Google Spreadsheets Connector

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Overview

With the **Google Spreadsheets Connector**, you can utilize FormAssembly's sophisticated features and have your data readily available in Google Spreadsheets (also known as Google Sheets).

This means no more manual exporting, let the connector do it for you!

Requirements

To use the Google Spreadsheets Connector, a FormAssembly user must

- have access to the Google Sheets Connector Add-on for their instance
    - This add-on is available for purchase by Essentials plans and up.
- have Content Management user permissions enabled for their login
    - Specifically, the Google Sheets permission must be enabled for the user account.
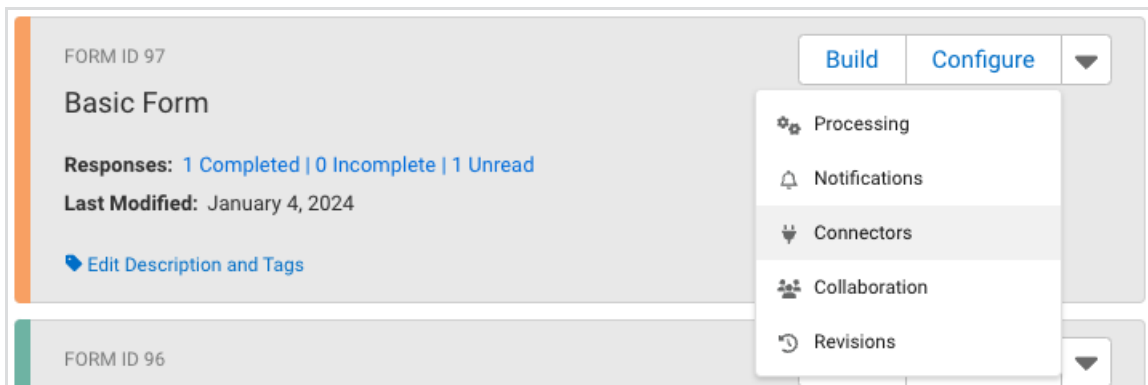- have a Google account

To use the Google Sheets Connector for Workflow, a FormAssembly user must additionally

- be part of a Team plan or higher
- have at least one spreadsheet available on their Google Drive account

Connector Setup for Forms

1. Add the connector to your form

- From the Forms List, hover over the **Configure** button for your form and select **Connectors**.
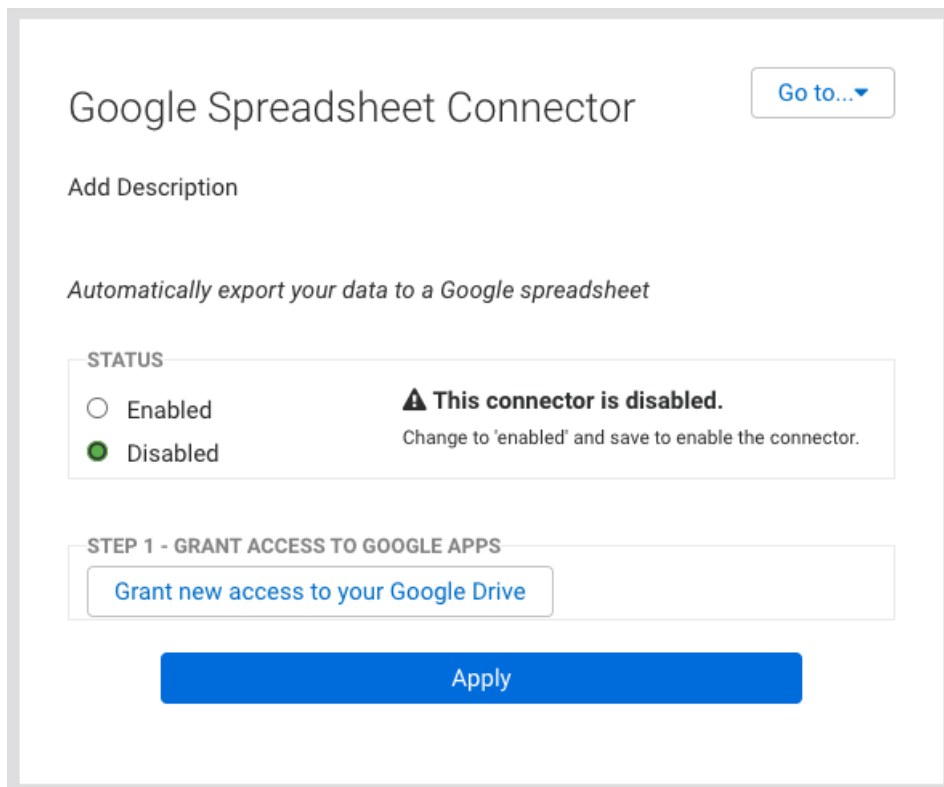
- The Google Spreadsheets Connector can be added to either the **Form Submitted** or **After Form Submitted** sections of the timeline.
- Click the appropriate "**+ Add connector for...**" option, on the timeline.
- Choose **Google Sheets 2.**
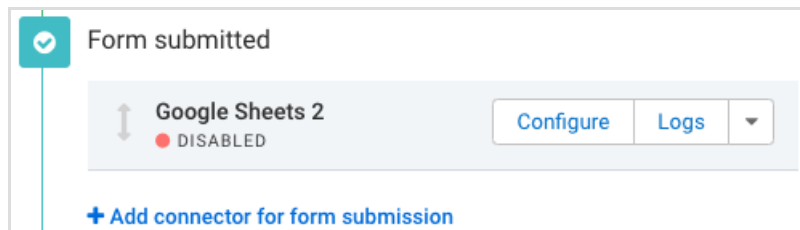
## 2. Grant the connector access to your Google Drive

