

Instructions for Converting Delrina to Formdocs

Formdocs Application Note D150

Below are two pages of instructions for converting a Delrina form file (Delrina Form Flow, Perform, Perform Pro, etc.) to the Formdocs file format.

If you have never created a form template in Formdocs designer it is strongly suggested that you invest 30 minutes in taking the Formdocs Tutorial. On the **Help** menu of Formdocs Designer, click **Getting Started** to launch the tutorial. At the completion of the tutorial you will know everything necessary to complete and adjust the conversion of your old form template to the Formdocs format. After you complete the tutorial, follow these steps:

CONVERTING DESIGN FILES

1. Start Perform Pro Designer.
2. Open the Perform Pro file you want to convert to Formdocs.
3. In the Perform Pro 'Print' dialog box, open the list of available printers and select the printer named **Formdocs Converter**. Note that you must not make 'Formdocs Converter' your default printer, but only select it for this print job.
4. Click **OK** to print. The Formdocs Designer will start up and do its best to convert and create a look-alike form design template.
5. Shut down Perform Pro.
6. In Formdocs Designer, make all of your Formdocs fields have descriptive and recognizable names. Unless there is a good reason not to, name your Formdocs fields with the same name as the corresponding fields in the Perform Pro form, providing those names are descriptive, such as:

"CUSTOMER_NAME", "CUSTOMER_ADDRESS", etc.

CONVERTING DATA FILES

1. Basically, if you can EXPORT data as ASCII or CSV text from Perform Pro then you can IMPORT that data into Formdocs.
2. In Perform Pro Filler mode, open the form and data file you wish to export. Choose the command to Export. In the Perform export dialog box, indicate that you want to include "**field names**" on the first row, and use a comma character ',' as the field separator. Ensure the text file you export has a **.TXT** or **.CSV** file name extension.
3. In Formdocs Filler, choose **File/New** and select the template with which you want to create a new Formdocs form file - and into which you will import your Perform Pro data.
4. In Formdocs Filler, choose **File/Import**. In the Import dialog box, select **Files of type** list, choose **Text**. Locate and select the text file you exported from Perform Pro and then click **OK**. The Import Text dialog box appears.
5. In the Formdocs Import Text dialog box, select **Comma** as the field delimiter and then put a check mark in the box labeled **First row contains field names**. Click **OK**.
6. If all of the fields in the file being imported exactly match all of the fields on the Formdocs form template, a message will inform you and also prompt you to view the field linkages; you should choose **No**.

If any of the fields in the file being imported cannot be matched to any fields on the Formdocs form template, a message will prompt you to view the field linkages, and you must choose **OK**. In this case the 'Import Linking' dialog box will appear. You must link fields in the file being imported to fields on the Formdocs form template by selecting a Formdocs form field in the left column, selecting a Perform Pro form field in the right column, and then clicking the **Link** button. Link as many fields as you desire. Note that you do not need to link all fields; any fields left un-linked will not be imported.

When you are done linking fields, click **OK**.

7. After importing completes, click **File/Save As** to name and save the Formdocs form file you just created.
8. You may now use Formdocs Filler to navigate, add records to, search, and sort the new form file.

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