

Instructions for Converting Formatta® to Formdocs

Formdocs Application Note D154

<http://www.formdocs.com>

INTRODUCTION

This document contains four pages of instructions for converting a Formatta form file 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 Formatta 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 Formatta Designer and open the Formatta design file you want to convert to Formdocs.
2. In Formatta Designer choose 'File/**Print**'; in the Formatta '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 Formatta form. For example, if there are no option buttons on your Formatta 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 Formatta file.
5. When the conversion completes, switch back to Formatta and terminate (Exit) Formatta.
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 Formatta items that may fail to convert, see the section below titled, **Formatta 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 Formatta form, provided those names are descriptive, such as:

"CUSTOMER_NAME"

"CUSTOMER_ADDRESS"

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

Formatta Design File Conversion Limitations

Any Formatta 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. Formatta Barcode fields are not carried over during conversion. A barcode can be replaced by copying an image of the barcode to the Windows Clipboard and then pasting it into your Formdocs form by choosing 'Edit/Paste Special', followed by 'Device Independent Bitmap'.
2. Formdocs provides a more compound **Table** object than Formatta thus Formatta Tables will convert only as a group of individual fields. Note the bounds, row height, and column width of the Formatta 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. Formatta Formulas are not carried over during conversion so you will need to re-define them as Formdocs **Calculations** for any fields that require them.
4. Formatta **Action Buttons** and Functions are not carried over during conversion so you will need to replace them with Formdocs Action Buttons and define scripts for them using Formdocs **Forms Automation Basic** (FAB) scripting.
5. Formatta **Digital Signature** Fields are not carried over during conversion so you will need to re-define them for any fields that are bound to them.
6. Formatta ComboBox are not carried over so you will need to re-define them using Formdocs' more robust **AutoFill** feature.

CONVERTING DATA FILES

To summarize, you will EXPORT data from Formatta and then IMPORT that data into your new Formdocs template to create a new Formdocs form file. The following instructions assume Formatta v5.x and above. If you have a different version of Formatta you may need to match the intent of these instructions to the actual commands in your version.

1. Start Formatta Filler and open the form file you wish to export.
2. On the File menu choose 'Export'. Ensure you specify the file you will export has a **'.CSV'** file name extension.
3. When you finish exporting, shut down Formatta Filler.
4. Start Formdocs Filler; choose **File/New** and locate and select the template you converted from Formatta.
5. 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 Formatta and then click **OK**. The Import Text dialog box appears.
6. 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**.
7. 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 Formatta 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**.

8. After importing completes, click **'File/Save As'** to name and save the Formdocs form file you just created. Your new Formdocs file will contain one record.
9. If you have more Formatta form files of the same type to import, repeat steps 1 through 7 to import each Formatta file into the same Formdocs file as a new record. When you are finished importing, you can use Formdocs Filler to navigate, add to, search, and sort all of the records in your new Formdocs form file.

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