

## Introduction

This job aid is intended to provide a quick reference guide for the basic steps to review and edit data previously entered in SMART FACTS. For detailed information, see the SMART FACTS Operations Manual, ch. 7.

## Entering Data in SMART FACTS

This job aid is NOT intended to provide instruction on entering data in SMART FACTS. For data entry guidance, see the SMART FACTS Manual and Job Aids.

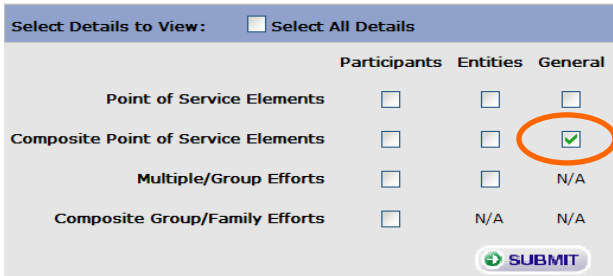
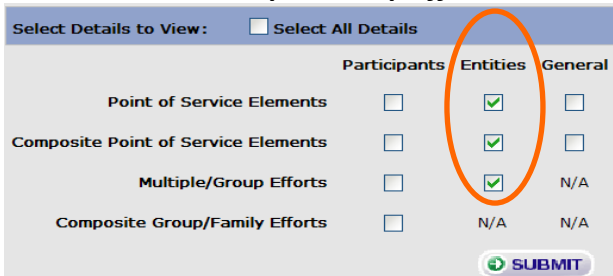
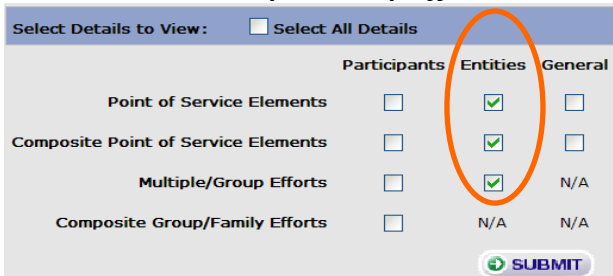
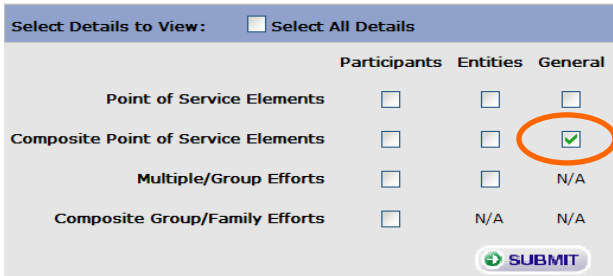
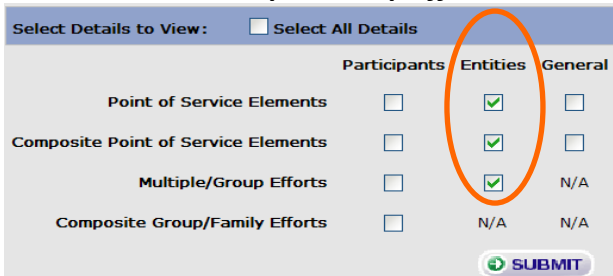
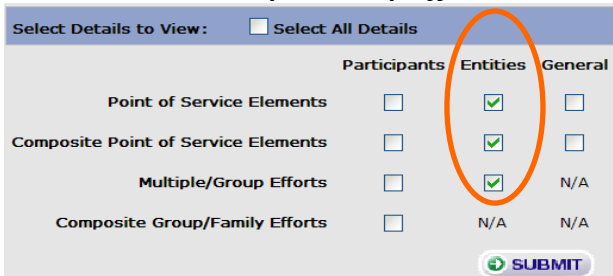
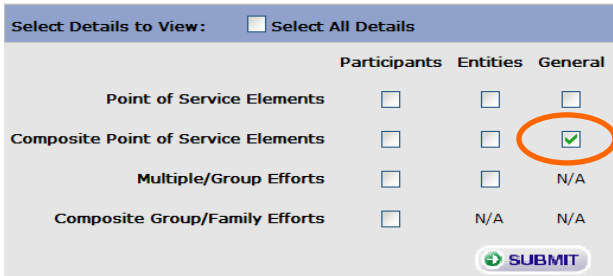
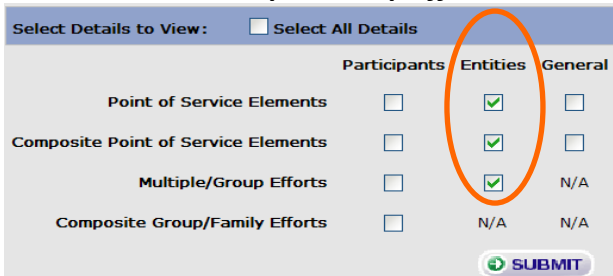
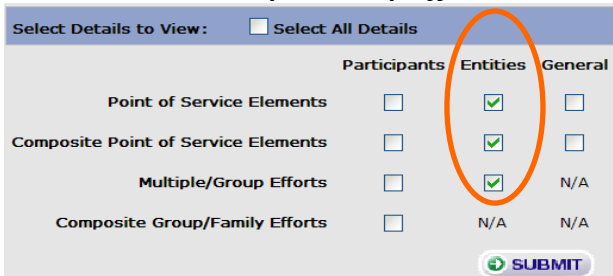
## Overview: Reviewing and Editing Data in SMART FACTS

