2015

SMART Exporting

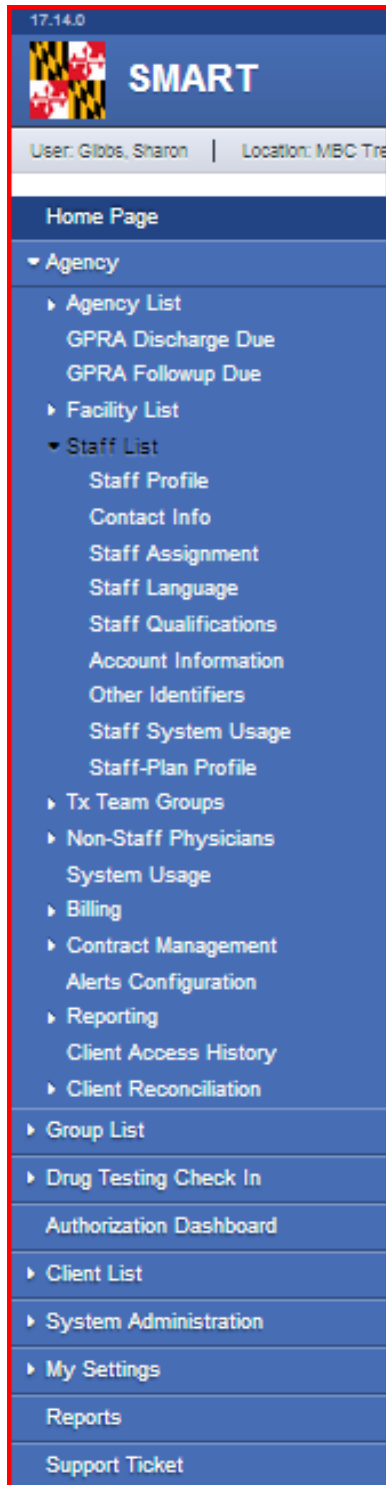## Exporting SMART Data to Excel and Access

This updated document provides detailed steps in exporting SMART data to Microsoft Excel, and importing SMART data from Excel to Microsoft Access.

SMART

Exporting Data from SMART to Microsoft Excel

1. Go to the Menu Tree, and click **Reports**. This will open the Reports Catalog screen.

IMPORTANT- Remember once data is exported from SMART and saved on your computer it is no longer secured data. You are now legally responsible for it. Make sure you save it where it is password protected or delete it from your desktop and trash can immediately.

Click Reports

SMART

2. Go to the Miscellaneous section of the screen, and select Admission Data.

Report Catalog
Title
Access
Admissions: Client Demographics
Agency Client Movement
Client Demographic by Substance
Program Client Movement
Referrals in by Agency
Referrals out by Agency
Waitlist by Agency, Facility & Program
Wait List: Statistics by Region
QA/QC
Program Enrollment Counts
Client List by Program
Agency/Facility Client Terminations
Programs-Staffing Allocations
Unfinished Client Activities
Security
Staff Permissions Summary
Miscellaneous
Admission Data
ATR Voucher Data
ATR Voucher Transaction Data
Client Profile Data
Combined Note Data
Discharge Data
Encounter Data
GPRA Assessment Data
GPRA Interview Compliance Report
GPRA Interview Data

Under Miscellaneous, use Admission Data and/or Discharge Data.

