Importing text files into Series 5, 5mx, 7 and Revo Data

Note: All occurrences of **Revo** in this document also refer to **Revo Plus** unless otherwise specified. This document details the steps necessary for bring information from structured text files into the Data application on the Series 5, 5mx, 7 and Revo. Specifically, it deals with CSV ("Comma separated values") files. The document contains examples of creating CSV files from several different applications, but the same general rules will apply in other cases. Some basic knowledge of your Psion is assumed.

Why text files?

Plain text files are among the simplest type of file you can create on a computer – they contain only the text you have typed. Note that a file that looks like plain text in, say, Word on the PC may include hidden formatting, so it is important to be quite sure that the file you have created is a text file.

CSV files are an example of a wider group called 'Text delimited' files. These files contain particular characters that are used to maintain some structure in the file without using special formatting commands. CSV files use a comma to keep the file's structure and Data can use this to build a data file from the text.

Creating a CSV file

On a PC

Many applications on the PC can create text or CSV files, though the method required can vary.

- In many Windows applications, you should select **Save as** from the **File** menu.

- The dialog here shows the **Save as** dialog in Excel 7. Note that **CSV** has been selected in the **Save as type** box.
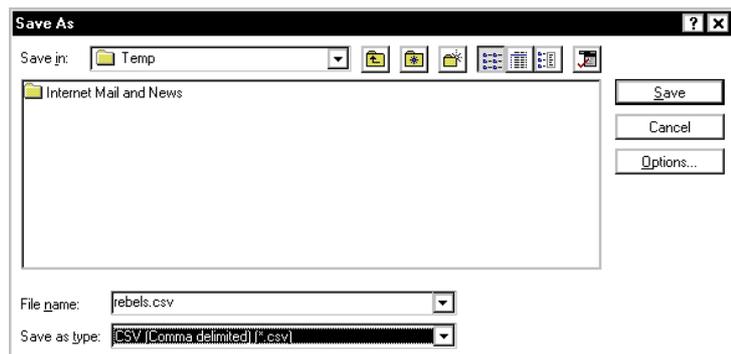
- In Lotus Organizer, you must select **Export** option from the **File** menu.
- You will need to specify which part of Organizer you wish to take information from – this will generally be the **Address** section.
- To specify that you are creating a CSV file, change the **List files of type** box to **ASCII Text**.
- In addition you can specify which fields (**labels** in Psion terms) should be exported.
- To do this, click on the **Mapping** button to see the **Export mapping** dialog.
- By clicking on items in both columns in this dialog, you can link Organizer fields to particular labels in the CSV file.
- This is one way to restrict the number of labels which transfer to the Psion, which can be useful.
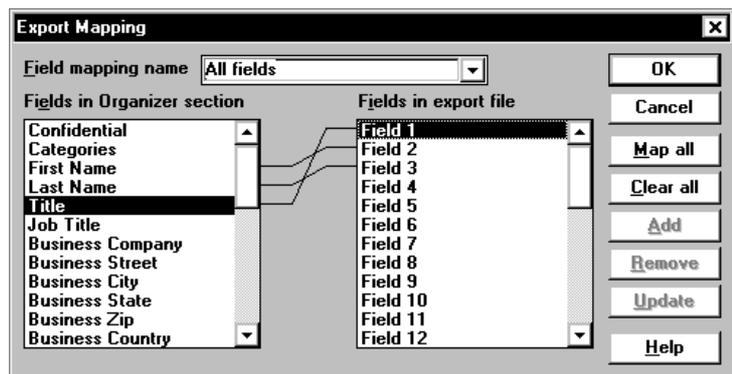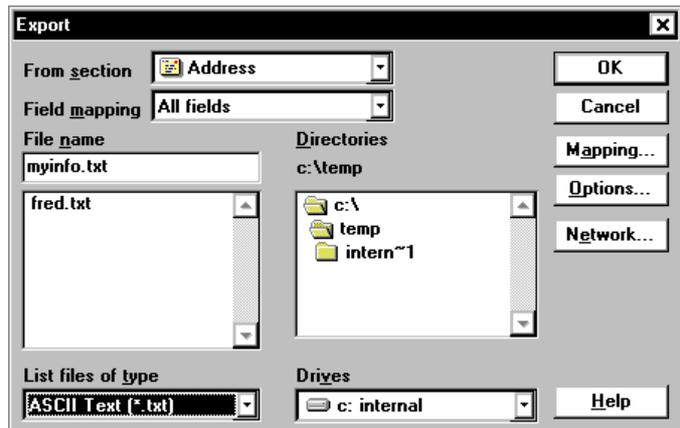
On a Series 3, 3a, 3c, 3mx or Siena

You can create CSV or other text delimited files on a Series 3, 3a, 3c, 3mx or Siena.

