



USING THE FORMEVER IMPORTER

The Importer fills Formever forms with data from a spreadsheet file.

The importer “robot” simulates manual data entry and follows all the data entry conventions of your forms.

Multiple form types can be filled in multiple periods from one spreadsheet file.

HOW IT WORKS

1. Create a spreadsheet with your data (see below) and save it in .csv (comma separated values) format.
2. Double click to open the importer, press “IMPORT DATA” and choose the spreadsheet file.
3. The importer checks the spreadsheet for errors.
4. A restore point is created.
5. The importer creates and fills forms with the data from the spreadsheet. If you have the *showwork* option on, you can watch the forms being filled. You can pause or cancel the import while it is in progress.

If there are any data errors, the importer stops. After you fix the errors, you can roll back to the restore point and start again, or delete the *data* lines that imported correctly and restart the import.

6. If you wish to remove the forms that have been created, you can restore your system to the pre-import version.

SAMPLE SPREADSHEET

Following is an example of a spreadsheet, the form that it fills, and detailed instructions about constructing import spreadsheets.

This spreadsheet fills Products forms in the Formever Manufacturing Sample system. Following the spreadsheet is an annotated image of a form filled by this import file.

Note that although only one form type (Products) in one period is illustrated, data for many form types can be imported into multiple periods in the same spreadsheet.

	A	B	C	D	G	
1	>comment	Data for the Product form in the Formever Manufacturing sample system.				
2	>comment					
3	>comment	The >showwork command is optional. Its variables are on or off.				
4	>showwork	on				
5	>comment					
6	>comment	The period command instructs the importer which period to import the data into.				
7	>comment	One import file can import into several periods. They must be sequential.				
8	period>jan16					
9	>comment	The >fields line has the form name and the fields you are importing.				
10	>comment	All required fields on the main form must be included.				
11	>comment					
1	12	products>fields	product code	product name	product type	country of origin
13	>comment					
14	>comment	After defining the main form, indicate the fields on the detail block.				
15	>comment					
2	16	products>product recipe details>fields	inventory item	quantity		
17	>comment					
18	>comment	The >data lines provide the data to import. The main form is first, followed by				
19	>comment	all its detail lines, then the data for the next form.				
20	>comment					
3	21	products>data	20001 White Chia	house brand	Brazil	
22	22	products>product recipe details>data	L0055	1		
23	23	products>product recipe details>data	B1500	1		
4	24	products>product recipe details>data	X0001	1		
25	25	products>product recipe details>data	C0001	90		
26	26	products>data	20002 Ultra Whey Vita-Pro	house brand	Brazil	
27	27	products>product recipe details>data	L0055	1		
28	28	products>product recipe details>data	B1500	1		
29	29	products>product recipe details>data	X0002	1		
30	30	products>product recipe details>data	C0002	180		
31	31	products>data	20003 Advanced Probiotics (10	house brand	Canada	

1. Fields to fill at the top level of the form
2. Fields to fill on the detail lines
3. Data for the top level of the first Products form
4. Data for the detail lines on the first Products form

It is immediately followed by the data for the next form.

FORM CREATED AND FILLED BY THE IMPORTER

This is the form filled by the importer from the preceding spreadsheet file.

The red and blue boxes, arrows and italic text have been added to clarify how the data relates to the import file.

PRODUCT

Product Code

20001

Main form data imported

Product Name

White Chia

Detail line data imported

PRODUCT RECIPE

Inventory Item:	Quantity:	+
L-0055 <input type="checkbox"/> 55mm White Lid	1	X
B-1500 <input type="checkbox"/> 500cc Bottle, Clear	1	X
X-0001 <input type="checkbox"/> Label for C0001	1	X
C-0001 <input type="checkbox"/> White Chia	90	X

Product Type

HOUSE BRAND

PRIVATE LABEL

Unit Price (List): \$ 7.98 ← *Calculated from other forms based on the import data.*

ADJUSTED

Unit Price (Adjusted): \$ 0.00 ← *Not required fields. Their inclusion in the import data is optional.*

Country of Origin:

Brazil

Details about constructing the spreadsheet follow.

CREATING THE SPREADSHEET

Commands (must be in Column A)	Description and instructions
>comment	Used to annotate the spreadsheet. The importer ignores these lines.
>showwork	Controls display of the data forms as they are entered. Column B will contain <i>on</i> or <i>off</i> The default is <i>on</i> . The forms display as they are entered. The import is slower when <i>on</i> is selected.
period> <i>period_name</i> Ex: period>jan16	Defines the period in which to create the data forms. This command must come before the <i>fields</i> command. After all the <i>data</i> lines for the first period, change periods with another <i>period</i> command. Periods must be in sequential order, but there can be gaps.
<i>form_name</i> >fields Ex: products>fields	Identifies the form name and which fields to fill. This command must be before any <i>data</i> lines. Column A has the name of the form. Subsequent columns have the names of the fields. If data is being imported for more than one period, this line does not have to be repeated in subsequent periods unless the master form has changed. In that case, a new <i>fields</i> command is needed for the new period.
<i>form_name</i> > <i>detail_name</i> >fields Ex: products>product recipe details> fields	Identifies detail lines and which fields to fill. This command must be before any <i>data</i> lines. Column A has the name of the form and of the detail lines. Subsequent columns have the names of the fields to fill in the detail lines. If data is being imported for more than one period, this line does not

Commands	
(must be in Column A)	Description and instructions
	have to be repeated in subsequent periods unless there are any changes to the master form (the main form or the detail lines). In that case, a new <i>fields</i> statement is needed for the new period.
<i>form_name</i> >data Ex: products>data	These lines have the data that you are importing The data will be in Column B and subsequent columns, and conforms to the fields defined in the <i>fields</i> command. E.g., if the <i>fields</i> command has the Name field in column B, the data lines will have Name data in column B.
<i>form_name</i> > <i>detail_name</i> >data Ex: products>product recipe details>data	These lines have the data to import for the detail lines. The data will be in Column B and subsequent columns. There can be multiple detail lines for each form.