SMART

3. Enter a date range or leave blank.

4. Click **Export**.

SMART

4. A dialogue box will open. If you will be exporting to create an Excel file, save to your Desktop and click **Save**.
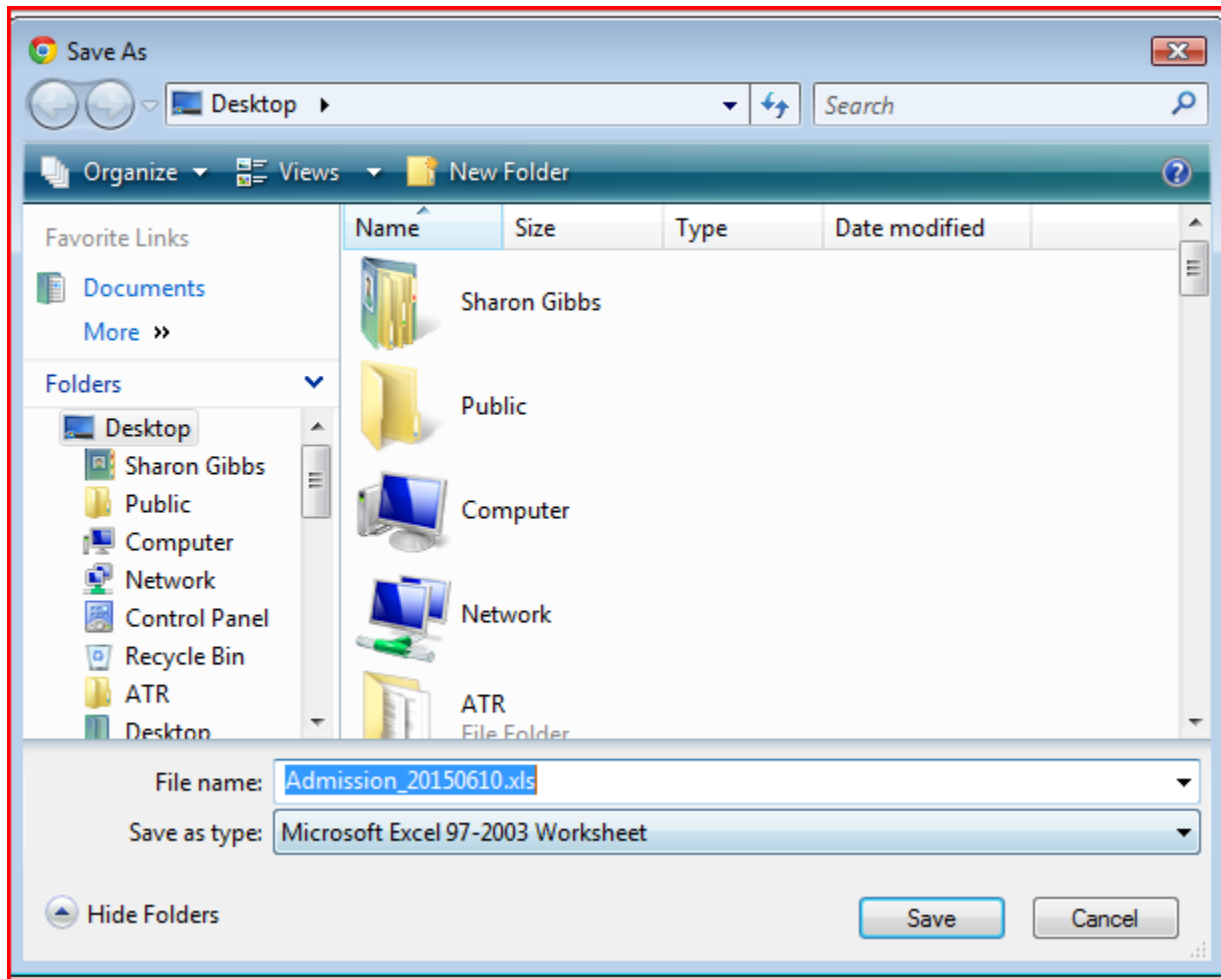
SMART