- Select **Save as** from the **File** menu to specify the type of file you wish to create.
- Change the **Save as** line to **Text** and change the **Delimiter** line to **Comma** to create a CSV file.
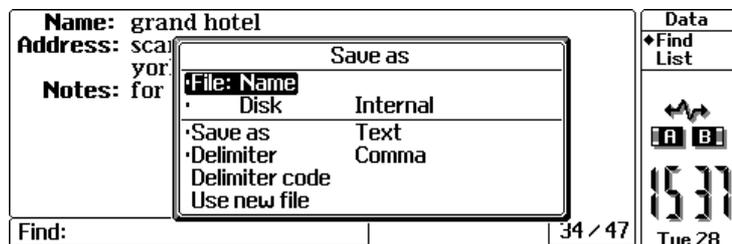
On a Series 5, 5mx, 7 or Revo

There may also be times that you wish to create a CSV file on your Series 5, 5mx, 7 or Revo.

- Select **More** then **Export as text file** from the **File** menu.
- This allows you to specify a file name and folder for your text file. Tap on the **Options** button to see the **Export options** dialog.
- For a CSV file, the **Label separator** should be set to **Comma**.
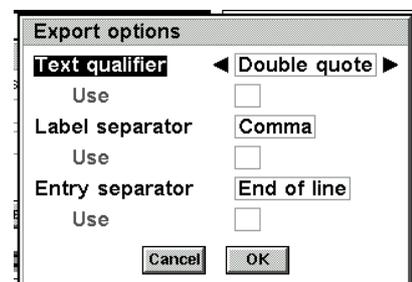
Copying the file

Once you have created the CSV file, you will need to copy it to your Psion.

If you are copying the file with PsiWin 2, you may be offered the opportunity to convert this file, either to Series 5, 5mx, 7 and Revo Data format or to Series 5, 5mx, 7 and Revo Word format. If you elect to convert to Word format, this will prevent you easily merging that file into Data, so it is best to copy the file without converting it.

Labels

An important part of this procedure is to consider the *labels* that your Series 5, 5mx, 7 and Revo database has, or that you intend it to have. You should set up the labels in your Psion by selecting **Change labels** from the **Tools** menu, adding the labels that suit your CSV file. Do this *before* attempting to import the CSV file.

Number of labels

Although the Series 5 is very flexible about the type of labels your database can have, there is an upper limit on the number of labels in your file. This does vary depending on the type of information you have, but is around twenty labels. If you try and merge in a CSV file that has more labels than the machine can deal with, additional labels will be ignored. This does not apply to the Series 5mx, 7 or Revo.

Using the field mapping in Lotus Organizer is a good way of choosing which labels will appear in your CSV file. Alternatively, since a CSV file is a plain text file, it is possible to edit it on the PC, though care should be taken when attempting this, or some information in your file may end up against the wrong labels.

Order of labels

It is important that you set up the order of the labels in your Data file so that they are the same as the order in the CSV file. Once the CSV file has been merged into a Data file, changing the order of the labels will not help.

Merging in a CSV file

Once you have set up the labels that you need in your Database, you can merge in the CSV file.

- To do this, select **More** then **Import text file** from the **File** menu.

- This allows you to specify which CSV file you wish to import. You should also tap on the **Options** button.

- Assuming you are importing a CSV file, the **Label separator** and the **Entry separator** should be set to **Comma** and **End of line** respectively.

- Your choice of **Text qualifier** depends on the CSV file; some CSV files use doubles quotes (") as well as commas as the text separator. If this is the case, you should select **Double quote** as the **Text qualifier**.

- Lotus Organizer does use a double quote qualifier.