IMPORTING FIELDS FROM AN EXCEL SPREADSHEET

Chris Kelley

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It may be more convenient to collect data in an Excel spreadsheet rather than creating forms and fields directly in Dynasite. If you format the fields in the excel spreadsheet in the following method, it is possible to import the fields directly into the system.

First create the new form in the system.

Keep track of the Table name – you'll use that name for the exported xml file.

Be sure to select Basic form.

The system will display a form with two fields – table begin and end.

Admin: Form Admin: Edit Items for Survivor Quality St

Refresh page | Add new field... | Add Shared Field | Reload

Save Field Order | Preview Form

Items on this form

| --- *BEGIN TABLE (0) *1427* --- (X)
--- *END TABLE (1) *1428* --- | (X)

Restart the application to render the new form fields. This is very important – **do not forget this step!**

Now you're ready to export the fields from Excel. Open the spreadsheet. You may have collected the data in a different format:

	A	B	C	D	E	
1	Label	Field Name	Data Type	Section	Enumerations	Comments
2	Where did you report the case?	location_of_case_report	enum	body	Thuthuzela Centre,Police station	
3	Where you satisfied with the way you were treated by the police? Please choose one:	level_of_satisfaction	enum	body	Excellent,Satisfied,Unsure,Dissatisfied	
4	How long did you wait before you were transported from the police station to Thuthuzela Centre?	duration_of_wait_for_transport	int	body		mnutes or hour
5	How did you get to the Thuthuzela Centre?	mode_of_transport_to_tcc	enum	body	Car, minivan, bus, bicycle, walked, other	Currently text,
6	Were you informed about TCC and what to expect when you arrive there?	informed_about_tcc	yes/no	body		
7	What time did you arrive at Thuthuzela Care Centre?	time_of_arrival	time	body		
8	How soon were you helped?	duration_of_wait_for_help	int	body		
9	Did someone receive / welcome you to the Thuthuzela Centre?	welcomed_by_staff	yes/no	body		
10	Who received / welcomed you to the Thuthuzela Centre?	person_who_welcomed	text	body		

You'll need to re-arrange some of the fields and re-name some of the labels. The fields should be in the order of label, starSchemaName, type, and enumerationList, using those names in the first field. Here's how this list looks after re-arranging the fields:
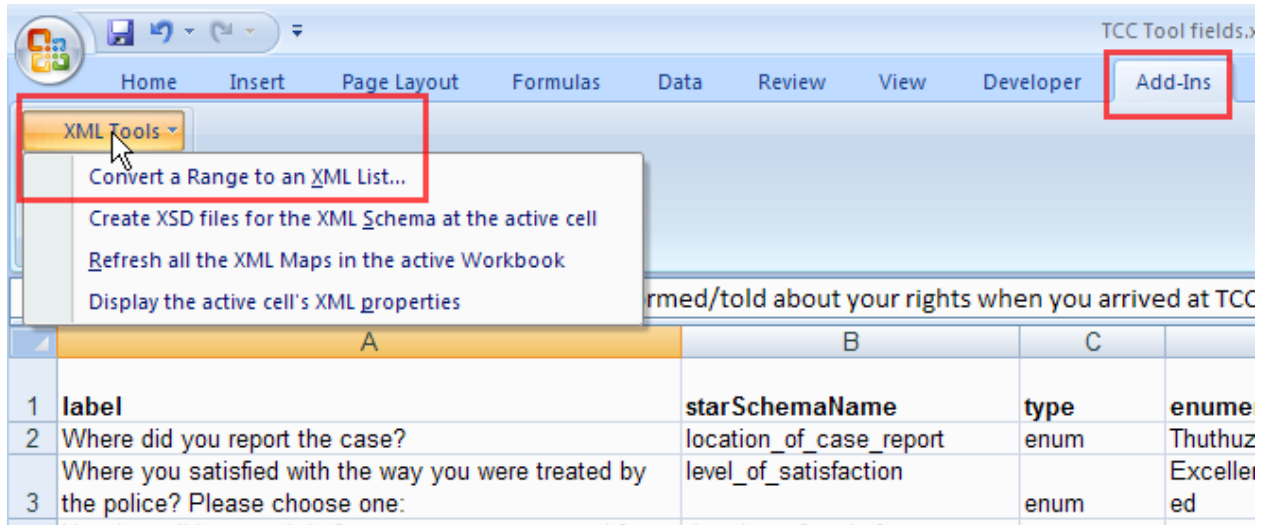
	A	B	C	D
1	label	starSchemaName	type	enumerationList
2	Where did you report the case?	location_of_case_report	enum	Thuthuzela Centre,Police station
3	Where you satisfied with the way you were treated by the police? Please choose one:	level_of_satisfaction	enum	Excellent,Satisfied,Unsure,Dissatisfied
4	How long did you wait before you were transported from the police station to Thuthuzela Centre?	duration_of_wait_for_transport	int	
5	How did you get to the Thuthuzela Centre?	mode_of_transport_to_tcc	enum	Car, minivan, bus, bicycle, walked, other
6	Were you informed about TCC and what to expect when you arrive there?	informed_about_tcc	yes/no	
7	What time did you arrive at Thuthuzela Care Centre?	time_of_arrival	time	
8	How soon were you helped?	duration_of_wait_for_help	int	
9	Did someone receive / welcome you to the Thuthuzela Centre?	welcomed_by_staff	yes/no	

The names in the first row correspond to field names in the FormField object.

