

Instructions for Converting FormFlow to Formdocs

Formdocs Application Note D152

<http://www.formdocs.com>

INTRODUCTION

This document contains four pages of instructions for converting a FormFlow form file (Delrina FormFlow, Symantec FormFlow, etc.) to the Formdocs file format.

Note that if you have never created a form template in Formdocs Designer it is strongly suggested that you invest 20 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 FormFlow form template to the Formdocs format, including how to setup calculations and work with tables. After you complete the tutorial, follow the steps below:

CONVERTING DESIGN FILES

1. Start FormFlow Designer and open the FormFlow design file you want to convert to Formdocs.
2. In FormFlow Designer choose 'File/**Print**'; in the FormFlow '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.
3. Click **OK** to print. The Formdocs Designer will start up and the Formdocs Converter Options dialog box appears.
4. In the Formdocs Converter Options dialog box, place a checkmark in the box **Recognize Fill Areas**. Then examine the other four **Recognize** sub-options and clear the checkmark from any option that is NOT present in your FormFlow form. For example, if there are no option buttons on your FormFlow form then **remove** the checkmark from that option. When you are finished examining options, click **OK**. The Formdocs Converter will start up and do its best to create a look-alike form design template from your FormFlow file.
5. When the conversion completes, switch back to FormFlow and terminate (Exit) FormFlow.
6. In Formdocs Designer, choose 'File/**Save**' to name and save the template file.

7. In Formdocs Designer read the **Conversion Help Topic** that appears, and make note of any instructions that apply to your form; you may need to add fields that were missed or delete any fields that were mistakenly added during conversion. You can minimize the Help window as you work. For more information about FormFlow items that may fail to convert, see the section below titled, **FormFlow Design File Conversion Limitations**.
8. After you have 'cleaned up' your form, and using the knowledge you learned by running the Formdocs tutorial, make all of your Formdocs fields have the appropriate data type (Text, Currency, Number, Date, Picture, etc.) and also give your fields 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 FormFlow form, provided those names are descriptive, such as:

"CUSTOMER_NAME"

"CUSTOMER_ADDRESS"

etc.
9. In Formdocs Designer, choose 'File/**Save**' to save your work.

FormFlow Design File Conversion Limitations

Any FormFlow item that has no corresponding match in Formdocs will not be carried over during conversion and you will need to replace them with either a Formdocs object or feature. Use the highlighted keywords below to search the Formdocs Designer Help file for step-by- step instructions on how to work with that object or feature.

1. FormFlow Comb fields and Circle text fields are not carried over during conversion. You will need to draw a replacement field for these items. A comb can be replaced with either a Formdocs Table field having one row and no headings, or a plain text field; a circle text can be replaced with either a Formdocs **Option** button or **Checkbox** field with the label positioned above the field.
2. Formdocs provides a more robust **Table** object than FormFlow thus FormFlow Tables will convert only as a group of individual fields. Note the bounds, row height, and column width of the FormFlow table and then delete all of those objects from the Formdocs workspace and replace it with a Formdocs Table object having the same heading, row, and column properties.
3. FormFlow **Calculations** are not carried over during conversion so you will need to re-define calculations for any fields that require them.
4. FormFlow Intelligent Forms Language (IFL) scripts are not carried over during conversion so you will need to re-define scripts for any fields or events that require them, using Formdocs **Forms Automation Basic** (FAB) scripting.
5. FormFlow **Digital Signatures** are not carried over during conversion so you will need to re-define them for any fields that are bound to them.
6. FormFlow external Database Connections are not carried over during conversion so you will need to re-define them using the Formdocs **AutoFill** feature.

CONVERTING DATA FILES

To summarize, you will EXPORT data from FormFlow and then IMPORT that data into your new Formdocs template to create a new Formdocs form file. The following instructions assume FormFlow v2.x. If you have a different version of FormFlow you may need to match the intent of these instructions to the actual commands in your version.

1. Start FormFlow Filler and open the form and data file you wish to export. Choose the command to Export. In the FormFlow 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.
2. When you finish exporting, shut down FormFlow Filler.
3. Start Formdocs Filler; choose **File/New** and locate and select the template you converted from FormFlow.
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 FormFlow 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 FormFlow 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. Your new Formdocs file will contain the same number of records (i.e. filled-in forms) that were present in the FormFlow file.
8. You may now use Formdocs Filler to navigate, add records to, search, and sort your new Formdocs form file.

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