Creating an Excel document to auto-load data from a .txt form file

Using an Excel, you can configure a spreadsheet to connect to your form data and update with new data automatically. This is extremely useful and timesaving for collecting form data via WesFiles.

While this process can be done without having Xythos Drive installed, it is highly advisable that you have Xythos Drive. The process of refreshing data is quicker and easier than without it.

Microsoft Office 2010/Mac Office 2011

The below screen shots were completed on Windows, however the procedure is the same between platforms with a couple of differences in menu locations. Go to the MAC OFFICE section for more details.

**STEP 1 – CREATE AN EXCEL SPREADSHEET WITH THE FIELDS FROM YOUR FORM**

The fields should be your Header Row and begin in A:1. You can format the row however you like. Note they should be in the same sequence that your form is in.

If you are unsure, you can skip this step and Import the data file the first time using the header rows that are in your data form. See ALTERNATE STEP 1 – CREATING THE SPREADSHEET WITH HEADERS ON FIRST IMPORT.

**STEP 2 – IMPORT YOUR DATA FROM THE TEXT FILE ESTABLISHING A DATA CONNECTION**

For this, we will be working in the Data tab of Excel.

Go to Data > From Text. Navigate to the data file on WesFiles that is collecting your form data. (filename.txt).
Highlight your file and click **Import**.

This opens **Text Import Wizard**

The data is Delimited and Excel detects this.

*Start Import at Row 2* if you already have your header row in place (this is so you do not import the header fields again onto your sheet).

Go through the fields and **Do Not Import (Skip)** any fields that do not have a corresponding field in your spreadsheet. Highlight and select **Do Not Import**. (Note the header will now say Skip). The text file has fields at the end that are for programming purposes. Most people do not want these in the spreadsheet. These can include Xythos Filename, data_directory, data_filename, redirect, separate_file, and username.

Click **Finish**.

The data rows are now in your document.
**STEP 3 – VIEW THE ESTABLISHED DATA CONNECTION**

In the **Data** tab, Click **Connections**.

This window shows you the data connection that is established between your current spreadsheet and the data source, your text document.

The name of the form will appear under **Name**.

Under **Locations where connections are used in this workbook** - click on **Click Here to see where the selected connections are used**. This will show you the range of cells that are populated with the imported data.

Click **Close**
**STEP 4 – SET THE PROPERTIES OF HOW YOUR DATA IS REFRESHED**

Click on any cell with data in it and (still under the Data tab) click **Properties**.

Uncheck **Prompt for file name on refresh** (when this is checked, Excel will ask you to navigate to the file every time)

Check **Refresh every x minutes** if you would like Excel to refresh the data when you have the file sitting open. It can go and check for data at regular intervals.

Check **Refresh data when opening the file**. This is very useful because it will automatically check for new data every time you open the spreadsheet.

Save your Spreadsheet. You may save it to any network location (Wesfiles, Dragon) or locally.

**IMPORTANT INFORMATION TO KEEP IN MIND**

The connection is established and will refresh when you open your document. The source data - .txt file – is unaffected and will stay in its original format.

Because the source data is in .txt format, Excel is importing all the fields every time. If you delete a row in your spreadsheet, it will re-populate on refresh.

*Formatting on your spreadsheet will be preserved.* If you highlight or color code records, that will remain.

*You will need to re-sort data after a refresh.* Excel will automatically populate the data by the Date field.
**Alternate Step 1 – Creating the spreadsheet with headers on first import**

If you are unsure of your field names, you can import the field names on first import. In this case, you would start with a blank spreadsheet, and go immediately to **Step 2 – Import your data from the text file establishing a data connection**. However, on the first step of the Import Wizard, you would begin Import at Row 1. Row 1 will contain your header row information. The fields will be named as they are in the file collecting the data. *If you re-name them, they will be overwritten on subsequent refresh of the data though the formatting (bold, fill etc) will remain.*

**Mac Office 2011**

The procedure for doing this is the same. There are a couple of program differences between Mac and PC.

On the Mac, Data tab, the Text import is under the External Data Sources section and simply says Text.

The Properties of the Data connection is accessed by clicking on a cell with data in it and going to Data > Get External Data > Data Range Properties.