

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":

9	
Calendar	
Gregorian Calendar	\sim
First day of week	
Sunday	\sim
Short date	
2017-04-05	\sim
Long date	
April 5, 2017	\sim
Short time	
9:40 AM	\sim
Long time	
9:40:07 AM	\sim

命 Change data formats



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**.

Responses \hat{v}	Actions \Diamond
5	
Edit	
Preview	
Form builder	
Set inactive	
Download form data	
Delete	_
Delete all form respo	nses

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":



		М	
:	date		f
		2019-04-18	Y
		2019-01-04	Y
		2019-01-11	Y
		2019-01-08	Y
1		2019-01-25	Y
		2019-01-11	Y
		2019-01-14	γ
		2019-01-14	γ
		2019-02-08	Y

- If you have a field type called "Yes and No", "Employee completed", "Manager completed", and • "Workflow step completed", you should not write "Yes" or "No" in Excel. You must input "1" as it counts for "Yes", and "0" as it counts for "No".
 - Do not write "Yes" in this kind of field type. If you do bulk upload with this feature and to any employee's form, this will give you the result of "No", as it does not recognize the value it needs.
 - \circ $\:$ If you put "0" for "No", the employee will be able to edit the form.



Once the document is ready and respects the instructions, we are now ready to bulk upload by going to Administration > Company > Bulk Upload. Once in this page, scroll down to the "Other data" section, and click on "Custom Form Data". y

Other	data

Employee medical	Update bank details	Training records	Library training	Meetings	Simple benefits
Custom benefits	Custom employee fields	Competencies	Succession	Library goals	Employee goals
Employee goal updates	Employee development records	Development types	Custom form fields	Custom form data	Employee notes
Employee localisation					



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 • 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 value • 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	·	configuration
Employee field ⑦		
Form *		
Please choose	\$	
Form CSV file to upload:		
	Browse	

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".