

User Guide

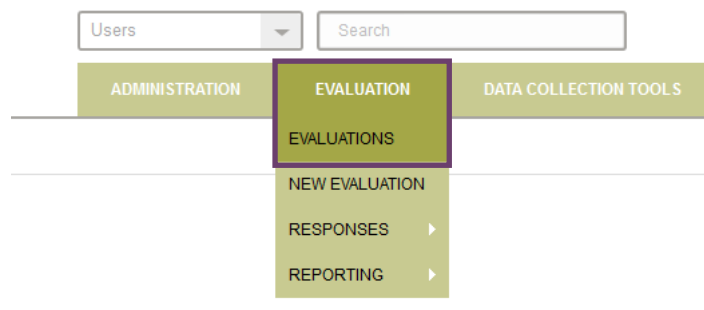
Generating Spreadsheet Templates and
Importing Survey Data

Generating Spreadsheet Templates and Importing Survey 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.

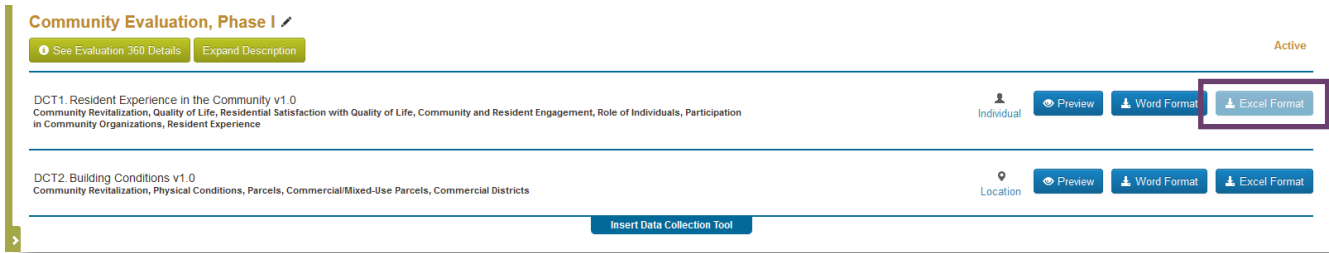
- Click the **Name** of the evaluation.

The screenshot shows the 'My Evaluations' table in SMDS. The table has columns for Name, Program Types, Start Date, Categories, Status, and Sharing. The 'Name' column is highlighted with a purple box, and a callout points to the 'Community Evaluation, Phase I' row.

| Name | Program Types | Start Date | Categories | Status | Sharing |
|--|---------------|--------------|------------|--------|-------------------|
| <input type="checkbox"/> Budgeting webinar | | May 10, 2016 | | Active | |
| <input type="checkbox"/> Buying a Home | | Aug 10, 2016 | | Active | |
| <input type="checkbox"/> CIM Evaluation Phase 1 | | Jun 20, 2013 | | Active | |
| <input type="checkbox"/> CIM Evaluation Phase 2 | | Jun 1, 2016 | | Active | |
| <input type="checkbox"/> Community Evaluation, Phase I | | Dec 19, 2014 | | Active | Your Organization |
| <input type="checkbox"/> Community Evaluation, Phase II | | Jan 1, 2015 | | Active | |
| <input type="checkbox"/> Community Gardening with Neighbors 2016 | | May 14, 2016 | | Active | |
| <input type="checkbox"/> Eva: CIM-Block Conditions v1.0 | | Jun 22, 2016 | | Active | |
| <input type="checkbox"/> Family Housing Pilot Program Time 1 | | Jun 1, 2016 | | Active | |
| <input type="checkbox"/> Fin Cap 2016 | | Jan 1, 2016 | | Active | |

