

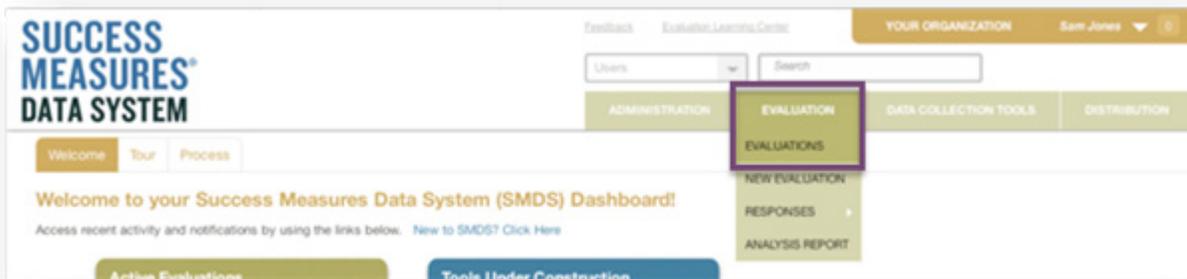
User Guide:
**Generating Spreadsheet Templates and
Importing Responses**

Generating Spreadsheet Templates and Importing Responses

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** tab.
- Click the **Evaluations** link.



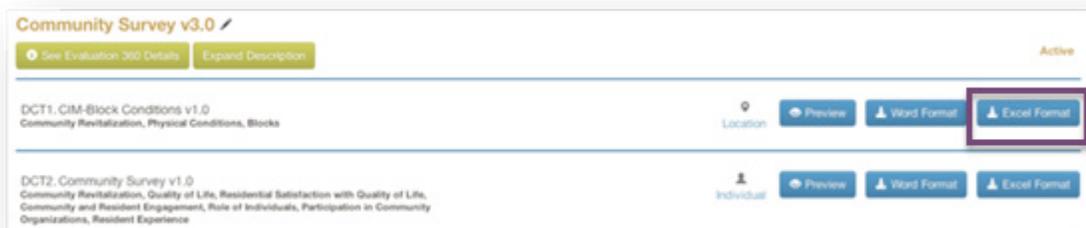
A list of evaluations is displayed. This list includes both Active and Draft evaluations. Only Active evaluations can generate spreadsheets.

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

Name	Program Types	Start Date	Categories	Status
<input type="checkbox"/> Community Survey		Jan 25, 2014		Draft
<input type="checkbox"/> Community Survey v3.0		Dec 15, 2013		Active
<input type="checkbox"/> Duke Street Neighborhood Survey		Apr 1, 2014		Active
<input type="checkbox"/> Lake Neighborhood February 2014		Feb 18, 2014		Active
<input type="checkbox"/> Neighborhood Evaluation		Jan 26, 2014		Draft

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

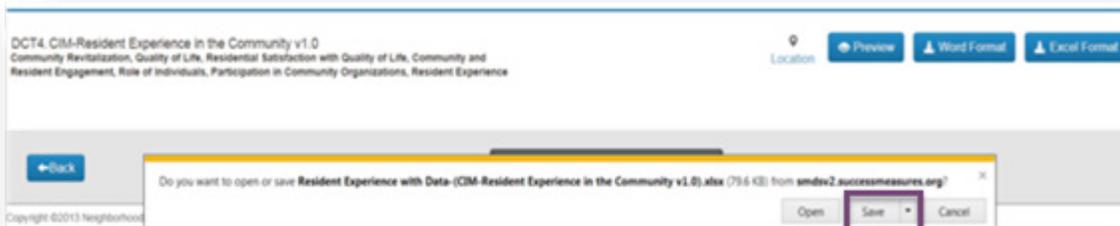
- Click the **Excel Format** button for that tool.



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.

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.

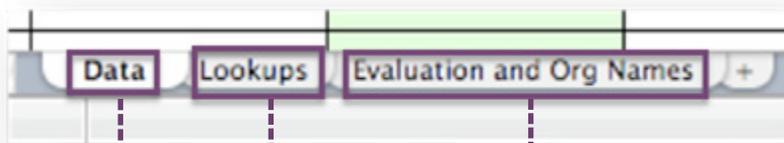
- Click the **Save** button. (Consider renaming the document to a name that you will easily remember.)



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	B	C	D
InfoName	Value	Notes	
Evaluation Name	Community Survey v3.0	Must match an evaluation active for this organization. If evaluation not found, new Evaluation will be created.	
Tool Name	Community Survey v1.0	Do not change	
Organization	Your Organization	Do not change	
InformationSourceType	IndividualRespondent		
Language	English	Do not change	

Navigation: Evaluation and Org Names | **Data** | Lookup

This user guide goes through the steps for a template from a tool that has individual as the information source. The spreadsheet from a tool that has location as the information source will have a different set of columns at the beginning.

For a tool that uses an individual as an information source, you must enter **Date Collected**, **Entered By**, and either **Alternate ID** or **Respondent** (Last Name, First Name).

Date Collected	Entered by	Respondent	AlternateID	SMDSUserEmail	Resident Experience in the Community	Please answer the following questions about the community in which you live.

