SUCCESS MEASURES® DATA SYSTEM

User Guide

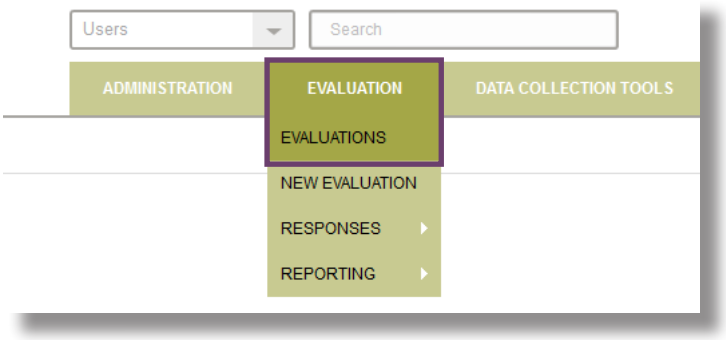
Generating Spreadsheet Templates and Importing Location Data

Generating Spreadsheet Templates and Importing Location Data

SMDS allows you to import responses using a system-generated excel template. Responses can be uploaded to any tool in an active evaluation. Entering data into a system-generated excel spreadsheet is useful if you will be collecting data on a tablet in the field but do not have internet access. From SMDS, you can download a spreadsheet for any tool, enter responses into the spreadsheet, and import those responses into SMDS.

Generating Spreadsheet Templates

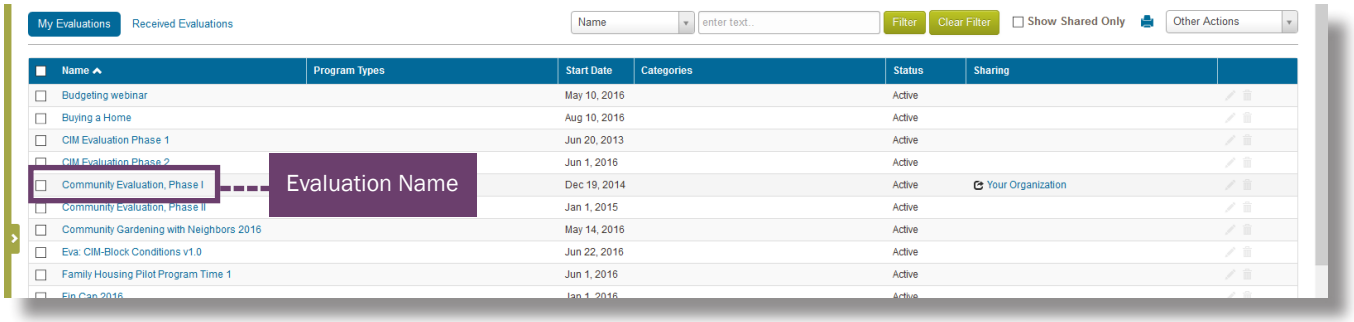
- Login to SMDS.
- Place your cursor over the **Evaluation** link.
- Click the **Evaluations** link.



A list of evaluations is displayed. This list includes both Active and Draft evaluations. Only Active evaluations can generate spreadsheets.

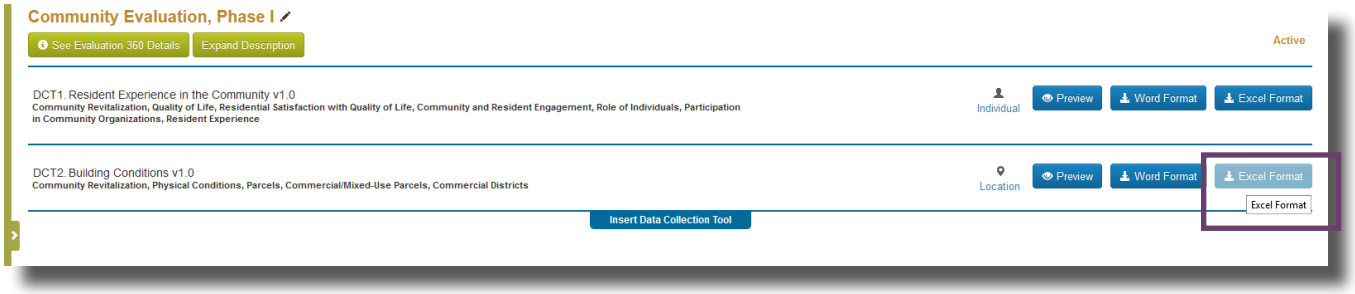
TIP: If you do not yet have an active evaluation in your SMDS account, use the guide for Creating an Evaluation.

