Migrating Existing Online Forms to the New Forms Manager

To facilitate the move from the legacy Blackbaud Grantmaking Forms Manager (IGAM) to the new Manage Forms, users will have the ability to export existing forms from IGAM which can then be imported into the new Forms Manager to reduce time in rebuilding.

NOTE: Not all aspects of existing forms will be exported; the following documentation should be reviewed to understand those areas that may require additional work.

Exporting Forms from the existing Forms Manager (IGAM)

The following forms can be exported from **Forms Manager (IGAM)**:
- Single Stage Applications
- Stage 1 Applications
- Stage 2 Applications
- Requirement Forms

To access the **Export** feature, go to **Applications>Forms Manager** then **Active Forms**. Please note: Forms must be **Active** to **Export.**

Right click on an **Active Form** to view the available options:
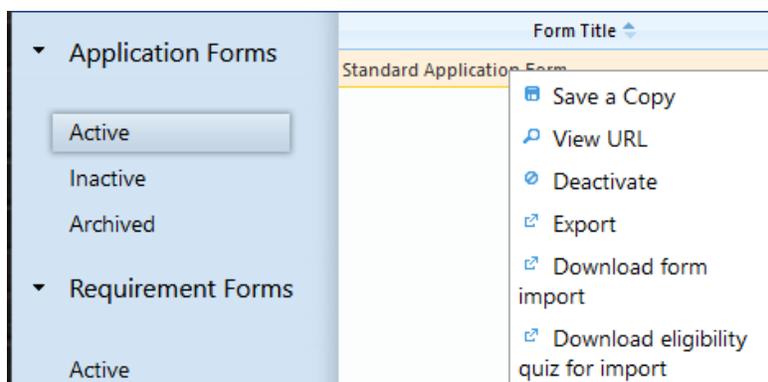
For Stage 1 and Single Stage Applications there are two files available to download, the Form Import and the Eligibility Quiz for Import. If an application form uses an eligibility quiz, both files need to be downloaded.

Downloading the forms creates a .csv file which can now be imported into the new Forms Manager to start the process of building a form.

Importing Forms in the new Forms Manager

Note: Since Eligibility Quizzes and Applications are managed as two separate forms, they will each be imported on a new form.

To import a form, go to **Applications**>**Manage Forms**. Click on the **+ Create Custom Form** option.

Fill out the Form Name, Form Type, Default Language and Description, you can also designate if you want to require a signature when submitting.

Click the **Create** drop down and select the option to **Create and Import Fields**.

Create and go to form

Create and import fields

Create and quick add fields

Create ∧   ✓ Published
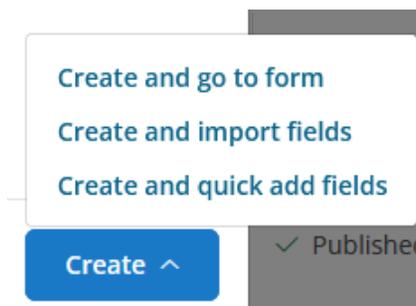
On the **Import Form Fields** screen, you only need to **Select File** to begin the process, you do not need to Download the sample file.

Import Form Fields
Standard Application Form

Step 1: Download

Click the button below to download a file to use for your data import.

Click here to view impor...

Step 2: Import your data

Click the button below to select your completed CSV file. Your file will be validated and any errors will be shown below. Click Download Errors to receive a CSV file of all errors.

⬆ Select file

Max File Size: 29MB

Cancel   Download errors   Import

Locate the file you previously exported. If there are any errors, remove the fields indicated from your source file and reselect to complete the import.

❌ There were error(s) in the provided file. Please download the errors and correct the data.

NOTE: Reasons for error(s) are covered below.

Differences to consider when importing fields.

ELIGIBILITY FORMS

In the new Forms Manager, eligibility quizzes are treated as a different type of form and are not part of the Application form. Importing an eligibility quiz can facilitate creating this new form. If you used a branching or routing question on an eligibility quiz you should consider using a routing form in the new Forms Manager.

Things to know:
1. The Text Description from the eligibility quiz page will be imported as the Page Title on an imported form.
2. Only the first ten questions from the eligibility quiz page will export and import.
3. All questions will default to the standard eligibility field option of Yes or No responses only.
4. To manage other types of eligibility questions, see additional resources on

designing forms.

APPLICATION FORMS

The import form fields process will facilitate creating a form but there are areas that will need to be cleaned up before launching the new form with a **Program**.

FORM PROPERTIES

The different options from the **Form Properties** screen are now mostly located in the **Program** area of the new forms experience. These are not imported in any way, when you create the **Program** that the application will be a part of you will now have expanded options.

TEXT NOTES, TEST HEADER & SECTION HEADERS

Any text that is not a field **Label**, **Description** or **Help Text** will not be a part of the exported form file. It is recommended you generate a **Printer Friendly Version** of the previous form to easily copy text into the new form.

This is a great way to evaluate your text. Pay particular attention to text that may have been instruction based on the usability of the old form as this may no longer be relevant with the new forms experience.

LAYOUT

There are several dynamic new layout options in the new forms experience. Once imported all fields will be in the same order they were in but will be placed on the new form one field per line. Page designations are saved, and the import tool will create the pages and page names from the old form.

LONG TEXT FIELDS

Previously a long text field could be added to a form multiple times. In the new forms, all fields must be unique. You will receive an error if a long text field appears on the import file more than once. The **Request Project Description**, **Organization Background** and **Contact Notes** fields are common fields that may have been used

more than once. You will be required to create new fields in Blueprint to replace instances where a long text field was used more than once. If you do not have Blueprint additional guidance will be provided.

ATTACHMENT FIELDS

Both **Attachments** fields and the **Attachments Page** are supported. However, only the first ten defined attachments will be included in the export file, there will be created as **single attachment** field on the new form. Additional attachments not included in the import will need to be added using the **multiple attachment** fields. You may need to evaluate how to use the ten standard **single attachment** and ten standard **multiple attachment** fields on the new forms.

CONTACTS

Contacts are managed in a very different manner on the new forms. Please see resources on designing new forms for more details.

If there are any contacts designated as a **Request** contact, including the **Request Primary Contact**, the import will add the **Request Contact Table** to the new form. You will need to update settings such as how many contacts you want to capture related to the request and which contact fields you want to enable.

If there are any contacts designated as an **Organization** contact, including the **Organization Primary Contact**, the import will add the **Organization Contact Table** to the new form. You will need to update settings such as how many contacts you want to capture related to the request and which contact fields you want to enable.

The **Same as Organization Primary Contact** check box is supported and will import, the validation should be updated on this checkbox for it to operate.

CODING SHEET FIELDS

Coding fields, including their **Labels**, **Descriptions** and **Help Text**, as well as required settings are imported. However, all **Coding** fields will need to be reviewed and updated to reset the number of allowable selections and what code values are enabled.

BRANCH

If you utilize **Branch Security** with **Blackbaud Grantmaking**, when you export form file, a field for **Branch** will automatically be added to the file and be imported onto the new form. You will need to update the validation on the field and set it to the appropriate **Branch**.