5. If you will be importing data from Excel to Access, please complete the following steps *prior* to saving to your Desktop:

      a. Go to the File name field, and change your file to a txt file. (For example Admission_20150610.xls would be changed to Admission_20150610.txt);

      b. Go to the 'Save as Type' field, and change it to 'All Files'; and

      c. Click **Save**.
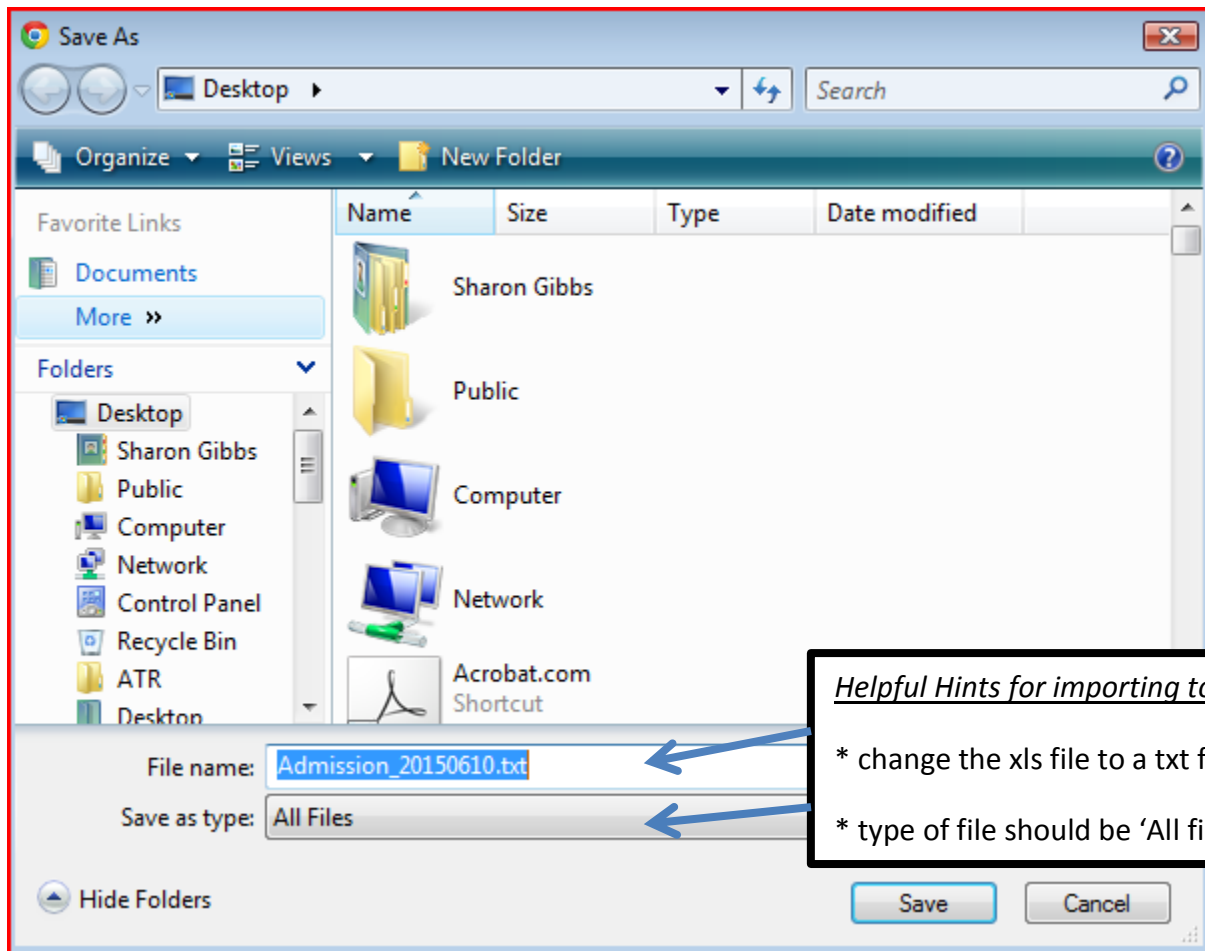
SMART

6. Click the tab at the bottom of the screen to open the excel spreadsheet.
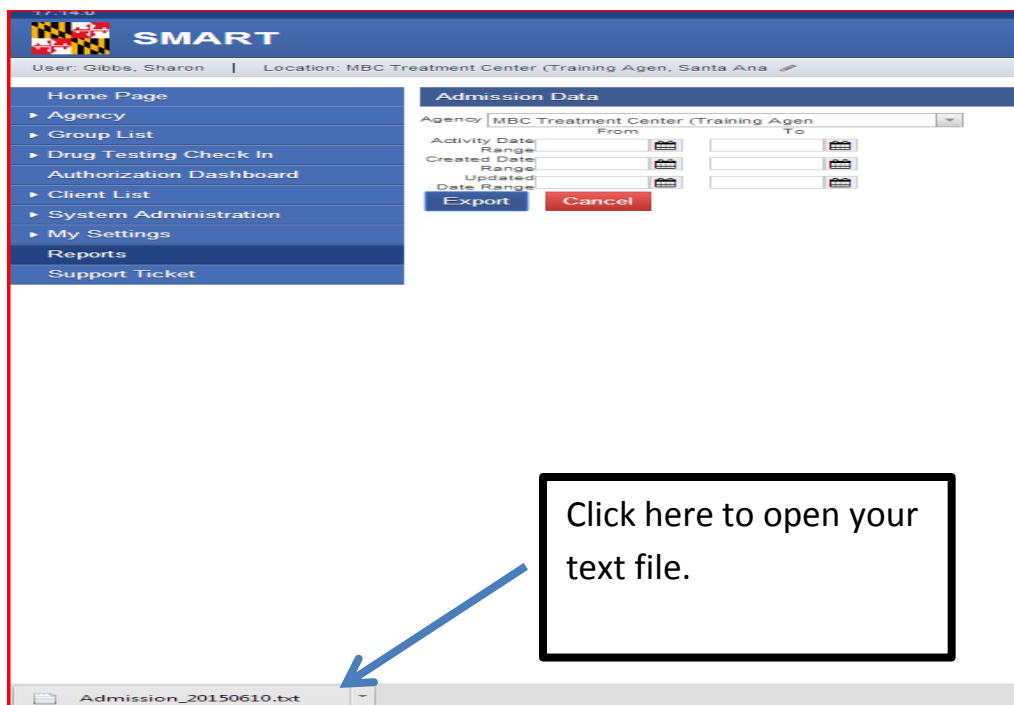
Click here to open your text file.

