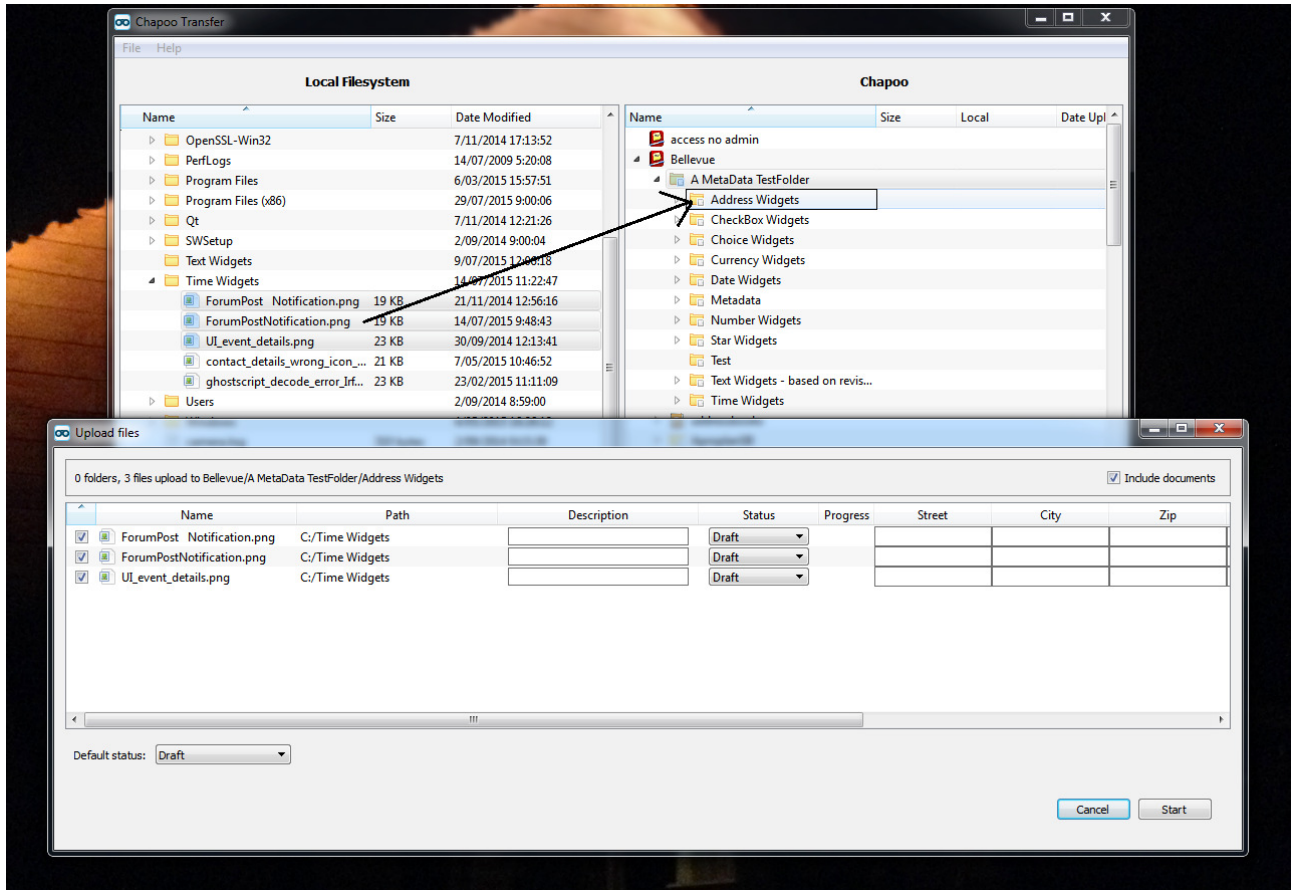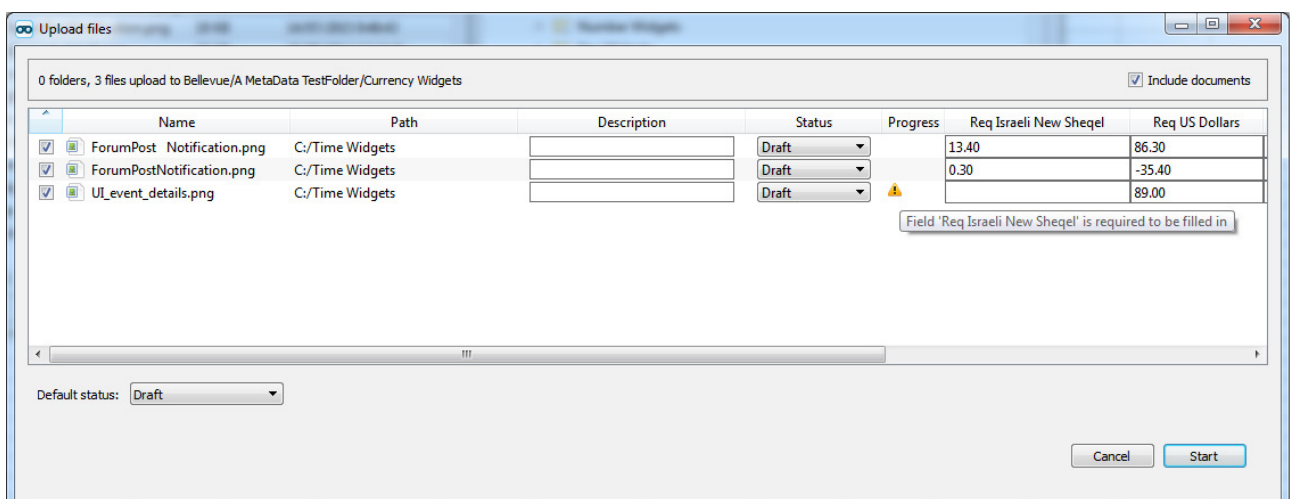# How to upload documents with metadata in Chapoo Transfer