Data collected
(mm/dd/yyyy)

Entered by

For a tool that has individuals as the respondent, you must enter either Respondent name, OR Alternate ID. Respondent names must be entered with a specific format (last name, first name).

A	B	C	G	H	I
Response #	Date Collected	Entered by	Location Type	Location Details	Location-Street

Data collected (mm/dd/yyyy)

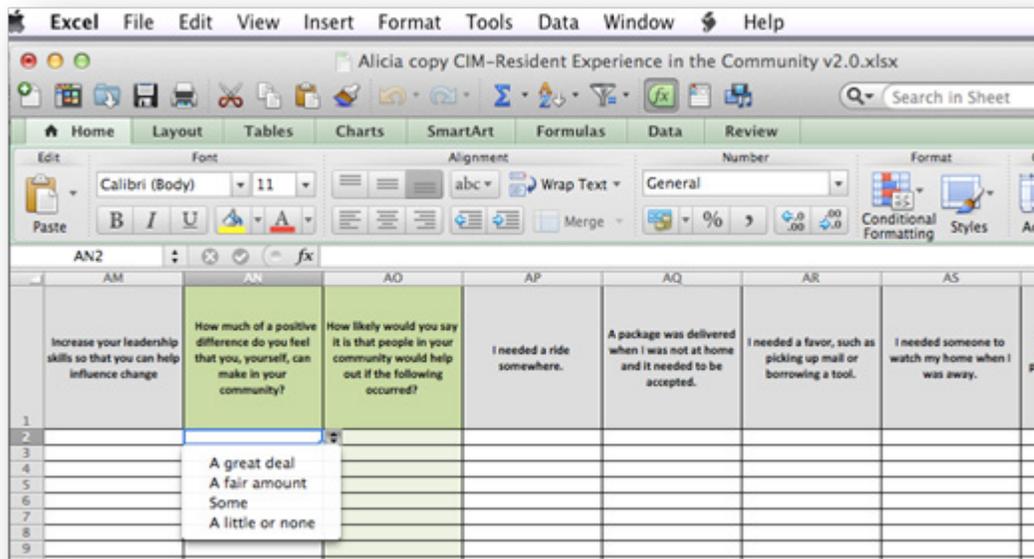
Entered by

Select the Location Details from the drop-down menu.

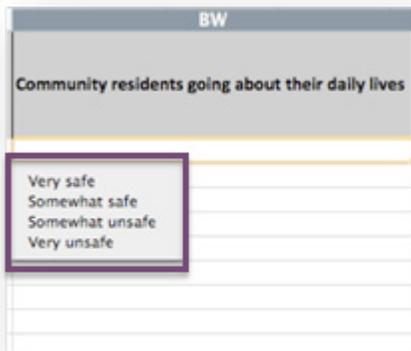
For a tool that has location as the information source, you must enter Date Collected, Entered by, and Location Details. Location Details is the response identifier. Enter address, block description, etc. to have a unique ID for each response.

The columns that are shaded are NOT columns for data; these are instructions columns or hold other text from the tool. Do not enter data into the shaded columns.

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. Click the tab.

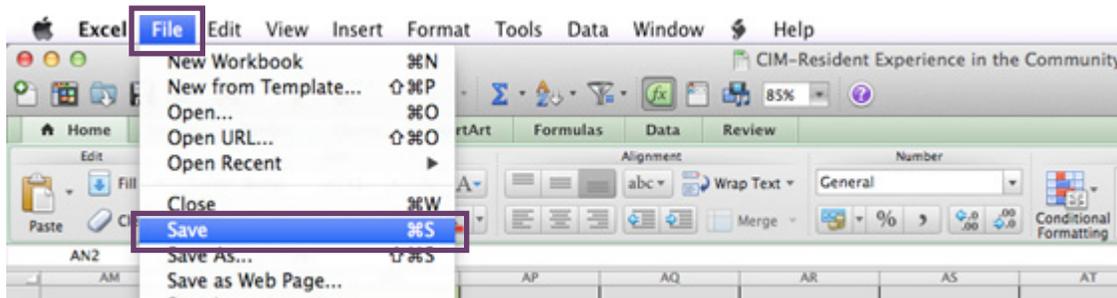


Selecting an answer from the drop-down list is the best way to make sure that there are no typos that will cause errors in the uploading of your responses. Any typo (a lower case letter when the tool answer has an upper case letter; or leaving off a period at the end of a sentence when the tool answer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



After you have entered data, save the spreadsheet again before uploading.

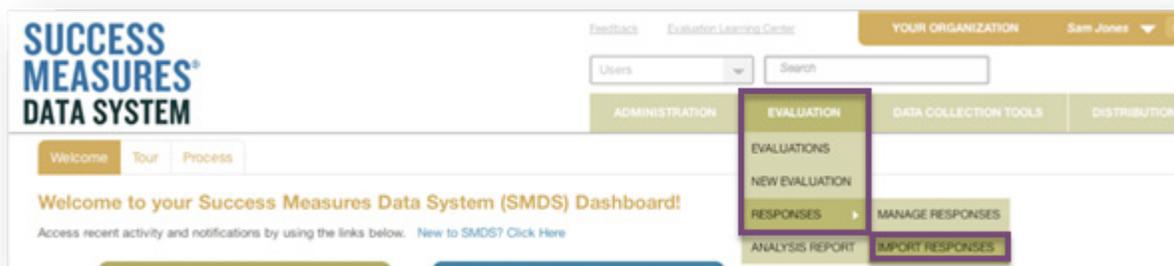
- Click the **File** link.
- Click the **Save** link.



