Merging Data from Files

Preparing Data Files
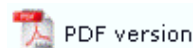Defining Fields
Linking to Fields
Masking
Printing Forms with merged Data
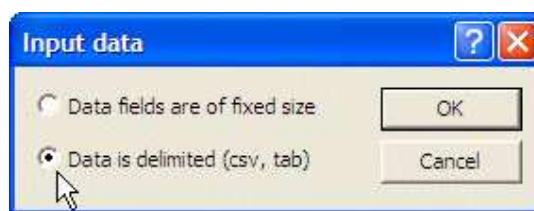
Merging Data from Files

📄 PDF version

You can insert data from files into zone, text and barcode objects on your form, and dynamically merge the data when the form is printed. This is similar to the 'mail merge' feature found in word processors, but considerably more powerful.

Data files can be any form of plain text file, and usually contain the output of database or spreadsheet applications.

There are two main ways to configure FoD-OMR to use data files:

1. If the first row of your data file contains the field name, FoD-OMR can use this row to identify each column and extract the information to the relevant data field. This option is only available when using CSV files. For more information see Printing forms with merged data.
2. Where the data is in a fixed field format or a CSV file without headings FoD-OMR objects are set up to reference a specific data field when the form is printed.

Before you can add the first field, you must make up your mind which format of data file is required, **either Data fields are of fixed size** or **Data is delimited**. Delimited covers both with and without the header line. Note that you MUST define delimited fields in their correct order for files without headers.

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FoD-OMR can use data files in three distinct 'formats':

- *Fixed* data files have the same data field always at the same location on each line in the data file.
- *Delimited* data files have their fields separated by a character known as a *delimiter*.
- *Delimited named* data files are like the *Delimited* data files in that the fields are separated by a delimiter. They also have a header line which allows more flexibility in forms design.

Field are grouped together in *records*, which are terminated by the line feed character. For each record in a data file, FoD-OMR extracts the data from its fields and prints one form.

The pictures below show data files representing the same data in separated format with headings, separated format without headings and fixed format.

Delimited files with headers offer the most flexibility and are preferred as the data source. The ability for the field names to be carried as headers in the first record enables both simpler form design and ease of data manipulation.

The separated format uses the comma as the delimiter and double quotation marks surround text items. The double quotation marks are known as the *text qualifier* as they indicate text fields. These are optional.

The fixed format uses a fixed starting point on each line to identify the fields.

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