- Click the **Name** of the evaluation.



A list of tools in that evaluation is displayed. Find the tool you will use in the list.

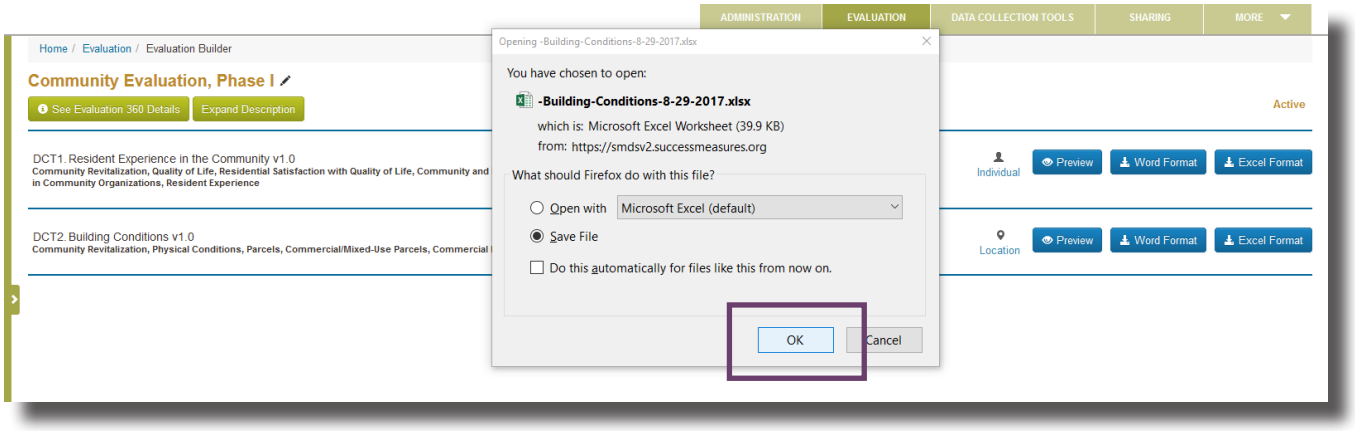
- Click the **Excel Format** button for that tool.



When you click the **Excel Format** button, you will be given the option to Open or Save an Excel worksheet template of the evaluation tool onto your desktop.

TIP: If you are downloading an excel spreadsheet of a tool with multiple languages available, SMDS will ask you which language you want to use for your excel spreadsheet.

- Click the **Save** button.

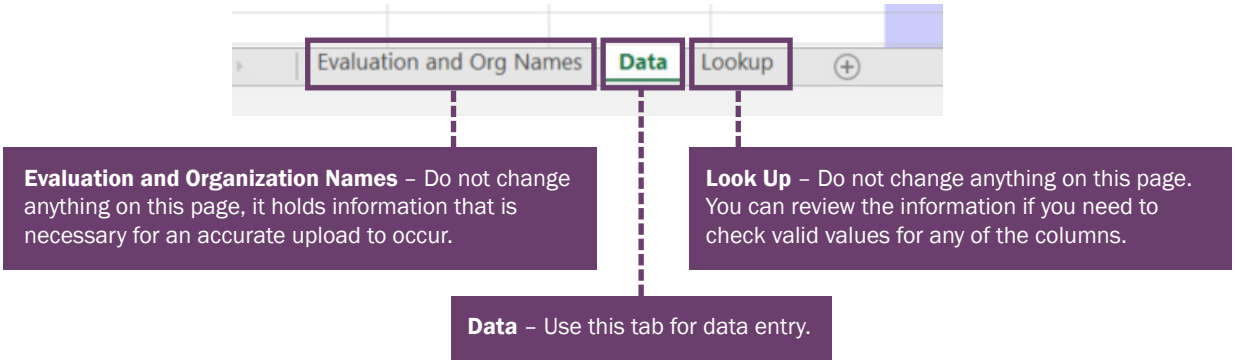


TIP: Consider renaming the document to a name that you will easily remember.