- Click **Configure** to begin setting up the connector.

- Click **Grant new access to your Google Drive.**
  - If you have already given access rights to your Google Drive account, select **Use existing authorization**

and move on to step 3.

- Sign in with your Google account credentials.
- Complete any additional authentication steps configured for your Google account.
- Accept the permissions requested by the FormAssembly Google Spreadsheets 2 Connector for your Google account.
  - If you do not accept the permissions, you will be unable to use the connector.
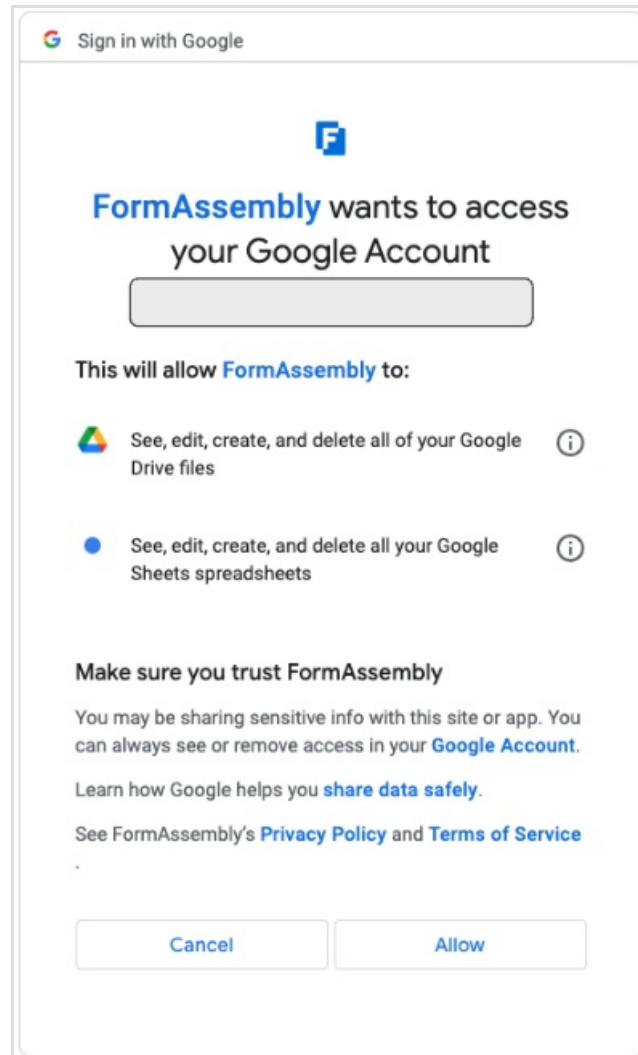
Note: If you've installed FormAssembly for Google Apps, you won't need to grant access again, as access will have been granted at installation.

3. Choose a Google Spreadsheet to connect to

- Choose whether to let FormAssembly create a new spreadsheet for form responses, or select an existing spreadsheet on your Google Drive.
- Set the connector status to **Enabled** to activate it for your form.
- Click **Apply** to save your changes.

Note: When a connected form is revised and saved, the next submission will start a new tab in your workbook. Additionally, renaming the most current tab in your workbook will cause a new tab to be created the next time a response is submitted to the form. This behavior is specific to the Form version of this connector and not the latest Workflow version.

Connector Setup for Workflows

Note: FormAssembly does not recommend using previous versions of Google Sheets Connectors and the latest version of the Google Sheets Connector in the same Workflow. It is recommended to delete the previous version of the connector and add a new step using the new Sheets Connector setup.

