

# Import Menu

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## Introduction

The useview **Import Menu** is a feature to import bulk data (in a .csv or Excel file) into a specific Joget form. The Import Menu properties allow you to perform simple column-to-field mapping. When importing records, you can specify the following import mode:

- **Import new record only:** Import only new records, existing records based on 'id' field are ignored.
- **Import new record or update existing record:** Import all records.
- **Delete record:** Delete matching records in database if matches the csv or Excel file based on 'id' primary key.



During import, you can click the **Validate data** checkbox to perform data validation based on the form field validation rules.

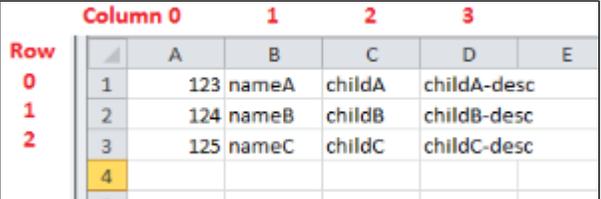
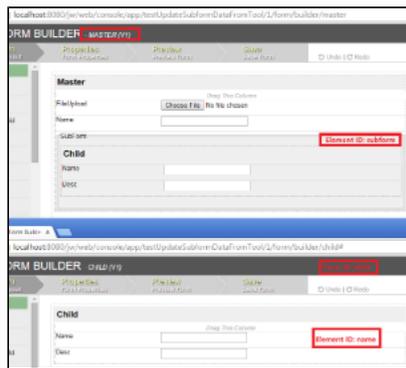
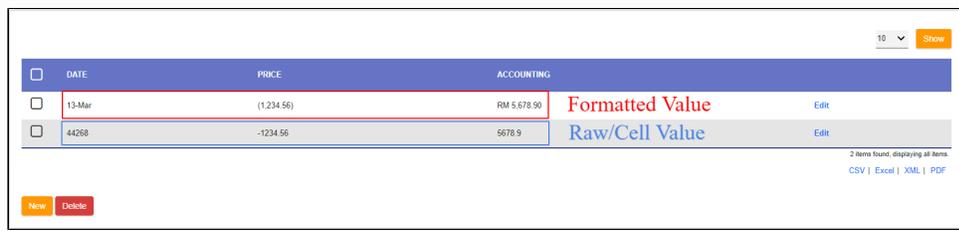
Figure 1: Import Menu in Useview Runtime

## Import Menu Properties

### Configure Import Menu

Figure 2: Import Menu Properties

Name	Description
ID	Menu element unique id. Userview will use this id in the URL for the menu if the Custom ID is empty.
Custom ID	Optional custom menu id. Value defined here must be unique to the rest of the Userview Menus as the first matching name will be called upon.
Label	The userview menu label. You can add <a href="#">Font Awesome Icons</a> into your menu labels.
Form	Specify on where to store the data by choosing a target form. The target form's store binder will be called upon for data storage. <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>i</b> <b>Post Form Submission Processing</b></p> <p>Any Tool mapped under <b>Post Form Submission Processing</b> of the target form will be triggered each time a record updated or created.</p> <p><b>Important:</b> The tool mapped will be triggered regardless of the <b>Run Tool on</b> attribute.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p><b>joget   FORM BUILDER - CASE (V1)</b></p> <p>Design Form (Design and Layout)   Properties (Form Properties)   Preview (Preview Form)   Save (Save Form)   Undo   Redo</p> <p><b>Post Form Submission Processing</b></p> <p><small>Run a tool after a form is submitted. Only applicable for primary form.</small></p> <p>Post Processing Tool: Bean Shell Tool</p> <p>Run Tool on: <ul style="list-style-type: none"> <li>Both data creation and update</li> <li><b>Data creation</b></li> <li>Data update</li> <li>Both data creation and update</li> </ul> </p> </div> </div>