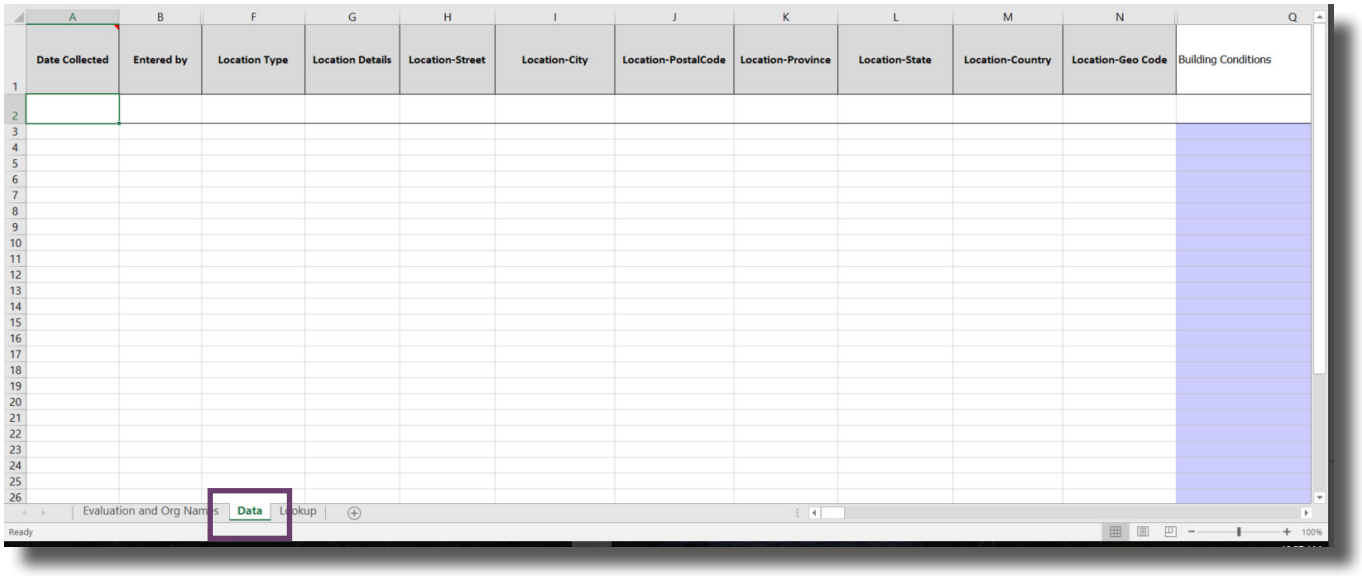
TIP: DO NOT make any changes to the layout of the template. Do not create new columns, delete columns, or move columns.

You must use the spreadsheet generated from the evaluation in SMDS. **Do NOT try to use an excel spreadsheet you created on your own.**

The downloaded worksheet will have three tabs.

