

Instructions for Converting Omniform to Formdocs

Formdocs Application Note D151 05/08/2016

Below are five pages of instructions for converting both an Omniform design file and data file to the Formdocs file format.

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

CONVERTING DESIGN FILES

1. Start Omniform Designer.
2. Open the Omniform design file you want to convert to Formdocs.
3. In the Omniform 'Print' dialog box, open the list of available printers and select the printer named **Formdocs Converter**.
4. Click **OK** to print. The Formdocs Designer will start up and the Formdocs Converter Options dialog box appears.
5. 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 Omniform form. For example, if there are no option buttons on your Omniform 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 Omniform file.
6. When the conversion completes, switch back to Omniform and terminate (Exit) Omniform.
7. In Formdocs Designer, choose 'File/**Save**' to name and save the template file.
8. In Formdocs Designer read the Conversion Help that appears, and make note of any item instructions that apply to your form; you may need to add fields that were missed or delete any extraneous fields. You can minimize the Help window as you work.
9. 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, etc.). Unless you have a good reason not to, it is important to name your Formdocs fields with the *same* name as the corresponding fields in the Omniform, provided those names are descriptive, such as:

"CustomerName",

"CustomerAddress",

etc.

Design File Conversion Limitations

1. Any Omniform object that has no corresponding match in Formdocs will not be carried over in the conversion. This includes Omniform combs and circle text. 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 Omniform thus Omniform Tables will convert only as a group of individual fields. Note the bounds, row height, and column width of the Omniform 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. Define calculations for any fields that require them. You must do this because Omniform calculations are not carried over during conversion.

CONVERTING DATA FILES

To summarize, you will EXPORT data as *Text* from Omniform and then IMPORT that data into Formdocs. The following instructions assume Omniform v5.x. If you have an earlier version of Omniform you may need to match the intent of these instructions to the actual commands in your version.

EXPORTING DATA FROM OMNIFORM

1. In Omniform Filler open the 'File' menu and choose, **Export Data**; the 'Export Data' dialog box appears.
2. In the 'Export' dialog box, press **New**; the 'Export Setup' dialog box appears
3. In the 'Export Setup' dialog box, under "Export To", select **ODBC Database**.
4. In the 'Export Setup' dialog box, press **Administrator**; the 'ODBC Data Source Administrator' dialog box appears.
5. In the 'ODBC Data Source Administrator' dialog box, click the tab titled, **System DSN**.
6. In the 'System DSN' panel, press **Add**; the 'Create New Data Source' dialog box appears.
7. In the 'Create New Data Source' dialog box, scroll the list and select, **Microsoft Text Driver (*.txt; *.csv)**, and then press **Finish**; the 'ODBC Text Setup' dialog box appears.
8. In the 'ODBC Text Setup' dialog box, do the following:
 - In the "Data Source Name" box, type the name, "*ConvertOmniformDataToFormdocs*" without any spaces.
 - In the "Description" box, leave it blank.
 - Under "Database Directory" place a checkmark in the box, "Use current directory".
 - Press **OK**; the 'ODBC Data Source Administrator/System DSN' dialog box re-appears.
9. In the 'ODBC Data Source Administrator/System DSN' dialog box, under "System Data Sources" select in the list the driver named, **ConvertOmniformDataToFormdocs**, then press **OK**; the 'Export Setup' dialog box re-appears.
10. In the 'Export Setup' dialog box, under "Available Data Sources", select the text driver named, **ConvertOmniformDataToFormdocs** and press **OK**; the 'Export As' dialog box appears.
11. In the 'Export As' dialog box do the following:
 - At "Save in", select the folder where you want the exported data to go.
 - In the "File name" box, type a *descriptive* name for the export file; for example, "**Purchase Order Data Export from Omniform**"; this will help you recognize its purpose, later.
 - In the "Save as type" box, select **Microsoft Text Driver (*.txt; *.csv)**, and then press **Save**; the 'Export' dialog box appears.

12. In the 'Export' dialog box do the following:

Under "Fields in:", select the Omniform fields you want to include in the export and press **Add**; if you want ALL fields to be included (the usual choice) you can select the first field in the list, then scroll the list to the bottom, hold down the <**SHIFT**> key and then click the last entry in the list; you will see ALL entries become selected and then you can press **Add**.

Under "Fields to Export" will be listed all of the Omniform fields that will be included in the export.

When you are done adding fields to be exported, press **OK**; you will be prompted, "*What do you want to do with the export selections...*"; press **Run**; the export operation will begin.

13. If the export succeeds then you will see a message, "*Successfully exported n records*". Press **Cancel**. You now have a text file of your Omniform data that is ready to be imported into your Formdocs template.

IMPORTING DATA INTO FORMDOCS

Before you can perform the following steps you must first complete the instructions at EXPORTING DATA FROM OMNIFORM, above.

1. In Formdocs Filler, choose **File/New** and select the Formdocs template (*.fdt) you created by converting the Omniform Design file.
2. In Formdocs Filler, choose **File/Import**; the 'Import From' dialog box appears.
3. In the 'Import From' dialog box, located to the right of the "File name" box, open the drop-down list and choose **Text**. Then locate and select the text file you exported from Omniform, and then click **Open**. The Formdocs 'Import Text' dialog box appears.
4. 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**; then click **OK**.
5. If all of the fields in the file being imported exactly match all of the fields on the Formdocs template, a message will display, "The import file is an exact match..." and also prompt you to view or edit the field matching; you should choose **No**. The import operation will begin, and you can skip to step 6, below.

Otherwise, 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 matching, and you must press **Match**; the 'Import Matching' dialog box appears.

In the 'Import Matching' dialog box you must match fields in the file being imported to fields on the Formdocs form template by selecting a Formdocs form field in the *left* column, selecting an Omniform field in the *right* column, and then clicking the **Match** button. Match as many fields as you desire. Note that you do not need to match all fields, but any fields left un-matched will not be imported.

When you are done matching fields, click **OK**; the import operation will begin.

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

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