Column Mapping	Name	Description																									
	Column Number	<p>Column number from the source file. Column number starts from zero.</p>  <table border="1" data-bbox="332 252 933 451"> <thead> <tr> <th>Row</th> <th>Column 0</th> <th>1</th> <th>2</th> <th>3</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>1</td> <td>nameA</td> <td>childA</td> <td>childA-desc</td> </tr> <tr> <td>1</td> <td>2</td> <td>nameB</td> <td>childB</td> <td>childB-desc</td> </tr> <tr> <td>2</td> <td>3</td> <td>nameC</td> <td>childC</td> <td>childC-desc</td> </tr> <tr> <td>4</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Row	Column 0	1	2	3	0	1	nameA	childA	childA-desc	1	2	nameB	childB	childB-desc	2	3	nameC	childC	childC-desc	4				
Row	Column 0	1	2	3																							
0	1	nameA	childA	childA-desc																							
1	2	nameB	childB	childB-desc																							
2	3	nameC	childC	childC-desc																							
4																											
	Field Name	<p>Corresponding element ID in the form set above to be mapped to.</p> <p>If you are referring to a Subform in the target form, remember to prepend the field name with subform element ID followed by an underscore.</p> <div data-bbox="332 577 1494 1228"> <p><b>Example</b></p>  <p>Subform ID: subform</p> <p>Form ID set in the Subform: child</p> <p>Field ID in the subform: name</p> <p>Field Name: subform_child_name</p> </div>																									
	Use Formatted Value	<p>Check this field to use Formatted Value instead of the default Raw/Cell Value.</p> <div data-bbox="332 1312 1494 1648"> <p><b>Example</b></p>  <table border="1" data-bbox="397 1375 1356 1606"> <thead> <tr> <th>DATE</th> <th>PRICE</th> <th>ACCOUNTING</th> <th></th> </tr> </thead> <tbody> <tr> <td>13-Mar</td> <td>(1,234.56)</td> <td>RM 5,678.90</td> <td>Formatted Value Edit</td> </tr> <tr> <td>44268</td> <td>-1234.56</td> <td>5678.9</td> <td>Raw/Cell Value Edit</td> </tr> </tbody> </table> </div>	DATE	PRICE	ACCOUNTING		13-Mar	(1,234.56)	RM 5,678.90	Formatted Value Edit	44268	-1234.56	5678.9	Raw/Cell Value Edit													
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13-Mar	(1,234.56)	RM 5,678.90	Formatted Value Edit																								
44268	-1234.56	5678.9	Raw/Cell Value Edit																								
Key Column Number		Define column number that defines the record id. Column number starts from zero.																									
Start From Row Number		Define which row number to start processing. Row number starts from zero.																									

Custom CSV Delimiter Character	Symbol to represent the delimiter separator.
Custom CSV Quote Character	Symbol to represent the regular quote character.

## Action Properties

**Actions**

Confirmation Message

Message to show when error occur

Message to show after data imported

Redirection (Hyperlink)

Figure 3: Action Properties

Name	Description
Confirmation Message	Confirmation Message.
Message to show when error occur	Message shown when error occur.
Message to show after data imported	Message shown after data imported.
Redirection (Hyperlink)	URL to redirect, for example, to redirect to the CRUD datalist.

## UI Properties

**UI**

Custom Header 1

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Custom Footer 1

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Disable delete record feature

Figure 5: UI Properties

Name	Description
Custom Header	Custom Header in HTML.
Custom Footer	Custom Footer in HTML.
Disable delete record feature	Disables the option for end users to delete records.

### Advance Properties

**Advanced**

Userview Key Name

UTF-8 Encoding Checking?

Figure 6: Import Menu Properties - Advanced

Name	Description
Userview Key Name	Corresponding element ID in the form set above to be mapped to (same like the mapping in "Column Mapping" above). When defined, the Userview Key value will be saved into the field defined here.
UTF-8 Encoding Checking?	When checked, it will check the uploaded file if it is a valid UTF-8 encoded file.

**Example:**

With the configurations above, we will attempt to import the following data in the screenshot below.