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

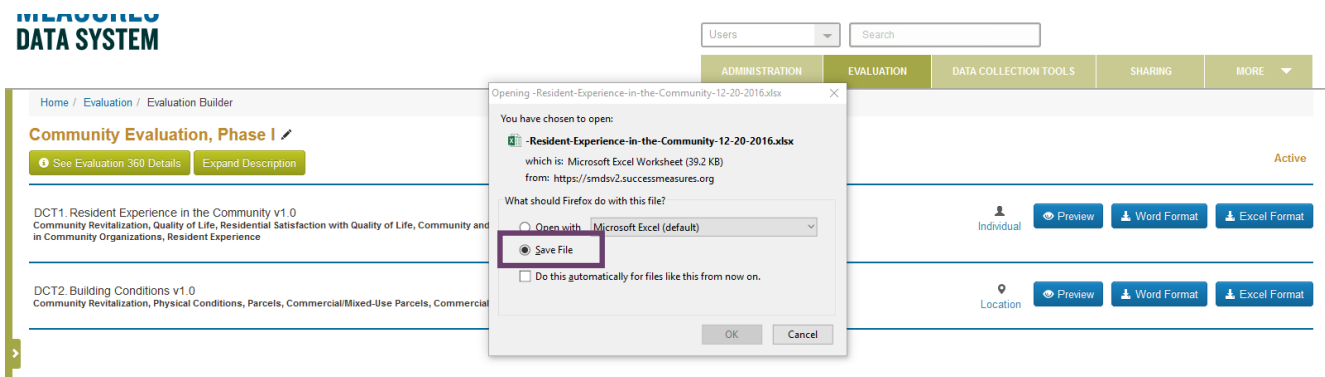
- Click the **Excel Format** button for that tool.



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.

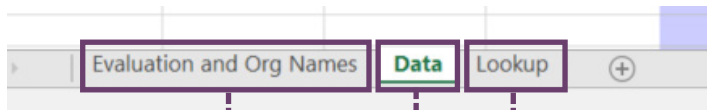


TIP: Consider renaming the document to a name that you will easily remember.

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.



Evaluation and Organization Names – Do not change anything on this page, it holds information that is necessary for an accurate upload to occur.

Look Up – Do not change anything on this page. You can review the information if you need to check valid values for any of the columns.

Data – Use this tab for data entry.

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

A screenshot of the 'Data' tab in the spreadsheet. The table has the following columns: 'Date Collected', 'Entered by', 'Respondent', 'AlternateID', 'Resident Experience in the Community', 'Please answer the following questions about the community in which you live.', 'Q1. Address:', and 'First, we'd like to know your thoughts about living in your community.' The 'Data' tab is highlighted with a green border. The table contains rows 1 through 24, with rows 2 through 24 highlighted in light blue.

| | Date Collected | Entered by | Respondent | AlternateID | Resident Experience in the Community | Please answer the following questions about the community in which you live. | Q1. Address: | First, we'd like to know your thoughts about living in your community. |
|----|----------------|------------|------------|-------------|--------------------------------------|--|--------------|--|
| 1 | | | | | | | | |
| 2 | | | | | | | | |
| 3 | | | | | | | | |
| 4 | | | | | | | | |
| 5 | | | | | | | | |
| 6 | | | | | | | | |
| 7 | | | | | | | | |
| 8 | | | | | | | | |
| 9 | | | | | | | | |
| 10 | | | | | | | | |
| 11 | | | | | | | | |
| 12 | | | | | | | | |
| 13 | | | | | | | | |
| 14 | | | | | | | | |
| 15 | | | | | | | | |
| 16 | | | | | | | | |
| 17 | | | | | | | | |
| 18 | | | | | | | | |
| 19 | | | | | | | | |
| 20 | | | | | | | | |
| 21 | | | | | | | | |
| 22 | | | | | | | | |
| 23 | | | | | | | | |
| 24 | | | | | | | | |

There are 3 columns that must be populated in order for you to import data:

1. Date Collected
2. Entered by
3. Respondent or Alternate ID

| | A | B | C | D | Q | R | |
|---|----------------|------------|------------|-------------|--------------------------------------|--|-------------|
| | Date Collected | Entered by | Respondent | AlternateID | Resident Experience in the Community | Please answer the following questions about the community in which you live. | Q1. Address |
| 1 | | | | | | | |