This guide will explain how to upload documents to Chapoo folders which have form(s) attached to them. Providing metadata will only be possible when uploading to a single Chapoo folder. When trying to upload documents to multiple folders the extra fields of the attached forms will not show.
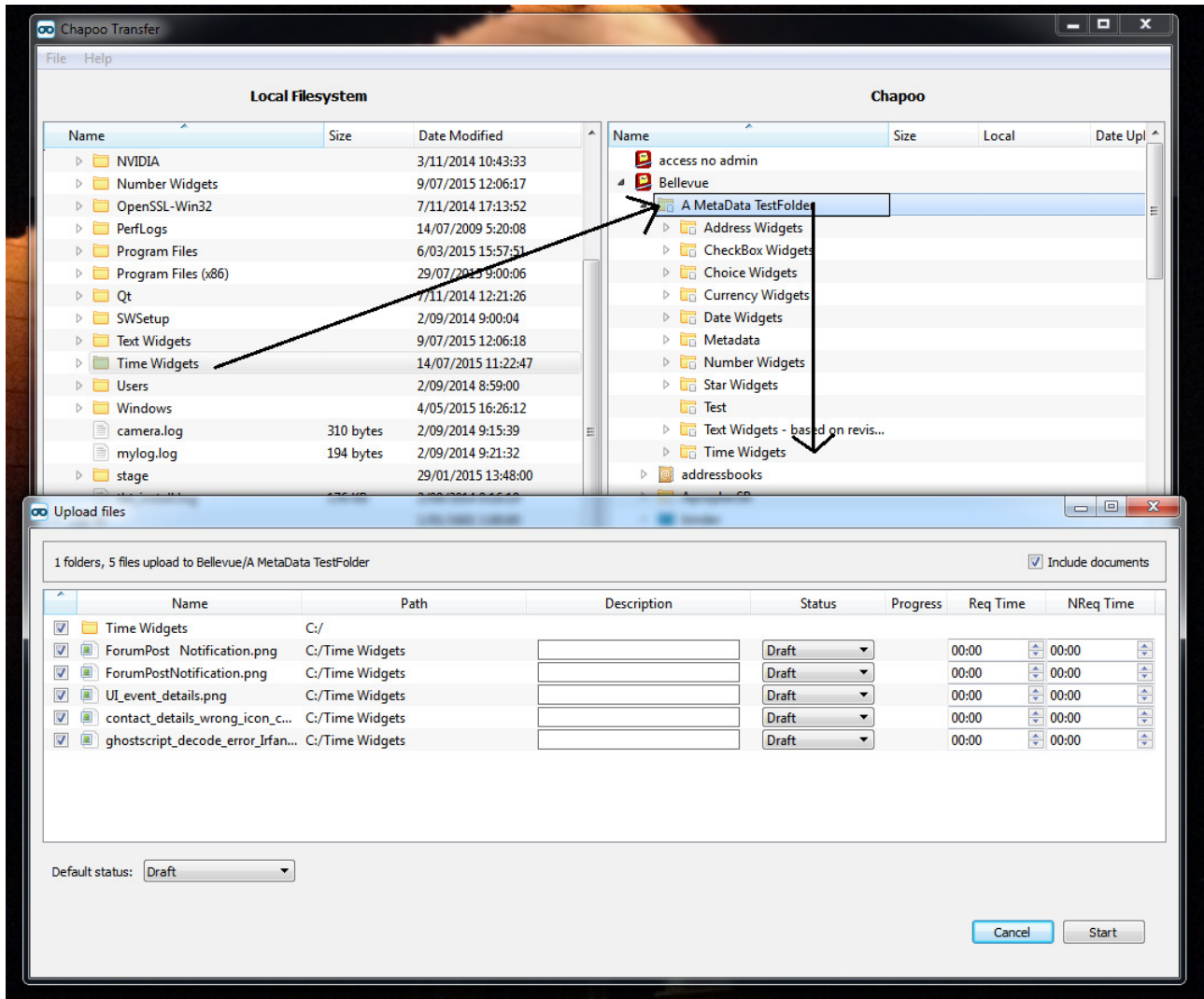
As an example I dragged 3 files to the 'Address Widgets' folder which has a form attached which contains an address widget. The upload dialog now shows additional input fields for each file representing the fields of the form.

