



# Batch Upload Guidance

## Overview

NGO Aid Map's batch upload feature is a tool for adding and updating data that allows InterAction members to make changes to more than one project at one time. This powerful complement to the existing web form (where you can only add or edit one project at a time) can make the process of managing your data on the site much more efficient.

**At this time, only InterAction staff can upload projects using the batch upload tool.** Members are responsible for preparing their changes in a spreadsheet and submitting the file(s) to InterAction. This guide explains how to prepare the spreadsheet correctly to ensure a smooth upload.

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## Introduction

InterAction members, large and small, face common time and resource constraints when it comes to data management. Many members manage hundreds, if not thousands, of projects. Submitting data for such large portfolios just once much less updating regularly can be challenging. Similarly for smaller members, regularly updating data on dynamic projects can be difficult.

To facilitate the addition and modification of project data on a larger scale, we have developed the batch upload tool, which allows users to add and edit multiple projects simultaneously, from dozens to hundreds. Now, organizations can add more data and keep information current, in much less time.

Need to update the descriptions for 50 projects? Or update the contact information for all your projects in the East Africa region? Batch upload can reduce the time spent on these fundamentally simple updates from hours to only minutes.

The current Member Workspace was introduced to allow InterAction members to manage their own data on NGO Aid Map (available at <http://office.ngoaidmap.org/admin> or by clicking “Member Access” at the top right of the NGO Aid Map homepage). Since the introduction of this workspace, you have had the ability to add new projects and make changes to existing ones. As you know from the web form, if you leave a required field blank or enter invalid data, you may get an error notice, or worse, save incorrect or misleading information. With batch upload, this does not change. You must still provide the minimum required fields and submit information in a valid format.

Because the batch upload processes all of your changes in one click, you will need to understand the ground rules to avoid problems. This guide outlines the specifications and processes you should follow to successfully import your data.

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## Batch Upload Formatting Basics

*Required File Type:* `.xls, xlsx, .csv`

You can use our [blank template](#) if you will just be adding new projects. If you will be making edits to existing projects, we recommend that you export your projects from your Member Workspace or from your organization page on the public site.

The field names for the batch upload differ slightly from those on the web form (you’ll find that they match the field names from the files you export from the site). The table below provides a comparison of the field names. Please note that the same standards for content and quality are the same for the web form and batch upload – only the names are different. In the last column, the table also provides notes on what to keep in mind when preparing a file for import. If you need more information on what kind of information is collected, see our [Project Reporting Guidance](#) document.

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**Table 1 - Comparison of Web Form and Batch Upload Field Names, with Important Notes for Creating a File for Import.** Bolded text indicates required fields. See [Appendix A](#) for details on each field.

Web Form Field Name	Import File Field Name	Import Notes
<b>Organization</b>	<b>organization</b>	
Project Identifiers	interaction_intervention_id	Required to edit existing projects. Leave blank for new projects.
Project identifiers	org_intervention_id	This is a project identifier assigned by the reporting organization
Project Identifiers		Additional project identifiers are not yet supported in the batch upload.
Tags	project_tags	“foodsecurity_site” is required for projects to appear on Food Security Aid Map. Other valid tags are “ebola”, “syria_refugees”, and “nepal_earthquake”
<b>Project name</b>	<b>project_name</b>	
<b>Description</b>	<b>project_description</b>	
Activities	activities	
Additional information	additional_information	
<b>Start date</b>	<b>start_date</b>	Format: MM/DD/YYYY
<b>End date</b>	<b>end_date</b>	Format: MM/DD/YYYY
<b>Sectors</b>	<b>sectors</b>	Must match an existing sector name ( <a href="#">here</a> ). See <a href="#">Appendix A</a> for format.
Cross-cutting issues	cross_cutting_issues	
Humanitarian		The separate humanitarian flag is not yet supported in the batch upload
Project budget	budget_numeric	Numbers only – no text
Budget Currency	budget_currency	Must match a 3-digit ISO 4217 currency code ( <a href="#">list</a> )
Budget Value Date	budget_value_date	If not provided, will default to project start date
Donor name	donors	Must match an existing organization ( <a href="#">here</a> ). See <a href="#">Appendix A</a> for format.
Partners	partners	Must match an existing organization ( <a href="#">here</a> ). See <a href="#">Appendix A</a> for format.
Prime awardee	prime_awardee	Must match an existing organization ( <a href="#">here</a> ). See <a href="#">Appendix A</a> for format.
Project Reach Unit	project_reach_unit	No acronyms, please
Target Project Reach	target_project_reach	Numbers only, no text
Actual Project Reach	actual_project_reach	Numbers only, no text
Target groups	target_groups	See <a href="#">Appendix A</a> for format
Geographic scope	geographic_scope	Default is “Specific Locations”. If set to “Global”, no location (below) can be provided. If set to “National”, only