Format

The spreadsheet must be saved as a .csv file (comma separated values).

Columns

Blank columns will create an error.

Multiple form types

When importing data into multiple form types, all the *fields* commands in the spreadsheet must precede any of the *data* lines.

If a form you are importing is referenced by another form (either through a form reference or through an entity code) make sure that it is filed first or already exists in the database.

Important note: Transaction references cannot be imported.

ENTERING DATA IN THE SPREADSHEET

The importer simulates manual data entry, so all of the same restrictions apply:

- Required fields must be entered. If a field is optional it can be left blank.
- Data cannot exceed the maximum number of characters for the field.
- Data cannot be imported into “Data entry not allowed” fields.

Names of forms and fields

Form names and field labels must match master form names and field labels. All capitalization, spaces and special characters will be ignored, so they can be entered in the way that you prefer.

Example: Product Code, product_code, product code:, productcode are all equivalent.

How to format specific field types in the spreadsheet

Form code fields

Multi-part codes

For a multi-part form code, do not enter the hyphens.

Example: For the code BR-123, the spreadsheet data should be BR123.

Codes with entity parts

The entity file being referenced must come first in the import file or already exist in the database.

Sequential form codes

A form code consisting of one sequential part is not a data entry field, so do not define or enter it in the spreadsheet.

Codes with sequential parts

Leave the sequential part blank.

Example: The pattern is AAA-*** (three letters followed by a 3-digit sequence number assigned by Formever). The spreadsheet data will be the three letters only.

Form codes parts with leading zeroes

If the data is numeric and the spreadsheet data is shorter than the number of digits in the code field, the importer will insert leading zeroes.

Example: The code is 0056. If the spreadsheet data is 56, the importer will fill the field as 0056.

Note fields

To force a line feed in the text use \n.

Description fields

If the field is defined as upper case, any lower case letters in the spreadsheet data will be converted to upper case.

Form Reference fields

The referenced form must be filed first, or already exist in the Formever database.

Pattern text fields

Pattern text with multiple parts and separator characters

Enter the pattern without separators.

Example: for the pattern (555) 333-4444, enter 5553334444

Pattern text with leading zeroes

If the pattern is numeric and the spreadsheet data is shorter than the number of digits in the pattern, the importer will insert leading zeroes.

Example: With a 4-digit pattern 56 in the spreadsheet will be entered as 0056.

Pattern text, one sequential part only

This is not a data entry field, so do not include it in the spreadsheet.

Pattern text with a sequential part

Leave the sequential part blank.

Example: The pattern is AAA-*** (three letters followed by a hyphen separator and a 3-digit sequence number assigned by Formever). In the spreadsheet, enter the three letters only.

Choice fields

Multiple choices allowed

Put multiple choices in one spreadsheet cell separated with a semi-colon.

Example: red;green;blue

Choice field with a default

If no data is provided in the spreadsheet cell, the default will be used.

Quantity fields

A quantity field with an alternate unit

Put the unit shortcut after the number.

Example:

A field with the unit *miles* and the alternate unit *kilometres* (shortcut *k*)

- 110 in the spreadsheet would result in 110 miles (default)
- 110k would result in 110 kilometres (the alternate unit).

A currency field with an alternate currency

Put the currency shortcut after the number.

Example:

A field in American dollars with an alternate currency of Euros

- 110 in the spreadsheet would result in 110 USD (default)
- 110e would result in 110 Euros (the alternate currency).

Quantity fields left blank

The field will have the value 0.

Date fields

Follow the format as defined in your master form

Example:

Master form format YY/MM/DD

Date to import December 31, 2014

Spreadsheet data 141231

Dates with leading zeros

If the data is shorter than the expected number of digits, it will be padded with preceding 00s.

Example:

YY/MM/DD format

123 in the spreadsheet would be filled as 00/01/23 (January 1, 2000).

Date fields left blank

The default defined in the master form will be used.

Detail lines

If a form has a detail block, there will be one data line with the data for the main form, followed by one or more lines of details.

Example:

In the spreadsheet, there is a main form (Products) and a detail block (Product Recipe Details) that has four lines. Different products could have different numbers of detail lines.

21	products>data	20001	White Chia	house brand	Brazil
22	products>product recipe details>data	L0055		1	
23	products>product recipe details>data	B1500		1	
24	products>product recipe details>data	X0001		1	
25	products>product recipe details>data	C0001		90	

More than one detail block

The >fields lines would have one line for the main form followed by a >fields line for each detail block.

The >data lines would have one line for the main form followed by line(s) for each of the detail blocks.

Stapled files

The spreadsheet data will be the path to the file that you are importing (jpg, png, pdf, Word document).