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Instructions for the Data Analysis and Reporting Tool

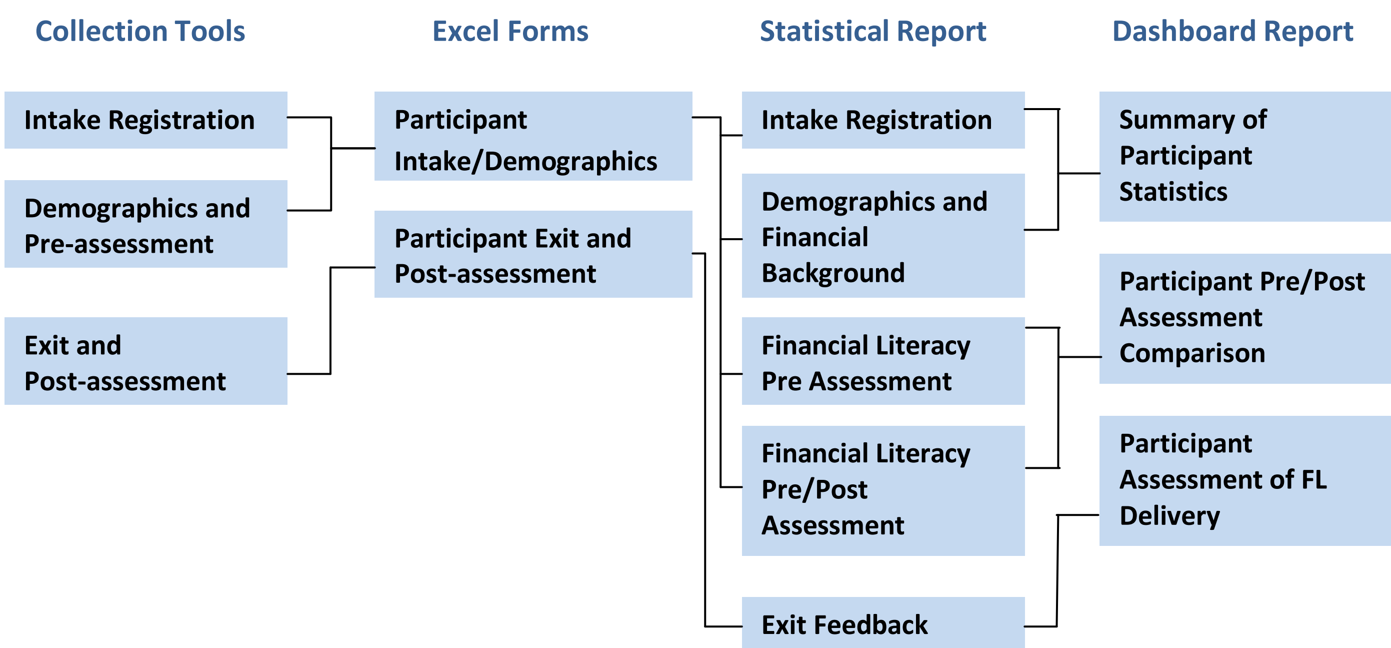
File compatibility - Excel 2007 or Excel 2010

Purpose:

This tool is for recording and analyzing quantitative participant data collected from the **Intake Registration, Demographics and pre-assessment**, and **Exit and post-assessment** forms. It is a self-contained workbook that creates excel datasheets, statistical reports (# or %) and dashboard reports (charts and graphs). The following sections explain how to enter the data and how the reports are produced. You may want to print this document to reference while you are using the tool.

The diagram below illustrates the sources of data used to produce the excel datasheets, statistical reports and dashboard reports.

Data Diagram:



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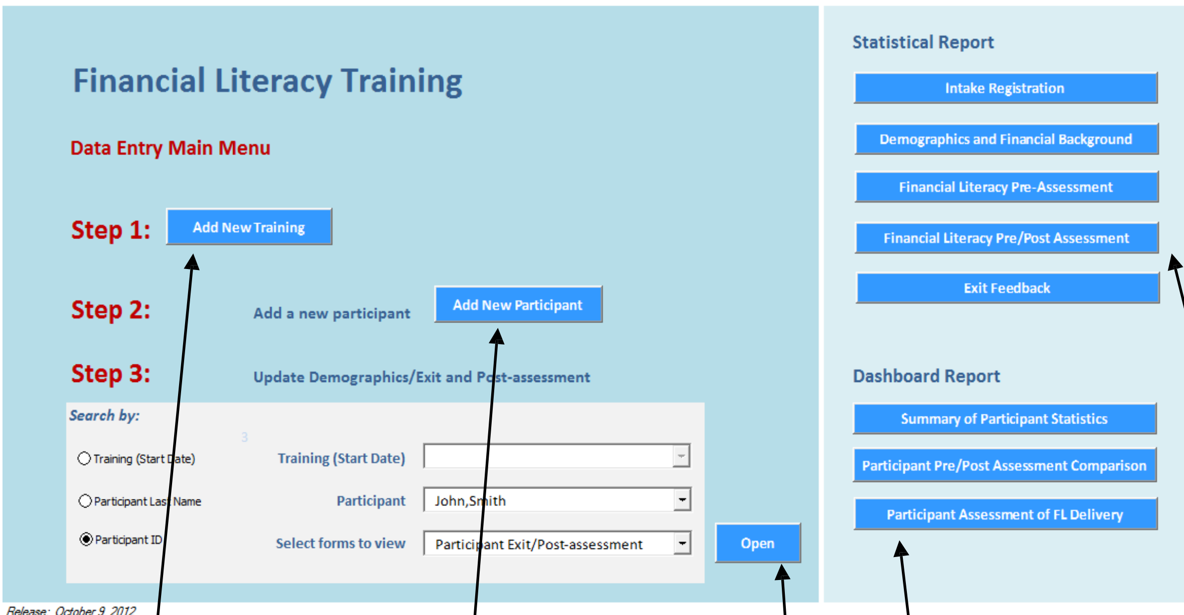
How to use this tool:

Macro must be enabled in order to run the programmed formulas. Depending on the security settings of your system, you may be prompted with a security warning: click 'Options', select 'Enable this content' in the pop-up window and click OK.

Main Menu



<u>Step 1 – Create a training</u>

Data is grouped by 'Training' and can also be retrieved and reported by training.
Click to enter the start date and end date of the training. Training ID is auto-generated by the system. You may want to take note of the training ID for easy reference.

<u>Step 2 – Add a new participant</u>

Click to enter a new participant's intake registration and demographic data.

<u>Step 3 – Update Demographic/Exit and Post-assessment</u>

Select a participant either ***by Training, by Participant Last Name or by Participant ID***. Then select which form you want to view and click 'Open'. It will open a brand new exit and post-assessment form if there isn't one already in the system.

<u>Statistical Report</u>

There are five reports, presented in table format, that display the quantitative data collected in numbers and percentages.
Click the report title to open the report.

<u>Dashboard Report</u>

There are three dashboard reports. They provide a graphic presentation of the data with charts, graphs and tables.
Click the report title to open the report.