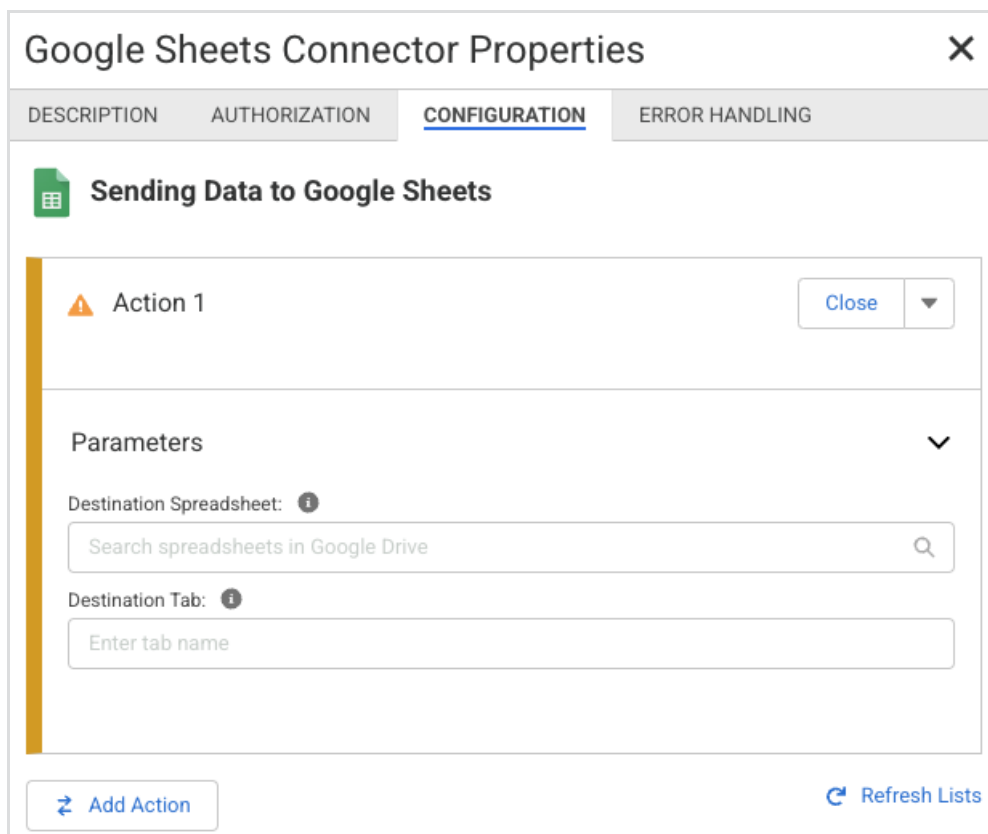## 1. Add the Google Sheets connector to your workflow

- Select **Add Step** and choose **Connector**
- Select **Google Sheets**
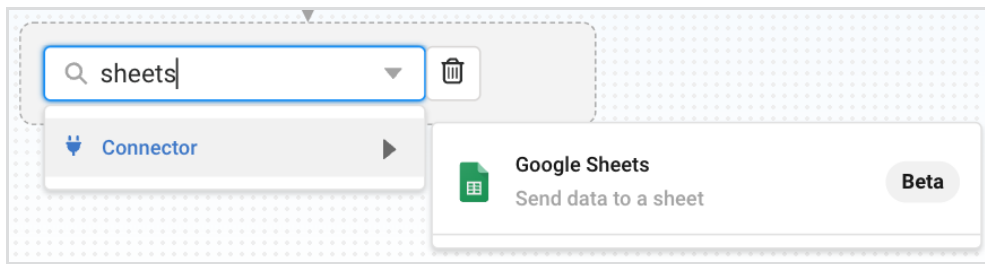
2. Set up the Connector Properties

Refer to our Workflow-native Connectors article for general configuration information.

Configuration Tab

Destination Spreadsheet

Select an existing spreadsheet on your Google Drive. If you do not see your desired spreadsheet in the list, click **Refresh Lists** at the bottom of the Configuration tab.

> **Note**: A spreadsheet must be available in the connected Google Drive account. If no spreadsheet exists, or you wish to send data to a new spreadsheet, create one in Google Drive and select Refresh Lists in the Google Sheets Connector.

Destination Tab

Enter the name of an existing tab from your destination spreadsheet, or leave it empty to automatically assign Sheet1 as the Destination Tab. Alternatively, entering the name of a tab that

does not exist in the destination spreadsheet creates a new tab with the name entered.