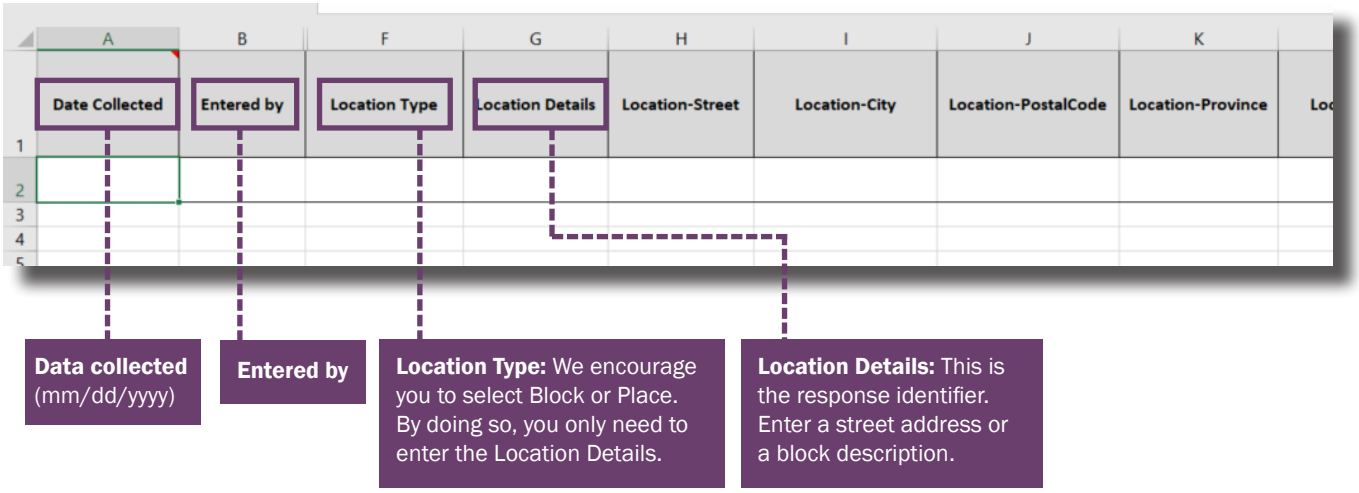


- Click the **Data tab**. This is where responses will be entered.



There are 4 columns that must be populated in order for you to import data:

1. Date Collected
2. Entered by
3. Location Type
4. Location Details

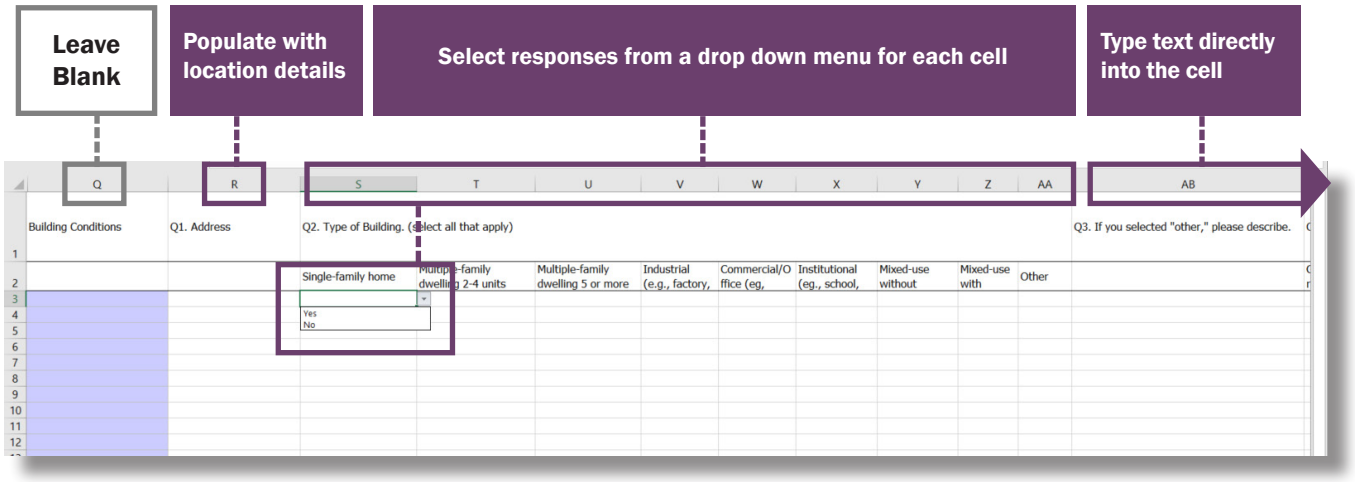


TIP: If entering a block description, be sure to label blocks in a way that can be easily identified by other staff or volunteers on a map. For example, the 400 block of W. Main, or West Main between Oak and Elm.

TIP: If you label your observation as Block or Place, you do NOT fill out any column after Location Details. You can go right to Question 1.

