



Bulk Upload Against Custom Forms



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Introduction

The purpose of this document is to understand how to bulk upload against custom forms. Please note of the following instructions to follow first before entering any data on the CSV file:

- In your CSV file, you must ensure that the CSV you upload is the exact columns of the form you are uploading against.
- The field database names must be included in the first row followed by each record you wish to upload on a separate line.
- Any field that is marked as mandatory on your form must be filled in the upload.
- Any field that has a specified value (e.g. select dropdown, checkboxes, radioboxes, etc.) must contain a valid value as per for form configuration.
- If you wish to enter multiple options, you should separate the values with pipe (|) WITH NO SPACES before, between and after – for example: *permanent|temporary|contract|full-time|part-time*
- The upload is case sensitive – for example, “yes” is not the same as “Yes”.
- All dates must be uploaded as “yyyy-mm-dd” format – this is different than our other bulk uploaders.


Change Date Format in Computer

If your form has a date field, before downloading, opening and entering any data in Excel, you must change your date format in your computer settings.

Once there, you must change your “Short date” field to “yyyy-mm-dd”:

Change data formats

Calendar

Gregorian Calendar 

First day of week

Sunday 

Short date

2017-04-05 

Long date

April 5, 2017 

Short time

9:40 AM 

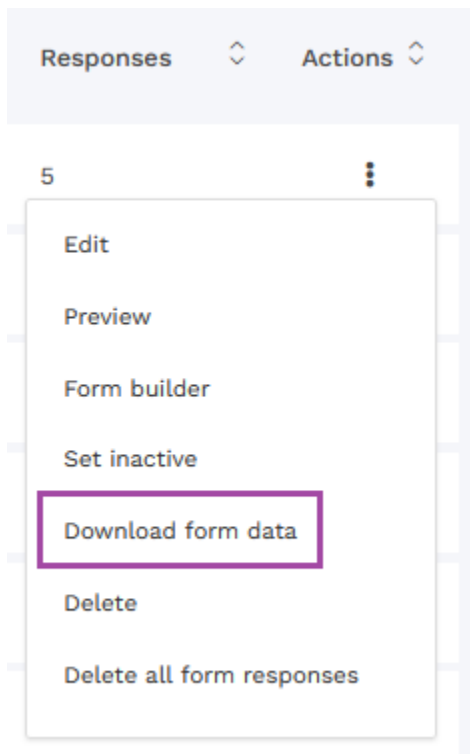
Long time

9:40:07 AM 

Obtaining and Downloading CSV Model

In order to get the actual template or CSV model of any custom form in your Form Builder, you will have to download the data of the specific custom form you want to upload it in. By doing so, go to **Administration > Company > Form Builder** or **Administration > HR > Form Builder**.

Once there, go to any form's actions, and click on "Download form data":



If you have 0 responses on a form, you must add one manually in order to get the Excel CSV Model. By doing so, you will have to the Forms module, choose any form, go to actions, click on the "+" button to add one manually, complete the form, then click on "Submit".

Now, you will be able to get the Excel CSV Template you need to bulk upload against custom forms.

Once downloaded and opened, here are the guidelines you must follow in order to successfully bulk upload your data:


- Keep the first row, which is all the headings needed for the bulk upload, and delete all the following data as these are not needed for the bulk upload.
- Make sure the employeeName field is the WorksID or System ID of the employees. This will help HRWize to better track the employees instead of having their full names written.
- Delete the first columns before employeeName (i.e. submission_id, employee_id, and works_id). These columns are not needed for the bulk upload.
- If you have date field in your form, make sure that your date format is "yyyy-mm-dd":

Once inside, it will take you to this page:

Bulk upload forms



- You must ensure that the CSV you upload is an EXACT match of the form you are uploading against
- The field database names must be included in the first row followed by each record you wish to upload on a separate line
- Any field marked as mandatory in the form configuration must be filled in the upload
- Any field with a specified value such as a select dropdown, checkbox, radio box etc must contain a valid value as per the form configuration
- The upload is case sensitive hence yes is not the same as Yes etc
- All dates must be uploaded as Y-m-d format- please note this is different to our other uploaders

Employee field 

Employee name System ID Works ID

Form *

Please choose

Form CSV file to upload:



From here, the Employee field must be Works ID or System ID as this provides a faster and easier way to track down the employee. Choose the form in the “Form” field, upload the form CSV file by clicking on “Browse”, then click on “Submit”.