Several options are available for reviewing and editing data in SMART FACTS, depending on the level of information and your user role.

<p><b><u>My Work (your own data entry)</u></b></p> <ul style="list-style-type: none"> <li>• To review your own data in all programs (except <b>Complex Issues &amp; Referrals</b>), use <b>My Work &gt; Review My Efforts</b> <ul style="list-style-type: none"> <li>○ Review all of your own data for a specific program, or find the date of a specific entry that you need to edit.</li> </ul> </li> <li>• To <b>edit</b> your own data in all programs (except <b>Complex Issues &amp; Referrals</b>), use <b>My Work &gt; Edit My Efforts</b> <ul style="list-style-type: none"> <li>○ Edit a specific entry when you already know the date of the item.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▼ <b>My Work</b> <ul style="list-style-type: none"> <li>To Do List</li> <li>Review My Efforts</li> <li>Edit My Efforts</li> </ul> </li> </ul>
<p><b><u>Staff Work (data entry by other staff)</u></b></p> <ul style="list-style-type: none"> <li>• Available to site and program managers</li> <li>• To review data entered by other SMP staff in all programs (except <b>Complex Issues &amp; Referrals</b>), use <b>Program Administration &gt; Review Staff Efforts</b> <ul style="list-style-type: none"> <li>○ Program Managers: Review data entered by staff users in your SMP.</li> <li>○ Site Managers: Review data entered by staff and program managers in your SMP.</li> </ul> </li> <li>• To <b>edit</b> data entered by other SMP staff in all programs (except <b>Complex Issues &amp; Referrals</b>), use <b>Program Administration &gt; Edit Staff Efforts</b> <ul style="list-style-type: none"> <li>○ Program Managers: Edit data entered by staff users in your SMP.</li> <li>○ Site Managers: Edit data entered by staff and program managers in your SMP.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▼ <b>Program Administration</b> <ul style="list-style-type: none"> <li>Edit Staff Efforts</li> <li>Review Outcome Efforts</li> <li>Review Staff Efforts</li> </ul> </li> </ul>
<p><b><u>Reports (data entry by the entire SMP)</u></b></p> <ul style="list-style-type: none"> <li>• Available to site and program managers</li> <li>• To review data for your entire SMP, use <b>Reports &gt; Letters, Forms &amp; Reports</b>, or <b>ETO Reports</b></li> </ul>	<ul style="list-style-type: none"> <li>▼ <b>Reports</b> <ul style="list-style-type: none"> <li>Letters, Forms &amp; Reports</li> <li>Volunteer/Partner Reports</li> <li>Standard Reports</li> </ul> </li> <li>▼ <b>ETO Reports</b></li> </ul>