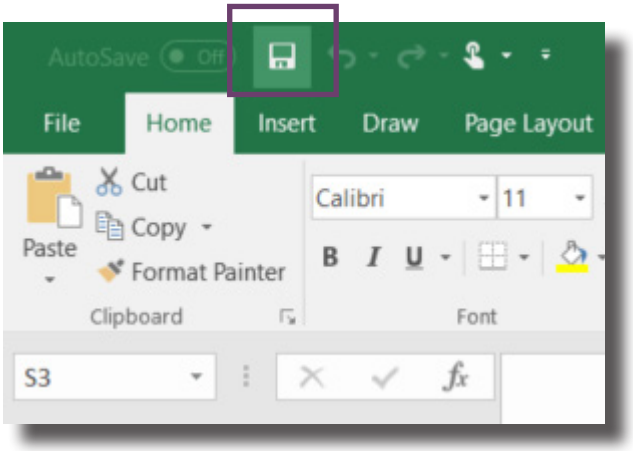
Instructions for Entering Data

- **Instruction columns are to be left blank** and have a blue background, such as column Q.
- **Q1, Column R, can be populated with the Location Details** from Column G, or you can leave it blank.
- **Q2, starting in Column S, has answer choices in a drop down menu for each cell.** Place your cursor in the cell to see the choices and select your answer.
- **Q3, starting in Column AB, asks for a description and you type the text directly into the cell.**



Continue through the spreadsheet, either typing in answers or selecting answers from drop down menus.

Save your spreadsheet frequently, and when finished.

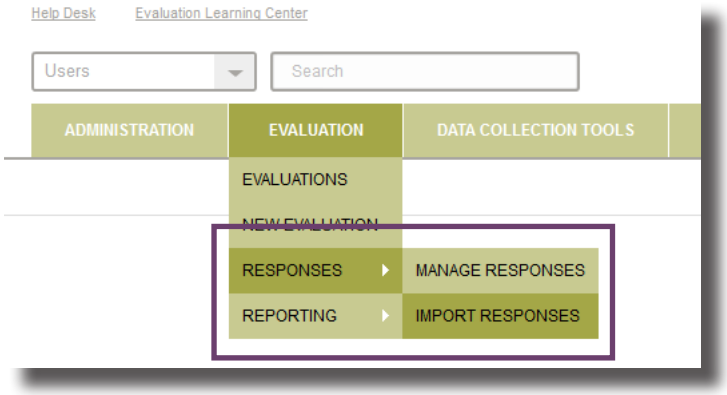


Importing Responses from a System-Generated Excel Spreadsheet

Before uploading your data, please review the following:

1. Check to make sure data looks populated correctly. Make sure there is no misplaced typing, and no hanging rows at the bottom with a response number but no data.
2. Make sure you have properly populated the columns for Date Collected, Entered by, Location Type, and Location Details.
3. Finally, scroll through the entire file and look for anything in your data that looks out of place.

- Place your cursor over the **Evaluation** link.
- Place your cursor over the **Responses** link.
- Click the **Import Responses** link.



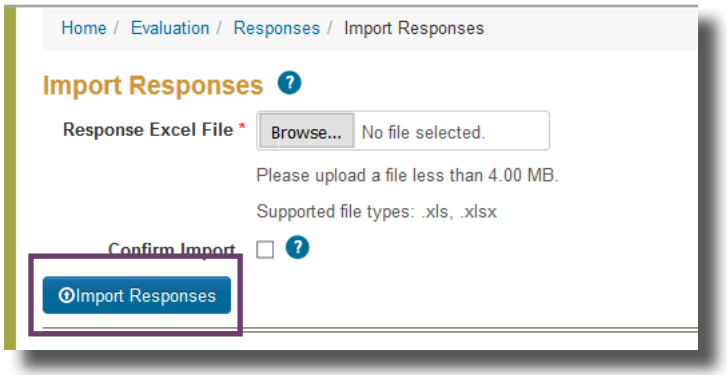
The Import Responses page will display.

You will first run the import in “Simulation” mode to see if there are errors in the data that would prohibit the upload. This means you will run the import the first time **without clicking the Confirm Import Box**. When the simulation runs error-free, then you will run it in full mode to import responses into the system.

- Click the **Browse** button. Navigate to the excel spreadsheet to upload to SMDS.