SMART

7. Click the Microsoft Excel Icon to view your data.

SMART

Importing from Microsoft Excel to Microsoft Access

1. Open Microsoft Access.
2. Click **Create**.

Click Create.
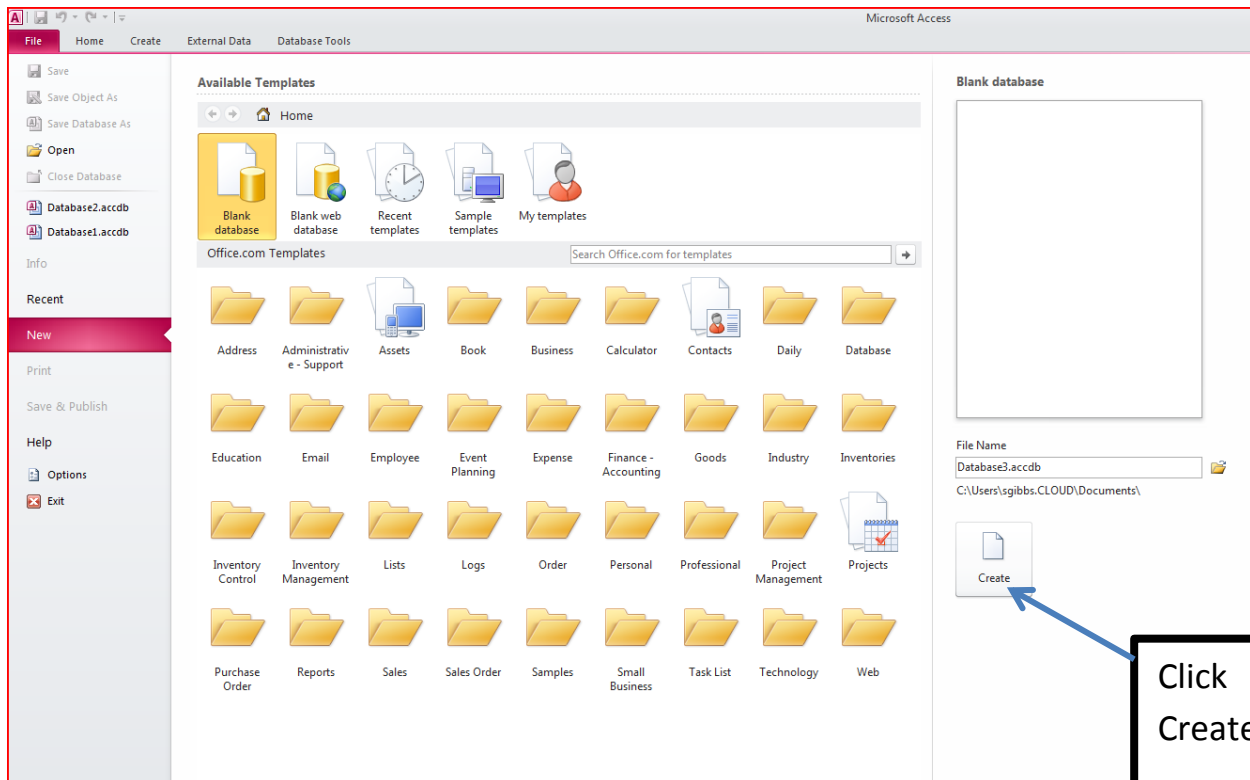
SMART