When starting the upload the metadata information will be validated. In the example below the upload does not start because the metadata of file 'UI_event_details.png' is invalid. This is indicated by the warning icon in the progress column of the file. The field 'Req Israeli New Sheqel' is empty but the field is required. The upload will not start as long as there are invalid metadata values.

You can also drag a local folder to the parent Chapoo folder of the Chapoo folder that has the same name. As an example I dragged the local 'Time Widgets' folder to the Chapoo 'A MetaData TestFolder' folder. The 'A MetaData TestFolder' folder has a subfolder with the same name as our local folder, 'Time Widgets'. Chapoo Transfer checks if this folder has a form attached to it, and it does.

Instead of filling out the metadata yourself it can also be read from a metadata.xlsx file. The format rules of this xlsx file are the following:

- Cell A1 is empty.
- Cells in xlsx files contain formatting. Formatting of all cells must be set to 'Text'. Most likely the editor will use number/date/... formatting automatically. If not set to 'Text', Chapoo Transfer will not read the data correctly.
- Cells A2-A... contain the names of the files you want to automatically fill out the metadata off.
- Cells B1-...1 contain the names of the fields of the forms you want to automatically fill out with values.
- The textual format of the values must be the same as seen in the webinterface of Chapoo with some exceptions:
    Date: dd/MM/yyyy
    Time: hh:mm
    Checkbox: yes/true or no/false/empty
    Choice: the value string of the choice
    Number/Currency: numbers use '.' as separator
    Rating: star rating is indicated by number 1-5

An example metadata.xlsx file looks like this:

	A	B	C	D	E	F	G	H	I	J
1		Date me	Check me (or don't)	Make a choice	Number Field	Give me an email	Time Me	Gimme Money	Street	
2	AR_003.PDF	25/05/1992 12:00	yes	---	9.5	gunst.pieter@gmail.com	00:30		Reibroekstraat	
3	odd_numbers-2.pdf	01/08/2000 22:45	no	First Choice	5.76	pieter.gunst@chapoo.com	02:45	13.99	Bellevue	
4	photo-1421930451953-73c5c9ae9abf.jpg	30/01/2020 07:32	yes			derp@herp.com	23:23	-2.5	Karel De StouteStraat	
5	Sömé Tèxt.txt	14/10/2015 01:11	no	Third Choice	3.14	noreply@google.com	15:17	49.98	Paddendreef	
6										

File Names

Values

Field Names

To read the metadata values from the metadata.xlsx file simply add it to your upload selection. So either select it with the other files you want to upload or make sure that the folder you select contains it. When the metadata.xlsx file is detected you will see the following dialog before seeing the upload dialog.

Chapoo Transfer will try to match all field name headers provided in the metadata.xlsx file with the fields in the form(s) attached to the Chapoo folder. In this case no typo was made and all the headers match with the correct fields. There is however a problem indicated by the warning triangle. There are 2 headers with the name "Country" and Chapoo Transfer does not know which "Country" header matches which "Country" form field. The form 'All Widgets' contains a field named "Country" and so does the form 'metadata revision test'. We set the second "Country" header to match with the "Country" form field of the 'metadata revision test' form attached to the Chapoo folder and the problem is resolved.

Now the upload dialog is shown with the filled in metadata and the upload can start.