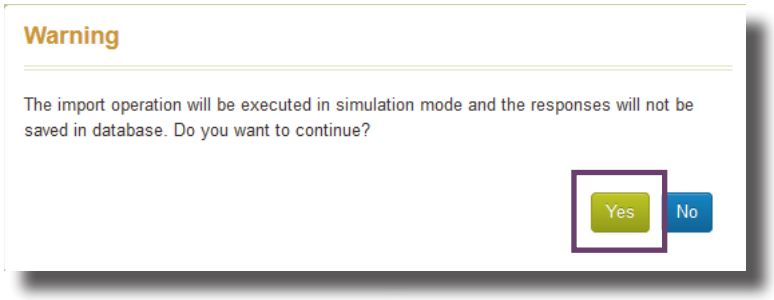
Leave the Confirm Import checkbox unchecked. This will allow the system to review your data and indicated if there are errors.

- Click the **Import Responses** button.



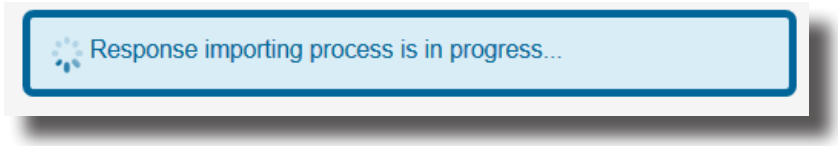
A dialogue box will appear, warning that the import is being executed in simulation mode.

- Click **Yes** in the dialogue box.



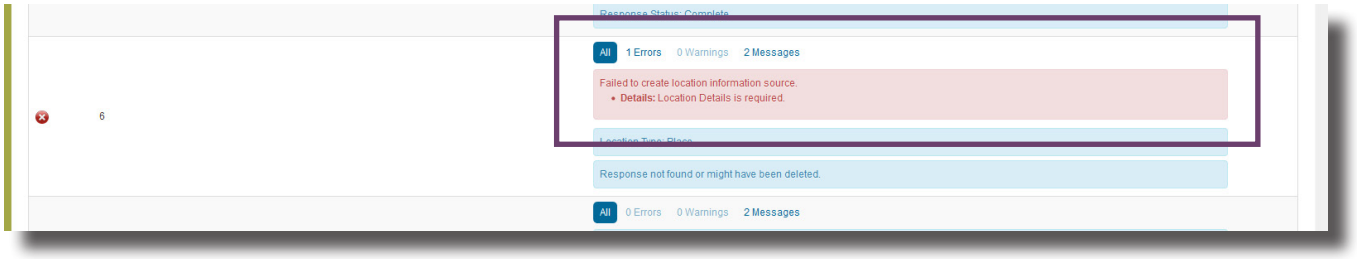
The initial review by the system of the data may take up to a minute if it is a large file. While the system is reviewing, you will a message on the screen that tells you it is working.

TIP: If your spreadsheet has a very large amount of data on it, you may need to split it into 2 spreadsheets for importing.



When the system's review of your excel data is complete, the system will tell you if there were errors that would negate the upload. Errors are listed in pink.

In this example, there was an error.



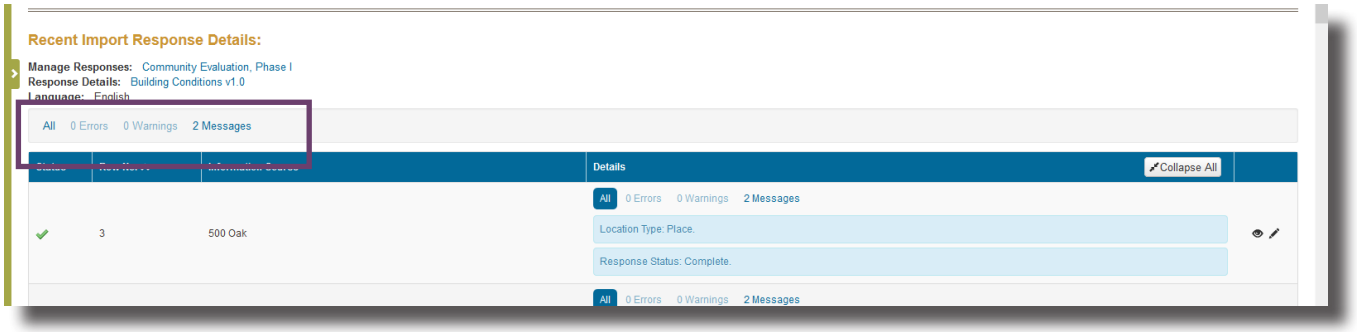
The system provides details about errors. Read the explanation to locate the error.