Web Form Field Name	Import File Field Name	Import Notes
		<i>ADMO/Countries may be added as locations.</i>
<b>Geographic Location</b>	<b>location</b>	<i>Must match a location name (<a href="#">here</a>), or be a lat/lon coordinate. See <a href="#">Appendix A</a> for format.</i>
Verbatim location	verbatim_location	
Contact person	project_contact_person	
Contact title	project_contact_position	
Contact email	project_contact_email	
Contact phone	project_contact_phone_number	
Project website	project_website	
Humanitarian Scopes		<i>These fields are not yet supported by the batch upload</i>
Date provided	date_provided	<i>Leave blank (auto-calculated)</i>
Date updated	date_updated	<i>Leave blank (auto-calculated)</i>
n/a	status	<i>Leave blank (auto-calculated)</i>
Donation amount	n/a	<i>Not available in batch upload</i>
Donation date	n/a	<i>Not available in batch upload</i>
Resource name	n/a	<i>Not available in batch upload</i>
Resource url	n/a	<i>Not available in batch upload</i>
Media (pictures/videos)	n/a	<i>Not available in batch upload</i>

You can do two things with the batch upload:  
**add** new projects and **edit** existing ones.  
The following sections explain how to do both step-by-step.

## How to Add New Projects

**1) Prepare a new Excel spreadsheet with the correct column names.** You can [use our blank template](#) to get started. If you are a batch upload pro, then you can create your file from scratch—but, be warned—if any field names are not spelled correctly, upload errors can occur.

**2) Enter your new project data.** Use [Appendix A](#) to ensure correct formatting. Remember, there are seven **required** fields:

1. *organization*
2. *project\_name*
3. *project\_description*
4. *start\_date*
5. *end\_date*
6. *sectors*
7. *location*


All projects must contain information for at least these seven fields, as any missing required data will cause the import to fail.


**3) Save the file.** Must be in Excel or CSV format.

**4) Email the file to us** at [mappinginfo@interaction.org](mailto:mappinginfo@interaction.org) noting you have new projects to add.

### Tips

#### For Adding Projects

 Create separate files when adding new projects and when editing existing ones. Do not use the same file to both add and edit.

 Use the checklist in [Appendix A](#) to format your file properly.

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## How to Edit Existing Projects

### 1) Export your organization's projects from NGO Aid

**Map's Member Workspace.** In the "Your Projects" tab in the workspace, click the "Export Projects" button at the top right of your project list. Exporting from the **backend** workspace will ensure all your projects are included. The export from the front end of the site only includes active projects.

### 2) Make your changes

directly in the exported file. Follow the formatting requirements outlined in [Appendix A](#).

Highlight/mark cells that have been changed.

- a. To delete data, delete the contents of a cell. You **cannot** delete data for any of the seven required fields.
- b. Three fields in the export file cannot be modified since they are generated by the system. These are *date\_provided*, *date\_updated*, and *status*.
- c. Values entered for *sector*, *location*, and *donors* must match the names of sectors, locations, and existing donor names in NGO Aid Map. Visit [this reference page](#) to view current names for each field.

### 3) Delete unchanged columns

in which no updates are needed. Is there a whole column (e.g., donors) in which you did not make changes? Delete that column (not just the values in the cells). Is there a row (project) with no changes? Delete that row. This makes the batch upload process much faster.

Be careful though: only delete the contents of **cells** for which you want the actual data erased from the database!

### 4) Save the file.


### 5) Email the file to us


at [mappinginfo@interaction.org](mailto:mappinginfo@interaction.org). Submit your file with a brief description of the changes.


\*\* The batch upload uses the *interaction\_intervention\_id* to identify which projects are already in the database. In your import file, if this field is blank or the value has been modified and does not match an ID in the database, a new project will be created with a new, auto-calculated ID


## Tips

### For Editing Projects

 The *interaction\_intervention\_id* is essential for editing projects.\*\* Leave the values for this field exactly as exported; otherwise projects may be duplicated.

 Do not delete the *interaction\_intervention\_id* when editing projects!

 Use the checklist in [Appendix A](#) to format your file properly.

 You cannot change your organization name. If you want to do this, you must go to the "Your Organization" section of your Member Workspace.

## FAQs

### *What do I do if I need to add a donor that is not in your current donor list?*

The batch upload can only add **existing** organizations as donors to projects (that is, organizations already in our database). Donor names not matching an existing organization name will not be imported. To add an organization not in our [current list](#), fill out [this form](#) with as much information as you can provide, and we will respond soon after with a status update.