Data collected
(mm/dd/yyyy)

Entered by

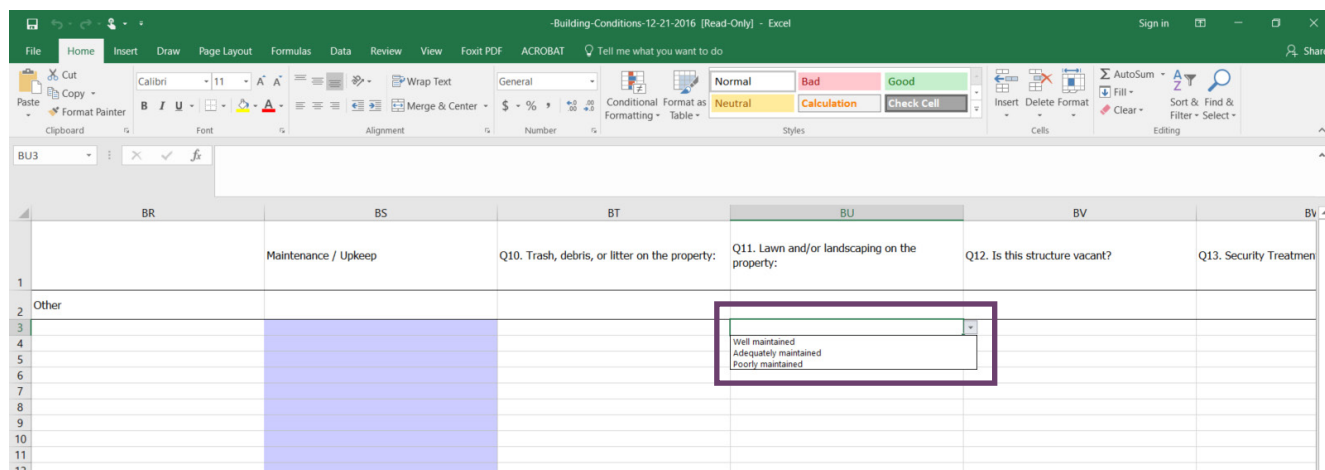
For a tool that has individuals as the respondent, you must enter either Respondent name, OR An Alternate ID might be a client ID or customer number.

TIP: If you also have email addresses for your respondents, you can expand columns D-Q and enter email addresses.

Entering Data into the Spreadsheet

Tool questions with multiple choice answers will have a **drop list of answer choices** in the excel spreadsheet. Be sure to select from the drop-down list.

To see the dropdown list, place your cursor in a cell and a tab will appear.



TIP: Selecting an answer from the drop-down list is the best way to make sure that there are no typos that will cause errors in the uploading of your responses. Any typo (a lower case letter when the tool answer has an upper case letter; or leaving off a period at the end of a sentence when the tool answer has a period) will cause an error and your spreadsheet will not be uploaded.

Continue through the spreadsheet, either typing in answers or selecting answers from drop down menus. Other question types will allow you to type the answer directly into the cell.

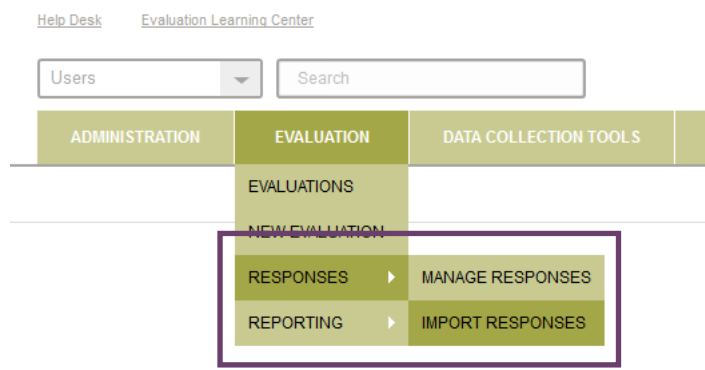
- **Save** your spreadsheet frequently, and when finished.

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.



