CSV Import Guide

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Overview

Welcome to *natural*FORMS. This user guide provides an overview of how to use the CSV data import feature for *natural*FORMS on your device.

How it Works

You can choose to automatically populate data onto e-form instances, decreasing the time to complete each e-form instance. To import data, you will open an e-mail on the device containing an attached .csv file with data for one or more e-form instances.

Each row in the .csv file represents an individual e-form instance, and must contain the **FormID** and the **e-form instance name.** Each additional column must be the name of an e-form field or sheet variable which is present on the e-form instance. Data for the individual e-form field or sheet variable is specified in that column.

An example of the .csv input is shown below:

$FormID	$InstanceName	Last_Name	SVCompany_Name
88000012	Test Form	Smith	ExpeData

When you click on the .csv attachment in your e-mail, an option appears to open the attachment in *natural*FORMS. After successful login, the data automatically populates onto the e-form instances specified in the .csv file.

Based on the example above, one e-form instance would be created in *natural*FORMS for the e-form with an ID of 88000012. The instance would be named **Test Form,** and the Last Name field would be populated with **"Smith."** The sheet variable Company Name would be populated with **ExpeData.**

You can view the populated data by opening the individual e-form instance. Sheet variable data appears in green and cannot be changed. Form field data appears in blue and is editable. Once the data has populated, you can proceed with using *natural*FORMS normally.

Now that you have an overview of the process, let's break it down step-by-step.

Creating a .CSV File in Excel

1   Open Excel. The top row of the Excel file must have column headers for the form name, instance name, and each field and sheet variable to import data.

2   The header for the first column **MUST** be **$FormID**. The FormID is the numerical identifier for the e-form.

3   The header for the second column **MUST** be **$InstanceName.** The Instance Name refers to the name which *natural*FORMS assigns to the created e-form instance.

4   Add column headers for the field and sheet variable names. These headers **MUST** match the field and sheet variable names assigned in EDW Forms Manager Client.

5   Confirm that the column headers for the field names and sheet variables are unique.

6   Complete your spreadsheet with the appropriate data for the FormID(s), Instance Name(s), field names, and sheet variable names.

7   Save the file as a .csv file.

8   E-mail the .csv file to an address that can be accessed on the device running *natural*FORMS.

Populating E-form Instances in *natural*FORMS

1   On the device, open the e-mail containing the .csv file.

2   Press, hold, and release the .csv file attachment in the e-mail. A menu will appear with the option of opening the .csv file in *natural*FORMS.

3   Select the option to open the .csv file in *natural*FORMS. The *natural*FORMS login screen will appear if you are not already logged in.

4   Log into *natural*FORMS if needed. You will see the e-form instance(s) which were set up in the .csv file created in *natural*FORMS.

5   Open the e-form instance(s) and verify that the pre-populated data is correct. That's it! You can now continue using *natural*FORMS normally.

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