

How to import data in DINO

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Introduction

DINO is a data management platform created by Gnucoop. It is possible to create forms and reports in a very flexible way. Once you create a form, you can insert data using the web or mobile application. It is also possible to bulk upload many forms at a time using a properly formatted excel or CSV file. In this document we describe how to import data in DINO starting from an excel or CSV file.

In order to use this document you need to be familiar with DINO and its terminology. In particular you need to know what the following are:

- Forms
- Metrics
- Fields, Slides
- IDs

Finally, in order to be able to import data for a given form schema, you need to have permission to create form datas for that specific form schema. So, if you can create new form data, you can also import them.

Procedure description

We describe the procedure to import some bulk data using a Google Sheet generated Excel file. Conceptually the same procedure holds for CSV files or if working directly with Excel.

We suppose that you want to import data in a form called Projects that has 2 slides, one of which is a repeating slide:

The form Projects was created using the following XLSForm. The “survey” sheet is

type	name	label
begin group	start	Start
select_one countries	country	Country
select_multiple countries	country_other	Other Countries
text	title	Project Title
date	project_date_start	Start date
select_one donors	selected_donor	Donor
integer	budget	Budget
boolean	isleader	Leading applicant
end group		
begin repeat	indicators	Indicators
text	indic	Indicator description
integer	value_indic	Value reached
end repeat		

and the “choices” is

list_name	name	label
donors	ue	UE
donors	govita	ITALIAN GOVERNMENT
donors	un	UN
donors	pub	ALTRI DONATORI PUBBLICI
donors	la	ENTI LOCALI
donors	priv	DONATORI PRIVATI
donors	other	Others
countries	AFG	Afghanistan
countries	ALB	Albania
countries	DZA	Algeria
countries	ASM	American Samoa

Follow these steps:

1. Create an empty file with only one sheet (file and sheet names do not matter).
2. In the first row you need to put the names of the form fields and of the DINO-specific form fields. In this example, form fields can be:
 - a. **country**
 - b. **country_other**
 - c. **title**
 - d. **project_date_start**
 - e. **selected_donor**
 - f. **budget**
 - g. **isleader**
 - h. ***indic* (*)**
 - i. ***value_indic* (*)**

be careful that fields which are within repeating slides need to be treated differently (that's why we put an asterisk). Please refer to the specific section below.

DINO-specific fields can be:

- j. **created_at**. The form creation date. Specify this, only if you want your forms to have a creation date different from the import date;
- k. **user_data_ref_id**. The ID of the user that will be associated to the form (default is the ID of the user who is importing the forms);
- l. **area_id**. The ID of the metric AREA to be associated with the form;
- m. **[area_name]**
- n. **case_id**. The ID of the metric CASE to be associated with the form;
- o. **[case_name]**

- p. **project_id**. The ID of the metric PROJECT to be associated with the form;
 - q. [project_name]
 - r. [project_code]
 - s. **location_id**. The ID of the metric LOCATION to be associated with the form;
 - t. [location_name]
 - u. **organization_id**. The ID of the metric ORGANISATION to be associated with the form;
 - v. [organization_name]
3. every row will correspond to a different new form. So, if we create a file with one header +, let's say, 5 rows of data, if the upload is successful, we will create 5 new forms in DINO.
 4. It is not necessary to have a column for every field of the form; it is not necessary to fill all rows of a given column, but If one field is empty for all rows, it can be left out,
 5. Data field must be formatted YYYY-MM-DD as text (be careful).
 6. Single choice fields must contain one of the accepted options as specified in the "choices" (see the form builder or the XLSForm file).
 7. Multiple choice fields must be formatted according to the following pattern: [opt1, opt2] (i.e. a list of options in square brackets).

For example, a valid file could be the following:

country	country_other	title	project_date_start	budget	isleader	area_id
ALB	[AFG,DZA]	Human rights in education	2022-01-28	120000	true	81387ff7-5c7d-44e7-9dc6-76b8d09265ac
ASM		A new approach to social justice	2022-02-14	20000		81387ff7-5c7d-44e7-9dc6-76b8d09265ac

In this case we are importing 2 forms, for both of them we are selecting only the metric AREA. Moreover, notice that we do not provide all form fields for all forms, but for the fields where we provide a value, we strictly follow the indications described above.

Dealing with metrics during import

During the import of some form data, as far as metrics are concerned, you might want to:

- create new metrics during the import
- reuse metrics already created

The rules to follow to correctly manage metrics are the following:

METRICA	CREAZIONE DA UI	CREAZIONE DA IMPORT	CREAZIONE + ASSEGNAZIONE DA IMPORT	UTILIZZO DA IMPORT	CREAZIONE + ASSEGNAZIONE DA IMPORT	UTILIZZO PARENT
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					(parent)	
Case	name	name	name	id oppure name (con opzione reuse), oppure entrambe	name	id oppure name (con opzione reuse), oppure entrambe
Organization	name	name	name	id oppure name (con opzione reuse), oppure entrambe	name	id oppure name (con opzione reuse), oppure entrambe
Location	name	name	name	id oppure name (con opzione reuse), oppure entrambe	name	id oppure name (con opzione reuse), oppure entrambe
Area	name	name	name	id oppure name (con opzione reuse), oppure entrambe	name	id oppure name (con opzione reuse), oppure entrambe
Project	name, code	name, code	name, code	id	name, code	id

Repeating slides

If you have field in repeating slides, they need to be named differently. First of all, you need to have an extra column for every repeating slide named after the slide. In this column, for every row, you need to place the number of repetitions of that slide for that form. Then, every field in the repeating slide need to be called <field_name>__X where X is the repetition number, from 0 (corresponding to one repetition) to N-1 where N is the total number of slide repetitions in that form.

For example, suppose you have only 1 repetition of the repeating slide and you want to add both fields “Indicator description” and “Value reached”. You would need to add there three columns to your import file:

indicators	indic__0	value_indic__0
1	Number of children	100

So for example we could have:

country	budget	indicators	indic__0	value_indic__0	indic__1	value_indic__1	isleader
ALB	120000	1	Children	100			true
ASM	20000						
AFG	15000	2	Parents	45	Schools	34	true

Errors

If an error occurs during synchronization, the system will force a logout and no data is synchronized. This can happen when providing a wrong ID for some of the entities that are referred to by their IDs (like metrics and users).