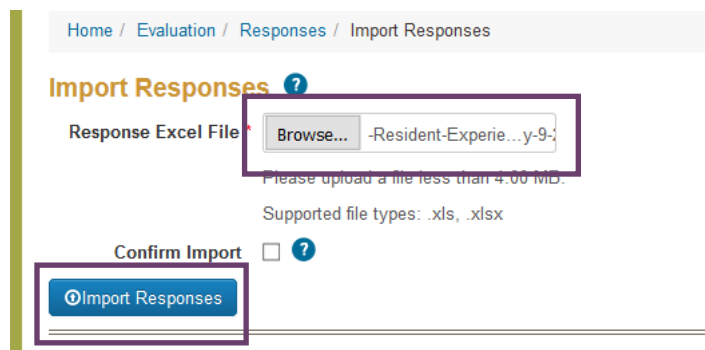
The Import Responses page will display.

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.

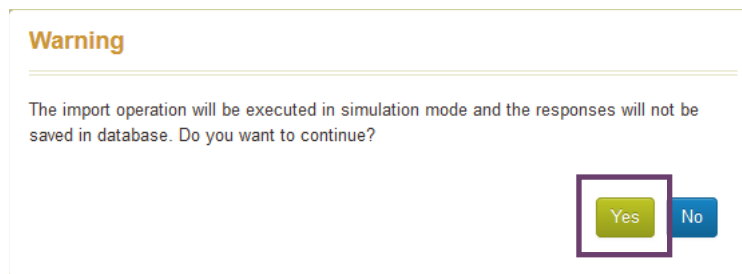
Leave the Confirm Import checkbox unchecked. This will allow the system to review your data and indicated if there are errors.

- Click the **Import Responses** button.



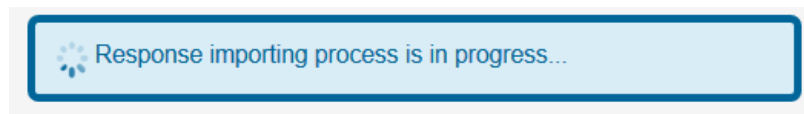
A dialogue box will appear, warning that the import is being executed in simulation mode.

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



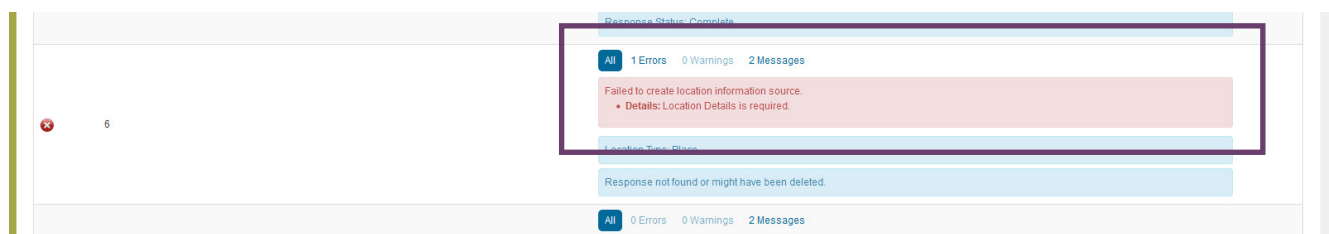
The initial review by the system of the data may take up to a minute if it is a large file. While the system is reviewing, you will a message on the screen that tells you it is working.

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.

Recent Import Response Details:

Manage Responses: Community Evaluation, Phase I
Response Details: Building Conditions v1.0
Language: English

| Status | New Response | Information Source | Details |
|--------|--------------|--------------------|--|
| ✓ | 3 | 500 Oak | <div>All 0 Errors 0 Warnings 2 Messages</div> <div>Location Type: Place.</div> <div>Response Status: Complete.</div> <div>All 0 Errors 0 Warnings 2 Messages</div> |

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.

Home / Evaluation / Responses / Import Responses

Import Responses ?