### *What do I do if I need to add a prime awardee that is not in your current prime awardee list?*

Follow the same instructions for adding a new organization above.

### *What do I do if I need to add a partner that is not in your current partner list?*

Follow the same instructions for adding a new organization above.

### *Can I add donation amounts or dates along with the donor name?*

Donation amounts and donation dates cannot be added using the batch upload. You may add this information using the web form.

### *Can I add media like pictures and videos to my projects?*

Project media cannot be added to projects using the batch upload. You can add pictures and video using the web form, in the “Media” section.

### *Can I update other information besides project data, like my organization information and documents/resources?*

The batch upload is only applicable for project data and cannot be used to modify organization information such as your organization name, description, or donation webpage information. To change this type of information, go to the “Your Organization” section of your Member Workspace.

### *Is there a limit on file size or number of projects for my batch upload file?*

While there is no official file size limit for this feature, files should contain mostly to only information that is actually being added or modified. Every cell in the file gets read and processed, even if the information is exactly the same as what is already present. To reduce upload time and negative impacts to the NGO Aid Map server performance, it is important that you remove whole columns (and rows) of data for which no changes are being made. Remember though, **this does not mean deleting the data in the cells that are unchanged** – this would cause the actual data to be deleted. If no changes exist in a column, delete the entire column, including the field name.

### *If I am providing internal project ids for all my projects, do I really need to include the InterAction intervention id to update my data?*

No. If your existing projects contain your own project ID in the “organization intervention id” field, then you do not need to also provide the interaction intervention id. However, if any of your existing projects are missing

your own ID, then make sure to export these from NGO Aid Map with their interaction intervention ids, to avoid creating duplicates on upload.

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## Separating Data Values

**Delimiters** separate distinct values and help the system interpret multiple discreet entries within a single cell in your spreadsheet (multiple sectors, locations, or donors for a single project, for example).

Some fields in NGO Aid Map have restricted values, meaning the values you provide **must match** a standardized value from a list. Exact locations (e.g. cities or villages) may be entered as text in the *verbatim\_location* field.

Donors, partners, and prime awardees (all are “organizations”) are similar except that any organization not currently in the database may be added by requesting a new organization via the [request form](#).

When preparing your file for batch upload, these fields (sectors, location, donors, partners, and prime awardees) require special attention to ensure the system interprets your list of entries correctly.

See [Appendix A](#) for detailed instructions on properly delimiting values in your batch upload file.

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# Appendix A – Formatting Checklist

In the order of appearance in the [Batch Upload Template](#)

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## ORGANIZATION

- Required if adding new projects
- Spelling should match that of the record in NGO Aid Map

## INTERACTION INTERVENTION ID

- Required if editing existing projects. Must exactly match that of a project in the database.
- If creating a file from scratch, copy from appropriate column of projects export file from backend Member Workspace
- If ID is missing from file or does not match a record in the database, a new project record will be created

## ORG INTERVENTION ID

- Not a required field, but strongly encouraged

## PROJECT TAGS

- Required for projects that should show up on a specific featured map, e.g. “foodsecurity\_site” or “syria\_refugees”
- Not used like traditional tag-words that aid in content searches

## PROJECT NAME

- Required if adding new projects
- Make project names descriptive and unique. Include the country name and/or year at the end to distinguish project names that would otherwise be identical.

## PROJECT DESCRIPTION

- Required if adding new projects
- Details are good, especially information on goals and objectives!

## ACTIVITIES

- Not a required field
- Details are good!

## ADDITIONAL INFORMATION

- Not a required field
- Provides more space for details, such as project background, context or results

## START DATE

- Required if adding new projects
- Use format MM/DD/YYYY
- Cannot be more than 7 days out from present day

## END DATE

- Required if adding new projects

- Use format MM/DD/YYYY
- Must be equal to or later than start date
- Use discretion when reporting “ongoing” projects. Report realistic timeframes (1/3/5 years...) for reevaluation so your data doesn’t become stale.