You will need to go back into your excel document to fix the error in your spreadsheet.

TIP: A common error may be if you didn't use the drop down list of answer options but instead typed the answer into the cell, which may result in a typo or added space within the answer.

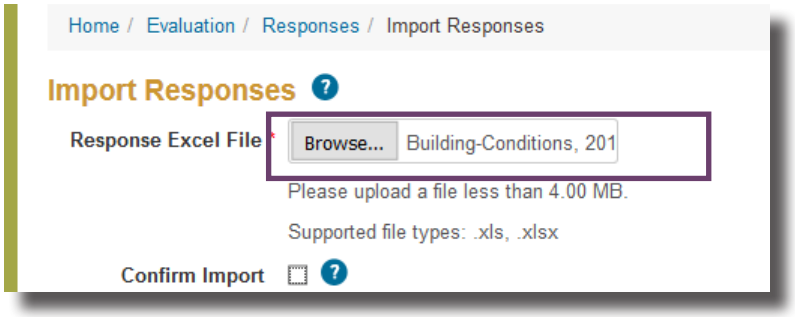
After fixing your errors, upload your document again **without** checking the **Confirm Import** checkbox.

When there are no errors in your excel data the system will show you a page with a list of responses info, it will tell you there are 0 errors, and each response item will have a check mark indicating that it is correct.

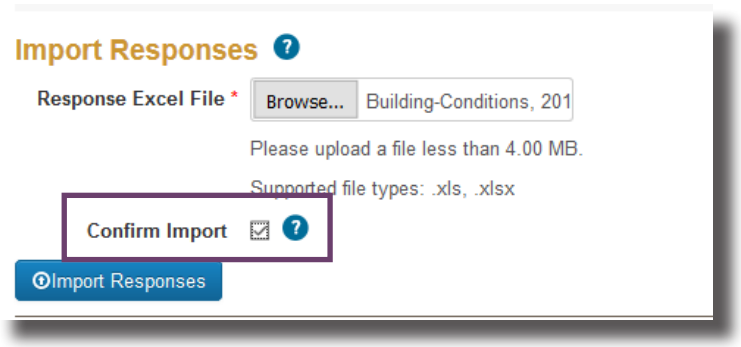


Once the Simulation process is showing that there are no errors, you are ready to do the import with the "Confirm Import" checkbox selected. This will complete the process of placing the response data into your evaluation.

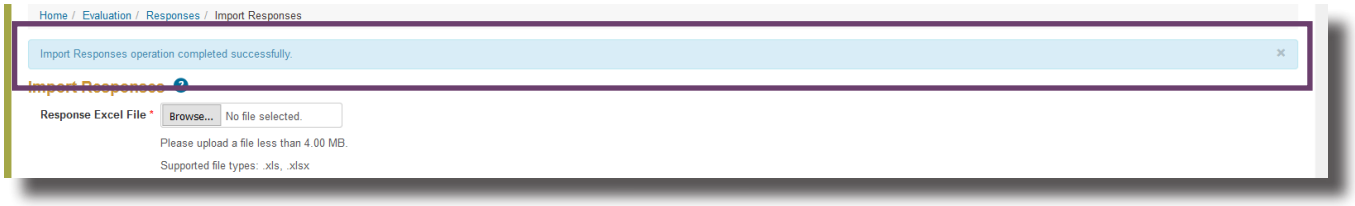
- Click the **Browse** button. Navigate to the excel spreadsheet to upload to SMDS.



- Select the **Confirm Import** checkbox.
- Click **Import Responses** button.