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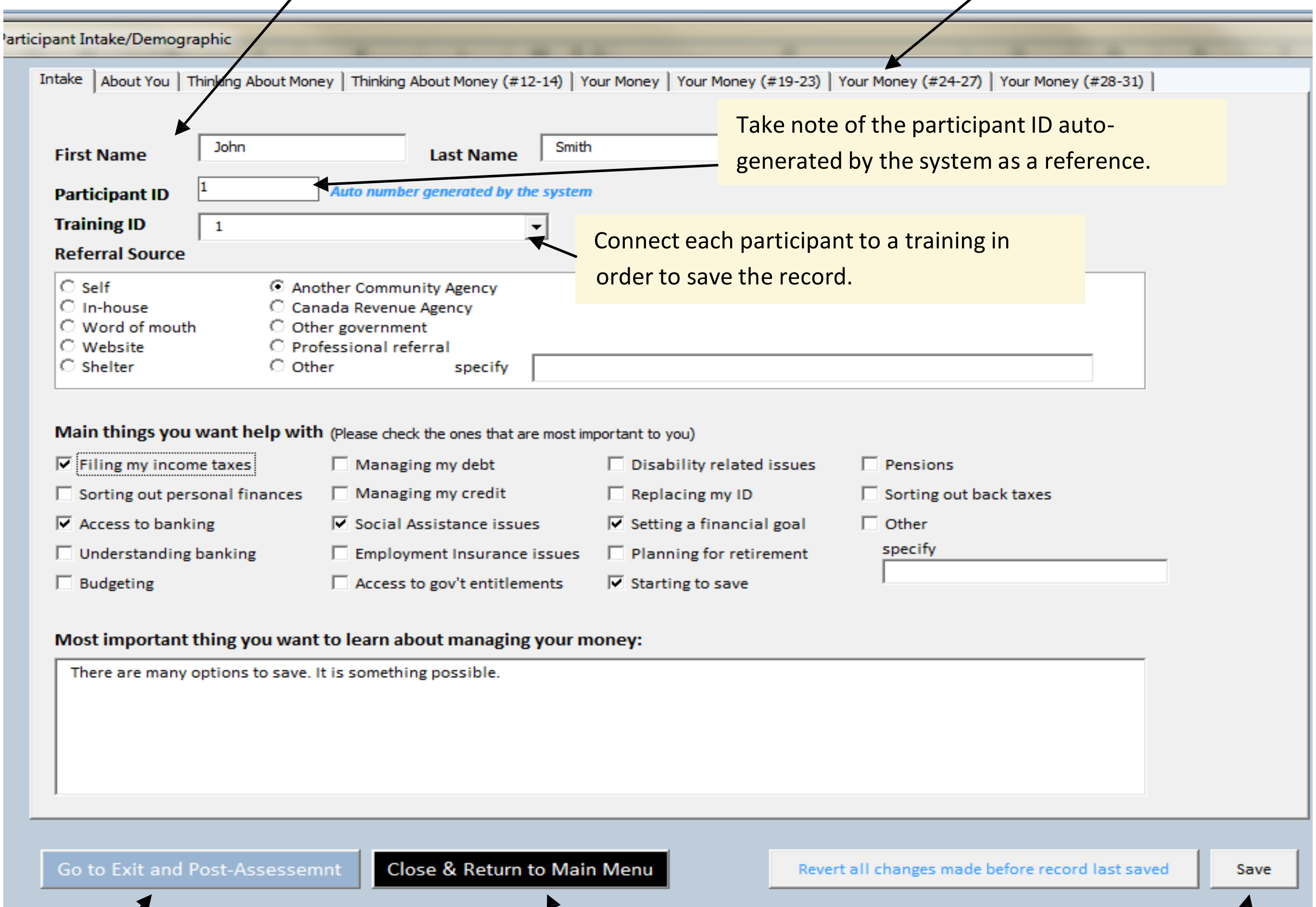
Participant Registration/Demographic

First Name and Last Name are optional but helpful for quick linking and reference to any post-training data.

Tab through the various pages to complete all data entries.



Participant Intake/Demographic

Intake | About You | Thinking About Money | Thinking About Money (#12-14) | Your Money | Your Money (#19-23) | Your Money (#24-27) | Your Money (#28-31)

First Name John **Last Name** Smith

Participant ID 1 *Auto number generated by the system*

Training ID 1

Referral Source

- Self
- In-house
- Word of mouth
- Website
- Shelter
- Another Community Agency (selected)
- Canada Revenue Agency
- Other government
- Professional referral
- Other specify

Main things you want help with (Please check the ones that are most important to you)

- [x] Filing my income taxes
- [ ] Sorting out personal finances
- [x] Access to banking
- [ ] Understanding banking
- [ ] Budgeting
- [ ] Managing my debt
- [ ] Managing my credit
- [x] Social Assistance issues
- [ ] Employment Insurance issues
- [ ] Access to gov't entitlements
- [ ] Disability related issues
- [ ] Replacing my ID
- [x] Setting a financial goal
- [ ] Planning for retirement
- [x] Starting to save
- [ ] Pensions
- [ ] Sorting out back taxes
- [ ] Other specify

Most important thing you want to learn about managing your money:

There are many options to save. It is something possible.

Go to Exit and Post-Assessemnt | Close & Return to Main Menu | Revert all changes made before record last saved | Save

Take note of the participant ID auto-generated by the system as a reference.

Connect each participant to a training in order to save the record.