### SECTORS

- Required if adding new projects
- Must match a sector name from the database (click the sectors tab [here](#))
- Multiple sectors are delimited by the pipe character: |  
(to create a pipe, hold SHIFT key and press backslash “\”, located above the ENTER key)

Example entry with 3 sectors:

*"agriculture|human rights democracy and governance|education"*

### CROSS CUTTING ISSUES

- Not a required field
- No standard delimiter – we recommend using commas to separate items in a list

### BUDGET NUMERIC

- Not a required field
- Enter numbers only (NO TEXT). “\$” are allowed
- Report full value – no abbreviations, e.g. “160M” and “160 million” should be “160,000,000”

### BUDGET CURRENCY

- Not a required field
- Enter a single 3-digit currency code from the ISO 4217 standard. [List here](#).
- Defaults to “USD” if not provided

### BUDGET VALUE DATE

- Not a required field
- Use format MM/DD/YYYY
- Defaults to project start date if not provided

### DONORS

- Not a required field, but strongly encouraged
- Names must match a name in the list of current organizations ([see list](#)). Fill out [this form](#) if you need to add one not present.
- Multiple organizations are delimited by the pipe character: |  
(to create a pipe, hold SHIFT key and press backslash “\”, located above the ENTER key)

**Example:** *“ChildFund International|US Agency for International Development (USAID)|UNICEF”*

### PARTNERS

- Not a required field
- Names must match a name in the list of current organizations ([see list](#)). Fill out [this form](#) if you need to add one not present.
- Multiple organizations are delimited by the pipe character: |

(to create a pipe, hold SHIFT key and press backslash “\”, located above the ENTER key)

**Example:** “ChildFund International|InterAction|Mwang’*a* County Government (Kenya)”

#### PRIME AWARDEE

- Not a required field
- Only one value allowed
- Name must match a name in the list of current organizations ([see list](#)). Fill out [this form](#) if you need to add one not present.

#### PROJECT REACH UNIT

- Required only if a target/actual project reach value is provided
- Do not use acronyms (e.g., enter “Households”, not “HHs”)

#### TARGET PROJECT REACH

- Not a required field
- Enter numbers only (NO TEXT), commas are OK
- Do not use abbreviations, e.g. “10K”

#### ACTUAL PROJECT REACH

- Not a required field
- Enter numbers only (NO TEXT), commas are OK
- Do not use abbreviations, e.g. “10K”

#### TARGET GROUPS

- Not a required field
- No standard delimiter – we recommend using commas to separate items in a list

#### GEOGRAPHIC SCOPE

- Not a required field
- Defaults to “Specific Locations” if not provided
- If set to National, only country level locations will be saved (more precise data will be lost)
- If set to Global, no location country data will be saved

#### LOCATION\*

- Required if adding new projects, if geographic scope is not set to global
- Must match a location name (countries and administrative levels) in the database (see lists [here](#))
- Uses a combination of delimiters: > and |
- The **greater-than symbol** connects a country or administrative level with the next lower administrative level, as in this example:

*"Haiti>Artibonite>Gonaives>Estere"*

which follows this pattern:

*"Country>ADM1>ADM2>ADM3"*

where ADM# indicates successively lower administrative levels.

- The **pipe** separates distinct locations, whether a simple list of countries or a list of more detailed locations, as in these examples:

"Haiti | China | India | Mexico | Argentina"

and

"Haiti>Artibonite>Gonaives>Estere | China>Sichuan | India>Punjab | Mexico | Argentina"

Please note that to enter several lower admins for a single country, each path must be written out:

"Haiti>Artibonite>Gonaives>Estere | Haiti>Artibonite>Gonaives>Ennery | Haiti>Artibonite>Gonaives>Gonaives"

- Each location must contain its full path to upload correctly. Simply entering "Estere" (from the example above) will not automatically connect to Haiti.
- Detailed locations below 1<sup>st</sup> admin (or 3<sup>rd</sup> for Haiti) such as counties, towns, or coordinates should be entered in the *verbatim\_location* field

\*Lat/Lon coordinates may be provided in this field for projects in place of names, if available. Multiple coordinates per project should be delimited by a pipe.

#### VERBATIM LOCATION

- Not a required field
- Detailed locations below 1<sup>st</sup> admin (or 3<sup>rd</sup> for Haiti) such as counties, towns, or coordinates should be entered in this field

#### PROJECT CONTACT PERSON

- Not a required field

#### PROJECT CONTACT POSITION

- Not a required field

#### PROJECT CONTACT EMAIL

- Not a required field

#### PROJECT CONTACT PHONE NUMBER

- Not a required field

#### PROJECT WEBSITE

- Not a required field
- Use this field only for web pages with details on the project at hand – not your organization's main website
- Preface each URL with <http://> or <https://>

## Appendix B – Links

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### File Template for Uploads

- [Batch Upload Template](#)

### Online Resources

- [Reference Lists for Batch Upload](#)
- [About NGO Aid Map's Approach to Sector Coding](#)
- [NGO Aid Map and IATI](#)
- [Reverse Geocoder](#) (email us at [mappinginfo@interaction.org](mailto:mappinginfo@interaction.org) for access)

### Other Guidance Documents

- [Project Reporting Guidance](#)
- [In-Kind Donations Reporting Guidance](#)
- [Member Workspace Guidance](#)