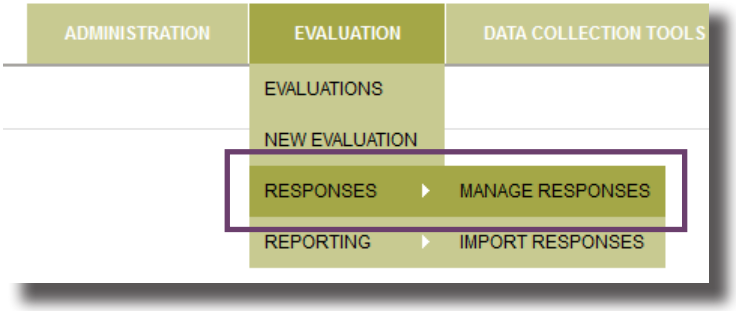


The system will complete the import and your responses will be added to your evaluation. The system will tell you that the Import Response operation completed successfully in a small light blue band at the top of the page.

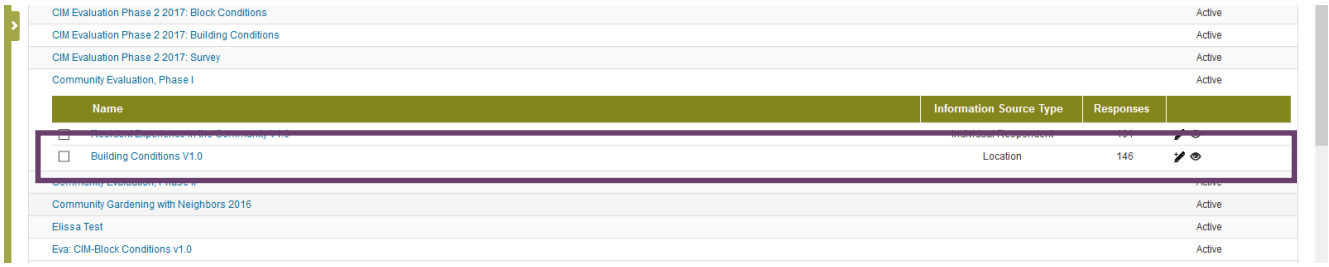


To confirm that the import was successful, you can go into your Manage Responses page to make sure the new responses are there.

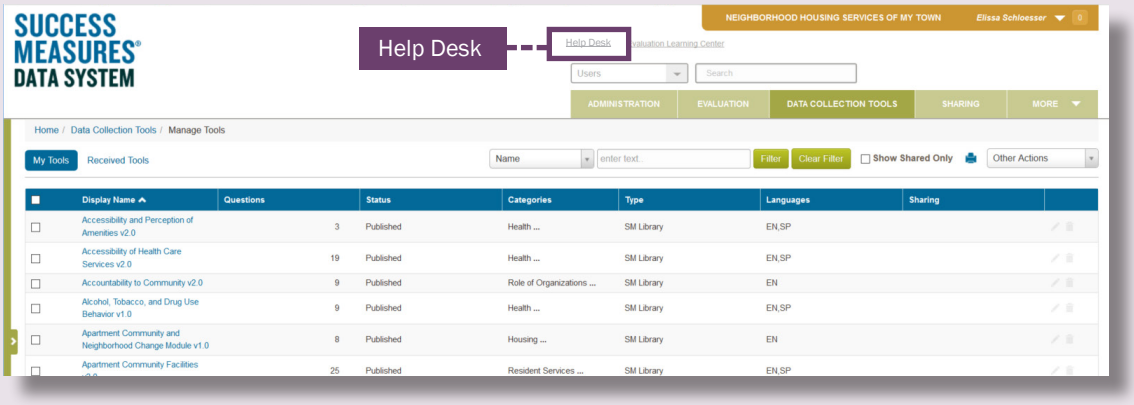
- Place your cursor over **Evaluation**
- Place your cursor over **Responses**
- Click **Manage Responses**



- Click the link for the evaluation



From there, you will see the tool with the # of responses. You can click the link for the tool to look at individual responses as well.

Need additional help?

- Click the **Help Desk** link at the top of the screen to find more guides on Customizing Tools and Question Formats. These guides are helpful resources as you work in the Tool Builder.
- If you have any questions or encounter any problems, please submit a help desk ticket.