FORM BUILDER WEBINAR

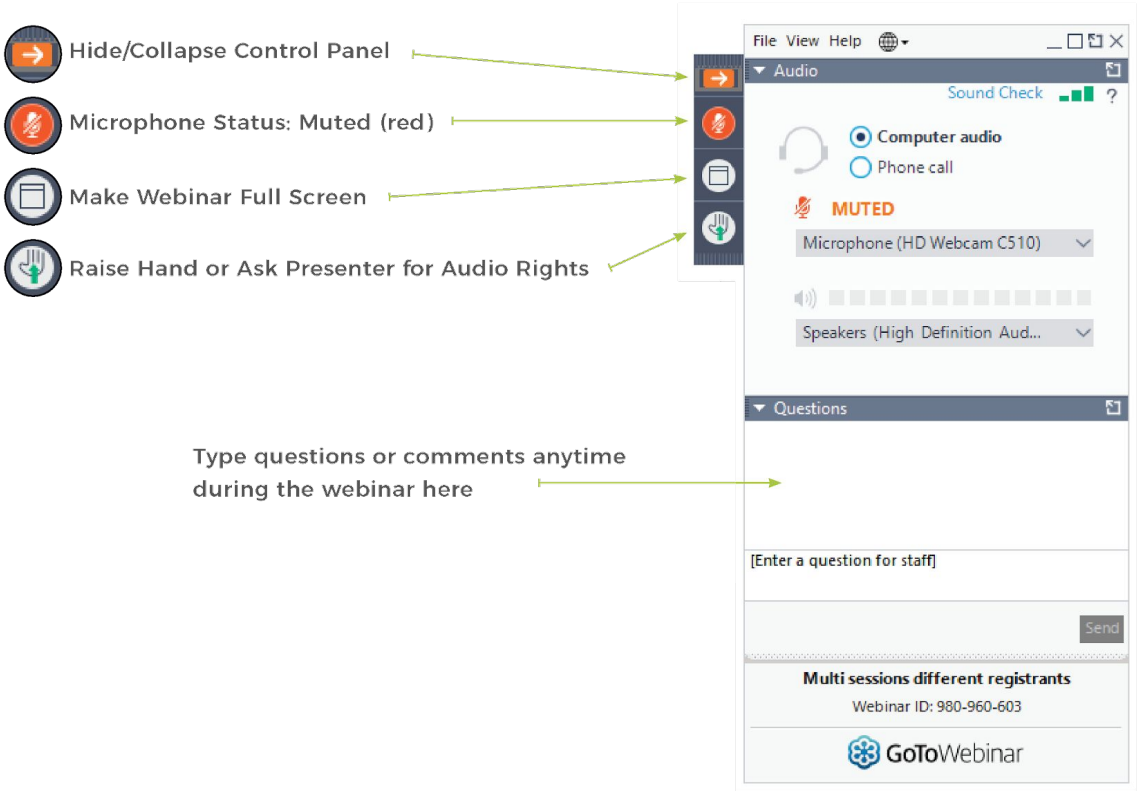
HOW TO ADD CUSTOM FIELDS TO USERS

Jonathan Hsu
VP of Customer Success

Berit Weymers
Customer Success Manager

powered by ZERION SOFTWARE

GoToWebinar Control Panel



POLL

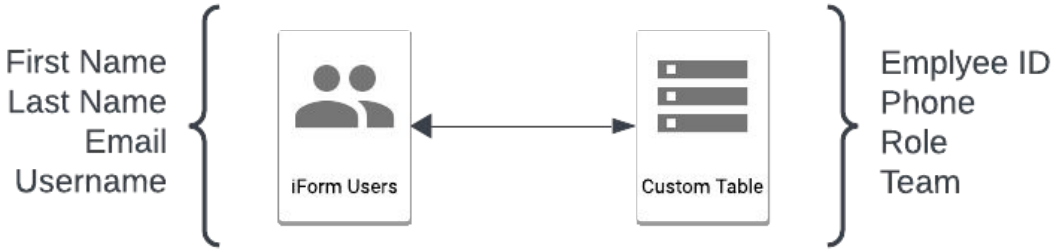
AGENDA

- iFormBuilder Users
- Automatic Lookup Element
- Common Use Cases

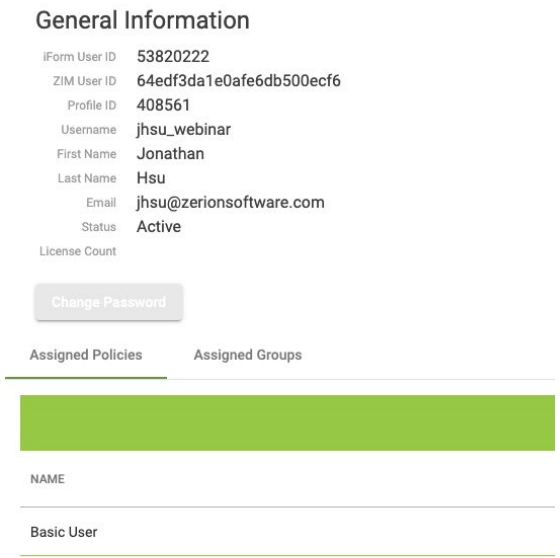
POLL

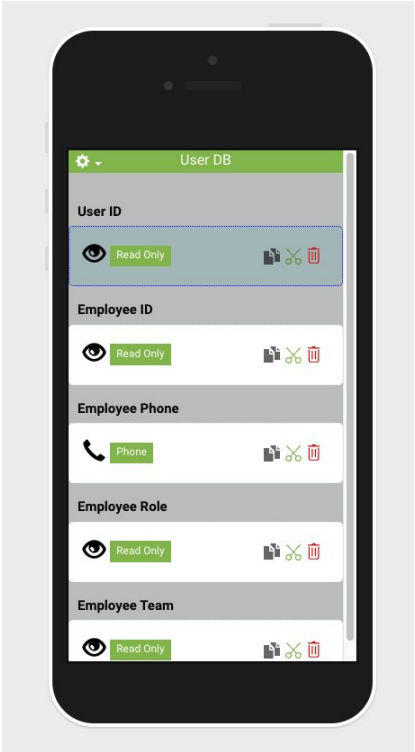
iForm Users

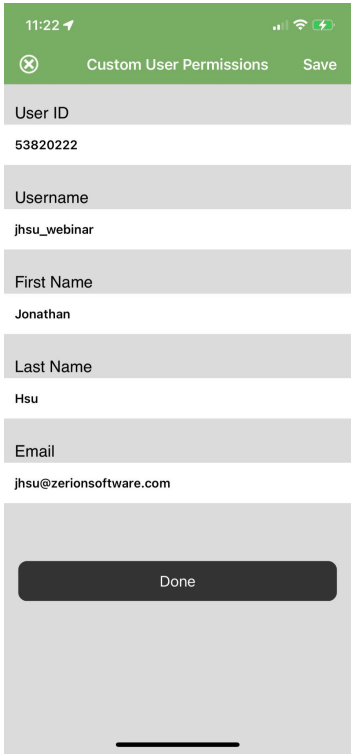
- IFB users have four primary properties
- Additional context-specific properties can aid in data collection
- Users should not "select themselves" nor change who they are
