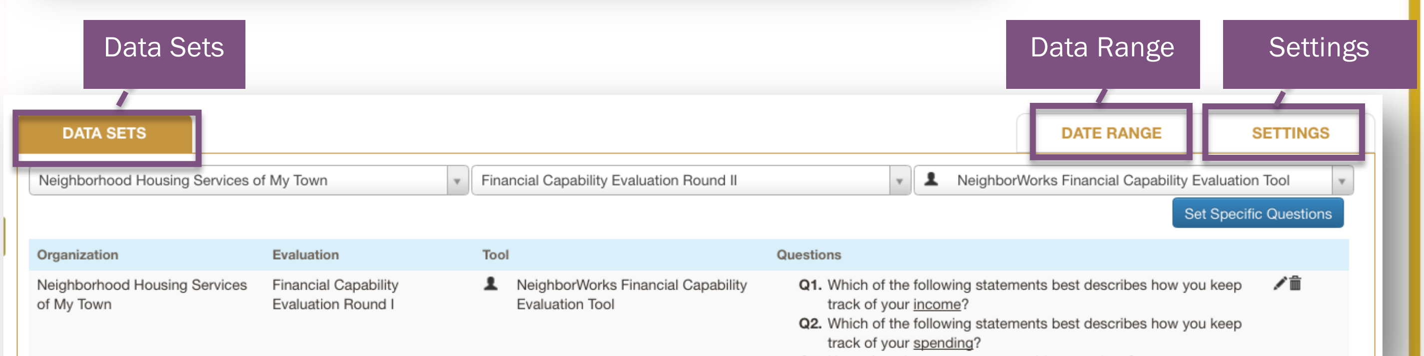
- Click the **Save Query** button.



The Save Report Query dialogue box will display.

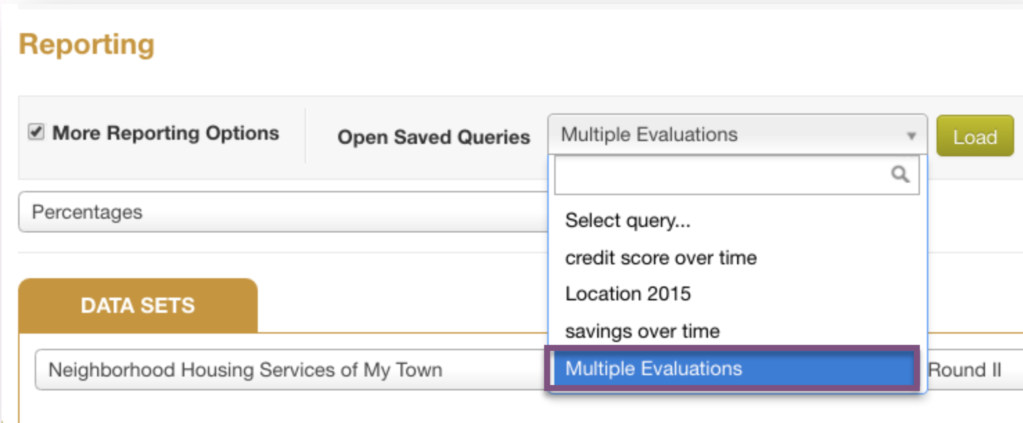
- Name the query.
- Click the **Save** button.





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.

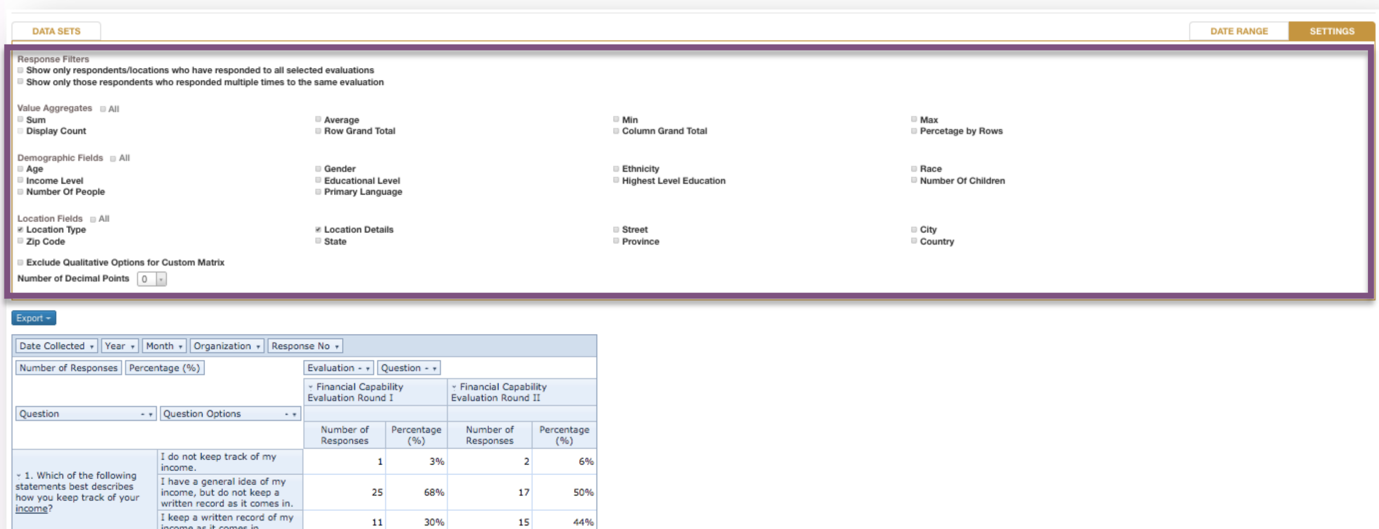
The newly saved query will be listed in the drop-down menu of the Open Saved Queries drop-down arrow.



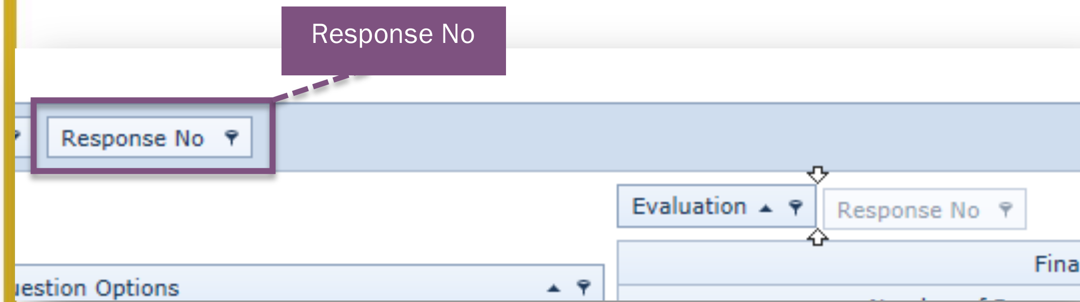
You may run this same query at any time. You can select the saved query from the drop-down menu and click the **Load** button.

- Click the **Run Report** button.

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



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.