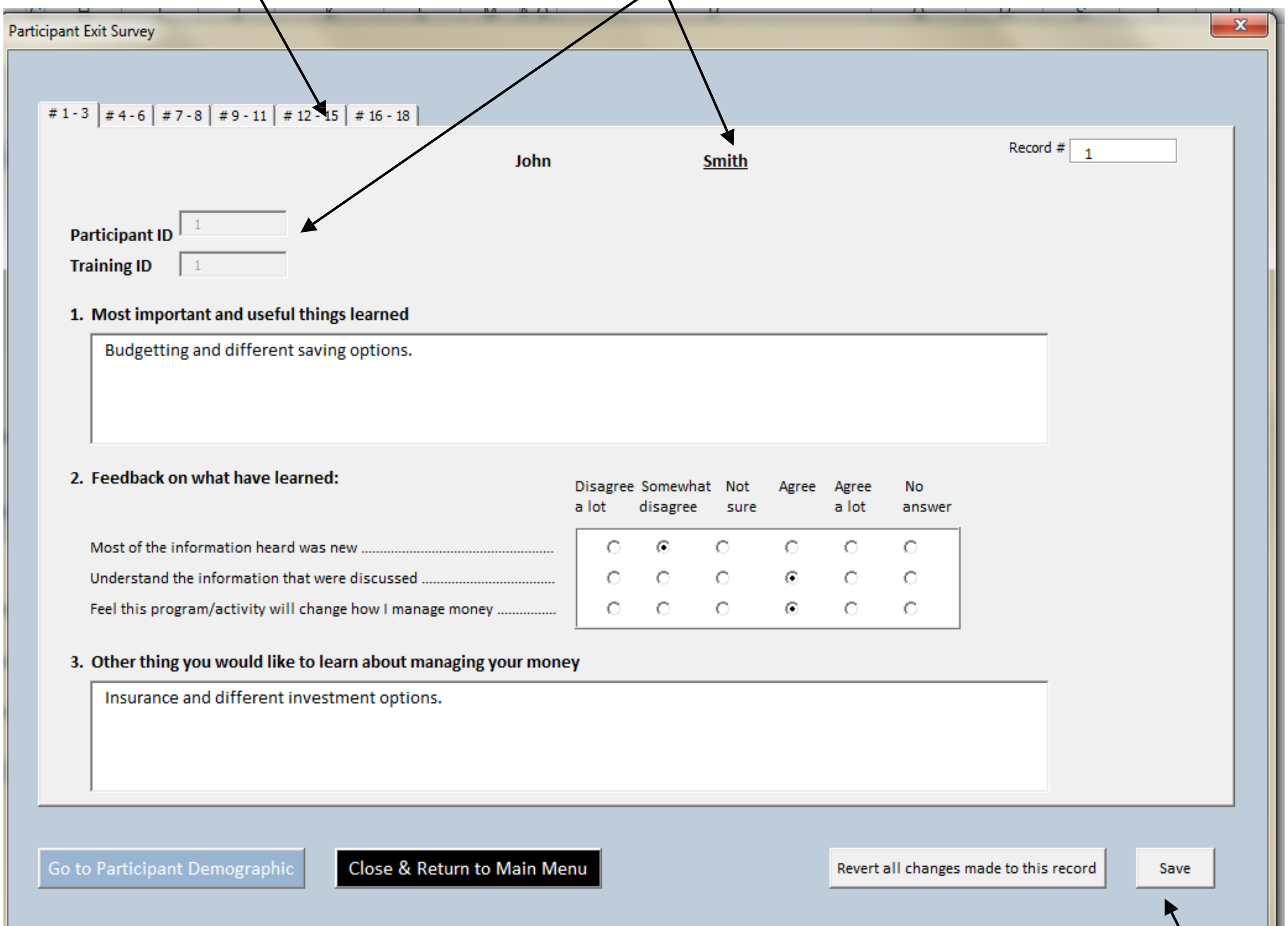
Click to continue to enter the exit and post-assessment data of the participant in view.

Close the form and return to the main menu to add another participant.

Click **'Save'** before closing the form.

Tab through the various pages to complete all data entries.

Names, participant ID and training ID are locked for changes. They are links to the respective participant demographic data, so you can only change the names in the demographic form.



Click **'Save'** before closing the form.

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Statistical Report

There are five reports presented in table format that display the quantitative data collected in numbers and percentages.

Intake Registration - *source of referral and help needed.*
Demographics and Financial Background - *demographics data including income and debt information.*
Financial Literacy Pre Assessment – *budgeting, pre-training attitudes and behaviours on money matters.*
Financial Literacy Pre/Post Assessment – *A comparison on budgeting, attitudes and behaviours on money matters pre and post training.*
Exit Feedback - *Feedback on the training.*