- A hidden lookup table with auto-select allows importing fields into a record



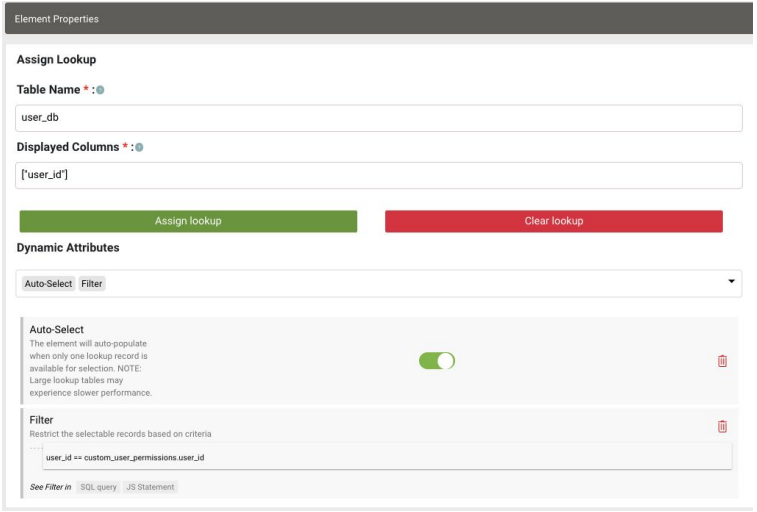
iForm Users


General Information
iForm User ID 53820222
ZIM User ID 64edf3da1e0afe6db500ecf6
Profile ID 408561
Username jhsu_webinar
First Name Jonathan
Last Name Hsu
Email jhsu@zerionsoftware.com
Status Active
License Count
Change Password
Assigned Policies
Assigned Groups
NAME
Basic User


User DB
User ID
Read Only
Employee ID
Read Only
Employee Phone
Phone
Employee Role
Read Only
Employee Team
Read Only


11:22
Custom User Permissions
Save
User ID
53820222
Username
jhsu_webinar
First Name
Jonathan
Last Name
Hsu
Email
jhsu@zerionsoftware.com
Done