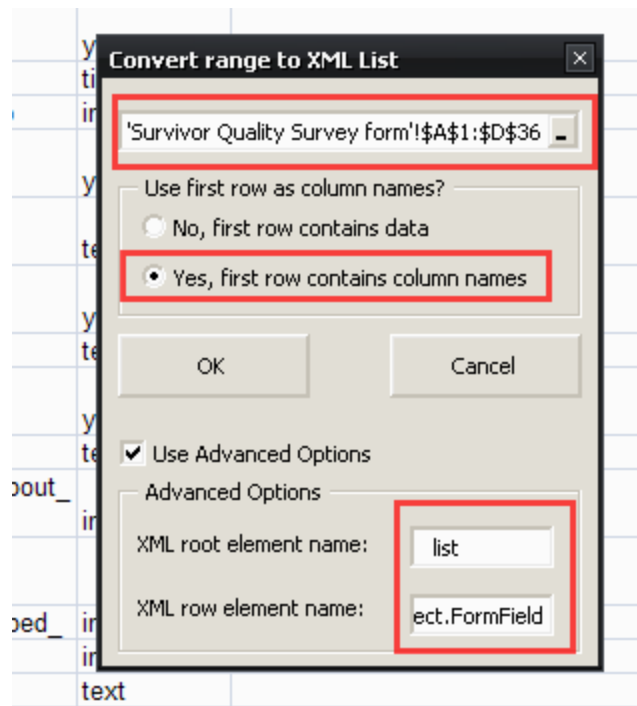The types roughly correspond to field types in zcore. The field types to use:

- Text – text entry box (VARCHAR(255))
- enum – produces a dropdown. List the items in the dropdown in the enumerationList, comma-separated.
- Int – integer (int)
- float – renders a text entry box.(float)
- yes/no – a yes/no field (tinyint(4))
- time – a time widget (time)
- date – a calendar widget (date)
- checkbox – a checkbox (tinyint(1))
- textarea – a large text field – for example, for a Comments field. (Long Varchar)
- info – descriptive text – display only, no data entry
- section header – header of a section of fields, descriptive text – display only, no data entry

Once the formatting is complete, go to Add-ins -> XML Tools -> Convert a Range to an XML List. If this does not appear in your copy of excel, see the MS Knowledge base article HA10263509 for instructions on how to install the XML Tools.
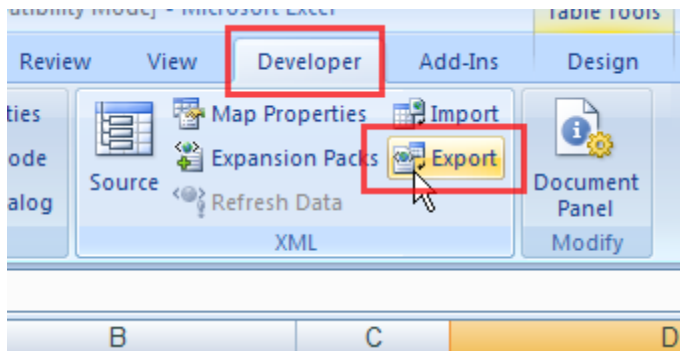
Complete the following:

- Select the range of fields you'd like to convert,
- select Yes, first row contains column names,
- Check Use Advanced Options
  - Enter "list" for root
  - Enter "org.cidrz.webapp.dynasite.valueobject.FormField" for row

After pressing OK, Excel will render the table in a new format.

	A	B	C	D	E	
1	label	starSchemaName	type	enumerationList	Section	C
2	Where did you report the case?	location_of_case_report	enum	Thuthuzela Centre,Police station	body	
3	Where you satisfied with the way you were treated by the police? Please choose one:	level_of_satisfaction	enum	Excellent,Satisfied,Unsure,Dissatisfied	body	
4	How long did you wait before you were transported from the police station to Thuthuzela Centre?	duration_of_wait_for_transport	int		body	m
5	How did you get to the Thuthuzela Centre?	mode_of_transport_to_tcc	enum	Car, minivan, bus, bicycle, walked, other	body	C
6	Were you informed about TCC and what to expect when you arrive there?	informed_about_tcc	yes/no		body	
7	What time did you arrive at Thuthuzela Care Centre?	time_of_arrival	time		body	

Now go to the Developer Toolbar and click Export:

Browse to the zcore-app \webapps\archive\forms\import\new and save the xml file, using the table name mentioned earlier. It is important to get this filename right or the import will not work.

Open this file in a text editor and do a search and replace of the following:

org_cidrz_webapp_dynasite_valueobject_FormField

with

org.cidrz.webapp.dynasite.valueobject.FormField

Save the file.

Back to the web app, Login (you remembered to restart the app, correct?), go to the Admin page and click "Field Import."

Administration

Application Administration

- Form Administration
    - ○ Create a new form
    - ○ Generate Form Changes
    - ○ Form Import
    - ○ Field Import - Imports a list of fields exported from Excel in xml format. Must use field names from FormField class.
    - ○ View Field List
    - ○ View List of Rules
    - ○ Manage Flows
- SQL console
- Application Update Job Log
- Reload TCC web application

Click the link to the new fiel you just created.

Field Import

Please place the forms you wish to import in C:\tcc\webapps\archive\forms\import\new\

Here is a list of the forms available for Field import into the system.
Click on the desired name to import.

File name

survivorQualitySurvey.xml

If all goes well, you'll receive a confirmation message that tells you that the file has been moved to the completed directory. Now proceed to the Admin -> Form Admin page to select the form and edit the fields. Be sure to drag the "End Table" field to the end of the list and click "Save Field Order" before previewing the form.

The import may fail; don't fret. It's probably a syntax error in one of the fields. Open the xml file and fix the error. Remove any of the fields that were successfully important and try again.