Reviewing Data Entered in SMART FACTS: My Work and Staff Efforts

To review data entered in SMART FACTS, take the following steps:

Step	Action								
1	Make sure that you are in the program for which you would like to view data. If not, <b>Change Program</b> to select the correct program.								
2	On the right side menu bar: to review your own work, select <b>My Work</b> , then click <b>Review My Efforts</b> ; to review staff work, select <b>Program Administration</b> , then click <b>Review Staff Efforts</b> .								
3	On the left, enter the date range (or use date links) for the data you would like to review, then click <b>Submit</b> .								
4	On the <b>Review My (or Staff) Efforts</b> screen, you will see the program selected in the upper left corner. If a different program is desired, click <b>View other Programs</b> in the middle of the screen.								
5	<p>Scroll down through the <b>Summary Statistics</b> section to the <b>Select Details to View</b> section. Check the appropriate boxes for the program you are in (see below), then click <b>Submit</b>.</p> <table border="1"> <thead> <tr> <th>Program</th> <th>Boxes to checkmark</th> </tr> </thead> <tbody> <tr> <td><b>Outreach &amp; Education</b></td> <td> <p>For the Outreach &amp; Education program, in the <b>General</b> column, select <b>Composite Point of Service Elements</b></p>  </td> </tr> <tr> <td><b>Volunteer Tracking &amp; Management</b></td> <td> <p>For the Volunteer Tracking &amp; Management and Partnership Development programs, in the <b>Entities</b> column, select all three boxes: <b>Point of Service Elements</b>, <b>Composite Point of Service Elements</b>, and <b>Multiple/Group Efforts</b>.</p>  </td> </tr> <tr> <td><b>Partnership Development Program</b></td> <td>  </td> </tr> </tbody> </table> <p><i>* These terms are defaults for ETO Software and cannot be changed.</i></p>	Program	Boxes to checkmark	<b>Outreach &amp; Education</b>	<p>For the Outreach &amp; Education program, in the <b>General</b> column, select <b>Composite Point of Service Elements</b></p> 	<b>Volunteer Tracking &amp; Management</b>	<p>For the Volunteer Tracking &amp; Management and Partnership Development programs, in the <b>Entities</b> column, select all three boxes: <b>Point of Service Elements</b>, <b>Composite Point of Service Elements</b>, and <b>Multiple/Group Efforts</b>.</p> 	<b>Partnership Development Program</b>	
Program	Boxes to checkmark								
<b>Outreach &amp; Education</b>	<p>For the Outreach &amp; Education program, in the <b>General</b> column, select <b>Composite Point of Service Elements</b></p> 								
<b>Volunteer Tracking &amp; Management</b>	<p>For the Volunteer Tracking &amp; Management and Partnership Development programs, in the <b>Entities</b> column, select all three boxes: <b>Point of Service Elements</b>, <b>Composite Point of Service Elements</b>, and <b>Multiple/Group Efforts</b>.</p> 								
<b>Partnership Development Program</b>									

Reviewing Data Entered in SMART FACTS: My Work and Staff Efforts, *continued*

6	Scroll down through the summary statistics section again, until you see the button: <b>Open All Toggles</b> .
7	Scroll to the green headings (i.e. <b>General...</b> ), and click <b>Toggle Point of Service Element Details</b> to the right of any item you wish to review in detail. If an additional option to <b>Toggle Client Details</b> appears, click on it. All details will appear for the selected activity during the selected timeframe.
8	Repeat as needed for additional activities, or to view all activity in this program, click <b>Open All Toggles</b> .  <b>Tip:</b> To close the detailed list, click each individual <b>Toggle</b> link again, or click the button which now says <b>Close All Toggles</b> .
9	To print, scroll to the top and click the <b>Print</b> button in the upper right corner of the screen.  <b>Note:</b> All open toggles will be included in the printout, which may lead to multiple pages being printed.
10	To view data for other programs in SMART FACTS, see step 4.