User Lookup


Element Properties
Assign Lookup
Table Name * :
user_db
Displayed Columns * :
["user_id"]
Assign lookup
Clear lookup
Dynamic Attributes
Auto-Select
Filter
Auto-Select
The element will auto-populate when only one lookup record is available for selection. NOTE: Large lookup tables may experience slower performance.
Filter
Restrict the selectable records based on criteria
user_id == custom_user_permissions.user_id
See Filter in
SQL query
JS Statement

Parsing the Lookup Element

Sort Order	Label	Name	Dynamic Value	Condition Value
0	User ID	user_id	iformbuilder.userID	
1	Username	username	iformbuilder.username	
2	First Name	first_name	iformbuilder.firstName	
3	Last Name	last_name	iformbuilder.lastName	
4	Email	email	iformbuilder.email	
5	User Lookup	user_lookup		false
6	Employee ID	employee_id	custom_user_permissions.user_lookup.employee_id	false
7	Employee Phone	employee_phone	custom_user_permissions.user_lookup.employee_phone	false
8	Employee Role	employee_role	custom_user_permissions.user_lookup.employee_role	false
9	Employee Team	employee_team	custom_user_permissions.user_lookup.employee_team	false

POLL

Common Use Cases

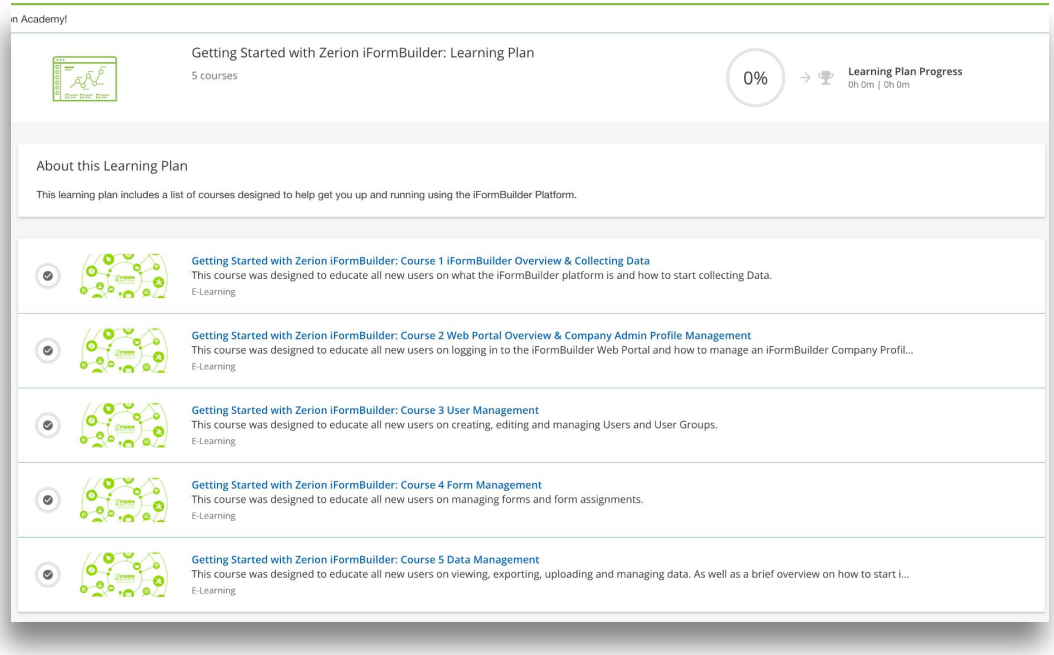
- "Manager only" fields
- Add signatures to User DB
- Validation for "employee not found"
- Define direct supervisor
- Filter subsequent Lookup Elements

ANNOUNCEMENTS

- Zerion Academy Asynchronous Courses Now Available!
- Attend Zerion Reimagined Onsite Workshops & Certification: Sept 12-15 in Herndon, VA.
- Upcoming Webinars:
  - September 20 - Form Building 102: The Building Blocks of Smart Controls
  - October 4 - Public Link Forms, More Than Just a Form

How to Access Getting Started Asynchronous Courses

1. Create a user in Zerion Academy https://zerionsoftware.docebosaas.com/learn/register . We suggest creating a username that is your email address. (Already have one? Skip to step 3.)
2. Follow the steps in the email to confirm your account and change your password.
3. Log in to Zerion Academy. Once logged in, click on the following Learning Plan link. This enrolls you and brings you to the learning plan that contains the courses. https://zerionsoftware.docebosaas.com//lms/index.php?r=coursepath/deeplink&id_path=21&hash=34ca05d869b49e9dd58548a4417cfb1a98b7e83c&generated_by=13007



THANK YOU!

/zerion Zerion @zerionsoftware