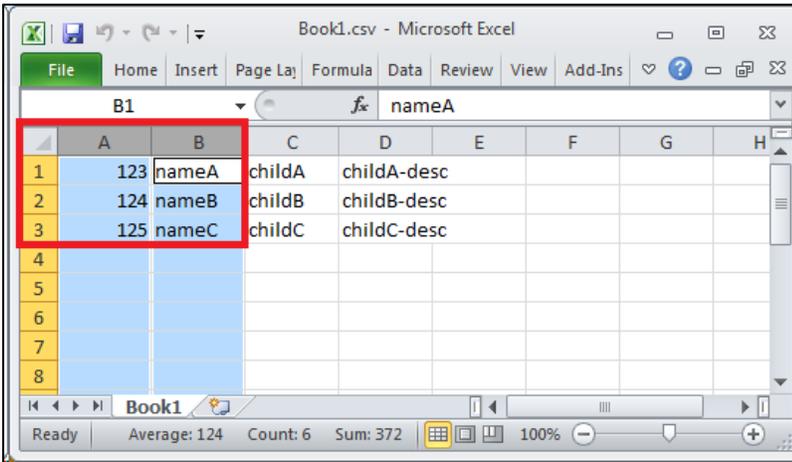


Figure 7: Source data highlighting data that will be imported into the target form's database table (master)

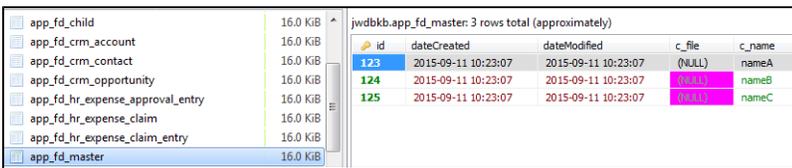


Figure 8: Data written into the form table (master)

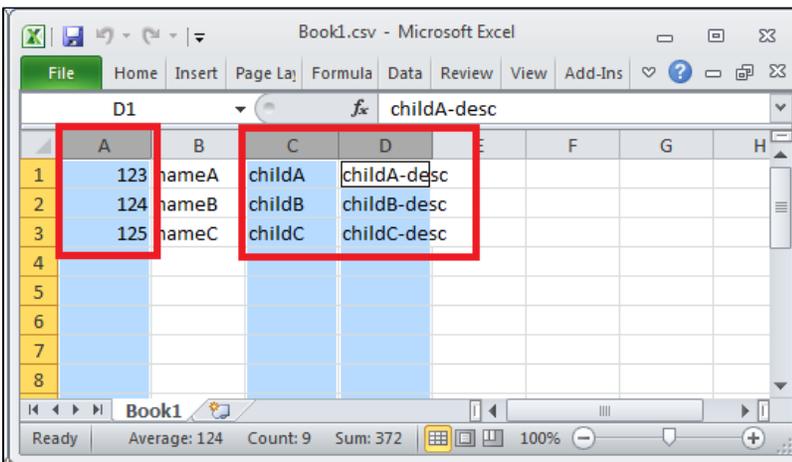


Figure 9: Source data highlighting data that will be imported into the target form's subform's database table (child)

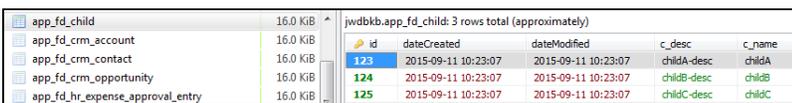


Figure 10: Data written into the form table (child)

## Performance & Offline Properties

You can configure the **Performance** settings in this Userview Element which allows one to cache existing content for improved performance and loading speed. Read more at [Performance Improvement with Userview Caching](#).

## Import Menu For Joget User Records

The [Joget User Mgmt Utility](#) has an import menu to import user records into Joget DX. You can download the app from [Joget Marketplace](#).

## Download Demo App

Download the following sample app and CSV file to demonstrate the use of Import Menu.