Importing Responses from a System-Generated Excel Spreadsheet

Before uploading your data, please review the following:

1. Check to make sure there are no “incomplete” rows. If there is anything in a row, the import program will try to read it. Make sure there are no rows hanging at the bottom with a response number but no data.
 2. Make sure there are no blanks in the required columns: date, entered by, and the response identifier.
 - a. For an individual, the response identifier is either Alternate ID, or Last Name, First Name.
 - b. For a location, the response identifier is 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.



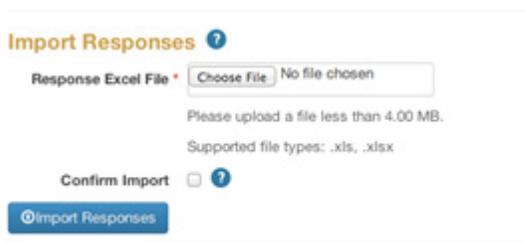
The Import Responses page will display.

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.

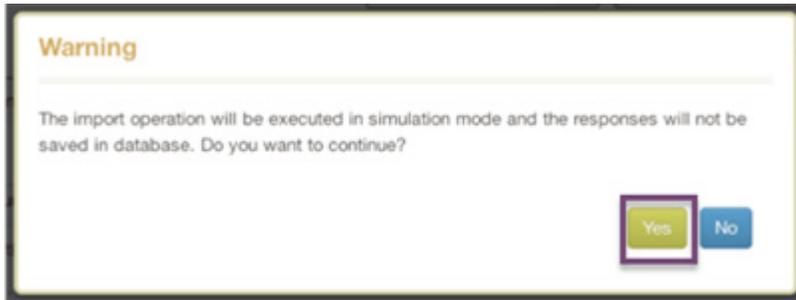
Leave the **Confirm Import** checkbox unchecked. This will allow the system to review your data and indicated if there are errors.

- Click the **Import Responses** button.

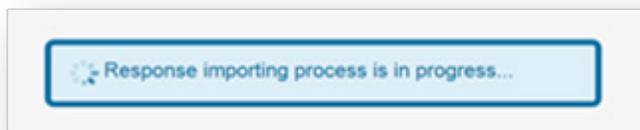


A dialogue box will appear, warning that the import is being executed in simulation mode.

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

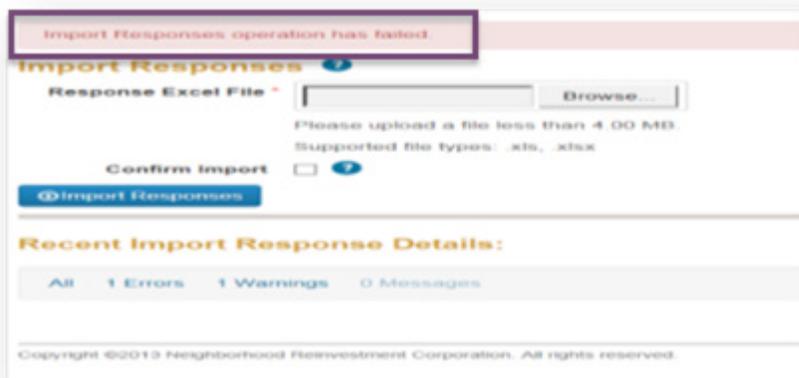


The initial review by the system of the data may take up to a minute if it is a large file. While the system is reviewing, you will a message on the screen that tells you it is working.



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

In this example, there were a few errors. The first error is that that one of the responses did not have a Response ID, so the operation failed.



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 errors. 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.

Status	Row No. ▲	Information Source	Details
✓	1	Fenton St and Silver Spring	<p>All 0 Errors 4 Warnings 2 Messages</p> <p>Multiple different Information Source values found in field 'Location Details'. Only first one would be considered. Values: Fenton St and Silver Spring,Fenton mdtBlock.</p> <p>Multiple different Information Source values found in field 'Location Street'. Only first one would be considered. Values: 1000 Fenton St,1000 Fenton St.</p> <p>New location has been created. - Location: Fenton St and Silver Spring</p> <p>Multiple() answers found for Option 'How long have you lived in this community?' - Years. Last value (20) is considered. Question: How long have you lived in this community?</p> <p>Extension Paper Block</p> <p>Response Status: Complete.</p>

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.

Status	Row No. ▲	Information Source	Details
✓	2	Sam Jones	<p>All 0 Errors 0 Warnings 2 Messages</p> <p>System User: samjones@housing.org</p> <p>Response Status: Complete.</p>

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.

Import Responses ?

Response Excel File No file selected

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

Confirm Import ?

You will also be able to find the new respondents in your list of Respondents by going to the Manage Respondents page.

