SUCCESS MEASURES®
DATA SYSTEM

User Guide

Generating Spreadsheet Templates

SUCCESS MEASURES®

Generating Spreadsheet Templates

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.

- Login to SMDS.

- Place your cursor over the **Evaluation** link.

- Click the **Evaluations** link.
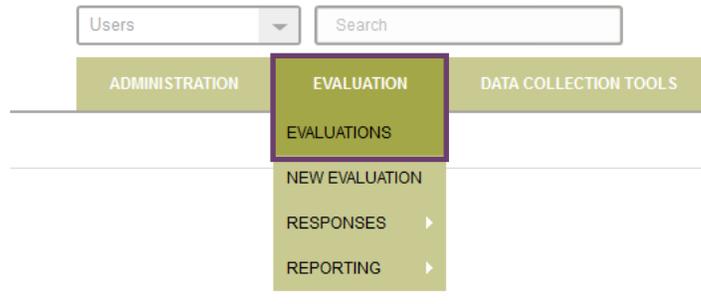
A list of evaluations is displayed. This list includes both Active and Draft evaluations.

TIP: Only Active evaluations can generate spreadsheets. 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.

SUCCESS MEASURES

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.

- Click the **Save** button. *(Consider renaming the document to a name that you will easily remember.)*
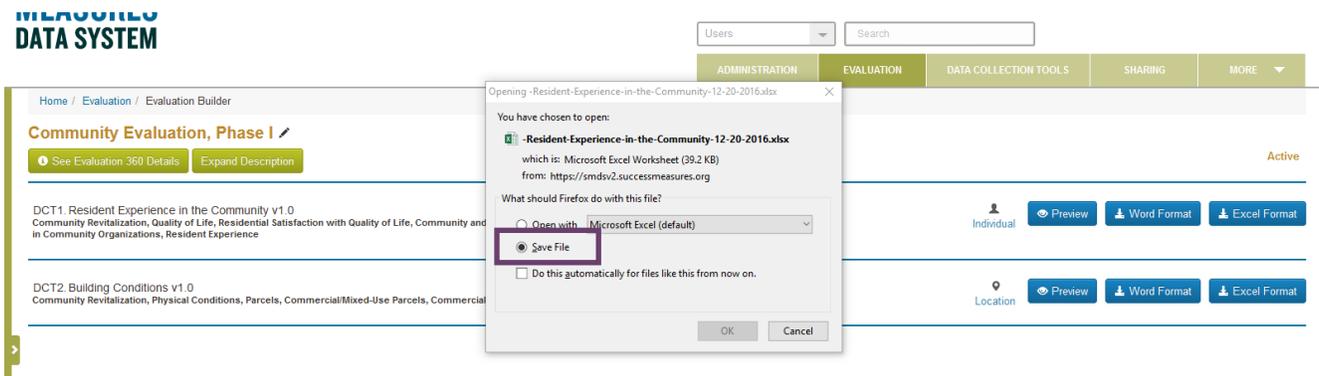
TIP: If you are downloading an excel spreadsheet of a tool with multiple languages available, SMDS will ask you which language you want to use for your excel spreadsheet.
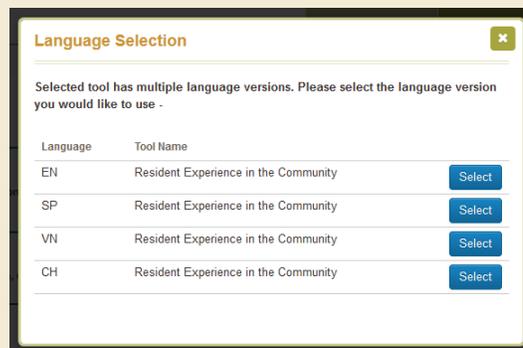
The downloaded worksheet will have three tabs.