> **Note**: When entering an existing tab as the destination tab, ensure the name of an existing tab is entered exactly as it appears on the spreadsheet to avoid sending data to an unintended destination.

Field Mapping

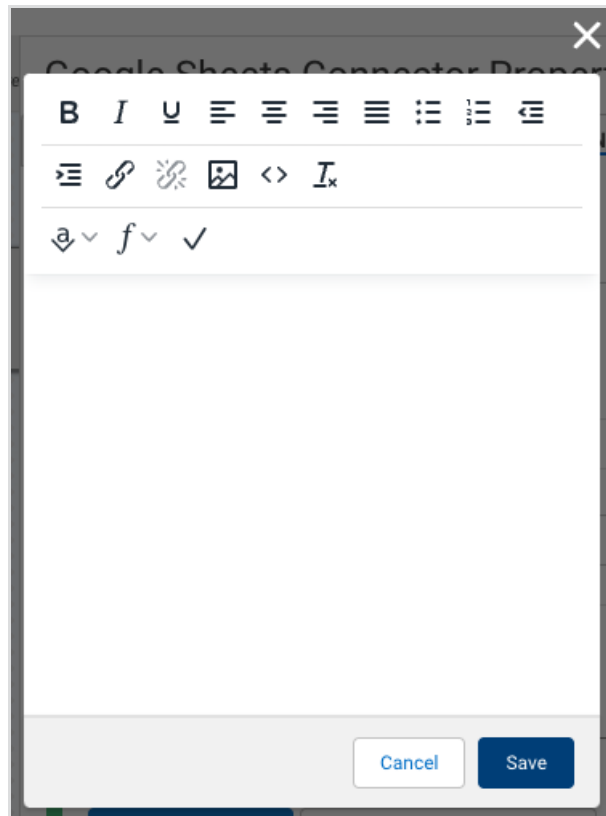Mapping form fields to destination tab columns can be completed automatically and manually.

To quickly map all form fields, click **Add all standard fields**. This will automatically map form fields in the order that they appear on the form to each column. Note that clicking **Add all standard fields** leaves out the file upload field metadata.

> **Note**: A newly created Google Sheet has 26 columns (A - Z) by default. If attempting to map more than 26 values, the new Google Sheet must be configured to include all the columns needed **before the connector runs**. For example, if there are 30 mapped values in the connector, four columns (AA, AB, AC, AD) should be added to the Google Sheet.

To manually add a form field or value, click **Add Another** or adjust an existing field or value mapping.

- Use the dropdown to select whether to map a "**Form Field"** or "**Value or Formula"**.
  - **Form Field**: Use the list to search for and select a form field from the forms included in the workflow.
    - **Note**: Available form fields are all fields from forms that occur **before** the Google Sheets Connector in the workflow.
  - **Value or Formula**: Enter a value as text or open the formula editor to use the formula builder to add workflow aliases. Click the formula button to open a WYSIWYG editor for further customizations to your value.

Choice Mapping

When mapping fields with multiple choices (checkboxes, radio buttons, etc.), the **Edit Choice Mapping** option becomes available. Use this to record custom values in your spreadsheet depending on the choice selected.
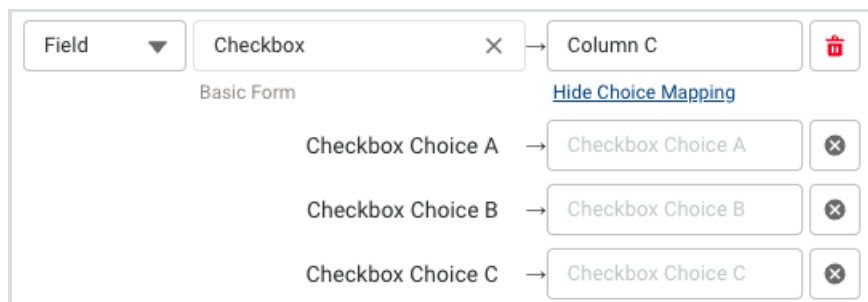
Repeatable Fields

