

## Metrics Steps

1. Purchase the Metrics Account [here](#)
2. Set up the market's organizational account in Metrics. This is only done ONCE. This is the basic contact info for the Metrics account and address of the organization and how FMC will remain in touch with the account. We recommend you use a market email and not a personal email. Write down the info; we cannot retrieve the password for you. If you lose it, you will have to assign a new password for your account from the FMC member log in screen. The Metrics account and the FMC member log in user I.D. is the same.
3. Once the Metrics account is set up, set up the market profiles for which you will be collecting data. For each different market site that your organization operates, a different market profile can be set up. If you hold a market at the same site on two different days with different vendors and hours, and want to collect data on both, we recommend you set that up as two separate markets adding the Day into the title (Tuesday Rose Market or Rose Market-Tuesday). The market profile is detailed information about that market site which will help anyone who is looking at your data understand the context of the market site and is included in the Summary Report with your data. The profile itself can be downloaded and used as an intro to a funder or to help a new vendor understand the market operation.

4. Once market profiles are set up, you will want to set up market seasons. This is one way for you to set up many different data sets, as each market can have as many seasons as you want to create in here. This will allow you to name the seasons and choose the market dates that are calculated in each season. For example, let's say you have a market that operates year-round but you want to collect data on the dates that the WIC FMNP program is operating. The season can be named WIC FMNP and the dates chosen for that season.
5. Now that market profiles and seasons are set up, you click on the blue market name and can enter data.
6. There are many types of data that can be entered: A market can enter data about each vendor (which we know sounds super appealing but we want to caution first timers about this and later on offer some options so forget this for now), it can survey or count a sampling of visitors or products, or it can enter data about the market day including sales totals and events. Deciding what data is collected is a crucial step to consider and one that the FMC staff has many resources for you to use to make that decision. We recommend that a market new to collection or with limited staff or volunteers, start small!  
One good way to start is to choose a sampling of days within a longer season on which to collect market day data. For example:  
If a market is open for 6 months, it might decide to collect data on the *first market day of each month* for those 6 months, or it might collect data for just *one month* during

that season. What is most important is that the data you collect is representative and correct, so a smaller, defined set of days is easiest at the beginning.

7. To enter data: either click on the blue highlighted name of the market or click on market data to the right of the market name. This brings you to the Market Data set of tabs. The two choices where data can be entered are Market Day Data or Tally and Survey Data. For each, there are subsets of data (such as Visitor Counts or Visitor Surveys). Once there, all have an “Add Data” command in yellow. By clicking on that, you see the fields that are possible for you to collect under each tab. You choose the season and the day for the data from the drop down.
8. Online Collection allows someone to be on the computer and adding data while within your account. This is helpful if you gathered data on paper to be entered later. Offline allows you to set up the data collection fields you want collected and then send a link so that someone with WIFI and a tablet or phone could be at the market collecting and entering the data while there. Either way, we strongly recommend that a manager or a survey support person look through all of the entries at a later date to check for mistakes.
9. Required data: for each section there is VERY LITTLE that HAS to be entered. For example, for Market Day data, the season, date, # of vendors, # of farm vendors and the weather *is all that is required*. All the other fields are optional. For the visitor survey, the date and season is all

that is required. You will also notice you can “toggle” the q in the Visitor Survey on or off while you are setting up the survey so you can hide them from surveyors.

- 10.** Market Day Data is where you add sales. Metrics is set up for adding aggregated sales for the day for all types of currencies. You will notice a Manage Currencies tab up top to type in the names of currencies you want to collect data; it allows you to “toggle off” those you do not want to collect data so they will not show up. When adding currencies, PLEASE be sure you are using the EXACT name - including proper capitalization - of any shared currencies (which includes incentives).
- 11.** Once data is entered and verified, **check out the** dashboards and the reports functions. The dashboards allow you to choose the dates of the data included but the data cannot be changed in each dashboard- what is showing is what you get! You can also download the dashboards as a report.
- 12.** The Reports Tab is the place where the individual data points (widgets) can be chosen and sent out to social media or downloaded or printed. Or you can run one Summary Report with up to 6 widget showing. You can choose the dates, you can change which widgets appear (if there are 6 chosen already then you must delete one to add another), and you can edit most of the narrative on the report, which is drawn from your market profiles. You CANNOT change the actual data; the only way that changes is by going back to your market data

area and deleting or editing a specific entry, or by changing the dates.

- 13.** Each widget can be pushed to social media or downloaded or printed. It will push to the social media account for which the computer you are working on is logged in.
- 14.** If you did create multiple market profiles and have entered data for all of them, you can also choose an organizational report with more than one market sites data collected into one report. Choose the “Org Metrics Report” from the left set of commands, choose the dates, the markets that you want added in, and the widgets. If you do change the markets included, hit “Reload Widgets.”

Quick tip on the dates: if you want to move quickly between years, click the date again and it will change from a monthly calendar to a yearly one. Once in the new year, choose the day and month.

- 15.** Excel export is to the left under Exports. Market Data includes all Market Day, Visitor Data and Vendor Data too. Ignore Vendor Sales (it’s an old command and we just haven’t pulled the plug on it yet). We strongly recommend you also download this for the same data you are using the Reports function for as a backup and as a double check.