3. Locate the External Data tab, and click the Excel Icon.
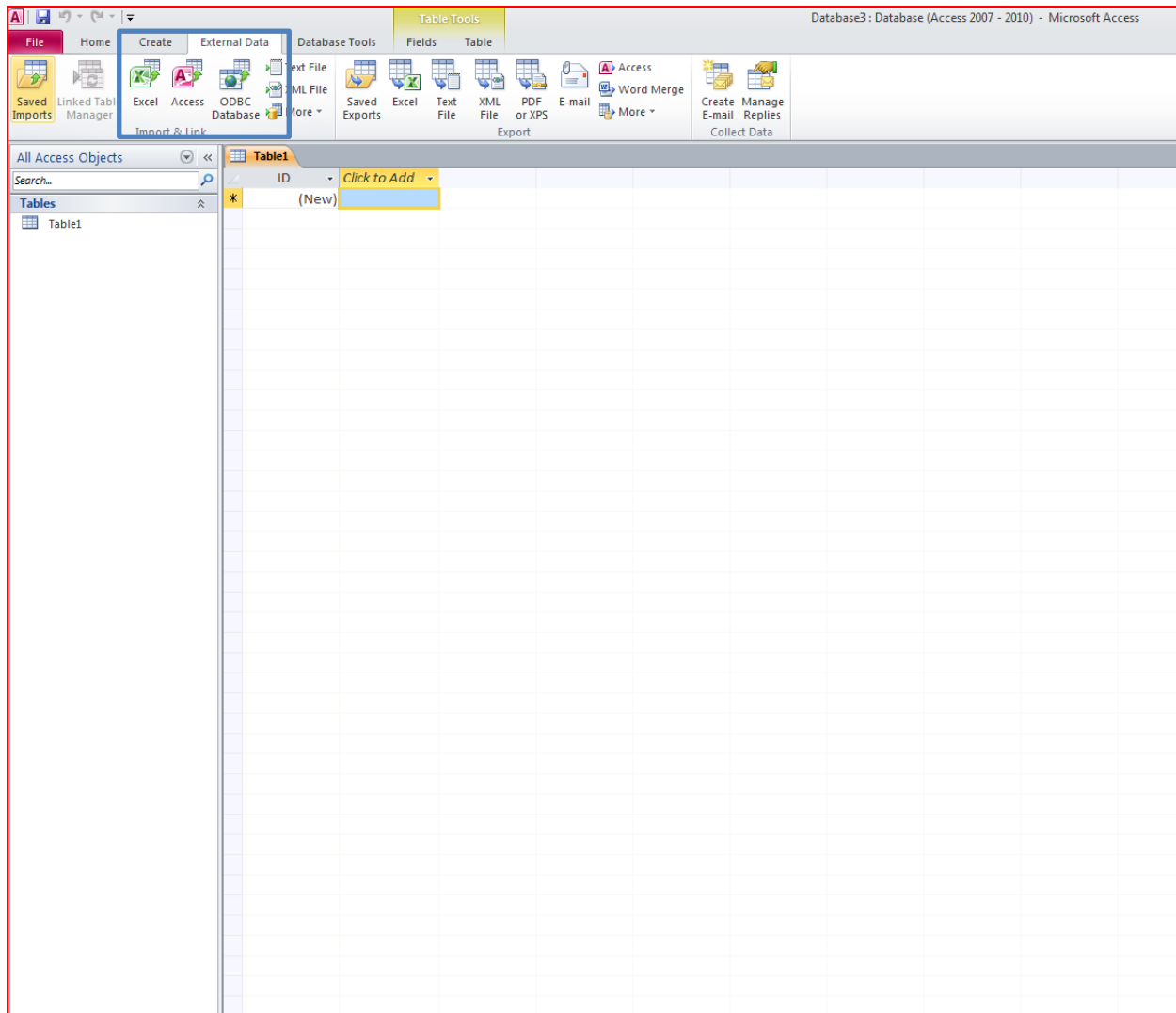
SMART

4. Click **Browse** to search for your file.

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5. Search and select the appropriate file.