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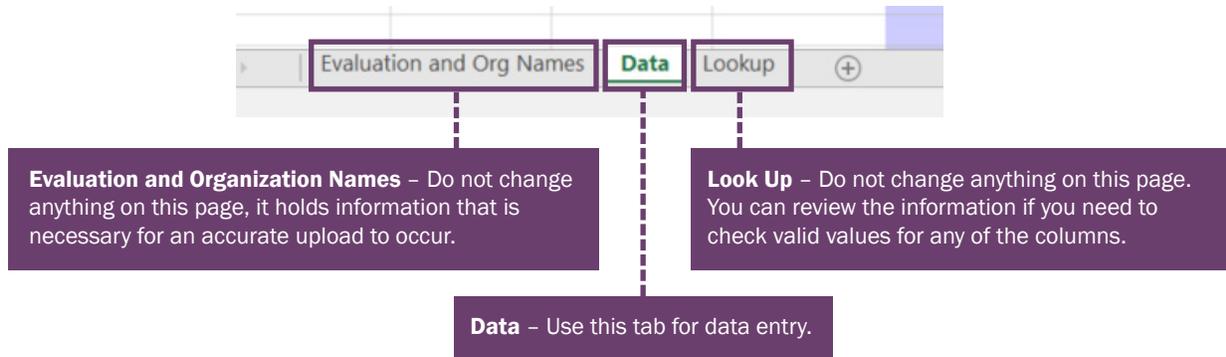
- Click the **Data tab**. This is where responses will be entered.

SUCCESS MEASURES

Populating the first few columns in a tool spreadsheet depends on the information source. First, you will see the steps for a spreadsheet that has Individual as the information source. Next, you will see the steps for a spreadsheet that has Location as the information source.

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).

| 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. Addre

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.

For a tool that uses Location as the information source, you must enter **Date Collected**, **Entered by**, **Location Type**, and **Location Details** (which would be address for a property, and a block description for a block).

A	B	F	G	H	I	J	K	
Date Collected	Entered by	Location Type	Location Details	Location-Street	Location-City	Location-PostalCode	Location-Province	Lo

Data collected (mm/dd/yyyy)

Entered by

Location Type: We encourage you to select Block or Place. By doing so, you only need to enter the Location Details.

Location Details: This is the response identifier. Enter a street address or a block description.

SUCCESS MEASURES

TIP: We highly recommends you do NOT use Property as the Location Type. For a parcel observation, use PLACE as the Location Type. For a block observation, use BLOCK as the Location Type. When using BLOCK and PLACE, do not fill out columns labeled location-street, location-city, location-postal code, or location-state.

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.
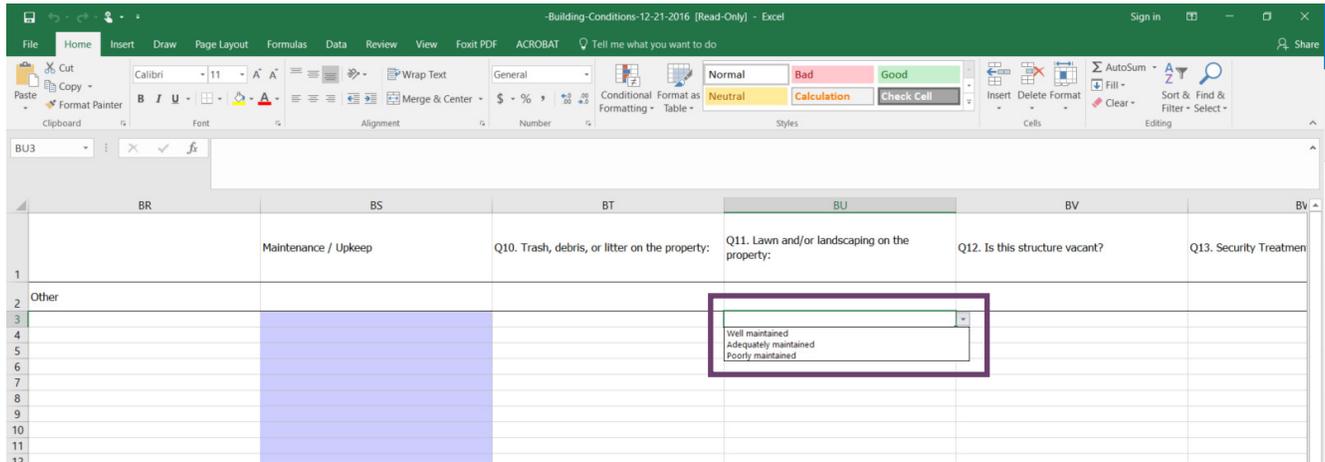
TIP: Selecting an answer from the drop-down list is the best way to make sure that there are no typos that will cause errors in the uploading of your responses. Any typo (a lower case letter when the tool answer has an upper case letter; or leaving off a period at the end of a sentence when the tool 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.

TIP: When you are ready to upload your data, check the Help Desk for our user guide on Importing Responses.

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.