When repeatable elements are detected, an option to further configure the behavior of your spreadsheet will appear. Repeatable elements can be added to your spreadsheet as new rows or comma-separated values within a single cell. By default, each submission is contained within a single row and each repeated element is contained within a single cell as comma-separated values. This behavior can be changed to create a new row each time the selected section is repeated.
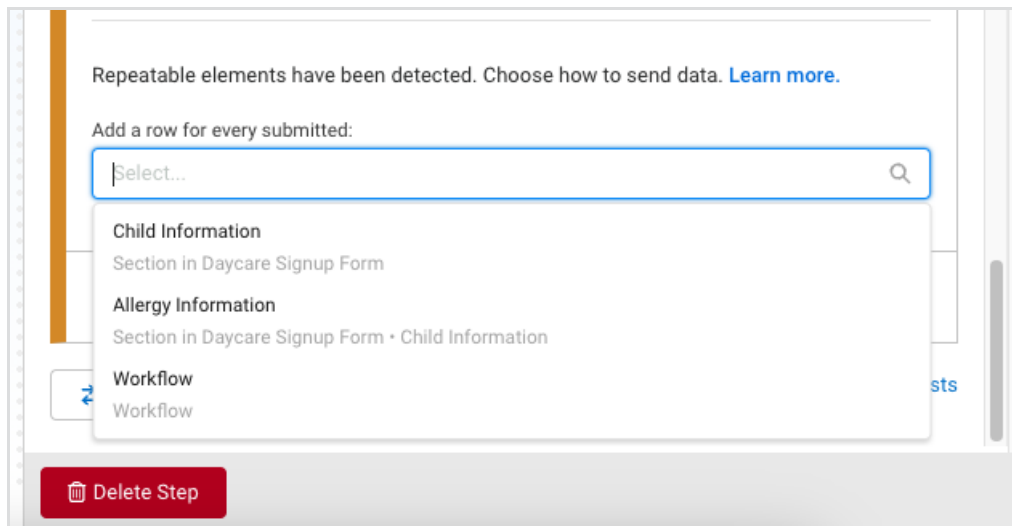
Click the **X** to clear the default 'Workflow' selection, and choose a new option from the menu.

> **Note**: If a repeatable field is **within** a repeatable section, only the repeatable section will display as a selectable option.
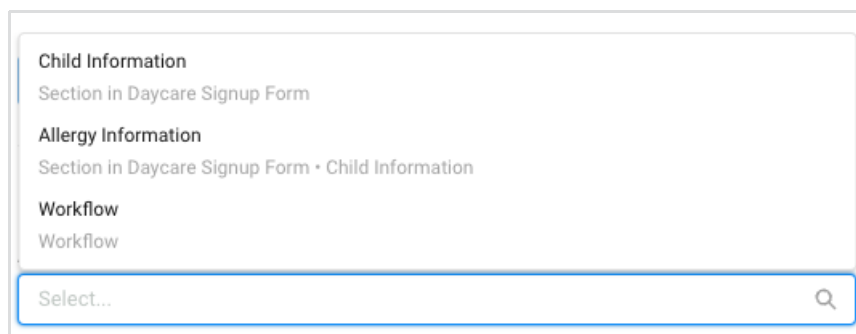
When a repeatable section is selected from the menu, for each instance the repeatable section is submitted, a new row will be created for the workflow response. For example, if the repeatable section 'Allergy Details' is selected for a patient intake form, for each allergy that is submitted for a patient a new row will be entered into the spreadsheet. In this patient intake form example, the patient information accompanying each allergy submitted will be copied into the appropriate cells of each line so there will be no empty cells for lines with data. Because the information is duplicated where necessary, information can be sorted with ease within Google Sheets.

	A	B
1	Patient Name	Allergy Details
2	A. Smith	Codeine
3	B. Johnson	Gluten
4	B. Johnson	Peanut butter
5	C. Williams	Peanut butter
6	C. Williams	Bananas
7	C. Williams	Nightshades
8	C. Williams	Avocado

View Responses in Your Google Spreadsheet

To see the connector in action, submit a test response.

Log into your Google account and either open the existing spreadsheet where you told the connector to place your data or take a look at the newly created spreadsheet.

Responses are automatically added to the spreadsheet upon submission.

Known Behaviors

Please note the following known behaviors with the Google Sheets Connector:

- The Workflow Architect (the creator of the workflow) must type to input the destination tab name to map data to an existing tab.
- If a value for the destination tab is not entered and there is not a default tab named Sheet1, upon running, the connector will create a new tab called Sheet1.
- The Google Sheets Connector will insert headers to the destination tab only when the tab contents are empty. If the form is changed, or the connector is later configured to include additional fields, any recently added or new field labels will not be reflected in the spreadsheet headers.
- The Manage Authorizations table may not reflect all authorized accounts within workflow connectors. However, revoking authorization revokes accounts on both form and workflow connectors.
- FormAssembly does not recommend using previous versions of Google Sheets Connectors and the latest version of the Google Sheets Connector in the same Workflow. It is recommended to delete the previous version of the connector and add a new step using the new Sheets Connector setup.