6. Click **Open**.
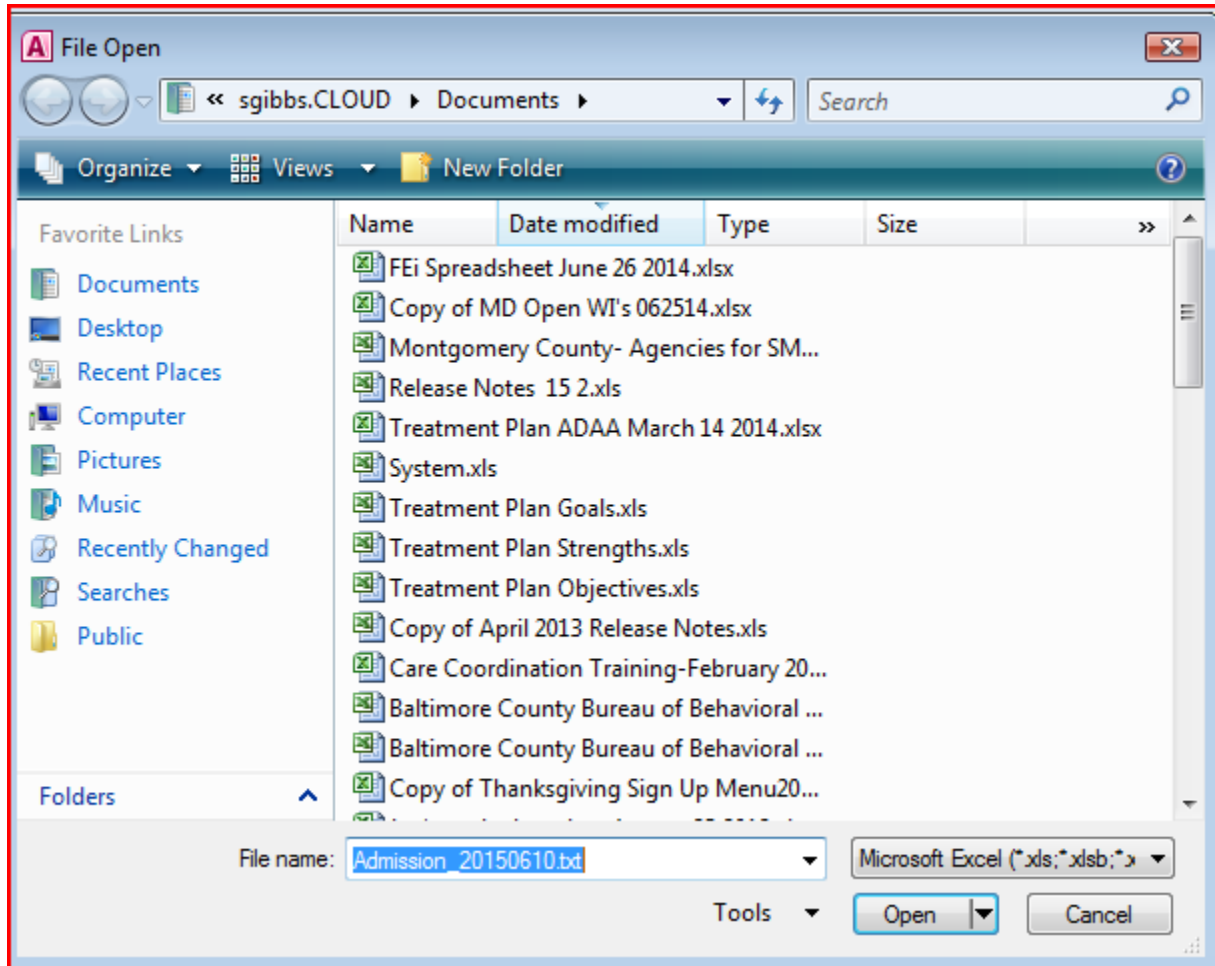
SMART

7. Click **OK**, once the 'File name' field is populated with the appropriate file.

SMART

8. Make sure **Tab** is chosen, and select 'First Row Contains field Names'.
9. Click **Next**.

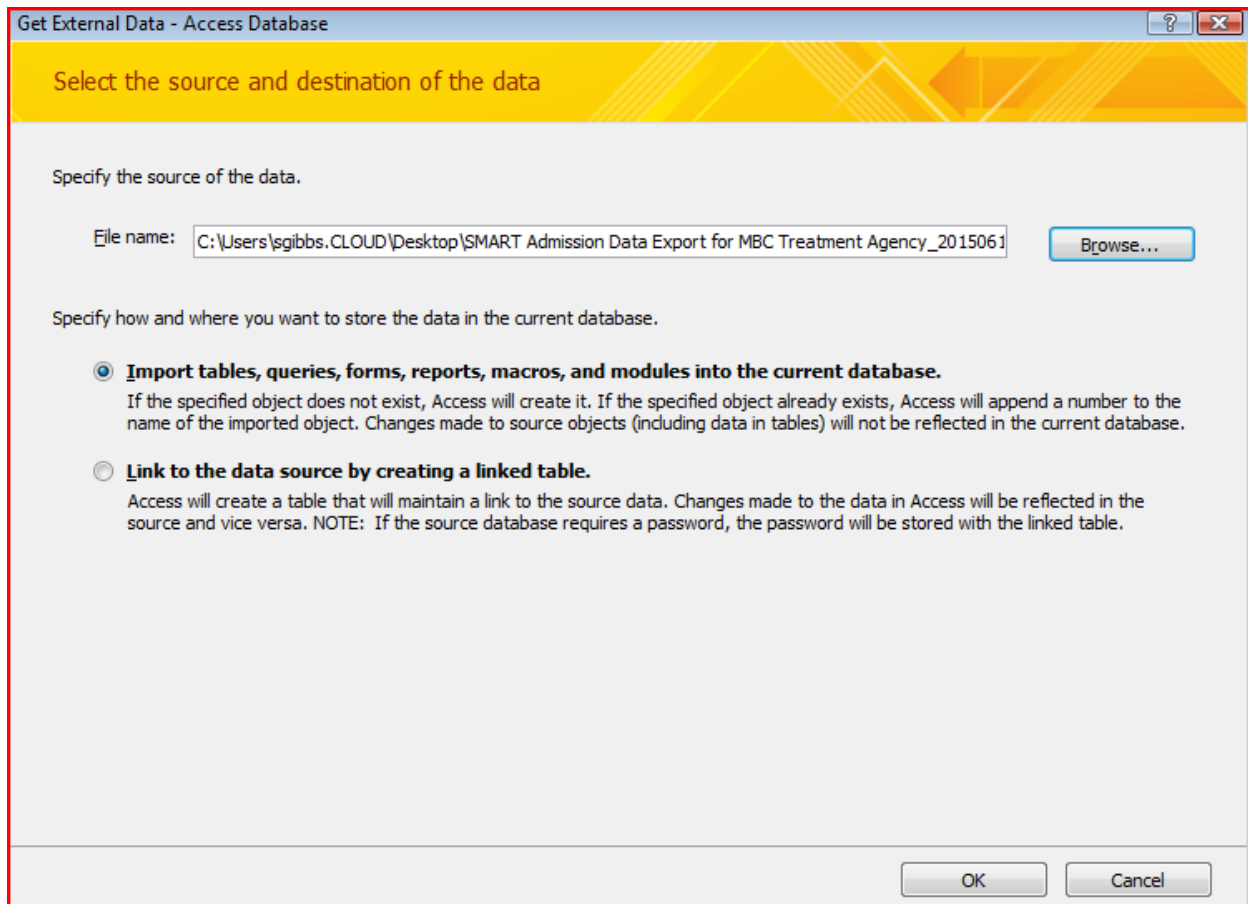| Admission ID	Agency Name	Client ID	Unique Client Number	Client I
	MBC Treatment Center (Training Agen	888226	F0101665199WA	Wayward
	MBC Treatment Center (Training Agen	884564	M0815749547BU	Bunny
	MBC Treatment Center (Training Agen	937232	M0812549876MO	Mouse
	MBC Treatment Center (Training Agen	1130686	M0613558989BR	Brown
	MBC Treatment Center (Training Agen	923940	M0823778736BU	Bunker
	MBC Treatment Center (Training Agen	1135625	M0101763333RE	Revere
	MBC Treatment Center (Training Agen	1481794	M0131986516JE	jesus
	MBC Treatment Center (Training Agen	1673052	M0504709763SM	Smith
	MBC Treatment Center (Training Agen	1674577	M0604919875BO	Bond
	MBC Treatment Center (Training Agen	1673152	M0509839587EA	EA
	MBC Treatment Center (Training Agen	1683311	M0101804321MO	mouse
172348	MBC Treatment Center (Training Agen	250982	M0601640987PI	Pig
237296	MBC Treatment Center (Training Agen	308509	F1010639999JO	Jones
237308	MBC Treatment Center (Training Agen	308523	M1010689999JA	James

Import Text Wizard

What delimiter separates your fields? Select the appropriate delimiter and see how your text is affected in the preview below.

Choose the delimiter that separates your fields:
- ⦿ Tab ○ Semicolon ○ Comma ○ Space ○ Other: [ ]

☑ First Row Contains Field Names

Text Qualifier: {none} ▾

Advanced...   Cancel   < Back   Next >   Finish

SMART

10. Click **Next**.

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11. Confirm that 'Let Access add primary key.' Is selected.
12. Click **Next**.

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13. Click **Finish**.

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14. Click **Close**