Link to article: https://discover.claromentis.com/knowledgebase/articles/428/creating-a-large-form-via-csv-import

Creating a large form via CSV import

When creating a large form with many fields, it can be quicker to add the fields via a CSV, instead of individually creating fields in the usual fashion.

This can also be used to copy a form between projects, as the CSV can be imported to create the form.

A CSV import is also useful in situations where adding lots of new fields to an established form is required.

(Do not use the CSV method for making edits to any current form fields, the CSV is for additions only)

Table view

When editing a form, click this button to view all the forms fields as a table:

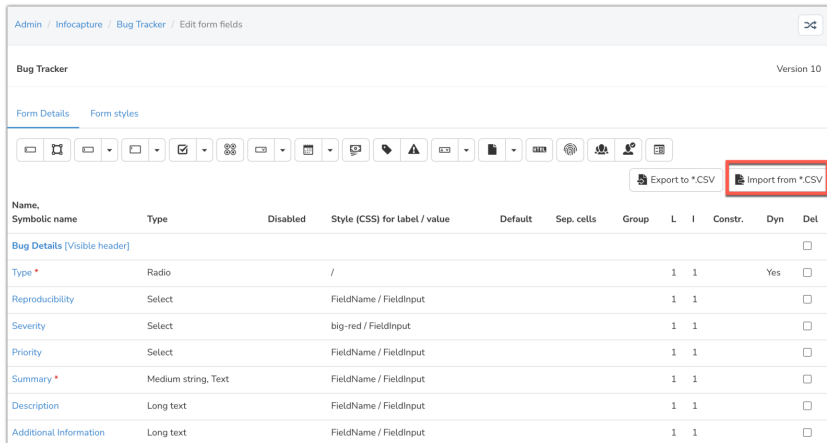A CSV of the fields can be downloaded using the 'Export to CSV' button:

Open the CSV in an external program on your PC to analyse or edit it further.

Adding new fields via CSV

If you are going to be adding new fields en masse export your current form as a CSV, then add the new fields to the CSV offline, following the advice shown below for how data should be entered into each column.
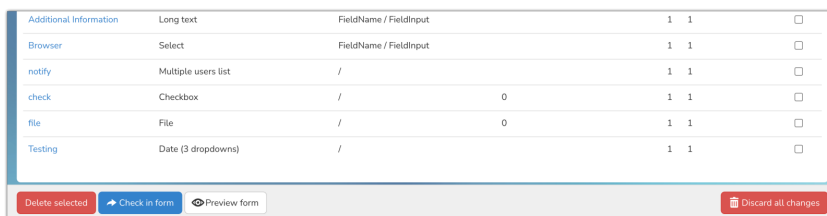
Once ready save the file and import it using the button for this, the new fields will be listed:

Preview the form to check all is well before checking in your form and applying the changes to a new form version.

Remember: If you make a mistake when running the import, delete the most recent form version in the revision history area to restore the previous version and remove what was just imported. Consider managing a test copy of your form to make changes to safely ahead of copying the changes on your live form.

Each CSV column and its purpose

Depending on what fields you wish to add to the form, enter information into the CSV columns as below.

order
The numerical order in which your fields will appear on the form. It makes sense to simply have 1, 2, 3, 4 etc going down the form.
This column is useful if, at a later stage, you wish to move around a large number of fields.

del
This will delete fields. Make sure there is a 0 in this column for each row, only change to a 1 if you're trying to mass delete many fields.

name
The field's name, as it appears to the user, aka the field label.

sym_name
The field's symbolic name, as is known to the system in the database, but not shown to the user.

As you are adding fields as new a simple rule is to enter the sym name as the label but with underscores for spaces or either side.

e.g. 'Job title' would have a symbolic name of 'job_title' and 'Brand' could be given '_brand' to ensure unique reference in the database.

optional_hint

For tooltips - any extra information you want to appear under a small 'question mark' option the submitter can see.

type

The type of form field. These are the available options:

```
 BBCODE_TEXT
 CHECKBOX
 DATE
 DATE_PICKER
 DATE_TIME_PICKER
 DOCUMENT
 FILE
 FINANCIAL
 GROUP
 HTML
 LABEL
 LONG_STRING
 LONG_TEXT
 MEDIUM_STRING
 MEDIUM_TEXT
 MULTIPLE_CHECKBOXES
 MULTIPLE_SELECT
 MULTIPLE_USERLIST
 NOTICE
 RADIO
 ROLE
 Section
 SELECT
 SHORT_STRING
 SHORT_TEXT
 SIGNATURE_PAD
 USERLIST
```

sub_type

If your field type is a Short String or a Medium String then this is where you specify the 'string type'. The options are:

```
 Text
 Integer
 Floating point
 Email
```

advanced_ui

This will always be 'no' unless you're using a select field or multiple select and you'd like the advanced UI, whereby you can type the dropdown list value you'd like rather than finding it on a list, in which case use 'yes'.

values

If you have a Multiple Checkbox, radio, select, or multiple select field, then enter the values here. Put each new value on a separate line.

default_value

If you want your field to have a default value already input when the user views the form, enter it here, otherwise leave blank.

show_please_select
required
disabled
reload_on_changing

These are all checkboxes that do as their names describe, put 'no' for unticked and 'yes' for ticked

css_label
css_value

Leave these blank unless you know of a CSS label you would like to add

label_size
input_size
Set as 1 for each unless you need your field to be larger.

separate_cells
label_above_field
group_with_next

These are all checkboxes that do as their names describe, put 'no' for unticked and 'yes' for ticked

constraint:reg.ex

constraint:value >=

constraint:value <=

constraint:size >=

constraint:size <=

Enter any values as appropriate to constrain the fields, more information here