Response Excel File Building-Conditions, 201

Please upload a file less than 4.00 MB.
Supported file types: .xls, .xlsx

Confirm Import ☒ ?

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

Import Responses ?

Response Excel File * Building-Conditions, 201

Please upload a file less than 4.00 MB.
Supported file types: .xls, .xlsx

☒ **Confirm Import** ?

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.

Home / Evaluation / Responses / Import Responses

Import Responses operation completed successfully.

Import Responses ?

Response Excel File * No file selected.







Please upload a file less than 4.00 MB.
Supported file types: .xls, .xlsx

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**

| ADMINISTRATION | EVALUATION | DATA COLLECTION TOOLS |
|----------------|----------------|-----------------------|
| | EVALUATIONS | |
| | NEW EVALUATION | |
| | RESPONSES ▶ | MANAGE RESPONSES |
| | REPORTING ▶ | IMPORT RESPONSES |


- Click the link for the evaluation

| CIM Evaluation Phase 2 | Active | | | | | | | | | | | | |
|--|-------------------------|-----------|---|-----------|--|--|-----------------------|-----|---|---|--------|-----|---|
| CIM Evaluation Phase 2 2017: Block Conditions | Active | | | | | | | | | | | | |
| CIM Evaluation Phase 2 2017: Building Conditions | Active | | | | | | | | | | | | |
| CIM Evaluation Phase 2 2017: Survey | Active | | | | | | | | | | | | |
| Community Evaluation, Phase I | Active | | | | | | | | | | | | |
| <table><tr><th>Name</th><th>Information Source Type</th><th>Responses</th><th></th></tr><tr><td><input type="checkbox"/> Resident Experience in the Community V1.0</td><td>Individual Respondent</td><td>102</td><td> </td></tr><tr><td><input type="checkbox"/> Building Conditions V1.0</td><td>System</td><td>100</td><td> </td></tr></table> | | Name | Information Source Type | Responses | | <input type="checkbox"/> Resident Experience in the Community V1.0 | Individual Respondent | 102 |   | <input type="checkbox"/> Building Conditions V1.0 | System | 100 |   |
| Name | Information Source Type | Responses | | | | | | | | | | | |
| <input type="checkbox"/> Resident Experience in the Community V1.0 | Individual Respondent | 102 |   | | | | | | | | | | |
| <input type="checkbox"/> Building Conditions V1.0 | System | 100 |   | | | | | | | | | | |
| Community Evaluation, Phase II | Active | | | | | | | | | | | | |
| Community Gardening with Neighbors 2016 | Active | | | | | | | | | | | | |
| Elissa Test | Active | | | | | | | | | | | | |
| Eva: CIM-Block Conditions v1.0 | Active | | | | | | | | | | | | |

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.



[Help Desk](#)
[Evaluation Learning Center](#)













Users
Search

ADMINISTRATION
EVALUATION
DATA COLLECTION TOOLS
SHARING
MORE

Home / Data Collection Tools / Manage Tools

My Tools
Received Tools

Name
enter text
Filter
Clear Filter
Show Shared Only
Other Actions

| Display Name | Questions | Status | Categories | Type | Languages | Sharing |
|--|-----------|-----------|---------------------------|------------|-----------|---|
| <input type="checkbox"/> Accessibility and Perception of Amenities v2.0 | 3 | Published | Health ... | SM Library | EN,SP |   |
| <input type="checkbox"/> Accessibility of Health Care Services v2.0 | 19 | Published | Health ... | SM Library | EN,SP |   |
| <input type="checkbox"/> Accountability to Community v2.0 | 9 | Published | Role of Organizations ... | SM Library | EN |   |
| <input type="checkbox"/> Alcohol, Tobacco, and Drug Use Behavior v1.0 | 9 | Published | Health ... | SM Library | EN,SP |   |
| <input type="checkbox"/> Apartment Community and Neighborhood Change Module v1.0 | 8 | Published | Housing ... | SM Library | EN |   |
| <input type="checkbox"/> Apartment Community Facilities | 25 | Published | Resident Services ... | SM Library | EN,SP |   |