Editing or Deleting Data Entered in SMART FACTS: My Work and Staff Efforts

To edit or delete data entered in SMART FACTS, take the following steps:

Step	Action				
1	Identify the date of the activity which appears in SMART FACTS. <b>Tip:</b> To find the date, take the steps above to review data.				
2	<b>Change Program</b> as needed to select the appropriate program.				
3	<ul style="list-style-type: none"> <li>To edit or delete your own work, select <b>My Work</b>, then click the sub-topic <b>Edit My Efforts</b>.</li> <li>To edit or delete staff work, select <b>Program Administration</b>, then click the sub-topic <b>Edit Staff Efforts</b>.</li> </ul>				
4	Select the date for the activity to edit or delete. Click <b>Submit</b> .				
5	Scroll down to find the item you wish to edit or delete. <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; text-align: center;"><b>Edit</b></td> <td>To edit the item, click <b>Edit Composite Effort</b>. Make changes as needed. Scroll down to click <b>Update Effort</b>.</td> </tr> <tr> <td style="text-align: center;"><b>Delete</b></td> <td>To delete the item, click the <b>Delete Composite Effort</b> link, then click <b>Yes</b> to confirm the deletion.</td> </tr> </table>	<b>Edit</b>	To edit the item, click <b>Edit Composite Effort</b> . Make changes as needed. Scroll down to click <b>Update Effort</b> .	<b>Delete</b>	To delete the item, click the <b>Delete Composite Effort</b> link, then click <b>Yes</b> to confirm the deletion.
<b>Edit</b>	To edit the item, click <b>Edit Composite Effort</b> . Make changes as needed. Scroll down to click <b>Update Effort</b> .				
<b>Delete</b>	To delete the item, click the <b>Delete Composite Effort</b> link, then click <b>Yes</b> to confirm the deletion.				

**More Options for Editing/Viewing Volunteer/Partner Data in SMART FACTS**

Step	Action
1	Make sure you are in the correct program (Volunteer Tracking and Management or Partnership Development).
2	<ul style="list-style-type: none"> <li>To edit volunteer profile information, use <b>View/Edit Volunteer / Partner</b>.</li> <li>To review data entered for a specific volunteer, use <b>Review Volunteer / Partner Work</b>.</li> </ul>
	For more information on Volunteer Data entry, see the SMART FACTS Operations Manual, chapter 5, and/or the Volunteer Tracking and Management Job Aid.

**Reviewing Your Entire SMP’s Work in SMART FACTS (Reports)**

- Available to site and program managers
- To review data for your entire SMP, use:
  - **Reports > Letters, Forms & Reports**
  - **ETO Reports**
    - **Tip:** Make sure you are in the correct program before using ETO Reports!
    - **Inquiry/Outreach Report:** Outreach and Education program
    - **Volunteer/Partner Work Report:** Volunteer Tracking and Management program or Partnership Development program
- For more information on Reports, see the SF Manual, chapter 7 and the Reports Basics Job Aid.



**SMP Resources: My Work**

Resource	Purpose	Access Instructions
SMART FACTS Operations Manual, ch. 7	Reports and Data Management Tools in SMART FACTS	<a href="http://www.smpresource.org">www.smpresource.org</a> > Resources for SMPs > SF, or SF home page: <a href="http://smartfacts.etosoftware.com">http://smartfacts.etosoftware.com</a> , or contact The Center
SMART FACTS Job Aids	Quick reference guides on various topics in SMART FACTS	<a href="http://www.smpresource.org">www.smpresource.org</a> : Resources for SMPs > SMART FACTS > SMART FACTS Training
The SMP Resource Center (The Center)	Policy guidance and questions about SF data entry and the SF Manual	E-mail: <a href="mailto:hflory@smpresource.org">hflory@smpresource.org</a> , <a href="mailto:sengenlken@smpresource.org">sengenlken@smpresource.org</a> , or <a href="mailto:gpaulson@smpresource.org">gpaulson@smpresource.org</a> Call: 1-877-808-2468