	A	B	C	D
1	**Select Training:**	List All		
		1 8/1/2012		
		3 8/7/2012		
		4 9/14/2012		
		6 9/1/2012		
		8 9/1/2012		
		List All		
2	Total number of Responses			
3	**Demographics**			
4	Area		#	Percentage
5	Gender	Male	5	50.0%
6		Female	4	40.0%
7		Transgender	1	10.0%
8	Age	Under 20	2	20.0%
9		20 to 30	3	30.0%
10		31 to 40	3	30.0%
11		41 to 50	2	20.0%
12		51 to 60	0	0.0%
13		Over 60	0	0.0%
14	First Language	English	7	70.0%
15		French	1	10.0%
16		Other	2	20.0%
17	Place of Birth	Born in Canada	4	40.0%
18		Born outside Canada	6	60.0%
19	Length of stay in Canada	Less than 5 years	3	50.0%
20		5 to 10 years	1	16.7%
21		Over 10 years	2	33.3%
22	Immigration Status	Citizen	3	50.0%
23		Landed immigrant	2	33.3%
24		Refugee or refugee claimant	0	0.0%
25		Undocumented	0	0.0%
26		Other	0	0.0%
	Aboriginal	Yes		

Select the training from the training drop down (listed in order of training ID). You can run the report by individual training or select 'List All' to analyse the full dataset.

Numbers and percentages will be updated automatically.

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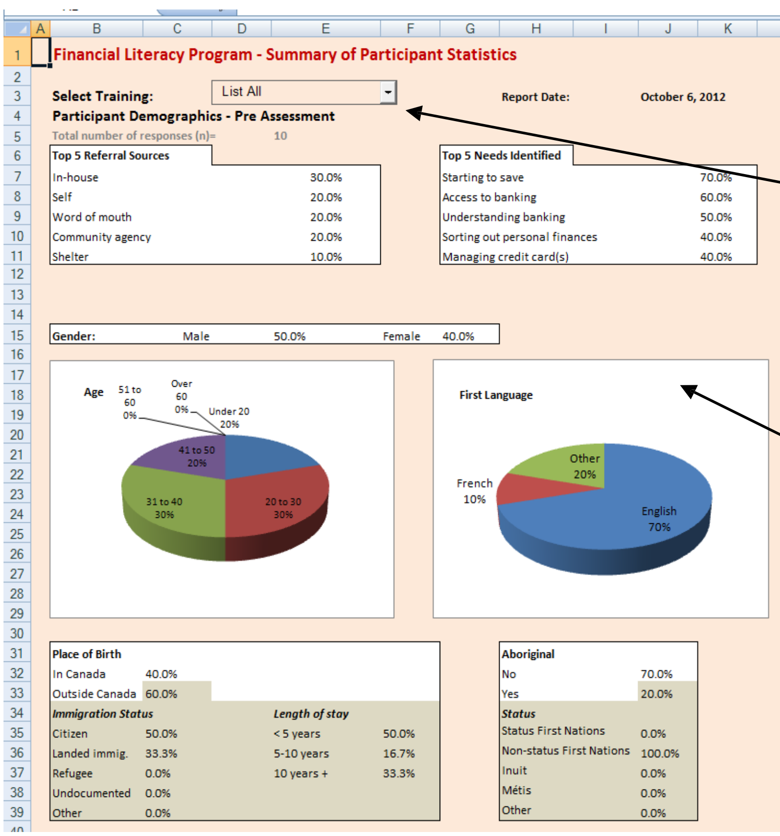
Dashboard Report

There are three dashboard reports:

Summary of Participant Statistics
Participant Pre/Post Assessment Comparison
Participant Assessment of FL Delivery

They provide a graphic presentation of the data with charts, graphs and tables. They also provide additional analysis such as Top 5 savings goal etc.



Select the training from the training drop down, (listed in order of training ID). You can run the report by individual training or select 'List All' to analyse the full dataset.

Numbers and percentages will be updated automatically.

To edit the layout of the charts, go to the top menu – Review, and unprotect the sheet.

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Data Worksheets

There are three worksheets to store the data:

DataTraining *– Training ID, training dates and description*

DataParticPre *– Baseline data collected through the intake registration and demographics and pre-assessment data collection tools.*

DataParticPost *– Outcomes collected through the exit and post-assessment data collection tool.*

Each participant record occupies one row of the worksheet. For flexibility and ease of use, these records are NOT locked and can be deleted. However, deleting or changing data on the worksheet directly can lead to errors. It is recommended that only staff with substantial knowledge of Excel be permitted to edit the data worksheets. Otherwise, changing participant records is best done by editing the forms where the data is initially entered.

Security

Formulas, layout and programming codes are locked for editing. They are protected with a password to ensure system integrity.

Recommendation

We thank you for your interest in downloading the Data Analysis Excel File Template. Please also download the Sample Data File to understand how the system can work for you. You may want to provide us with your contact information to receive any new releases or updates on the system by emailing support@prospercanada.org